

**Budget Plan: 2009/10 to 2012/13**  
**Budget Planning Committee**  
**DRAFT---Status Report ---DRAFT**

**Goal #1:** *To ensure that the College maintains fiscal stability, including an appropriate contingency level.*

**Objective #1:** *Build a preliminary budget based on the district allocation model and the fund 1 resources allocated for CSM.*

<b>Action Steps</b>	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
1.1.1. Review the prior year end actual budget.	July	Oct 2010	Nov 2011				This is an ongoing process that takes place in the fall of each year as outlined in the Budget Planning Calendar
1.1.2 Analyze prior year data and summarize findings.	Sept	Oct 2010  Oct 2011	X  x				2009-10 budget review of actual expenditures completed.  2010-11 budget review completed. Prior year data review is an annual process as outlined in the Budget Planning Calendar.
1.1.3 Based on review of finding and allocation, construct the Fund 1 and Fund 3 budgets.	Sept	Sept 2010  Oct/ Nov 2011	x  x				Fund 1 2010-11 budget adopted in September of 2010.  Fund 1 2011-12 budget adopted in October 2011. Fund 3 2011-12 budget adopted in November 2011. Annual budget construction is ongoing as outlined in the Budget Planning Calendar.

	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
<b>Action Steps</b> 1.1.4. Review the budget for alignment with Institutional Priorities.	Oct	Oct 2010	X				Completed in conjunction with development of Measure G funding framework.
		Oct 2011	x				Completed as part of budget development for the 2011-12 fiscal year including the 5 in 5 initiative priorities (BSI, CTE, Transfer) and using Measure G as bridge funding.
							This is an ongoing review as outlined in the Budget Planning Calendar.

**Goal #2:** Establish a budgetary commitment to ongoing funding for the continued replacement of equipment and technology.

**Objective #1:** To determine and fund equipment and technology needs for the college.

	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
<b>Action Steps</b>							
1.1 Identify a line item for equipment and technology.	Dec 2009	April 2010	x	x			\$400k was identified to support equipment and technology. In addition, the district allocated <del>\$360k</del> in Measure G funding for 2010-11
1.2 Coordinate with the Technology Committee to identify and prioritize equipment and technology needs.	ongoing			x			Ongoing. The Chair of the Technology Committee met with the BPC to discuss priorities. The Chair is expected to continue to meet with the BPC to provide updates on priorities.

**Goal #3:** To ensure transparency of the Budget Planning Committee's decisions and decision making process

**Objective #1:** Measure CSM employee satisfaction with BPC decisions and decision making process.

<b>Action Steps</b>	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
1.1 Develop a survey to assess employee satisfaction and perception.	Nov 2009	April 2010	x				Survey was developed.
1.2 Administer survey to all CSM employees.	Nov 2009	May-June 2010	X				Survey was administered to employees using online survey during months of May-June, 2010.
	April 2010	May-June 2011	x				Survey as administered to employees using online survey during months of May-June 2011.
1.3 Evaluate and communicate survey results.	Jan 2010	Sept 2010	X				Survey results compiled and distributed to CSM community in September 2010.
	May 2010	Sept 2011	x				Survey results compile and distributed to CSM community in September 2011
1.4 Develop a mechanism for responding to questions/comments in the BPC Suggestion Box.	Oct 2009; Ongoing	Oct 2009	x				A BPC suggestion box was implemented in October of 2009. Questions and comments are compiled by PRIE and discussed at BPC meetings. Responses are developed and provided to the sender.

**Goal #4:** Develop and implement a comprehensive institutional advancement plan to include strategies for fundraising and external grants development.

**Objective #1:** Conduct a feasibility study for fundraising, development, and external grants' development

Action Steps	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
1.1 Review CSM's previous Plan for Institutional Development, 1999, (funded by the David and Lucile Packard Foundation)	Spring 2010-Fall 2010						
1.2 Review summary reports and fundraising and grants' development history at CSM with PRIE	Spring 2010-Fall 2010						
1.3 Review and assess donor cultivation and development opportunities with the SMCCCD Foundation (SMCCCF) director	Spring 2010-Fall 2010						
1.4 Review status of individual endowments held by the SMCCCD Foundation (SMCCCF) to assess their currency and applicability (e.g. assess whether the purpose of some endowed accounts can be legally expanded to reflect current needs)	Spring 2010-Fall 2010						
1.5 Review and assess current alumni cultivation efforts with Student Life and Leadership Development staff, Public Relations and Marketing director, and pertinent SMCCCF staff	Spring 2010-Fall 2010						
1.6 Review and assess public relations strategies as they may relate to fundraising and development	Spring 2010-Fall 2010						

