

FY2024-25 Annual Planning  
Nuventive Improve Training

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*DECEMBER 8, 2023*

# Purpose of this meeting

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- Share with annual planners 2024-25 goals and introduce 2024-25 annual planning process
- Learn how to navigate the Nuventive Annual Planning module

# 2024-25 Goals

## 2022-25 Strategic Enrollment Management Plan Goals

Goals to ensure covering operational, and risk, safety and liability needs

### Increase **FTES**

*(Enrollment of full-time equivalent students)*

### Increase **ENGAGEMENT**

*(Improve admissions to enrollment yield rate and the percent of students enrolled in 12+ units)*

### Increase student **RETENTION** or **course SUCCESS**

### Increase completion of **DEGREES** or **CERTIFICATES** or **TRANSFERS**

### Organizational **EFFECTIVENESS**

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

### **Risk, Safety, Liability**

*\* Priority every year*

*(Same goals used last year. They are in Nuventive under Funding Request, Mapping)*

# 2024-25 Annual Planning & Budgeting process

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- Nuventive is available now for 2024-25 Annual Planning.
- Deadline for submissions will be in the Spring 2024 semester. More specific information regarding the 2024-25 process will be communicated in the Spring.
- An additional similar training will take place at the beginning of the Spring 2024 semester.

# NOTE: Resubmitting Funding Requests

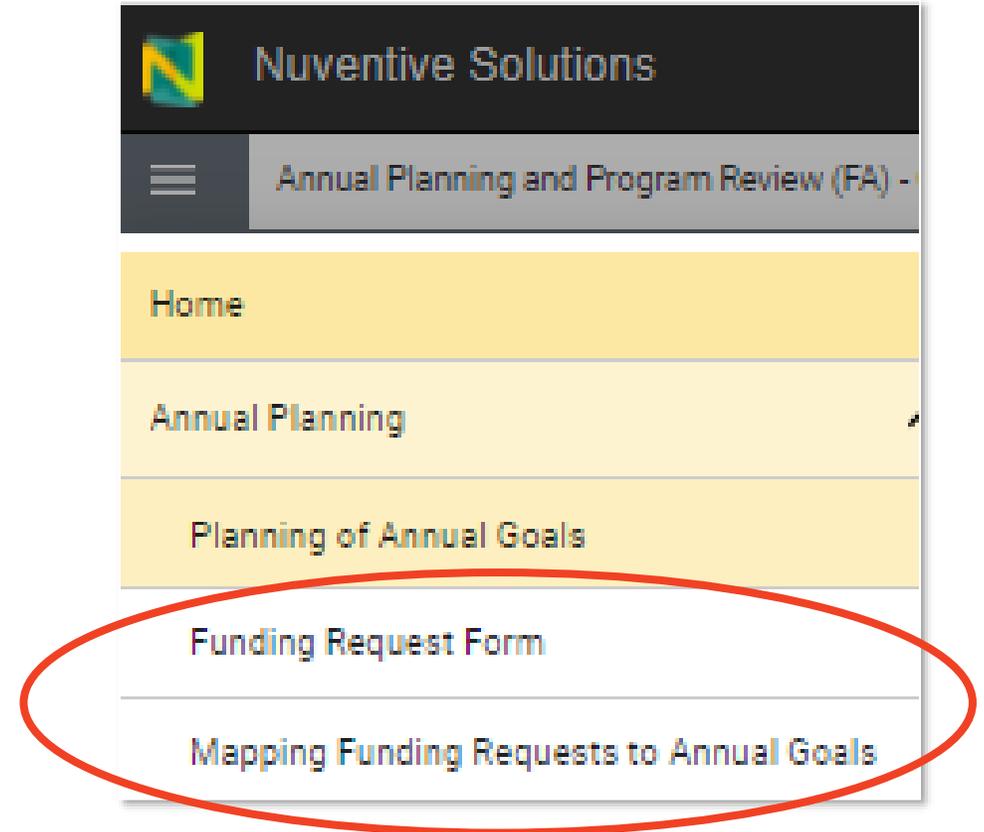
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- To resubmit a funding request: update the submission **year** and **rationale** to clarify alignment to the 2024-25 Goals.
- Requests that require more than these two changes may be submitted as a new request.

# Nuventive Overview

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- How to log-into & Navigate Nuventive
- Resubmitting & Entering New Funding Requests
- Mapping Funding Requests to the goals



