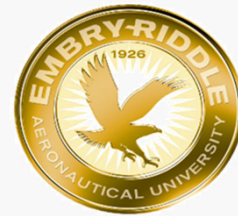




STRATEGIC PLAN

2018-23



Embry-Riddle Aeronautical University – Strategic Plan for 2018-23

MISSION - Who is Embry-Riddle Aeronautical University?

Embry-Riddle Aeronautical University is the world leader in aviation and aerospace higher education. Our mission is to teach the science, practice and business necessary to prepare students for productive careers and leadership roles in business, government agencies and the military. Embry-Riddle's reputation as a leader in aviation and aerospace higher education is grounded in its aviation roots dating back to 1926.

VISION – What is our Future?

Embry-Riddle will be the source for innovation and excellence in aerospace education and research. We will be the unquestioned global leader in aviation and aerospace higher education, with a reputation for personal attention to the success of all students. Our Prescott campus will focus on undergraduate education that emphasizes problem-based discovery and become a top-ranked destination for its undergraduate STEM programs. Our Worldwide campus will be recognized as the best in online and distance education. And, our Daytona Beach campus will be recognized for leadership in select areas of research, aerospace innovation and attention to student success, also grounded in problem-based discovery.

VALUES – What do we value?

Embry-Riddle provides a transformative educational experience through fostering collaboration and teamwork, ethical and responsible behavior, and a culture of research and discovery that mirrors the professions we serve. We focus on the development of the professional skills needed for success in global business. Embry-Riddle is committed to providing a climate that facilitates the highest standards of academic achievement, innovation and entrepreneurship in a culturally diverse community that supports the unique needs of each individual.

PROCESS – How was the Strategic Plan developed?

As we looked for ways to take Embry-Riddle to even greater heights, we asked administration, faculty and staff to lay the foundation for a new Strategic Plan. Across six core areas of interest, Strategic Implementation Teams were established to identify best practices, key goals, success metrics and next steps related to: 1) Enrollment Management, 2) Student Experience and Success, 3) Global Strategy, 4) Research and Innovation, 5) Development and Alumni Relations, and 6) Marketing and Communications. The teams were charged to engage the broader Embry-Riddle community to define the issue and develop a solution strategy. Throughout the process, we sought feedback from the broader Embry-Riddle community through multiple mechanisms: i) online input, ii) Faculty Senate meetings, iii) meetings with constituent groups, and iv) open faculty/student/staff forums.

Enrollment Management (Strategies, Critical Tasks and Timeline)