<b>Action Steps</b>	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
1.7 Review and assess current best practices in donor cultivation, fundraising, and grants' development	Fall 2010						

**Goal #4:** *Develop and implement a comprehensive institutional advancement plan to include strategies for fundraising and external grants development.*

**Objective #2:** *Create an internal capacity to support institutional advancement planning.*

<b>Action Steps</b>	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
2.1 Conduct gap analysis of what expertise is needed to develop an institutional advancement plan	Fall 2010						
2.2. Identify internal participants in planning processes as well as internal expertise (e.g. members of BPC, IPC, PRIE, and other constituencies)	Fall 2010						
2.3 Identify, as appropriate, the external expertise needed to enhance planning processes.	Fall 2010						
2.4 Identify individuals who will serve as lead(s) for planning processes and/or lead writers	Fall 2010						

**Goal #4:** *Develop and implement a comprehensive institutional advancement plan to include strategies for fundraising and external grants development.*

**Objective #3:** *Develop and adopt institutional an advancement plan which includes implementation strategies and dollar-amount target goals.*

<b>Action Steps</b>	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
3.1. Based upon 1) survey of best practices, 2) historical review of CSM and SMCCCD practices, and 3) plans to identify internal capacity, draft preliminary plan for review, which includes dollar-amount target goals	Spring 2011						
3.2 Review draft plan with key internal constituencies (President's Cabinet, BPC, IPC, College Council, Academic Senate, and others as pertinent)	Spring 2011						
3.3 Revise plan as needed	Spring 2011						
3.4 Adopt plan	Spring 2011						



**Goal #4:** *Develop and implement a comprehensive institutional advancement plan to include strategies for fundraising and external grants development.*

**Objective #4:** *Develop new internal grants' development and management processes to be outlined in the institutional advancement plan*

<b>Action Steps</b>	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
4.1 <i>Design coordinated internal strategies and processes for identifying prospective initiatives for external funding</i>	Fall 2010- Spring 2011						
4.2 <i>Review grants' development criteria and standards previously used at CSM to evaluate the feasibility of pursuing grants opportunities</i>	Fall 2010- Spring 2011						
4.3 <i>Design processes for identifying prospective grant opportunities, matching them with the appropriate project, evaluating the feasibility of pursuing funding, and approving applications</i>	Fall 2010- Spring 2011						
4.4 <i>Evaluate current processes and design new strategies, as needed, for supporting the implementation, management, and oversight of grants' funded projects</i>	Fall 2010- Spring 2011						
4.5 <i>Identify the appropriate administrative structure, personnel, and other resources necessary to support grants development and oversight</i>	Fall 2010- Spring 2011						

**Goal #4:** Develop and implement a comprehensive institutional advancement plan to include strategies for fundraising and external grants development.

**Objective #5:** Develop fundraising strategies to be outlined in the institutional advancement plan, including strategies for donor cultivation, for partnerships with private and corporate foundations, and for relationships with community organizations and public agencies.

	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
<b>Action Steps</b>							
5.1 Design and adopt, pending approval, a President's External Advisory Group or Council (with members from the community)	Fall 2010-Spring 2011						
5.2 Develop systematic and coordinated strategies for identifying and cultivating prospective donors at CSM, to include members of programmatic advisory groups and other individuals	Fall 2010-Spring 2011						
5.3 Identify resources available through SMCCCF to support a robust fundraising effort at CSM	Fall 2010-Spring 2011						
5.4 Develop systematic and coordinated strategies for identifying funding opportunities and prospective partnerships with foundations, corporations, community groups, and public entities	Fall 2010-Spring 2011						
5.5 Identify the appropriate administrative structure, personnel, and other resources necessary to support donor cultivation and fundraising activities at CSM	Fall 2010-Spring 2011						

**Goal #4:** *Develop and implement a comprehensive institutional advancement plan to include strategies for fundraising and external grants development.*

**Objective #6:** *Develop process for revenue generation through organized facilities rental.*

<b>Action Steps</b>	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
6.1 Identify the appropriate structure, personnel and other resources necessary to support a facilities rental program.	Fall 2010- Spring 2011						