# Nuventive Access & Log-in

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# Logging in with URL

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



Nuventive Solutions

Sign in



**Nuventive**<sup>TM</sup>

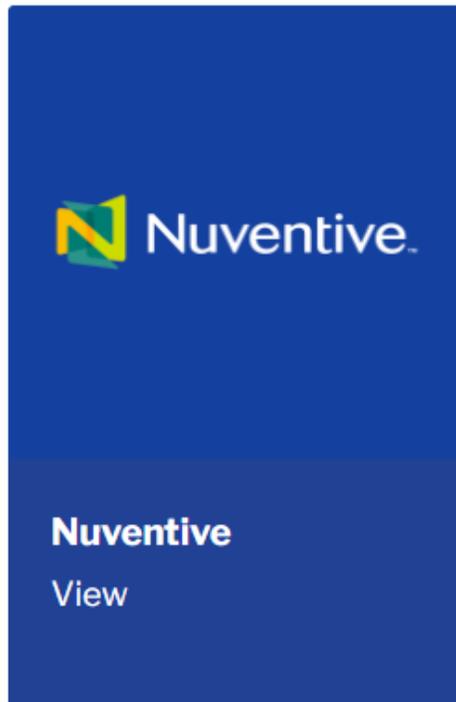
**Achieve. Improve. Adapt.**

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Privacy Policy

# 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.



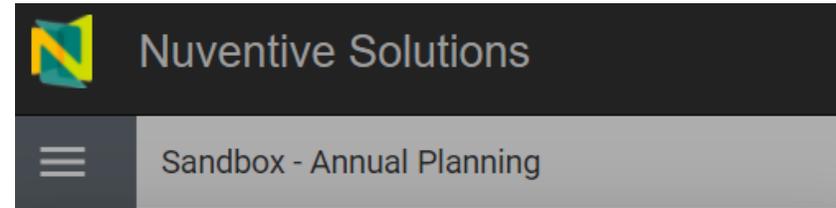
# Resubmitting Funding Requests

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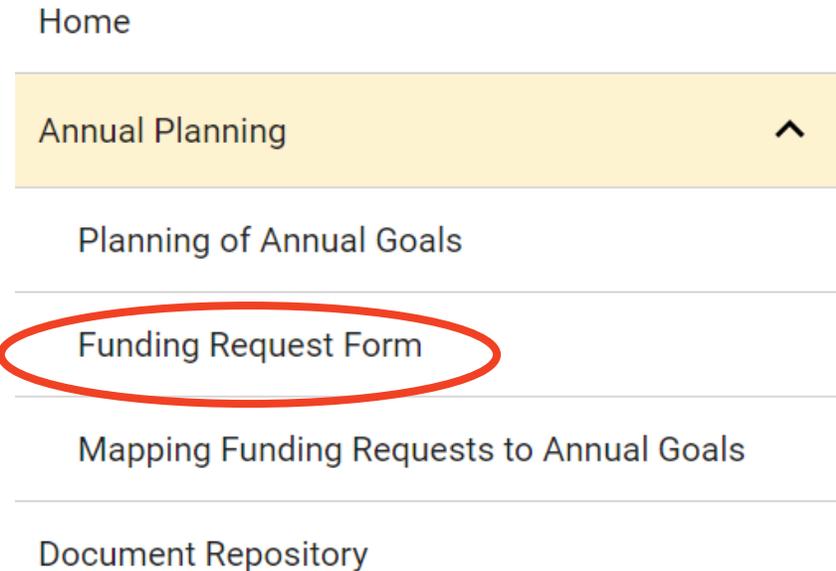
# Funding Request Form

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Click on the hamburger to get to the Home screen.



Click on Annual Planning and then **Funding Request Form**

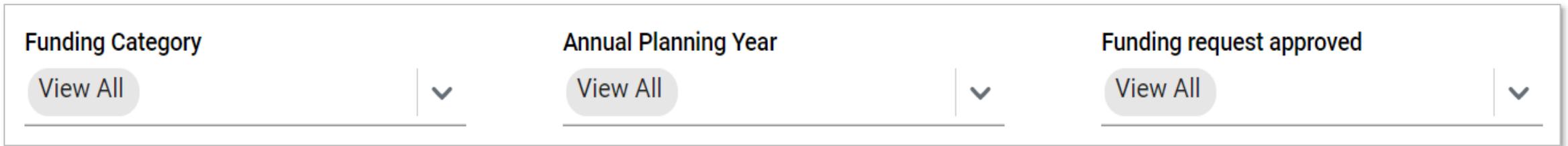


# Reviewing Funding Requests

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To review existing funding requests:

- Use the filters to view funding request cards previously entered by selecting the funding category and/or annual planning year.