Goal: Develop an enrollment vision and an associated management plan that supports ERAU's unique identity and mission.			
Strategies	Critical Tasks for FY-19 and FY-20 (person responsible)	Deadline	Date Completed
Enrollment Strategy: Prepare a Strategic Enrollment Management Plan (SEMP) that will assist in meeting enrollment objectives.	(a) Develop ERAU's 5-year Strategic Enrollment Vision [e.g., diversity, size, quality, degree offerings] (P)	(a) Apr 2018	(a)
	(b) Develop a Strategic Enrollment Management Plan [SEMP] aligning vision and academic offerings; identify and resolve constraints/conflicts within priorities which aligns facilities, marketing initiatives, IFS strategy, diversity targets, academic offerings and other priorities with strategic vision; identify and resolve constraints/conflicts within priorities (SVP-AAP, CLT)	(b) Mar 2019	(b)
Annual Recruitment Cycle: Develop a process to annually implement the SEMP.	(a) Develop actions/decisions with dates/stakeholders for annual recruitment cycle [e.g., Feb – coordinate with Academics to identify goals by program] (SVP-AAP)	(a) Ongoing	(a)
	(b) Identify measurable targets [IFS, diversity, class size, SAT, GPA] (SVP-AAP)	(b) Ongoing	(b)
Recruiting Structure: Optimize recruitment efforts to enroll new students consistent with the Strategic Enrollment Vision.	(a) Coordinate resources and integrate recruiting across all units: consider organizational, incentive, and budgetary changes where needed (SVP-CFO)	(a) Sep 2018	(a)
	(b) Determine a supportive and responsive structure for enrollment marketing that meets the needs of enrollment, admissions, and marketing (SVP-CFO, VP-MC)	(b) Sep 2018	(b)
	(c) Hire new partner for IFS and student search; incorporate all three campuses (SVP-CFO)	(c) Oct 2017	(c) Aug 2017
	(d) Review/optimize creative & printing services – internal and external (SVP-CFO, VP-MC)	(d) Sep 2018	(d)
Tuition and IFS Strategy: Recruit students in alignment with the SEMP and provide long term stewardship of the University's resources.	(a) Develop a pricing strategy for tuition, fees and other charges that supports enrollment goals and other University priorities (SVP-CFO)	(a) Oct 2019	(a)
	(b) Review institutional aid [e.g. Athletic aid, stipends, waivers]; optimize award practices [e.g. timing, stacking, restrictions] to meet ERAU goals (SVP-AAP, CLT)	(b) Dec 2018	(b)
	(c) Ensure current targeted academic, degree specific, need-based, and other awards are optimally aligned with ERAU goals (SVP-AAP, CLT)	(c) Dec 2018	(c)
	(d) Increase philanthropic support [endowed/annual] for scholarships (SVP-DAR, SVP-CFO)	(d) Jun 2020	(d)
Transfer and Graduate Students: Increase transfer and tuition-paying graduate enrollments.	(a) Expand intercampus transfer [e.g., B.S. to M.S.], and mutually beneficial articulation and linkage agreements [e.g., 3+1+1, international exchange] (SVP-AAP)	(a) Ongoing	(a)
	(b) Coordinate graduate enrollment responsibility between admissions and academic leadership; ensure parties are aligned with, and accountable for, goals (SVP-AAP)	(b) Mar 2019	(b)
	(c) Improve admissions experience & timeliness [e.g. transfer credit evaluation] (SVP-AAP)	(c) Ongoing	(c)
Retention/Persistence: Identify opportunities to improve retention prior to admission/enrollment.	(a) Evaluate the viability of a bridge program(s)/extended orientation (SVP-AAP)	(a) Jan 2019	(a)
	(b) Coordinate with Academics and SIT-2 to identify, assess, and mitigate skills gaps before arrival through online and summer programs (SVP-AAP)	(b) Jan 2019	(b)
	(c) Use predictive analytics to better position students for success before enrollment (SVP-CFO, SVP-AAP)	(c) Aug 2020	(c)

Enrollment Management (Expenditures and Performance Metrics)

