

FY2023-24 Annual Planning NEW Nuventive Improve Training

OCTOBER 21, 2022

Purpose of this meeting

To provide an overview of:

- Key changes to the 2023-24 Annual Planning & Budgeting process
- The 2023-24 College Goals
- How to navigate the Nuventive Annual Planning module

Key changes to the 2023-24 Annual Planning & Budgeting Process

PLANNING

Establish Annual Goals:

- For 2023-24, everyone will work towards the same goals provided by the College.
- No new annual goals expected from the areas, divisions/units, office/programs.

BUDGETING

Aligning Funding to Annual Goals:

- Review previously submitted funding requests that were not funded in 2022-23. Resubmit funding requests that support the 2023-24 College goals.
- Submit new funding requests to support the 2023-24 College goals.

2023-24 College Goals

Increase FTES

(full-time equivalent students)

Increase yield rate

(where yield rate: Percent of students who enroll in ECC after having been offered admission)

Increase student retention or course completion

Increase degree or certificate completion or transfers

Organizational Effectiveness

(ensure operations continue efficiently for the sustainability of the College)

Risk, Safety, Liability

** Priority every year (not just 2023-24)*

Enrollment & Retention

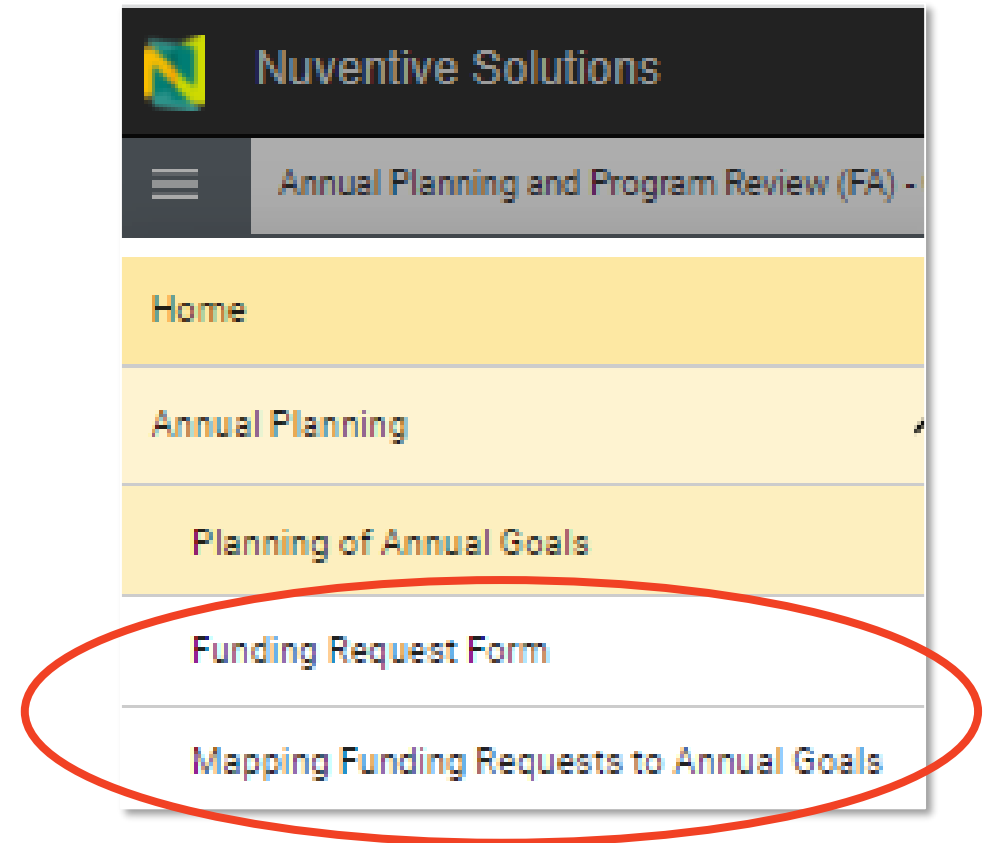
*** Annual goals have already been entered into Nuventive**

NOTE: Resubmitting Funding Requests

- To resubmit a funding request: update the submission **year** and **rationale** to clarify alignment to the 2023-24 College goals
- Requests that require more than these two changes may be submitted as a new request
- Resubmitted requests and new requests will be reviewed and prioritized the same way.

Nuventive Overview

- How to log-into & Navigate Nuventive
- Resubmitting & Entering New Funding Requests
- Mapping Funding Requests to College-wide goals.