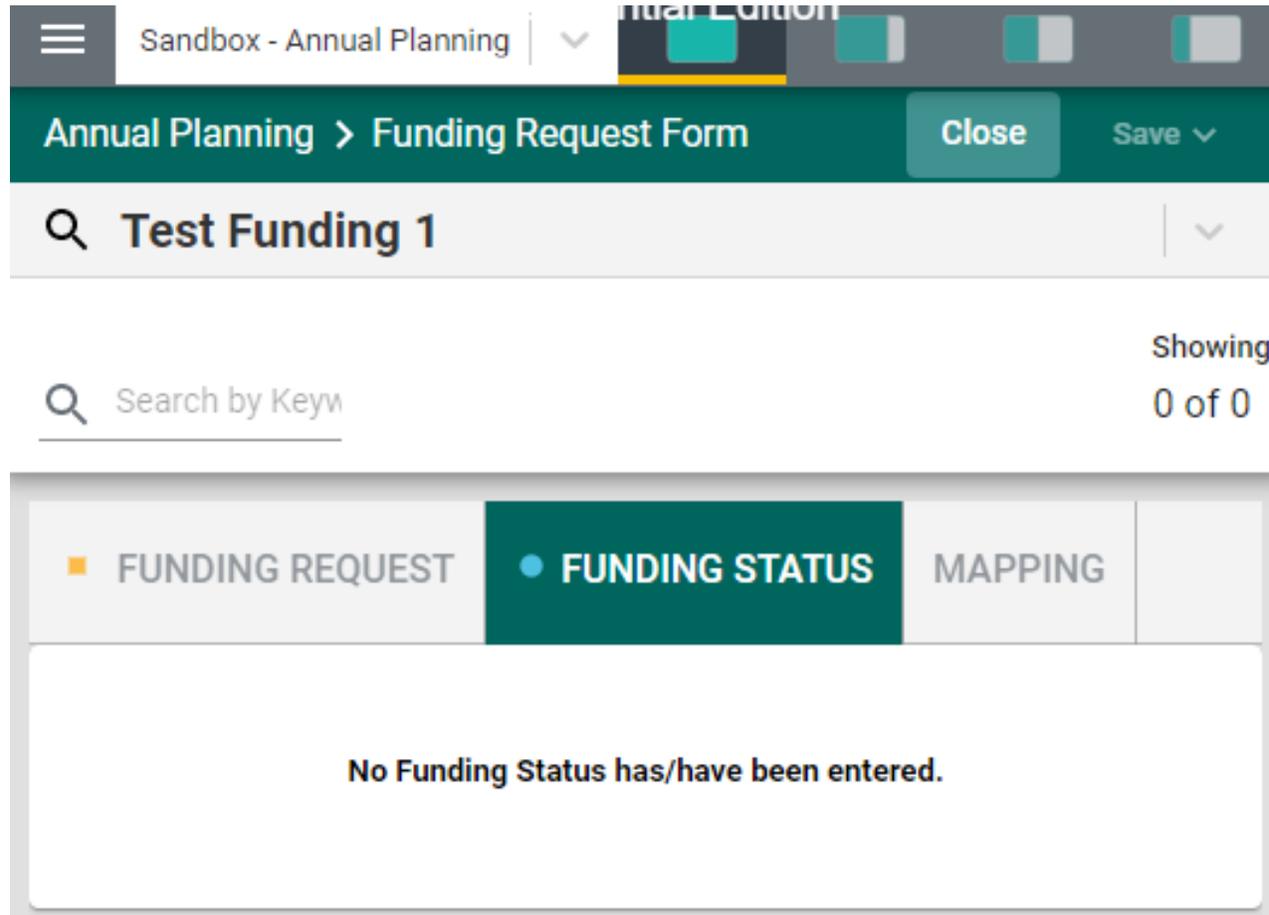


The image shows a horizontal filter bar with three sections. Each section has a title, a 'View All' button, and a downward arrow. The sections are: 'Funding Category', 'Annual Planning Year', and 'Funding request approved'.

If a funding request from a previous year was approved, the “Funding request approved” filter should say **YES**.

Please do not use the **NO** filter. If the Funding request was not approved in previous years, the approval status would be **blank**.

# Determining Funding Approval Status



The screenshot shows a web application interface for 'Sandbox - Annual Planning'. The main header is 'Annual Planning > Funding Request Form' with 'Close' and 'Save' buttons. Below the header, there is a search bar containing 'Test Funding 1'. A search filter 'Search by Keyw' is visible. On the right, it says 'Showing 0 of 0'. The main content area has three tabs: 'FUNDING REQUEST', 'FUNDING STATUS' (which is selected 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 2023-24, the Funding Status tab will be populated.
- If the Funding Status tab is blank, the funding request was not approved in 2023-24.

# Resubmitting Funding Requests

The screenshot shows the Nuventive Improvement Platform Essential Edition interface. The top navigation bar includes the Nuventive Solutions logo, the user name 'Welcome, dhong@elcamino.edu!', and a 'Sign out' button. The main header displays 'Sandbox - Annual Planning' and 'Annual Planning > Funding Request Form'. Below this, there are filters for 'Funding Category', 'Annual Planning Year', and 'Funding request approved', each with a 'View All' button. A notification banner states: '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.' The main content area lists three funding requests: 'Test Funding 1' (Amount Requested: 60,000), 'Test Request: Full-time Clerical Assistant' (Amount Requested: 78,000), and 'ACDA conference' (Amount Requested: 78,000, Date: D. HONG 10/18/22). A context menu is open over the 'Test Funding 1' request, showing options: 'Open', 'Copy', 'Audit Log', and 'Delete'. A blue arrow points to the three dots menu icon of the 'ACDA conference' request.