Goal: Develop an enrollment vision and an associated management plan that supports ERAU's unique identity and mission.					
Strategies	FY-19	FY-20	FY-21	FY-22	FY-23
Enrollment Plan: Prepare a Strategic Enrollment Management Plan (SEMP) that will assist in meeting enrollment objectives.	(b) \$35K	No resources needed	No resources needed	No resources needed	No resources needed
Annual Recruitment Cycle: Develop a process to annually implement the SEMF.	No resources needed	No resources needed	No resources needed	No resources needed	No resources needed
Recruiting Structure: Optimize recruitment efforts to enroll new students consistent with the Strategic Enrollment Vision.	(a) \$50K (b) \$200K	(a) \$75K (b) \$300K	(a) \$100K (b) \$350K	(a) \$100K (b) \$400K	(a) \$100K (b) \$500K
Tuition and IFS Strategy: Recruit students in alignment with the SEMF and provide long term stewardship of the University's resources.	(c) See SIT 5	(c) See SIT 5	(c) See SIT 5	(c) See SIT 5	(c) See SIT 5
Transfer and Graduate: Increase transfer and tuition-paying graduate enrollments.	No resources needed	No resources needed	No resources needed	No resources needed	No resources needed
Retention/Persistence: Identify opportunities to improve retention prior to admission/enrollment.	(a) \$30K (b) See SIT 2	(a) \$40K (b) See SIT 2	(a) \$50K (b) See SIT 2	(a) \$60K (b) See SIT 2	(a) \$75K (b) See SIT 2
Total Expenses	\$315K	\$415K	\$500K	\$560K	\$675K
	<i>(\$400K reallocated)</i>	<i>(\$400K reallocated)</i>	<i>(\$400K reallocated)</i>	<i>(\$400K reallocated)</i>	<i>(\$400K reallocated)</i>
Metric 1 - New Student Enrollment Targets <i>Definition: New Residential - UG (DB/PC)</i> <i>New Residential - GRAD (DB/PC)</i> <i>WW Total Registrations</i>	1,625 / 745 200 / 23 87,500	1,650 / 775 210 / 24 88,500	1,670 / 800 220 / 26 89,500	1,685 / 825 235 / 28 91,000	1,700 / 825 250 / 30 91,500
Metric 2 - Demographics (Residential Campuses) <i>Definition: International (DB/PC)</i> <i>Female (DB/PC)</i> <i>Other underrepresented minorities (DB/PC)</i>	17% / 8% >21% / >25% >23% / >23%	17% / 8% >21% / >25% >23% / >23%	18% / 9% >22% / >25% >23% / >23%	19% / 9% >23% / >26% >23% / >23%	20% / 10% >24% / >26% >23% / >23%
Metric 3 - Financial Aid <i>Definition: IFS 1st-time UG Rate (DB/PC)</i> <i>Philanthropic General Scholarship (Spendable/Endowed)</i> <i>Re-allocated IFS</i>	35.5% / 39.4% \$525K / \$1.05M \$0	35.2% / 39.4% \$700K / \$1.75M \$400K	34.9% / 39.4% \$1.0M / \$2.5M \$800K	34.9% / 39.4% \$1.3M / \$3.7M \$1.6M	34.9% / 39.4% \$1.5M / \$5.0M \$2.0M

Student Experience and Success (Strategies, Critical Tasks and Timeline)

Goal: Create lifetime success - through a holistic approach to student development and success which transforms the student experience.			
Strategies	Critical Tasks for FY-19 and FY20 (person responsible)	Deadline	Date Completed
Success, Persistence & Graduation: Leverage technology to support success early in a student's career and provide opportunities for enhancing academic performance.	(a) Implement ALEKS placement exams and integrate ALEKS with curriculum (D-COAS-DB) (b) Implement Retention CRM (CIO) (c) Implement Customer Service software - case management & knowledgebase (CIO) (d) Implement Campus Solutions "permissions/waitlists" functionality (R-PC)	(a) Dec 2018 (b) Oct 2018 (c) Jun 2018 (d) Aug 2018	(a) (b) (c) (d)
Academic and Advising Experience: Provide transformative engagement with an emphasis on learning excellence and holistic advising (i.e., academic advising, professional socialization, personal development, and relationship building).	(a) Conduct barrier courses analyses and develop mitigation strategy (D-COAS-DB) (b) Transform student advising using best practices; develop recommendation (R-PC) (c) Gather student experience feedback from key stakeholders – students and recent graduates (AD-S-DB) (d) Educate faculty on pedagogical best practices to improve student outcomes – develop training plan for continuous improvements (D-COAS-DB) (e) Create a culture of mentoring – making students experience memorable; engage faculty and establish process (D-COE-PC) (f) Enhance student life opportunities; develop plan for continuous improvements (AD-S-DB) (g) Enhance tutoring; develop process for continuous improvement (AVP-IE) (h) Freshmen outreach – based on risk; develop process for continuous improvement (AVP-IE)	(a) May 2018 (b) April 2018 (c) Nov 2018 (d) Oct 2018 (e) Nov 2018 (f) Aug 2018 (g) Aug 2018 (h) Oct 2018	(a) (b) (c) (d) (e) (f) (g) (h)
Academic Programs and Policies: Ensure programs and policies provide positive impact on student experience and success.	(a) Develop a strategic academic vision (P, AC) (b) Review course cap policies and practices to provide a more positive student impact (AC) (c) Ensure all courses have student assessments (CAO-PC) (d) Facilitate seamless transferability among campuses (R-DB, R-PC, R-WW) (e) Ensure all majors have Industrial Advisory Boards (D-ALL-ALL) (f) Create alternative academic pathways for at-risk students (CAO-PC)	(a) Aug 2018 (b) May 2018 (c) Nov 2018 (d) May 2018 (e) Sept 2018 (f) Nov 2018	(a) (b) (c) (d) (e) (f)
Student Services: Reimagine and implement services to provide integrated, seamless, user-friendly support and enable self-service access 24x7x365.	(a) Refine ERNIE to provide seamless support (CIO) (b) Upgrade ERAU mobile application (CIO) (c) Implement queue management tool for student business services (AVP-IE) (d) Reimagine student business services: (AVP-IE) i. DB: Create single physical location for student business (SVP-A) ii. PC: Review new model for future applicability (C-PC) (e) Develop student communications strategy (D-EM-DB) (f) Develop service excellence training for all (AVP-IE) (g) Consolidate to a single catalog for the 3 ERAU campuses (R-DB, R-PC, R-WW)	(a) Mar 2018 (b) Nov 2017 (c) Dec 2017 (d) Jun 2018 (e) Sept 2018 (f) Jun 2018 (g) Aug 2018	(a) (b) Nov 2017 (c) Jan 2017 (d) (e) (f) (g)

