

Sample Summer Work Plan

Development = Green; Enrollment = Blue; Advancement Office = Grey

Month		What	When	Who	Notes	
JULY	○	Determine dates/locations/hosts for lead events			Work at committee meeting	
	○	Determine campaign goal & lead level (any other levels)			Done at committee meeting	
	○	Draft Case Statements			Need for solicitation letter/campaign	
	○	Purchase & set up Giftworks				
	○	Development Committee meeting			Have Top 50 & Case ready	
	○	Family Packet information sheets done			Grandparent & photo release	
	○	HR parent binder forms completed for printing			Brand each document	
	○	Create prospect list for Parent Recruitment team				
	○	Story Hour details; date, time, who				
	○	Alumni page on website			Available for data collection & solicit	
	○	Finalize all Mentor Program documents and assignments				
	○	Draft Annual Appeal letter			Available for committee review at board	
	○	Prayer partner rollout			Ready for teacher inservice	
	○	Review all new student recruitment packet material			Make all changes (dates)	
	○	K orientation and family picnic plans				
	AUGUST	○	Determine how board will be solicited for campaign			
		○	Board meeting			Prepare docs/correspond prior
○		Enrollment committee meeting			Prepare docs/correspond prior	
○		Teacher in-service talk on AD plans, changes for the year			Annual campaign, new re-reg plans	
○		Set re-registration and registration fees/discounts/dates			At committee meeting	
○		Obtain parish mailing lists			For solicitation mailings	
○		Review and if necessary redesign pledge card			Use SPIRIT as template	
○		Plan new family event for September			Need invitations, date, plan	
○		Website design, phases 1 & 2			Computer Web images	
○		Marketing proofs finalized and ordered			Printer	
○		Finalize enrollment goals for 2014-15				
○		Back to school night desk surveys designed and copied			Healey format	
○		Finalize re-reg process for rollout on back to school night			With committee help	
○	100 new student packets put together					
○	Ask teachers for 10-15 bullets of grade happenings			For grade "fact sheet" for open houses		