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

# Resubmitting Funding Requests: How to Enter a New Annual Planning Year

Nuventive Solutions  
Nuventive Improvement Platform Essential

Sandbox - Annual Planning

Annual Planning > Funding Request Form

Close Save

Test Funding 1

Save & Add New

Save & Close

**FUNDING REQUEST** FUNDING STATUS MAPPING

\* denotes a required field.

Annual Planning Year ⓘ \*

2022-23 x 2023-24 x

2024-25

Ongoing funding

Funding Category ⓘ \*

Staffing

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 2024-25 to the annual planning year field. Keep the previous years in the field.

# Resubmitting Funding Requests: Updating Funding Request 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

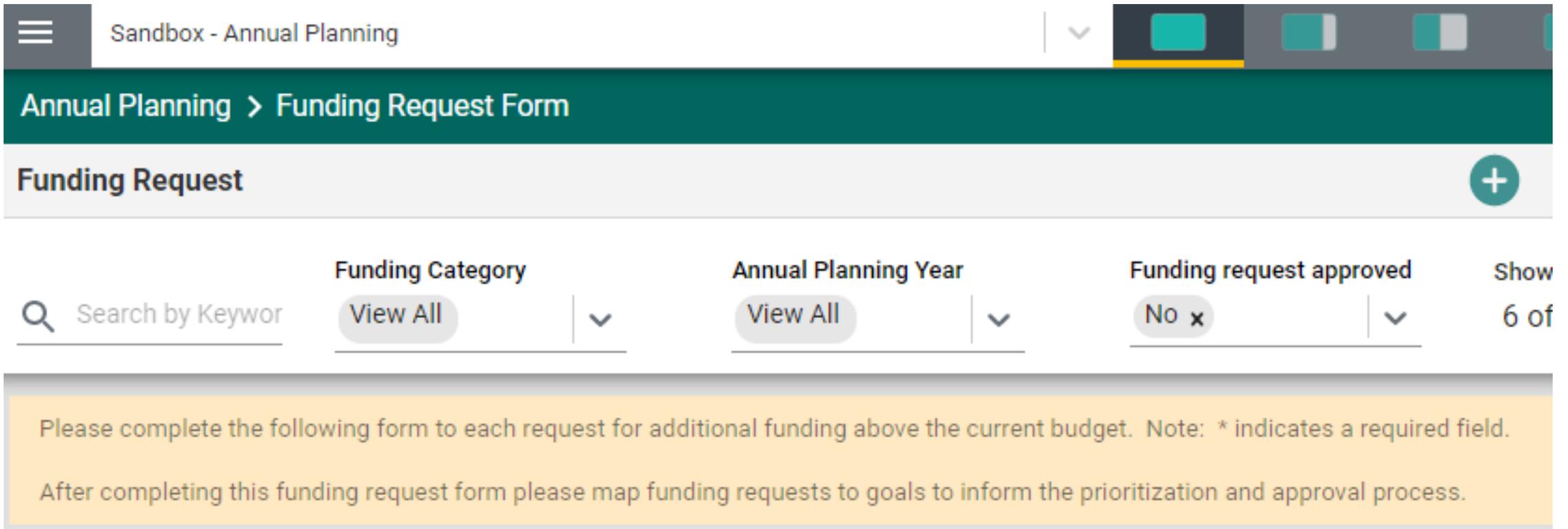
Be sure to provide a clear rationale for your funding request by including an explanation of how it supports the 2024-25 goals. The goals can be found in the Mapping tab.

# Submitting New Requests

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# Entering New Funding Request