Student Experience and Success (Expenditures and Performance Metrics)

Goal: Create lifetime success - through a holistic approach to student development and success which transforms the student experience.					
Strategies	FY-19	FY-20	FY-21	FY-22	FY-23
Success, Persistence & Graduation: Leverage technology to support success early in a student’s career and provide opportunities for enhancing academic performance.	Reallocate existing resources	Reallocate existing resources	Reallocate existing resources	Reallocate existing resources	Reallocate existing resources
Academic and Advising Experience: Provide transformative engagement with an emphasis on learning excellence and holistic advising (i.e., academic advising, professional socialization, personal development, and relationship building).	(a) \$75K	(a) \$75K	(a) \$75K	(a) \$75K	(a) \$75K
	(g) \$42K	(g) \$42K	(g) \$42K	(g) \$42K	(g) \$42K
Academic Programs and Policies: Ensure programs and policies to provide positive impact on student experience and success.	Reallocate existing resources	Reallocate existing resources	Reallocate existing resources	Reallocate existing resources	Reallocate existing resources
Student Services: Reimagine and implement services to provide integrated, seamless, user-friendly support and enable self-service access 24x7x365.	Reallocate existing resources	Reallocate existing resources	Reallocate existing resources	Reallocate existing resources	Reallocate existing resources
Total Expenses	\$117K <i>(\$692K reallocated)</i>	\$117K <i>(\$345K reallocated)</i>	\$117K <i>(\$347K reallocated)</i>	\$117K <i>(\$349K reallocated)</i>	\$117K <i>(\$351K reallocated)</i>
Metric 1 - Undergraduate 4-year graduation rate <i>Definition: first time, full-time degree seeking cohort</i>	36%	38%	40%	42%	44%
Metric 2 - Undergraduate 6-year graduation rate <i>Definition: first time, full-time degree seeking cohort</i>	59%	61%	64%	67%	70%
Undergraduate 1st Year retention rate <i>Definition: first time, full-time degree seeking cohort</i>	82%	83%	85%	87%	88%
Undergraduate 2nd Year retention rate <i>Definition: first time, full-time degree seeking cohort</i>	67%	68%	69%	70%	72%
First Year Completion of 0-24 ERAU Credit Hours <i>Definition: % of first time, full-time degree seeking students completing less than 24 ERAU credit hours</i>	14%	13%	12%	10%	9%
Metric 6 – Career Placement Rate <i>Definition: % of graduates in career position (job, military, continuing education) within 1 year of BS</i>	97%	97.2%	97.4%	97.6%	98%
Metric 7 - Worldwide persistence rate** <i>Definition: Average number of courses taken per student per year</i>	4.3	4.8	5.2	5.6	6

**Reflects persistence for Worldwide non-traditional students – will continue to refine metrics for Worldwide

Global Strategy (Strategies, Critical Tasks and Timeline)