Nuventive Access & Log-in

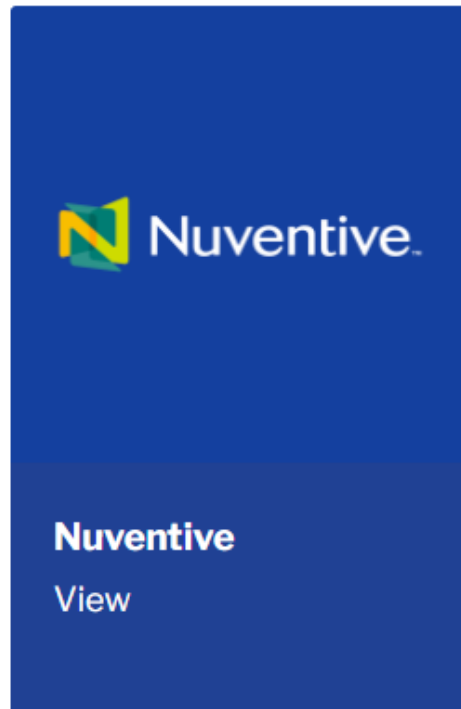
Logging in with URL

<https://solutions.nuventive.com/>



Logging in through IRP website

The log-in link can also be found in the [IRP website](#). Click on the Nuventive button below for quick access to the New Nuventive Improve link.



Nuventive Access

Nuventive is the online planning platform where annual goals, actions, metrics and resource requests are documented, mapped and tracked.

Goals should cascade first from the institution to all areas, then to all divisions/units, and finally to all offices/programs. The relationships between these goals can be documented and mapped within Nuventive. Any new budget request can also be documented in Nuventive and mapped to a goal to inform the review and approval of budget requests.

For the 2021-22 annual planning and budgeting process, ECC introduced a new version of Nuventive. The new *Nuventive Improve* platform will facilitate the tracking of goals, metrics, actions and the mapping of resource requests to goals. This will allow greater transparency and alignment of the priorities across all ECC entities. It will also more clearly connect the annual planning and budgeting processes.

All areas will use new *Nuventive Improve* platform for the 2022-23 planning process which began in October 2021.

To access Nuventive:

- [Link to NEW Nuventive Improve](#)

Logging in

Use your ECC credentials to log-in. Click on “Don’t show this again” to stay logged into Nuventive in the future.



Select Your Office or Program Name

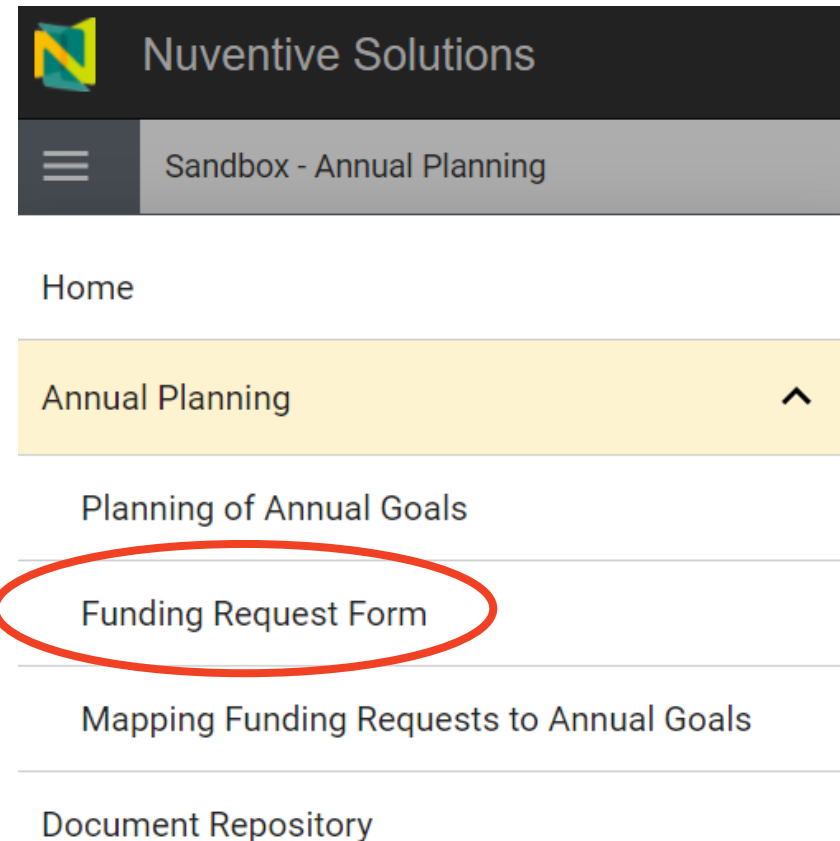
Select your office or program name by either typing in the name or by clicking the dropdown arrow to view the list.



Resubmitting Funding Requests

Funding Request Form

Click on the hamburger to get to the Home screen.



Click on **Funding Request Form**



Reviewing Funding Requests

As funding requests are entered:

- One “card” per funding request
- Filters used to view funding request cards and hide old cards.

Funding Category	Annual Planning Year	Funding request approved
View All	View All	View All

Filtering by funding request approved status is not yet available. In the future, this will allow you to filter funding request by approval status.

