

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.
3.1.B. Expand business, community, and individual partnerships to increase financial contributions.	YEAR 1: Identify the target groups (as well as current contributors) and their interests.
3.1.C. Strengthen planned giving.	YEAR 1: Develop an on and off campus Planned Giving Information 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	

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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	Campus Foundation Committee	June 2011	

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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	

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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 new technology into the marketing 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.
3.4.C. Create an innovative Visitors Center.	YEAR 1: Survey (or research) local college/university visitors' centers.
3.4.D. Develop and implement a campaign to increase the number of high school employees that would recommend Saddleback College.	YEAR 1: Survey high school employees.

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	

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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	

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 Cobos and Leslie Humphrey	March 2011	
Research on campus functions that would integrate into Visitor's Center	Leslie Humphrey and Nicole Ortega	March 2011	
Develop a report based on research and produce a recommendation for year 2 and 3	Leslie Humphrey and Nicole Ortega	June 2011	

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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

Tactics (Your to-do list)	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	

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. (http://www.saddleback.edu/foundation/ways.html)
G 3.4	Efficiency	Cost and/or time saving measures.
G 3.4	Centralized System	Established protocols of collaboration and oversight.