Goal: To achieve international recognition as the leading aeronautical university through strategic global engagement with business and academia.			
Strategies	Critical Tasks for FY-19 and FY-20 (person responsible)	Deadline	Date Completed
Environment: Provide an educational and work environment that develops globally competent staff, students and faculty who understand, and excel in, an international discipline.	(a) Reorganize to establish an Office of International Programs that reports to the Provost and has responsibility for ERAU's overall global strategy and all international student and scholar services (SVP-AAP)	(a) May 2018	(a)
	(b) Create and promote learning outcomes in all majors applied to multimodal international experiences (D-ALL-ALL)	(b) Jun 2023	(b)
	(c) Evaluate and implement safety and security policies/processes for global programs (D-ISS)	(c) Jan 2019	(c)
	(d) Institutionalize ERAU's global engagement through policies and procedures, promotion and tenure and budget (SVP-AAP, FS)	(d) Jun 2023	(d)
Locations: Expand ERAU's global brand by identifying select locations for expansion.	(a) Identify sustainable market opportunities and services (C-WW, D-ISS)	(a) Ongoing	(a)
	(b) Develop strategic global partnerships and services (C-WW)	(b) Ongoing	(b)
	(c) Pursue collaborative research and international funding opportunities (SVP-AAP)	(c) Ongoing	(c)
	(d) Establish a centralized clearinghouse for global, cultural and linguistic assets and programs services (D-ISS)	(d) May 2019	(d)
Enrollment: Develop and implement an international enrollment and marketing plan that diversifies ERAU's international student population.	(a) Develop and implement a holistic university digital marketing and communications strategy services that spans the globe (VP-MC)	(a) May 2018	(a)
	(b) Leverage intercollegiate athletics as international enrollment driver (SVP-AAP, C-DB, C-PR)	(b) Ongoing	(b)
	(c) Create international enrollment objectives supported by IFS strategy (SVP-CFO)	(c) May 2018	(c)
	(d) Increase the number of linkage programs (SVP-AAP)	(d) Jun 2023	(d)

Global Strategy (Expenditures and Performance Metrics)

Goal: To Achieve international recognition as the leading aeronautical university through strategic global engagement with business and academia.					
Strategies	FY-19	FY-20	FY-21	FY-22	FY-23
Environment: Provide an educational and work environment that develops globally competent students, faculty and staff who understand, and can excel in, an international discipline.	Reallocation of existing budget and staff	Reallocation of existing budget and staff	Reallocation of existing budget and staff	Reallocation of existing budget and staff	Reallocation of existing budget and staff
Locations: Expand ERAU's global brand by identifying select locations for expansion.	(b) \$25K	Reallocation of existing budget and staff	Reallocation of existing budget and staff	Reallocation of existing budget and staff	Reallocation of existing budget and staff
Enrollment: Develop and implement an international enrollment and marketing plan that diversifies ERAU's international student population.	Included in SIT-6 Marketing & Communications	Included in SIT-6 Marketing & Communications	Included in SIT-6 Marketing & Communications	Included in SIT-6 Marketing & Communications	Included in SIT-6 Marketing & Communications
Total Expenses	\$25K <i>(\$115K reallocated)</i>	<i>(\$95K reallocated)</i>	<i>(\$95K reallocated)</i>	<i>(\$95K reallocated)</i>	<i>(\$95K reallocated)</i>
Metric 1- International Experience <i>Definition: Study, internship and research abroad, student and faculty exchange, co-curricular activities, language studies, international volunteer</i>	~800	840	880	920	960
Metric 2- International Revenue <i>Definition: Repatriated receivables, tuition, grants, contracts.</i>	↑revenue 2%	↑revenue 4%	↑revenue 6%	↑revenue 8%	↑revenue 10%
Metric 3- Linkage Programs <i>Definition: 3+1+1, 2+2, dual enrollment, agent contracts, government sponsored students.</i>	130	140	155	170	180
Metric 4- Campus Abroad <i>Definition: ERAU physical locations abroad</i>	3 civilian 24 military				5 civilian 30 military

Research and Innovation (Strategies, Critical Tasks and Timeline)

Goal: To be known internationally for groundbreaking aerospace/aviation research and innovation in select, signature areas, and for discovery-driven undergraduate programs.

Strategies	Critical Tasks for FY-19 and FY-20 (person responsible)	Deadline	Date Completed
Signature Research Areas: Identify select, signature research themes where ERAU has a competitive global advantage. Incentivize research and collaboration in these areas and build the necessary infrastructure to compete for large-scale, funded research projects.	(a) Launch a Presidential Fellow faculty hiring initiative in select areas of research (SVP-AAP)	(a) Aug 2018	(a)
	(b) Reward highly successful, well-funded faculty with competitive compensation (SVP-AAP, D-ALL-ALL)	(b) Ongoing	(b)
	(c) Increase internal research and development funding in areas with high ROI (SVP-AAP)	(c) Jul 2019	(c)
	(d) Create customer-centric research support infrastructure (SVP-CFO, SVP-AAP)	(d) Aug 2018	(d)
	(e) Create shared facilities and resources that enable collaborations and major proposals related to our select areas of research (D-ALL-ALL, SVP-A, SVP-AAP)	(e) Aug 2018	(e)
	(f) Recognize researchers through prestigious awards (SVP-AAP)	(f) Ongoing	(f)
	(g) Leverage Worldwide global educational network to become a leader in international research collaboration (C-WW)	(g) Ongoing	(g)
Graduate Programs: Identify and support select, signature graduate programs and recruit a research-ready graduate student body.	(a) Require that tuition support be included for graduate research assistantships on all grant applications and graduate assistants supported by ERAU (SVP-AAP, PI)	(a) Aug 2018	(a)
	(b) Require R1-competitive stipends/benefits for all graduate assistants (SVP-AAP, PI)	(b) Aug 2018	(b)
	(c) Expand online graduate programs and professional development offerings in select areas in which ERAU has a competitive advantage (SVP-AAP, C-WW)	(c) Aug 2018	(c)
	(d) Provide staff support to increase the number of competitive applications for prestigious scholarships and fellowships (SVP-AAP)	(d) Aug 2018	(d)
Undergraduate Discovery: Make ERAU a national model for integrating research as a critical element to enrich the undergraduate curriculum and spur innovation.	(a) Expand curricular and co-curricular opportunities for undergraduate research and scholarship, allowing students in all programs to gain experience (SVP-AAP)	(a) Ongoing	(a)
	(b) Provide staff support to increase the number of competitive applications for prestigious scholarships and fellowships (SVP-AAP, C-ALL, CAO-ALL)	(b) Aug 2018	(b)
	(c) Recognize undergraduate research/scholarship mentorship in workload, faculty evaluations, and tenure and promotion; and support research-based curricular development and implementation (SVP-AAP, CAO-ALL)	(c) Ongoing	(c)
Innovation: Accelerate innovation and strengthen industry partnerships.	(a) Establish a University Corporate Relations and Business Development Office (P)	(a) Jan 2018	(a)
	(b) Create a University-level fund to invest in student and faculty business startups (SVP-AAP)	(b) Jul 2018	(b)
	(c) Recognize and reward disclosures, patents, and contribution to the University innovation ecosystem (SVP-AAP, D-ALL-ALL)	(c) Oct 2018	(c)
	(d) Integrate entrepreneurship into curriculum as an educational learning outcome (SVP-AAP, D-ALL-ALL)	(d) Aug 2018	(d)

Research and Innovation (Expenditures and Performance Metrics)