Determining Funding Approval Status

The screenshot displays a web application interface for 'Sandbox - Annual Planning'. The main header shows 'Annual Planning > Funding Request Form' with 'Close' and 'Save' buttons. Below this, a search bar contains 'Test Funding 1'. A secondary search bar is labeled 'Search by Keyw'. On the right, it says 'Showing 0 of 0'. The main content area has three tabs: 'FUNDING REQUEST', 'FUNDING STATUS' (which is active and highlighted in green), and 'MAPPING'. Below the tabs, a message states: 'No Funding Status has/have been entered.'

- If the funding request was approved for funding in 2022-23, the Funding Status tab will be populated with budget account information.
- If the Funding Status tab is blank, the funding request was not approved in 2022-23.

Resubmitting Funding Requests

Sandbox - Annual Planning

Annual Planning > Funding Request Form

Funding Request

Search by Key Funding Category View All Annual Planning Year View All Funding request approved View All Showing 6 of 6

Please complete the following form to each request for additional funding above the current budget. Note: * indicates a required field.

After completing this funding request form please map funding requests to goals to inform the prioritization and approval process.

Test Funding 1	
Amount Requested	60,000
Test Request: Full-time Clerical Assistant	D. HONG 10/18/22
Amount Requested	78,000
ACDA conference	D. BERNEY 1/11/22
Amount Requested	7,500

To open an request that you would like to resubmit, click on the three dots and select open to edit the funding request form.

Resubmitting Funding Requests (planning year)

Sandbox - Annual Planning

Annual Planning > Funding Request Form

Close Save

Test Funding 1

FUNDING REQUEST FUNDING STATUS MAPPING

Annual Planning Year *

2022-23 x 2023-24 x

Type of Funding Request *

Ongoing funding x v

Funding Category *

Staffing x v

Funding Request Description *

Test Funding 1

The Save function only works when all required fields (indicated with *) have been completed.

To resubmit a funding request :

- Add 2023-24 to the annual planning year field. Keep 2022-23.

Resubmitting Funding Requests (Rationale)

In the rationale for the funding request, please clearly and succinctly articulate:

- * How will the funding request support the goals of the institution, area or division/program?
- * What rationale for the funding request was provided in the last program review? If applicable, copy text from program review.

Rationale for funding request

Test Funding 1: Rationale

Does this funding request directly address a critical risk?

No

X | v



If applicable, was this funding request mentioned or derived from the last program review?

No

X | v



Amount Requested

60,000

Be sure to provide a clear rationale for your funding request by including an explanation of how it supports the 2023-24 college goals. The college goals can be found in the Mapping tab.

Submitting New Requests

Entering New Funding Request

Click  to add a new funding request

 Sandbox - Annual Planning 



Annual Planning > Funding Request Form

Funding Request 

 Search by Keywor

Funding Category

View All



Annual Planning Year

View All



Funding request approved

No x

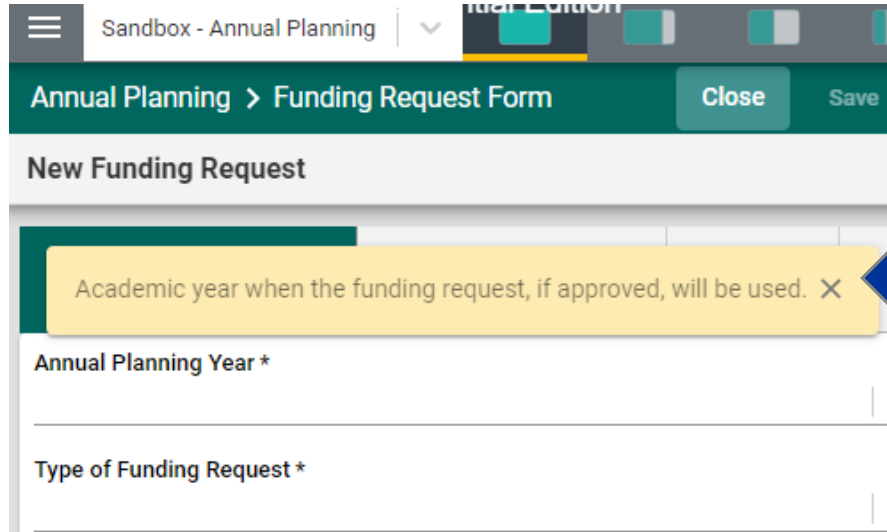


Show 6 of

Please complete the following form to each request for additional funding above the current budget. Note: * indicates a required field.

After completing this funding request form please map funding requests to goals to inform the prioritization and approval process.

