

College Advancement Planning Group
3-year Implementation Worksheet

Goal 3.1: Increase external foundation contributions to \$1 million annually.

Strategies	Initiatives (For Annual Tactical Planning)
3.1.A. Establish and utilize a comprehensive alumni database to increase contacts and support.	<p>YEAR 1:</p> <ul style="list-style-type: none"> a. Contact, review, select alumni database vendor. b. Working with Sunguard consultants, build alumni website and develop a plan to contact and maintain dialogue with alumni. <p>YEAR 2:</p> <ul style="list-style-type: none"> a. Create the database. <p>YEAR 3:</p> <ul style="list-style-type: none"> a. Utilize the database to contact alumni.
3.1.B. Expand business, community, and individual partnerships to increase financial contributions.	<p>YEAR 1:</p> <ul style="list-style-type: none"> a. Identify the target groups (as well as current contributors). Identify the interest of the respective groups for contribution. b. Work with partners to find advertising venues on campus. * c. Hold 2 major events to bring community on to campus and increase external revenue streams - Identify the target audience. Estimate the budget and revenue. Identify the events, which meet the budget/revenue requirements and target audience's interest. d. Offer naming or sponsorship opportunities through the foundation - Identify division, department, program events that could provide sponsorship, naming opportunities. Find the target sponsors for each event. <p>YEAR 2:</p> <ul style="list-style-type: none"> a. Meet with groups having common interest. Create accounts for contributions. c. Develop promotional strategies. Budget promotional campaign. Plan the events. e. Work with the divisions/departments to develop a revenue share plan, modify the events for better sponsorship opportunities.

	<p>YEAR 3:</p> <p>a. Solicit contributions.</p> <p>c. Hold the events.</p> <p>e. Start events under the sponsorship.</p>
<p>3.1.C. Strengthen planned giving.**</p>	<p>YEAR 1: Develop an on and off campus marketing campaign.</p> <p>YEAR 2: Initiate the on and off campus marketing campaign.</p> <p>YEAR 3: Expand the on and off campus marketing campaign.</p>

*For example, if SC develops a partnership with a four-year college, we can advertise that partnership on our website. Since it involves the college, such advertising would be unobtrusive and a good way to bring in greater resources for the college. Coastline College is a good example of a college that does this successfully.

** Planned gifts: A bequest through a will or trust is the most common form of a planned gift. A bequest allows you to make a substantial contribution to support Saddleback College without diminishing the assets available to you during your lifetime. Estate tax savings is also an important benefit since a bequest is a tax deductible for federal estate tax purposes.

Annual Tactical Planning Worksheet

Goal 3.1: Increase external foundation contributions to \$1 million annually.

Strategy 3.1.A. Establish and utilize a comprehensive alumni database to increase contacts and support.

Year 1 Initiative: _____

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable

Notes:

Annual Tactical Planning Worksheet

Goal 3.1: Increase external foundation contributions to \$1 million annually.

Strategy 3.1.B. Expand business, community, and individual partnerships to increase financial contributions.

Year 1 Initiative: _____

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable

Notes:

Annual Tactical Planning Worksheet

Goal 3.1: Increase external foundation contributions to \$1 million annually.

Strategy 3.1.C. Strengthen planned giving.

Year 1 Initiative: _____

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable

Notes:

Goal 3.4: Improve the efficiency of college-wide communications and marketing strategies through a centralized system.

Strategies	Initiatives (For Annual Tactical Planning)
3.4.A. Enhance communication with students and faculty to include the latest technology.	YEAR 1: Survey faculty and staff about needs (what works/what doesn't). YEAR 2: Develop a plan based on survey and current communications technology. YEAR 3: Implement the plan.
3.4.B. Develop and implement a plan that integrates marketing and public relations into the larger college community.	YEAR 1: Develop the plan. YEAR 2: YEAR 3:
3.4.C. Create an innovative Visitor's Center.	YEAR 1: Survey (or research) local college/university visitors' centers. YEAR 2: Create our plan. YEAR 3: Implement the plan.
3.4.D. Develop and implement a campaign to increase the number of high school employees that would recommend Saddleback College.	YEAR 1: a. Develop the [Marketing and Outreach] campaign. b. Develop a campaign and deploy a survey and/or focus groups so that data can be collected. YEAR 2: a. Identify the contacts. YEAR 3: a. Implement the campaign.

Annual Tactical Planning Worksheet

Goal 3.4: Improve the efficiency of college-wide communications and marketing strategies through a centralized system.

Strategy 3.4.A. Enhance communication with students and faculty to include the latest technology.

Year 1 Initiative: _____

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable

Notes:

Annual Tactical Planning Worksheet

Goal 3.4: Improve the efficiency of college-wide communications and marketing strategies through a centralized system.

Strategy 3.4.B. Develop and implement a plan that integrates marketing and public relations into the larger college community.

Year 1 Initiative: Develop the plan.

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable

Notes:

Annual Tactical Planning Worksheet

Goal 3.4: Improve the efficiency of college-wide communications and marketing strategies through a centralized system.

Strategy 3.4.C. Create an innovative Visitor's Center.

Year 1 Initiative: _____

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable

Notes:

Annual Tactical Planning Worksheet

Goal 3.4: Improve the efficiency of college-wide communications and marketing strategies through a centralized system.

Strategy 3.4.D. Develop and implement a campaign to increase the number of high school employees that would recommend Saddleback College.

Year 1 Initiative: Develop the campaign.

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable

Notes: