

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.	YEAR 1: After reviewing and selecting an alumni database vendor, work with consultants to build alumni website and develop a plan to contact and maintain dialogue with alumni.
	YEAR 2: Cultivating and building an alumni network. Customizing the database.
	YEAR 3: Create an active alumni association. Tactics: Use the database to invite people to events.
3.1.B. Expand business, community, and individual partnerships to increase financial contributions.	YEAR 1: Identify the target groups (as well as current contributors). Identify the interest of the respective groups for contribution.
	YEAR 2: Develop promotional strategies. Budget promotional campaign. Plan the events. Tactics: 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. Work with the divisions/departments to develop a revenue share plan, modify the events for better sponsorship opportunities.
	YEAR 3: Solicit contributions, hold events, and hold sponsorship ceremony.

3.1.C. Strengthen planned giving. **	YEAR 1: Develop and initiate an on and off campus education plan.
	YEAR 2: Expand the on and off campus marketing/education campaign.
	YEAR 3: Continue the on and off campus marketing/education campaign.

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: After reviewing and selecting an alumni database vendor, work with consultants to build alumni website and develop a plan to contact and maintain dialogue with alumni.

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable
Website design & development	Amy Wheeler	June 2011	
Database development	Amy Wheeler	Begins January 2011 Ongoing	
Importing database info into iModules	Amy Wheeler	January 2011	
Social networking to build Alumni	Amy Wheeler	Begins January 2011 Ongoing	
Develop an alumni communications plan	Amy Wheeler	February 2011	

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: Identify the target groups (as well as current contributors) and their interests.

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable
Find advertising venues on campus and establish rates.	Jennie McCue	June 2011	
Visit new local businesses weekly to develop relationships.	Foundation Director, College President, and Foundation Board President	Ongoing	
Establish a Campus Foundation Committee	Foundation Director or designee	November 2010	
Identify current contributors	Foundation Director or designee	November 2010	
Develop plan to identify target groups for college (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.)	Campus Foundation Committee	June 2011	

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: Develop an on and off campus Planned Giving Information campaign.

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable
Review what currently exists in terms of planned giving and develop a report	Foundation Director or designee	June 2011	
Develop a relationship with a financial advisor.	Foundation Director or designee	June 2011	
Set targets for second, and third year based on report and recommendation from financial advisor	Foundation Director or designee	June 2011	

Notes:

Year 2 Tactic: Conduct planned giving orientation after district retirement seminar.

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: Integrate communication using the latest technology in the marketing plan. YEAR 2: Conduct modifications as necessary. YEAR 3: Conduct student survey regarding effectiveness of college communication.
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 Visitors 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.
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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: Integrate new technology into the marketing plan.

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable
Reintroduce the guidelines for communication with students.	Jennie McCue	January 2011	
Integrate the communication and technology into the college marketing plan.	Marketing Department	October 2010	
Identify current technology	Marketing Committee	Ongoing	

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
Refer to Marketing Committee	Jennie McCue and Marketing Committee	June 2011	

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: Survey (or research) local college/university visitors' centers.

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable
Conduct research of colleges and universities	Ana Maria and Leslie Humphrey	March 2011	
Research on campus functions that would integrate into Visitor's Center	Leslie and Nicole	March 2011	
Develop a report based on research and produce a recommendation for year 2 and 3	Leslie and Nicole	June 2011	

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: Survey high school employees

<i>Tactics (Your to-do list)</i>	Responsible Personnel	Timelines or Due Dates	Deliverable
Research and contract with consultant to develop survey	Jennie McCue and Amy Wheeler	October 2010	
Develop a survey	Jennie McCue, Leslie Humphrey, Amy Wheeler, Nicole Ortega, and Consultant	January 2011	
Approach appropriate district/schools for approval	Leslie Humphrey or Consultant	January 2011	
Deploy survey	Leslie Humphrey or Consultant	January 2011	
Analyze data from research and develop goals for plan	Marketing and Outreach Committees, and Consultant	June 2011	

Notes:

Year 2 Tactic Develop a campaign based on research

Data Collection Needs

Level of Need (Goal, Strategy, Initiative, Tactic & Year)	Data Needed	Date Needed

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Definition of Terms

Level (Goal, Strategy, Initiative, Tactic & Year)	Term(s)	Definition
G 3.1	External [foundation] contributions	Any donation from an off campus source.
S 3.1.A	Alumni	Any one who has taken any class at Saddleback College.
S 3.1.B	Contributions	Monetary or in-kind donations.
I 3.1.B Y2 +	Campaign	A systematic course of organized activities for some specific purpose. (dictionary.com)
I 3.1.B Y3	Sponsorship	A person, firm, organization, etc., that finances to advertise a product or company. (dictionary.com)
S 3.1.C	Planned Giving	** 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.
G 3.4	Efficiency	Cost and/or time saving measures.
G 3.4	Centralized System	Established protocols of collaboration and oversight.