Category Descriptions



Sandbox - Annual Planning

Annual Planning > Funding Request Form

Close Save

New Funding Request

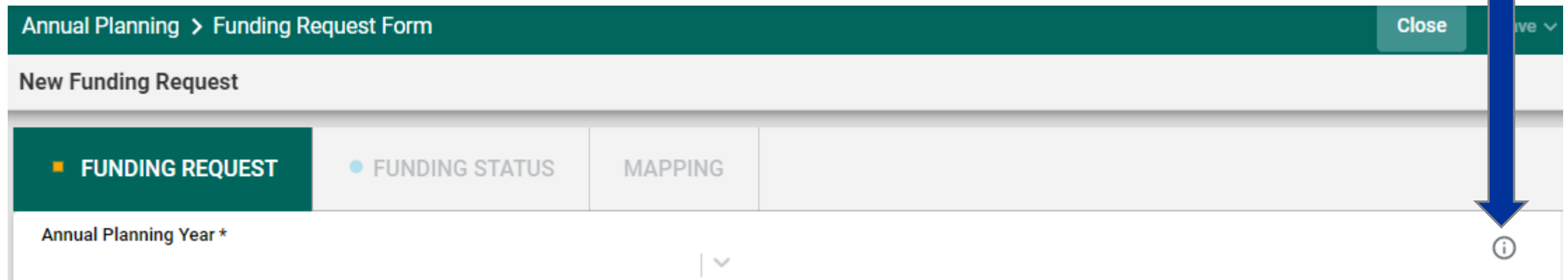
Academic year when the funding request, if approved, will be used. X

Annual Planning Year *

Type of Funding Request *

- A description will appear the first time you click in the white space under each category field.
- Click “x” to hide the description box.

Click ⓘ to access the description again.



Annual Planning > Funding Request Form

Close Save

New Funding Request

FUNDING REQUEST FUNDING STATUS MAPPING

Annual Planning Year *

ⓘ

Required Fields

Annual Planning > Funding Request Form

New Funding Request

■ **FUNDING REQUEST** ● FUNDING STATUS

Annual Planning Year *

Type of Funding Request *

Funding Category *

Funding Request Description *

* Indicates a required field

Funding Request Form (Amount Requested)

Note to
enter
***numbers
only*** for the
Amount
Requested.



REQUIRED FIELD FOR ONE-TIME OR ONGOING FUNDING REQUESTS: X

Please enter numbers only - no text.

For ongoing requests, please specify how much is needed for the budget augmentation.

For one-time requests that may last more than one year, please specify how much will be needed for each subsequent year in the rationale.

Amount requested for this annual planning year

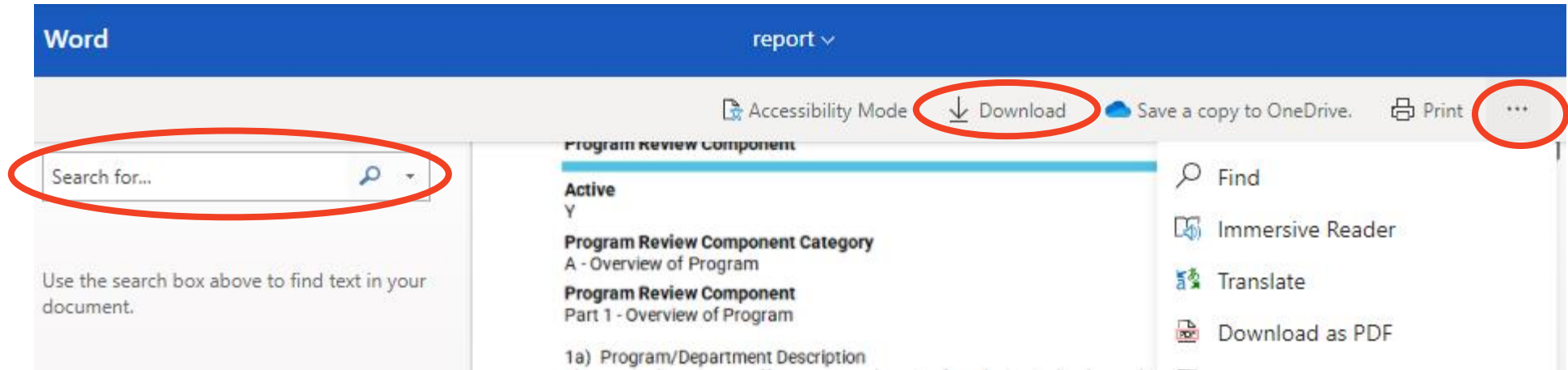
65,000|

For Academic Affairs & Student Services: Historical records from TracDat

- All Funding Recommendations and Program Review recommendations from previous years are available as a PDF to the right of the “Funding Request Form”
- Click on viewing options to enlarge data/documents on the right side bar.

The screenshot displays the TracDat interface for 'Annual Planning and Program Review (BSS) - Anthropology'. The main section is titled 'Annual Planning > Funding Request Form'. Below this, there is a 'Funding Request' header with a plus icon. The interface includes search and filter options: 'Search by Keyword', 'Funding Category' (with a 'View All' button), 'Annual Planning Year' (with a 'View All' button), and 'Funding request approved' (with a 'View All' button). A status indicator shows 'Showing 5 of 5'. A yellow banner at the bottom provides instructions: 'Please complete the following form to each request for additional funding above the current budget. Note: * indicates a required field. After completing this funding request form please map funding requests to goals to inform the prioritization and approval process.' On the right side, a sidebar is visible, featuring the El Camino College logo and the title 'Planning & Program Review Recommendations'. Below this, it lists 'Historical Recommendations (pri...'. A red circle highlights the top of the sidebar, which contains a dropdown menu and several colored tabs (teal, dark teal, light grey, and dark grey).