Click  to add a new funding request



Sandbox - Annual Planning

Annual Planning > Funding Request Form

Funding Request 

Search by Keyword

Funding Category  

Annual Planning Year  

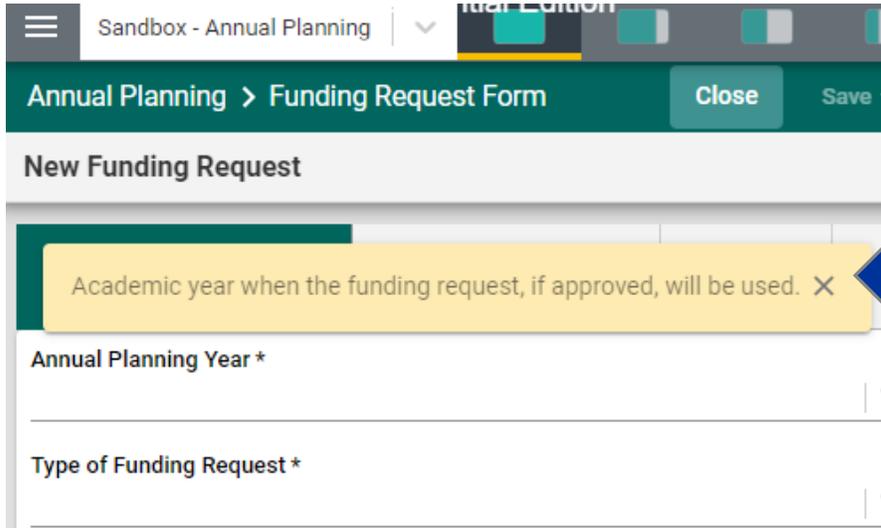
Funding request approved  

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

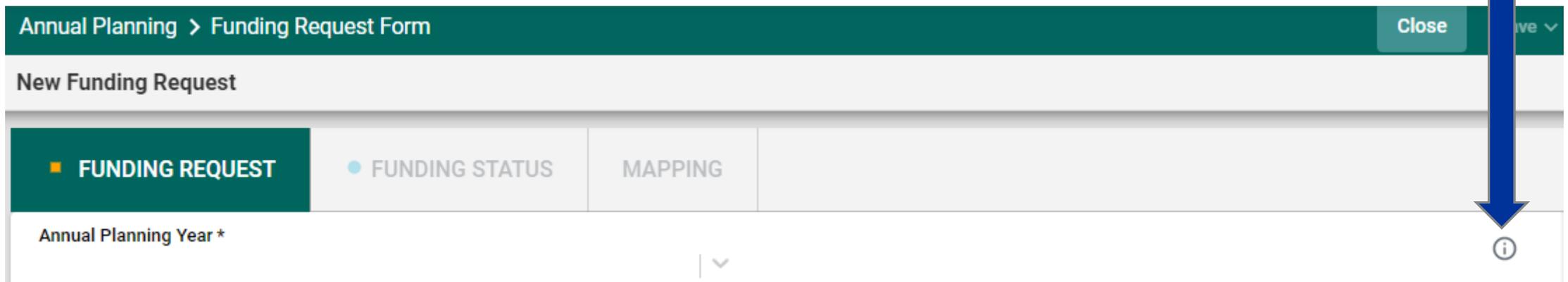
Academic year when the funding request, if approved, will be used. X

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)

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



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

Please enter numbers only - no text. ✕



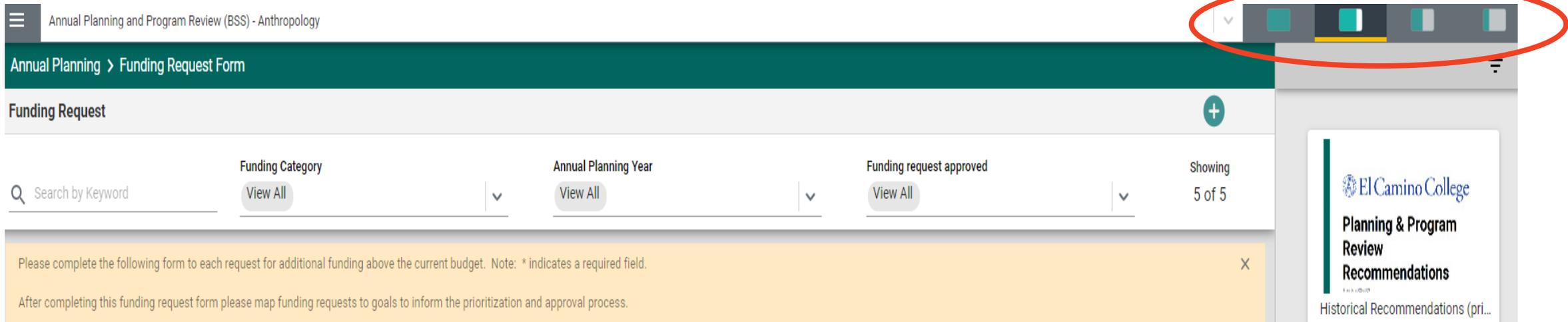
Amount Requested

65,000

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# 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.



Annual Planning and Program Review (BSS) - Anthropology

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 5 of 5

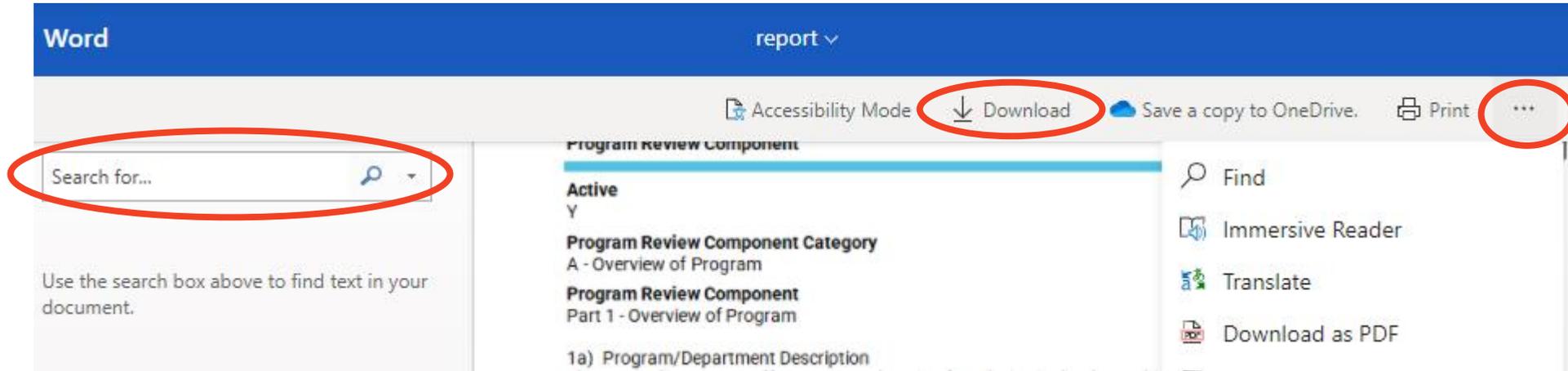
Please complete the following form to each request for additional funding above the current budget. Note: \* indicates a required field.

