

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.

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

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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.

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

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.

| Tactics (Your to-do list) | 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 | <u>Report of current contributors</u> |
| Develop a relationship with a financial advisor | Foundation Director or designee | June 2011 | <u>Report: Set targets for second, and third year based on report and recommendation from financial advisor</u> |
| Set targets for second, and third year based on report and recommendation from financial advisor | Foundation Director or designee | June 2011 | (Moved up) |

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College Advancement Planning Group
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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 | <u>Published guidelines</u> |
| Integrate the communication and technology into the college marketing plan | Marketing Department | October 2010 | <u>Marketing plan</u> |
| Identify current technology | Marketing Committee | Ongoing | <u>List of current technology</u> |

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 | <u>Marketing plan</u> |

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 | June 2011 | <u>Report based on research and produce a recommendation for year 2 and 3</u> |
| Research on campus functions that would integrate into Visitor's Center | Leslie Humphrey and Nicole Ortega | June 2011 | <u>Report based on research and produce a recommendation for year 2 and 3</u> |

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| 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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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

| 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 | <u>Contract with consultant</u> |
| Develop a survey | Jennie McCue, Leslie Humphrey, Amy Wheeler, Nicole Ortega, and Consultant | January 2011 | <u>Survey questions completed</u> |
| Approach appropriate district/schools for approval | Leslie Humphrey or Consultant | January 2011 | <u>List of district responses</u> |
| Deploy survey | Leslie Humphrey or Consultant | January 2011 | <u>Completed survey</u> |
| Analyze data from research and develop goals for plan | Marketing and Outreach Committees, and Consultant | June 2011 | <u>Plan</u> |

Definition of Terms

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| 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. |