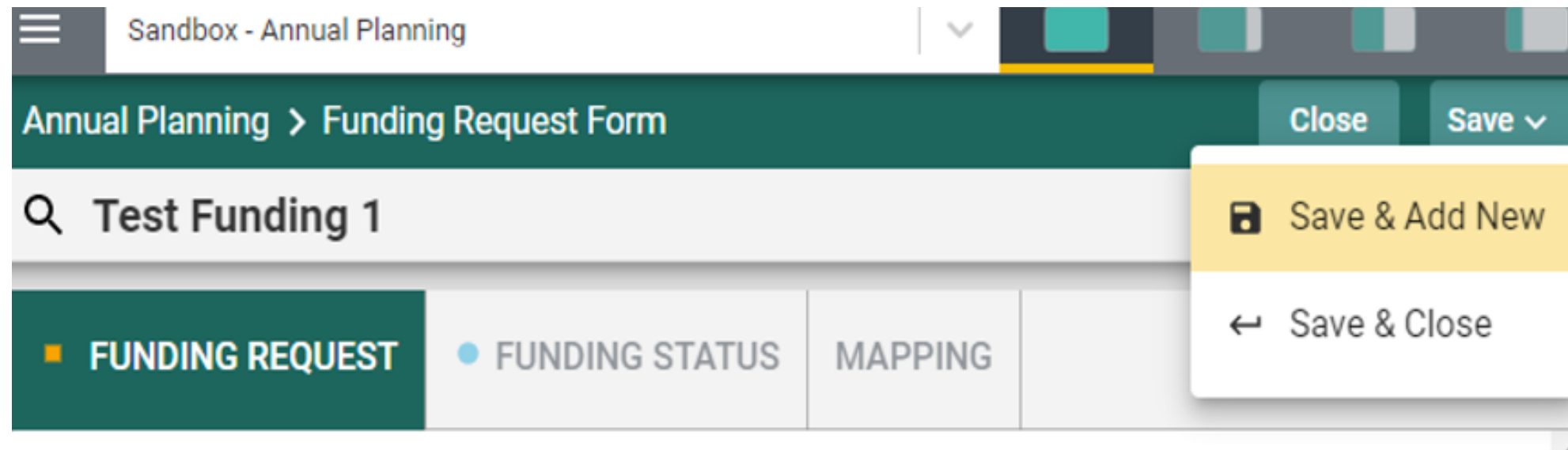
For Academic Affairs & Student Services: Historical records from TracDat



When the document opens, either **download** the document
OR click on ... on the right and select **Find** to search key words.

Save your work

The Save function only works when all required fields (indicated with *) have been completed.



Open a Funding Request

Sandbox - Annual Planning

Annual Planning > Funding Request Form

Funding Request

Search by Keyword Funding Category View All Annual Planning Year View All Funding request approved View All Showing 6 of 6

Please complete the following form to each request for additional funding above the current budget. Note: * indicates a required field. X

After completing this funding request form please map funding requests to goals to inform the prioritization and approval process.

Test Funding 1	D. HONG 10/20/22	⋮
Amount Requested 60,000		
Test Request: Full-time Clerical Assistant	D. HONG 10/20/22	⋮
Amount Requested 78,000		
ACDA conference		
Amount Requested 7,500		

Open

Delete

- Each saved funding request will show as a card in the Funding Request landing page.
- To view or edit a funding request, click ⋮ and select open.