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

El Camino College  
Planning & Program Review Recommendations  
Historical Recommendations (pri...)

\*TracDat was the annual planning and budgeting system used before Nuventive.

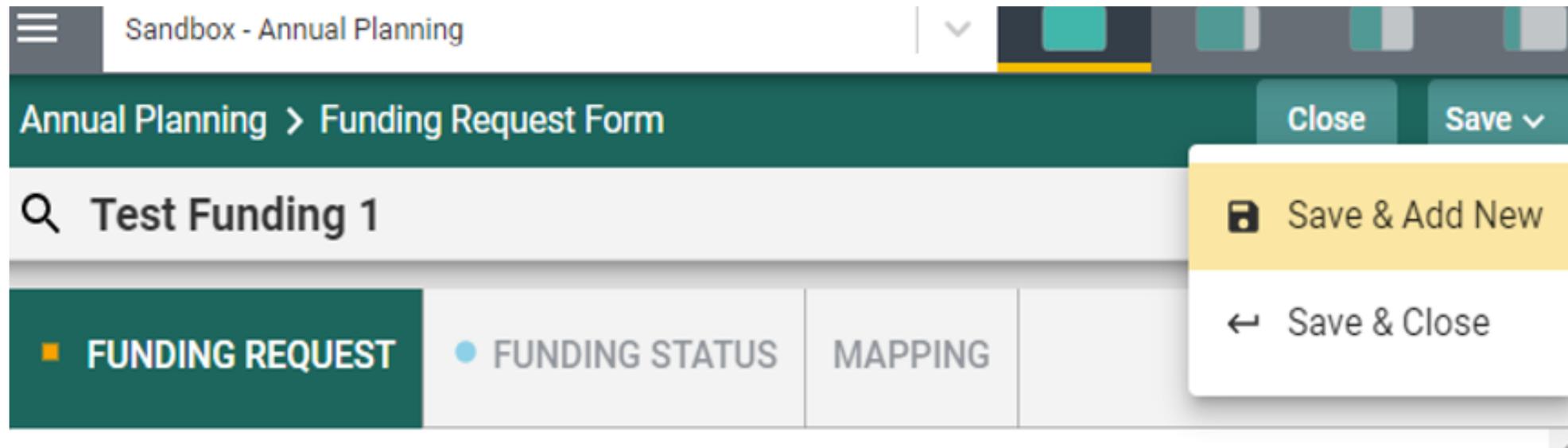
# For Academic Affairs & Student Services: Historical records from TracDat



When the document opens, either **download** the document OR click on the three dots on the top right corner (...) and select **Find** to search for 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.

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

- Open
- Copy
- Audit Log
- 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 2024-25 Goals

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# Mapping Funding Requests to Goals

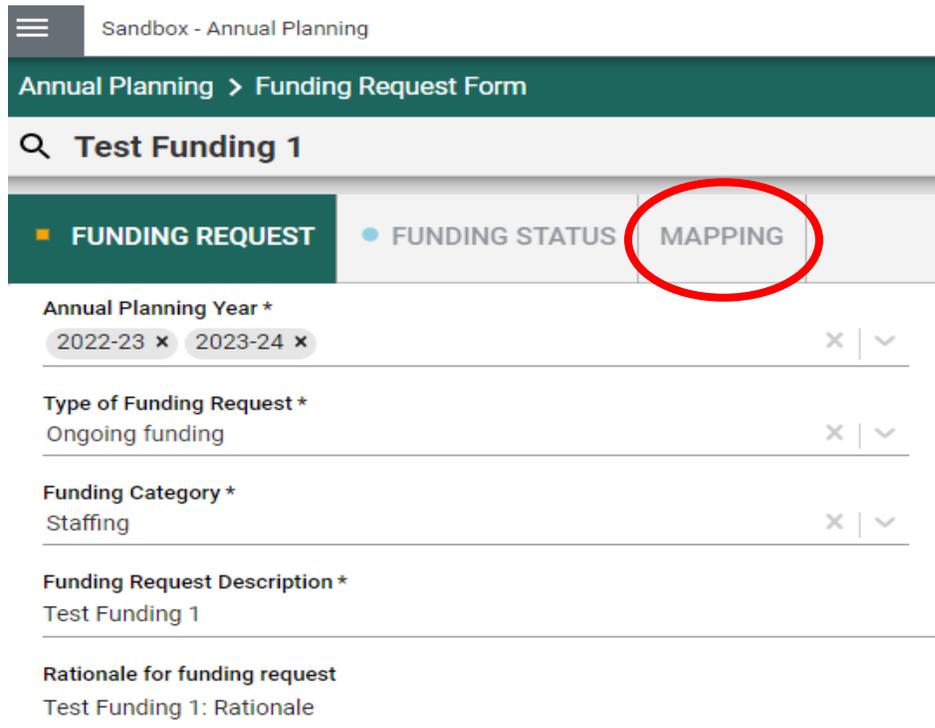
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Purpose of mapping: To provide information about how the funding request will support one or more of the 2024-25 goals.

