

College of San Mateo
DECISION-MAKING MATRIX: BUDGET PLANNING

Evaluation Categories:

- Integration with Planning Efforts
- Evidence of Need
- Demand
- Mandates
- Efficiency Measures
- Costs
- Financial Potential
- Personnel
- Overall College Capacity
- Community Relations

PROGRAM OR AREA:											Decision: <input type="checkbox"/> YES <input type="checkbox"/> NO	
EVALUATION FACTORS	Weighted Decision Criteria										RATING	
	Negative				Neutral (or) Moderate			Positive				
	0	1	2	3	4	5	6	7	8	9		10
Integration with Planning Efforts												
1. Fit with CSM Mission	Does not align with College Mission				Marginally addresses College Mission			Helps fulfill College Mission				
2. Addresses Goals or Objectives in CSM's Strategic Plan, 2008-2013	Does not align with Goals or Objectives				Marginally reflects Goals or Objectives			Addresses Goals or Objectives Advances the institution				
3. Addresses Recommendations in CSM's Educational Master Plan, 2008	Does not align with Recommendations				Marginally addresses Recommendations			Addresses Recommendations Advances the institution				
4. Addresses priorities articulated in the emerging: Institutional Priorities, 2009	Does not align with Priorities				Marginally addresses Priorities			Addresses Priorities Advances the institution				
5. Addresses Recommendations in SMCCCD's Strategic Plan, 2008-2013	Does not align with Recommendations				Marginally addresses Recommendations			Addresses Recommendations Advances the institution				

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6. Other College or District Plan & Recommendations...List: 1) 2) 3)	Does not align with Plan				Marginally reflects Plan			Addresses Plan Advances the institution			
Evidence of Need											
7) Environmental Scan data from Educational Master Plan or SMCCCD Strategic Plan	Weak or no identifiable data illustrate need				Limited or inconclusive data illustrate need			Strong evidence illustrates need			
8) External advisory group or professional organization provides data	Weak or no identifiable data illustrate need				Limited or inconclusive data illustrate need			Strong evidence illustrates need			
9) Qualitative evidence gathered from focus groups and/or surveys	Weak or no identifiable data illustrate need				Limited or inconclusive data illustrate need			Strong evidence illustrates need			
10) Other data sources: List: 1) 2) 3)	Weak or no identifiable data illustrates need				Limited or inconclusive data illustrate need			Strong evidence illustrates need			
Demand											
11) Scope of Demand	Evidence illustrates need in a very small population/no growth anticipated				Evidence illustrates need in a limited population; potential for growth unclear			Evidence illustrates need in a large population; potential for growth is well documented			
12) External Competition	Evidence illustrates strong competition in area among providers of programs or services (includes competition within SMCCCD)				Evidence illustrates moderate competition in area among providers of programs or services (includes competition within			Evidence illustrates no or little competition in area among providers of programs or services			

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		SMCCCD)		
Mandates				
13) ACCJC Accreditation Recommendations or Standards	Little or no internal or external mandate	Consistent with ACCJC Recommendation, Standard, or Self-study's recommendations	<u>Must</u> address Recommendation or Standard or CSM faces serious consequences—sanction or loss of accreditation	
14) External Licensure Requirements (e.g. Board of Nursing)	Little or no external mandate	Consistent with professional requirements	<u>Must</u> address requirement or CSM faces serious consequences— loss of program licensure or accreditation	
15) Title V or other Educational Code Mandates	Little or no external mandate	Consistent with Title V or Ed Code (but not necessarily explicit)	<u>Must</u> address requirement or CSM faces legal consequences	
16) State Chancellor's Office (CCCCO) Requirements	Little or no external mandate	Consistent with CCCCCO practices and recommendations	<u>Must</u> address requirement or CSM faces sanction	
17) Labor-contract mandates	No explicit contractual mandate	Consistent with past-practice/suggestive in contract	Must address contract requirements	
18) Other				
Efficiency Measures				
19) FTES/WSCH	Generates little FTES; little potential for growth	Generates moderate FTES; some potential for growth	Generates high FTES; demonstrated potential for growth	
20) LOAD	High LOAD Or	Moderate LOAD	Low LOAD Or	