Mapping of Funding Requests to College Goals

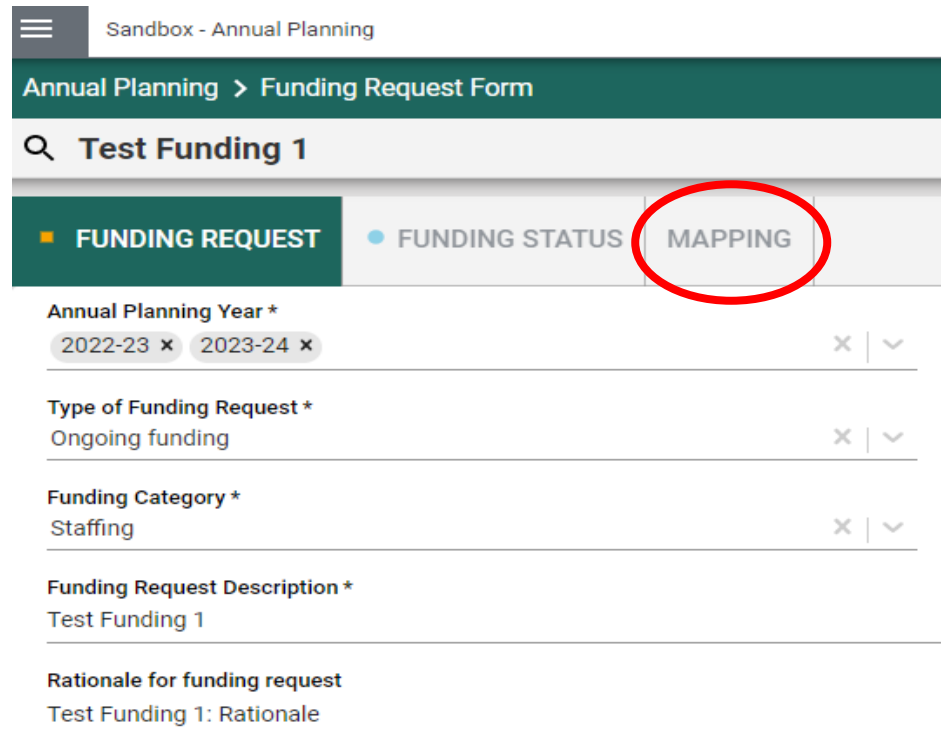
Mapping Funding Requests to Goals

Purpose of mapping: To use the 2023-24 College goals to provide context to the rationale for the funding request.

One funding request may be mapped to more than one goal.

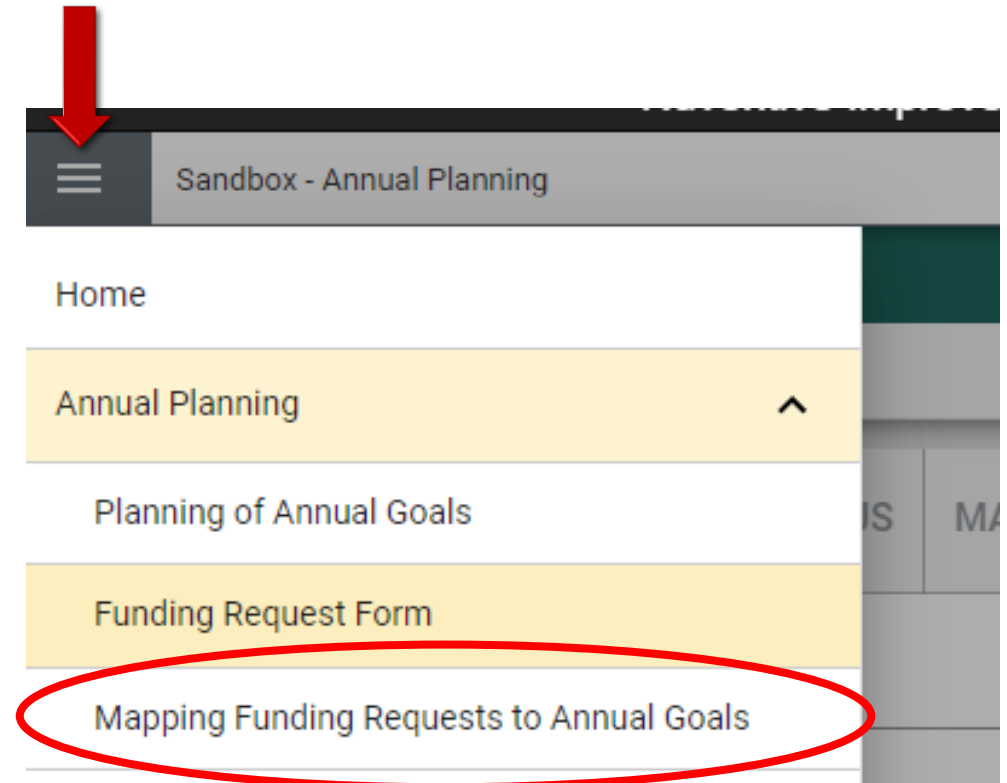
Mapping Form Access

One way to access the Mapping form is to click on “Mapping” within the Funding Request Form.



The screenshot shows the 'Sandbox - Annual Planning' interface. The breadcrumb trail is 'Annual Planning > Funding Request Form'. Below this is a search bar containing 'Test Funding 1'. A horizontal tab bar contains three tabs: 'FUNDING REQUEST' (active, highlighted in dark green), 'FUNDING STATUS', and 'MAPPING' (highlighted with a red circle). Below the tabs are several filter sections: 'Annual Planning Year *' with buttons for '2022-23' and '2023-24'; 'Type of Funding Request *' with 'Ongoing funding'; 'Funding Category *' with 'Staffing'; 'Funding Request Description *' with 'Test Funding 1'; and 'Rationale for funding request' with 'Test Funding 1: Rationale'.

Another way to access the Mapping form is to click on Mapping Funding Requests to Annual Goals.