Although one funding request may be mapped to more than one goal, **please only map to the goal(s) that this funding request contributes most directly to.**

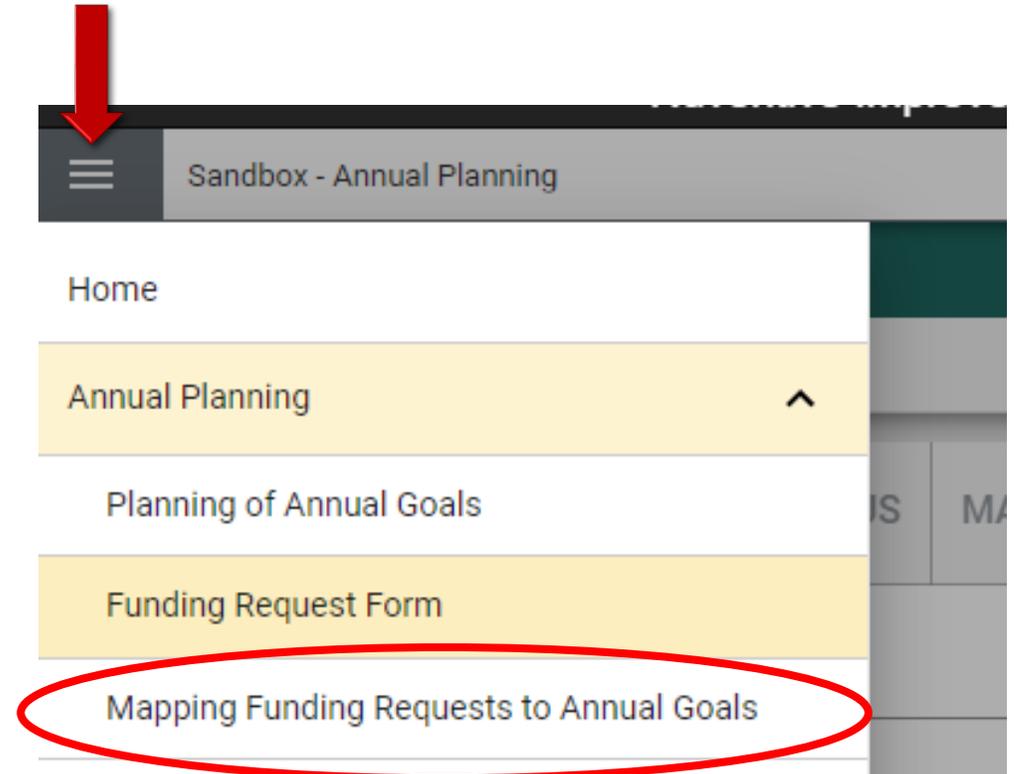
# Mapping Form Access

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'. The search bar contains 'Test Funding 1'. Below the search bar are three tabs: 'FUNDING REQUEST' (selected), 'FUNDING STATUS', and 'MAPPING' (circled in red). The form fields include: 'Annual Planning Year \*' with filters for '2022-23' and '2023-24'; 'Type of Funding Request \*' set to 'Ongoing funding'; 'Funding Category \*' set to 'Staffing'; 'Funding Request Description \*' set to 'Test Funding 1'; and 'Rationale for funding request' set to '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' navigation menu. A red arrow points to the hamburger menu icon. The menu items are: 'Home', 'Annual Planning' (with an upward arrow), 'Planning of Annual Goals', 'Funding Request Form', and 'Mapping Funding Requests to Annual Goals' (circled in red). The right side of the menu shows partial text for 'IS' and 'MA'.

# Mapping Funding Requests to Goals

Nuventive Solutions Nuventive Improvement Platform Essential Edition

Sandbox - Annual Planning

Annual Planning > Funding Request Form

Test Funding 1

To link a funding request to an annual goal(s), click on the "L" in the corresponding column. If the button is highlighted in yellow, it indicates the funding request is linked to the goal on the left. (Note: do not use the Notes function available to the far right of your screen.)

SEMP = Strategic Enrollment Management Plan

FUNDING REQUEST FUNDING STATUS MAPPING

2022-25 SEMP Goals - College-wide Ann... | v

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

Select 2022-25 SEMP Goals from this dropdown box.