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	no contractual mandate for high LOAD		Explicit contractual mandate for high LOAD (e.g some English classes)	
Costs				
21) Direct and Indirect <u>Short-term</u> Costs: Personnel <ul style="list-style-type: none"> • Faculty (FT/adjunct) • Staff • Administrators 	Requires significant investment of College resources And/or Little or No District (or other entity) assumption of cost	Requires marginal investment of College resources And/or District (or other entity) assumes some cost	Requires minimal investment of College resources And/or District (or other entity) assumes some or all costs	
22) Direct and Indirect <u>Short-term</u> Costs: Equipment and Technology	Requires significant investment of College resources And/or Little or No sharing of costs with District (or other entity)	Requires marginal investment of College resources And/or District (or other entity) assumes some cost	Requires minimal investment of College resources And/or District (or other entity) assumes some or all costs	
23) Direct and Indirect <u>Short-term</u> Costs: Capital	Requires significant investment of College resources And/or Little or No sharing of costs with District (or other entity)	Requires marginal investment of College resources And/or District (or other entity) assumes some cost	Requires minimal investment of College resources And/or District (or other entity) assumes some or all costs	

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24) Direct and Indirect <u>Long-term</u> Costs: Personnel <ul style="list-style-type: none"> • Faculty (FT/adjunct) • Staff • Administrators 	Requires significant investment of College resources And/or Little or No District (or other entity) assumption of cost				Requires marginal investment of College resources And/or District (or other entity) assumes some cost			Requires minimal investment of College resources And/or District (or other entity) assumes some or all costs			
25) Direct and Indirect <u>Long-term</u> Costs: Equipment and Technology	Requires significant investment of College resources And/or Little or No sharing of costs with District (or other entity)				Requires marginal investment of College resources And/or District (or other entity) assumes some cost			Requires minimal investment of College resources And/or District (or other entity) assumes some or all costs			
26) Direct and Indirect <u>Long-term</u> Costs: Capital	Requires significant investment of College resources And/or Little or No sharing of costs with District (or other entity)				Requires marginal investment of College resources And/or District (or other entity) assumes some cost			Requires minimal investment of College resources And/or District (or other entity) assumes some or all costs			
Financial Potential											
27) Direct/Short-term (Return on investment through increased FTES or other funding sources)	Poor short term potential, likely to cost College				Questionable short-term self-sufficiency for program or services (or ability to generate income that will offset costs)			Excellent, likely to yield self-sufficiency (or ability to generate income that will offset costs)			

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27) Direct/Long-term (Return on investment through increased FTES or other funding sources)	Poor long term potential, likely to cost College				Questionable long-term self-sufficiency for program or services (or ability to generate income that will offset costs)			Excellent, likely to yield long-term self-sufficiency (or ability to generate income that will offset costs)			
28) Potential to attract grants or donation	Little or no match with available funding sources				Some capacity to attract external funds			Excellent match with potential funders			
Personnel											
29) Leadership <ul style="list-style-type: none"> • Faculty • Staff • Administrators 	Poor in-house leadership or no expertise in this area				Adequate in-house leadership and/or expertise in this area			Excellent in-house leadership and/or expertise in this area			
30) Expertise <ul style="list-style-type: none"> • Faculty • Staff • Administrators 	Weak skills in staff/team Expertise is not easily available				Adequate skills in staff or team			Superb and identifiable expertise and skills in staff or team			
31) Percentage of personnel within "retirement zone" [within 1-5 years of retirement]											
32) Staffing ratios [define ratios]: <ul style="list-style-type: none"> • Faculty • Staff • Administrators 											

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Overall College Capacity												
33) General Background or expertise of College	Weak in area or totally new (untested) area to College				Average experience in this area			Strong experience in this area				
Community Relations												
34) Viability of external partners	Weak or no external partnerships				Partners have no major effect			Partners have enhancing effect				
35) School Relations	Weak or no external partnerships				Partners have no major effect			Partners have enhancing effect				
36) Viability of marketing and outreach efforts	Little or no activity				Limited tools and experiences			Excellent experience and tools				
OTHER												
Total Score (Sum of scores for each factor evaluated)												