The screenshot shows the 'Sandbox - Annual Planning' sidebar. A red arrow points to the hamburger menu icon. The sidebar contains a list of links: 'Home', 'Annual Planning' (with an upward arrow), 'Planning of Annual Goals', 'Funding Request Form', and 'Mapping Funding Requests to Annual Goals' (highlighted with a red circle). On the right side of the sidebar, there are partial views of other sections labeled 'IS' and 'MA'.

Mapping Funding Requests to Goals

Annual Planning > Funding Request Form Close Save

Q Test Funding 1

To link a funding request to an annual goal(s), click on the "L" in the corresponding cell to highlight in yellow (once a button is highlighted in yellow, it indicates the funding request is linked to the goal on the left). Please be sure to click "Save" at the top right before exiting the screen.
(Note: do not use the Notes function available to the far right of your screen).

FUNDING REQUEST **FUNDING** **STATUS** **MAPPING**

2023-24 College Goals - College-wid... ▼ **Funding Request**
Linked

Q Search by Keyword

	Test Funding 1
Goal 1 Increase FTES	L
Goal 2 Increase enrollment-to-admissions yield rate OR rate of students who enroll full time...	L
Goal 3 Increase retention and/or course completion	L
Goal 4 Increase degree and certificate completion and transfers	L
Goal 5 Operational Effectiveness	L

Select 2023-24 College Goals from this dropdown box. There will be five goals.

- Click in the "L" button to link the funding request to the goal(s) that apply.
- A button highlighted in Yellow indicates the funding request is linked to the goal on the left.
- One funding request may be linked to more than one goal.**

Mapping Form: Ignore Add/Edit Note Feature

Annual Planning > Funding Request Form Close Save

🔍 Test Funding 1

To link a funding request to an annual goal(s), click on the "L" in the corresponding cell to highlight in yellow (once a button is highlighted in yellow, it indicates the funding request is linked to the goal on the left). Please be sure to click "Save" at the top right before exiting the screen.
(Note: do not use the Notes function available to the far right of your screen).

■ FUNDING REQUEST ● FUNDING STATUS **MAPPING**

2023-24 College Goals - College-wid... x | v **Funding Request**
Linked

🔍 Search by Keyword

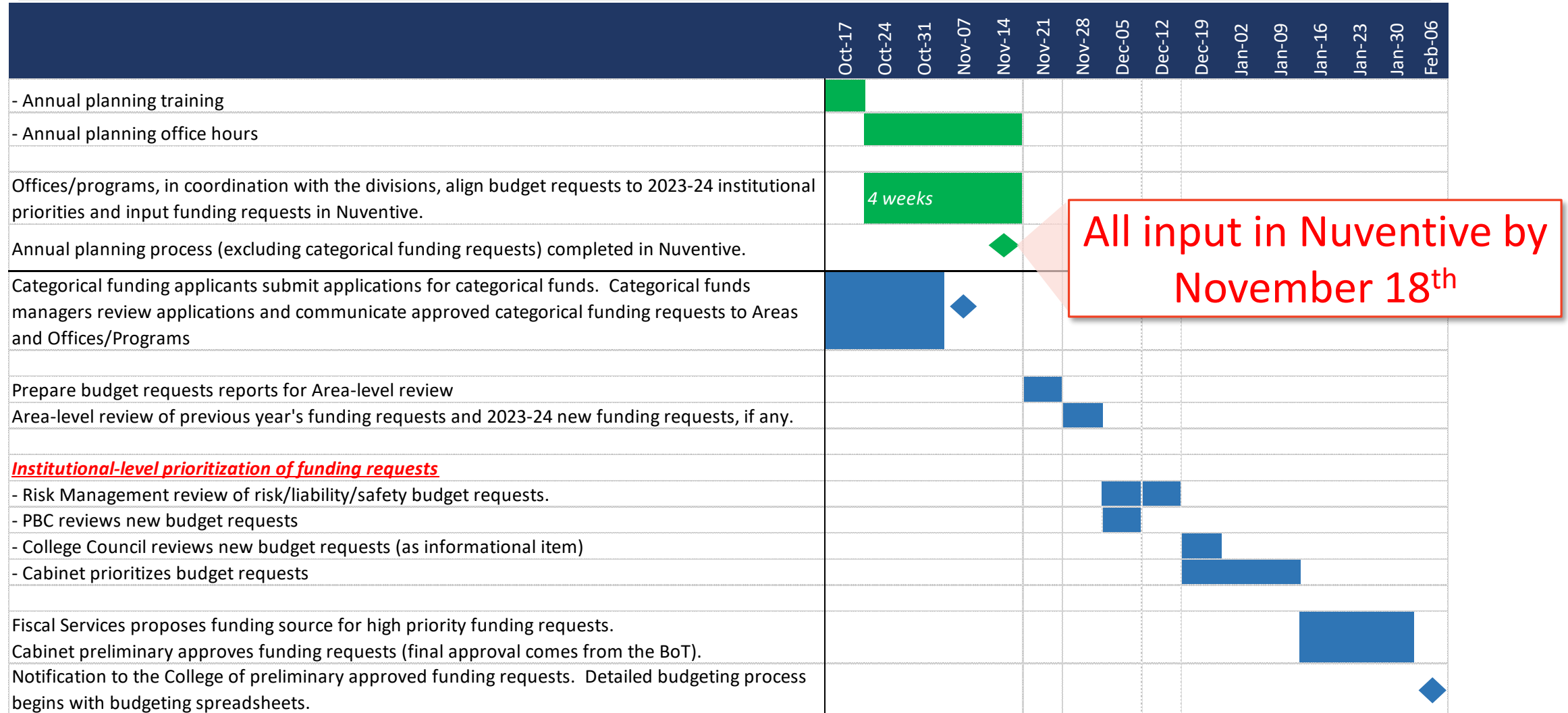
Goal 1 Increase FTES	L
Goal 2 Increase enrollment-to-admissions yield rate OR rate of students who enroll full time...	L

