

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

**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		x				BPC meeting of October 15, 2012
1.1.2 Analyze prior year data and summarize findings.	Sept		x				BPC meeting of October 15, 2012
1.1.3 Based on review of finding and allocation, construct the Fund 1 and Fund 3 budgets.	Sept		x				September and October BPC meetings. Mike introduced the College Resource Allocation Narrative which captures the Four Phases of the College's Budget Development Process.
1.1.4. Review the budget for alignment with Institutional Priorities.	Oct		x				Any budget requests must adhere to Institutional Priorities.

**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.*

<b>Action Steps</b>	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
1.1 <i>Identify a line item for equipment and technology.</i>	Dec 2009		x				Five year technology strategic plan has been developed by ITS with accompanying funding. Funding has been provided specifically for learning support centers (computer labs) and a separate account for funding faculty and staff non-computer needs. In addition, funding for computer equipment and other technology needs has also been established.
1.2 <i>Coordinate with the Technology Committee to identify and prioritize equipment and technology needs.</i>			x				VPI, VPSS, Instructional and student services managers have developed a process for prioritizing technology needs.

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

**No longer relevant as BPC does not make decisions but now reviews approved IPC budget requests to ensure the College remains solvent.**

**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		x				Campus Climate Satisfaction Surveys developed and include specific questions about budget process
1.2 Administer survey to all CSM employees.	Nov 2009 &April 2010		x				Campus Climate Satisfaction Surveys conducted for the past three years.
1.3 Evaluate and communicate survey results.	Jan 2010; May 2010		x				Campus Climate Satisfaction Surveys results compiled and shared with the CSM community. Spring 2012 Campus Climate survey conveyed that 85.2% of staff and 68.5% of faculty believe that, "All constituencies have adequate opportunity to participate in the development of financial plans and budgets." Also, 79.4% of classified staff and 74.5% of faculty believe that, "Appropriate and timely financial information is provided regularly throughout CSM."
1.4 Develop a mechanism for responding to questions/comments in the BPC Suggestion Box.	Oct 2009; Ongoing		x				Online process developed to provide CSM constituencies the opportunity share ideas and suggestions.

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

**Goal #4 has not been accomplished as initially developed. Grant writing has evolved but primarily at a division level and not always with college-wide dialogue. A few grants have also been secured including one for Mental Health, Small Business Development, Puente Program, VTEA, Economic Work Force and Power Pathways. A grant proposal for a MESA Program was submitted but ultimately not funded.**

**A Project Director position has been approved for the Business/Technology Division and this position may have assigned the task of grant writing for the division.**

**Until such time that it is deemed necessary to hire a full-time grant writer, a suggestion is to consider a more loosely structured but coordinated effort for grant writing. Thus, allow departments in consultation with their division dean, to pursue targeted grants that fulfill the College's Mission and/or Institutional Priorities.**

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

<b>Action Steps</b>	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						

<b>Action Steps</b>	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
<i>1.3 Review and assess donor cultivation and development opportunities with the SMCCCD Foundation (SMCCCCF) director</i>	Spring 2010- Fall 2010						
<i>1.4 Review status of individual endowments held by the SMCCCD Foundation (SMCCCCF) to assess their currency and applicability (e.g. assess whether the purpose of some endowed accounts can be legally expanded to reflect current needs)</i>	Spring 2010- Fall 2010						
<i>1.5 Review and assess current alumni cultivation efforts with Student Life and Leadership Development staff, Public Relations and Marketing director, and pertinent SMCCCCF staff</i>	Spring 2010- Fall 2010						
<i>1.6 Review and assess public relations strategies as they may relate to fundraising and development</i>	Spring 2010- Fall 2010						
<i>1.7 Review and assess current best practices in donor cultivation, fundraising, and grants' development</i>	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. <i>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</i>	Spring 2011						
3.2 <i>Review draft plan with key internal constituencies (President's Cabinet, BPC, IPC, College Council, Academic Senate, and others as pertinent)</i>	Spring 2011						
3.3 <i>Revise plan as needed</i>	Spring 2011						
3.4 <i>Adopt plan</i>	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>	<i>Fall 2010- Spring 2011</i>						
4.2 <i>Review grants' development criteria and standards previously used at CSM to evaluate the feasibility of pursuing grants opportunities</i>	<i>Fall 2010- Spring 2011</i>						
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>	<i>Fall 2010- Spring 2011</i>						
4.4 <i>Evaluate current processes and design new strategies, as needed, for supporting the implementation, management, and oversight of grants' funded projects</i>	<i>Fall 2010- Spring 2011</i>						
4.5 <i>Identify the appropriate administrative structure, personnel, and other resources necessary to support grants development and oversight</i>	<i>Fall 2010- Spring 2011</i>						



**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.

<b>Action Steps</b>	Proposed Timeline	Actual Timeline	Completed	In Progress	Suspended	No Action	Comments
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						