Goal: To be known internationally for groundbreaking aerospace/aviation research and innovation in select, signature areas, and for discovery-driven undergraduate programs.					
Strategies	FY-19	FY-20	FY-21	FY-22	FY-23
Signature Research Areas: Identify select, signature research themes where ERAU has a competitive global advantage. Incentivize research and collaboration in these areas and build the necessary infrastructure to compete for large-scale, funded research projects.	(a) \$250K (b) \$30K (c) \$75K (d) \$98K	(a) \$638K (b) \$50K (c) \$100K (d) \$130K	(a) \$913M (b) \$60K (c) \$150K (d) \$195K	(a) \$1.44M (b) \$70K (c) \$200K (d) \$195K	(a) \$1.6M (b) \$70K (c) \$250K (d) \$195K
Graduate Programs: Identify and support select, signature graduate programs and recruit a research-ready graduate student body.	(b) \$50K	(b) \$75K	(a) \$33K (b) \$100K	(a) \$66K (b) \$125K	(a) \$99K (b) \$150K
Undergraduate Discovery: Make ERAU a national model for integrating research as a critical element to enrich the undergraduate curriculum and spur innovation.	(b) \$46K	(b) \$92K	(b) \$92K	(b) \$92K	(b) \$92K
Innovation: Accelerate innovation and strengthen industry partnerships.					
Total Expenses	\$549K <i>(\$585K reallocated)</i>	\$1.09M <i>(\$1.3M reallocated)</i>	\$1.54M <i>(\$1.5M reallocated)</i>	\$2.19M <i>(\$2.3M reallocated)</i>	\$2.46M <i>(\$2.5M reallocated)</i>
Metric 1 - Research Productivity <i>Definition: Annual research expenditures.</i>	\$21.6M	\$23.M	\$25.5M	\$29.0M	\$32.0M
Metric 2 - Presidential Faculty Fellows <i>Definition: Number of faculty hired under Presidential Faculty Fellows program</i>	1	3	5	8	10
Metric 3 - Doctoral Production <i>Definition: Number of PhD graduates per year</i>	4	8	12	16	20
Metric 4 - Undergraduate Discovery and Innovation <i>Definition: Percentage of baccalaureate graduates who have participated in faculty-mentored research, professional society sponsored competitions, capstone design projects, entrepreneurial activities/classes, etc., that contribute to discovery and innovation mindset.</i>	40%	50%	60%	70%	80%
Metric 5 - Business Partnerships <i>Definition: Number of SBIR and STTR grant applications submitted/awarded</i>	3/1	5/2	8/3	13/4	17/5

Development and Alumni Relations (Strategies, Critical Tasks and Timeline)

Goal: To establish a culture of philanthropy, rooted in lifelong relationships with alumni, friends, corporations, and foundations, that supports ERAU's advancement and aligns with the goals of its Strategic Plan.