📄 Add/Edit Note

***Please Do Not Use
this Add/Edit
Note feature***

Next Steps

2023-24 Annual Planning & Budgeting Calendar



Annual Planning Resources

Annual Planning drop in **Office Hours**:

(every week until November 18th)

- Every Thursday, 3-5pm

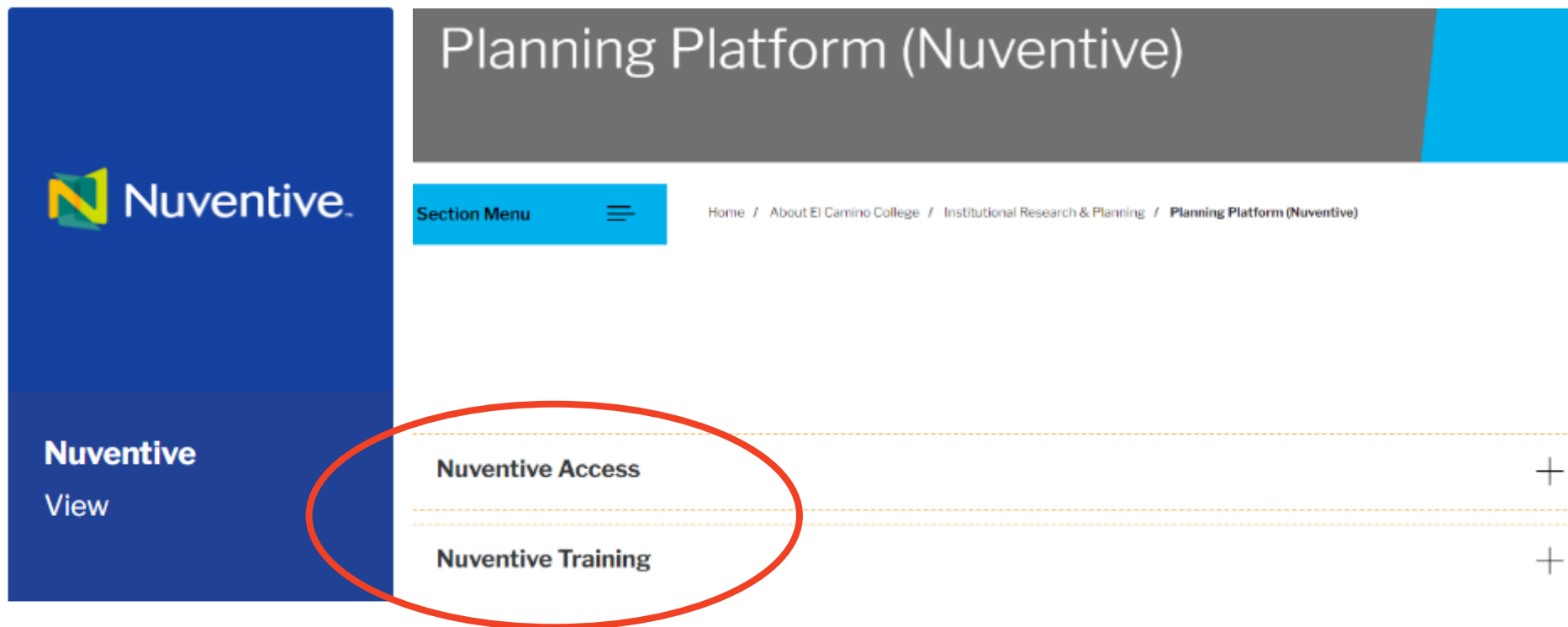
Zoom: <https://elcamino-edu.zoom.us/j/83600114801>

Zoom meeting ID: 836 0011 4801

(same link for all meetings)

Nuventive Resources on IRP Website

- Nuventive log-in link can be found in [Nuventive Access](#)
- Today's PowerPoint presentation can be found in [Nuventive Training](#)



Contact for Support

Contact for questions related to Nuventive access & support: Diora Hong (dhong@elcamino.edu)

Contact for questions related to annual planning process: Grace Ou (gou@elcamino.edu)



Thank You
Questions?