There are five goals.

- Click on the "L" button to link the funding request to the goal that is supported by the funding request.
- A button highlighted in green indicates the funding request supports the goal on the left.
- One funding request may support more than one goal. Please only map to the goal(s) that this funding request contributes most directly to.

# Mapping Form: Ignore Add/Edit Note Feature

Annual Planning > Funding Request Form Close Save v

Q Test Funding 1 | v

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).

SEMP = Strategic Enrollment Management Plan

FUNDING REQUEST FUNDING STATUS **MAPPING**

2022-25 SEMP Goals - College-wide Ann... | v **Funding Request**  
L = Linked

Q Search by Keyword **Test Funding 1** **Add/Edit Note**

<b>Goal 1</b> Increase FTES	<b>L</b>
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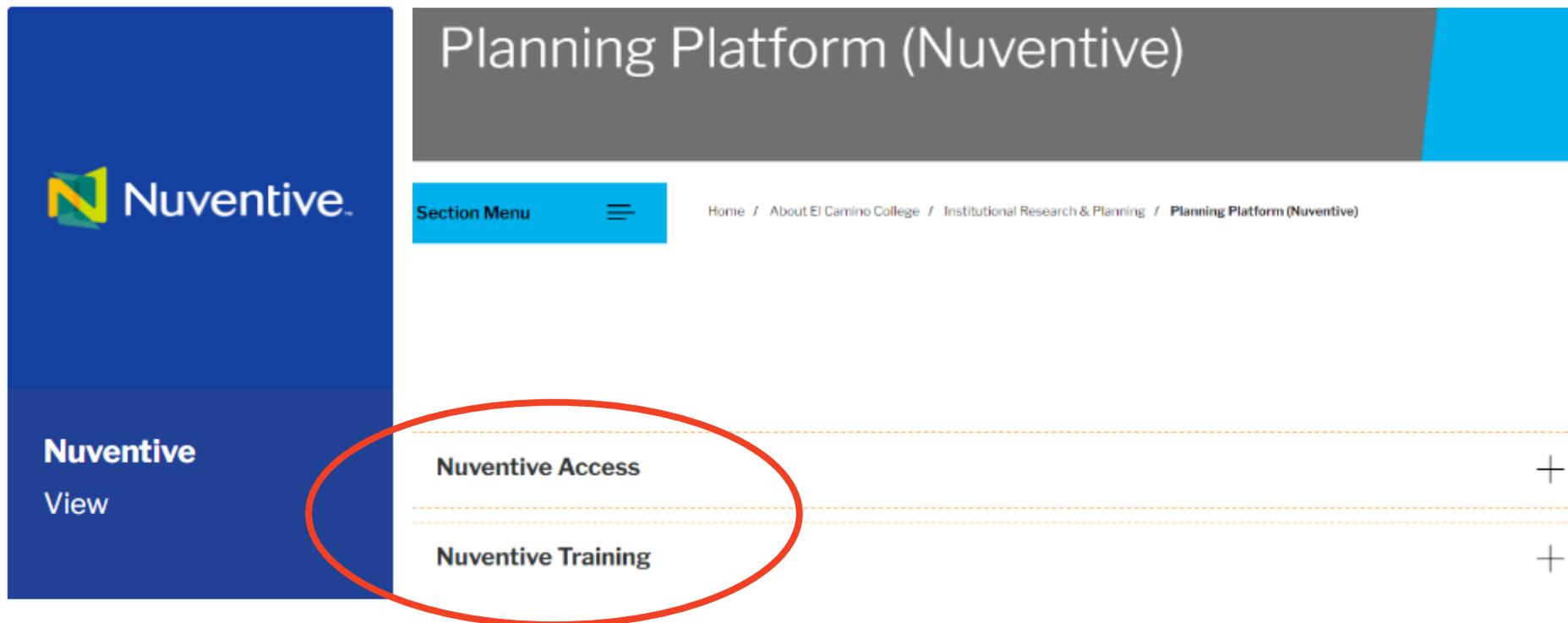
***Please Do Not Use this Add/Edit Note feature***

# Next Steps

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# 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

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

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

# To Request for Access to a Program in Nuventive

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If you are an annual planner for your program and do not have Nuventive access, please contact the following individuals in your area to request for access.

## Academic Affairs:

Diora Hong ([dhong@elcamino.edu](mailto:dhong@elcamino.edu))

Grace Ou ([gou@elcamino.edu](mailto:gou@elcamino.edu))

## Administrative Services:

Shobhana Warriar ([swarrier@elcamino.edu](mailto:swarrier@elcamino.edu))

## Student Services:

Jose Acevedo ([jacevedo@elcamino.edu](mailto:jacevedo@elcamino.edu))

Parrish Geary ([pgeary@elcamino.edu](mailto:pgeary@elcamino.edu))

## Human Resources:

Roxanne McCoy ([rmccoy@elcamino.edu](mailto:rmccoy@elcamino.edu))



Thank You  
Questions?