Strategies	Critical Tasks for FY-19 (person responsible)	Deadline	Date Completed
Organization: Achieve Divisional organizational excellence and engage the entire campus in support of philanthropy and alumni and donor engagement.	(a) Set expectations that leadership will participate actively in fundraising efforts and solicit them for transformational gifts that demonstrate their commitment to ERAU's future (P)	(a) Sep 2018	(a)
	(b) Provide fundraising workshops for deans and central administrators (SVP-DAR)	(b) Oct 2018	(b)
	(c) Reorganize and begin expanding DAR team and strengthen budget (P, SVP-DAR)	(c) Jun 2018	(c)
	(d) Install best practices advancement policies, procedures, and systems (SVP-DAR)	(d) Sep 2018	(d)
	(e) Begin developing compelling cases for support for university/units (SVP-DAR, VP-MC)	(e) Nov 2018	(e)
	(f) Deploy a strategic communications plan for the Division and embed philanthropic mindset in <i>all</i> communications and activities (SVP-DAR, VP-MC)	(f) Aug 2018	(f)
Engage Alumni: Purposefully engage alumni, increasing alumni involvement, pride, volunteerism, and giving.	(a) Grow awareness of and highly visible pride in ERAU brand among alumni by launching a content management strategy and alumni recognition program (SVP-DAR, VP-MC)	(a) Sep 2018	(a)
	(b) Begin delivering ongoing career development and other value to alumni (SVP-DAR, CS)	(b) Jun 2018	(b)
	(c) Begin harnessing alumni human capital through strategic volunteerism (SVP-DAR)	(c) Sep 2018	(c)
	(d) Install an alumni engagement scoring model, and leverage it to achieve increased alumni giving (SVP-DAR)	(d) Aug 2018	(d)
Grow Donor Base: Grow donor base by identifying and engaging new prospects and establishing a culture of philanthropy.	(a) Identify fresh prospects through [i] affinity data, [ii] data campaigns, [iii] referrals, [iv] validated prospect research, [v] discovery calls and [vi] qualification calls (SVP-DAR)	(a) Ongoing	(a)
	(b) Launch effective programs of affinity-based fundraising, such as with parents (SVP-DAR)	(b) May 2018	(b)
	(c) Attract expanding support through acquisition, retention and elevation of donors by establishing an increasingly effective annual giving program (SVP-DAR)	(c) Aug 2018	(c)
	(d) Establish an institutional culture of philanthropy by growing faculty/staff participation, securing sacrificial gift commitments by campus leaders, achieving 100% participation among giving [i.e., non-IAB] boards, and increasing rate of giving by students (SVP-DAR)	(d) Dec 2018	(d)
Generate Increased Major Gift Revenues: Launch programs for major giving, corporate/foundation giving, donor relations, and planned giving and conduct mini-campaigns.	(a) Produce resources for Presidential priorities through active, strategic solicitations and serial mini-campaigns. Plan a business-focused mini-campaign. (P, SVP-DAR)	(a) Sep 2018	(a)
	(b) Roadmap and launch a best-practice corporate philanthropy program as part of a centralized, collaborative, integrated corporate relations program (SVP-DAR)	(b) Nov 2018	(b)
	(c) Roadmap a best-practice foundation relations program; increase submissions (SVP-DAR)	(c) Oct 2018	(c)
	(d) Launch a best-practice donor impact reporting program to grow lifetime giving (SVP-DAR)	(d) Nov 2018	(d)
	(e) Roadmap and deploy a best-practice planned giving program (SVP-DAR)	(e) Sep 2018	(e)
Board of Trustees: Support the Board's leadership of philanthropy efforts.	(a) Deliver fundraising training for the BOT (SVP-DAR)	(a) Jan 2019	(a)
	(b) Secure BOT referrals and introductions to, and hosting of, donor prospects (SVP-DAR)	(b) Jun 2019	(b)
	(c) Solicit BOT for gifts, including deferred gifts, to presidential priorities (P, SVP-DAR)	(c) Jun 2019	(c)

Development and Alumni Relations (Expenditures and Performance Metrics)

Goal: Establish a culture of philanthropy, rooted in lifelong relationships with alumni, friends, corporations, and foundations, that supports ERAU's advancement and aligns with the goals of our Strategic Plan.					
Strategies	FY-19	FY-20	FY-21	FY-22	FY-23
Organization: Achieve Divisional organizational excellence and engage the entire campus in the support of philanthropy and alumni engagement.	\$338K	\$294K	\$294K	\$294K	\$294K
Engage Alumni: Purposefully engage alumni, increasing volunteerism, pride, and giving.					
Grow Donor Base: Identify and engage new prospects and establish a culture of philanthropy.	\$177K	\$282K	\$334K	\$414K	\$494K
Increase Major Gift Revenues: Deploy effective programs in donor relations, planned giving, corporate and foundation relations, and major gifts and conduct mini-campaigns.	\$246K	\$256K	\$256K	\$256K	\$256K
Board of Trustees: Support the BOT					
Total Expenses	\$761K	\$832K	\$884K	\$964K	\$1,044K
	<i>(\$199K reallocated)</i>	<i>(\$199K reallocated)</i>	<i>(\$199K reallocated)</i>	<i>(\$199K reallocated)</i>	<i>(\$199K reallocated)</i>
Metric 1 – Annual FY Development Productivity <i>Definition: Outright gifts and new gift pledges (less current year payments) secured from all sources (alumni, friends, corporations, foundations) through all channels (annual fund, major gift, estate, in-kind)</i>	\$12M	\$14M	\$16M	\$18M	\$20M
Metric 2 - Alumni Engagement Score <i>Definition: A weighted scoring of purposeful engagements that correlate strongly to quality alumni experiences, volunteerism, and giving.</i>	TBD	TBD	TBD	TBD	TBD
Metric 3 – Total donors <i>Definition: new & consecutive-year donors, annually</i>	3700	3900	4100	4300	4500
Metric 4 – Gifts of \$50,000+ per year <i>Definition: Uses metric 1 definition</i>	21	25	30	38	50