

Philanthropy and Alumni Engagement

Goal 5: 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		Deadline	Date Completed
(1) Institutional Engagement: Engage the entire University in support of philanthropy and alumni and donor engagement.	(a)	Engage the BOT in the development process and keep the development committee regularly updated. (SVP)	Ongoing	
	(b)	Build an educational training program around the fundraising process. (SVP)		Fall 2023
	(c)	Partner and engage with Enrollment Management, Student Groups, Career Services, the Library, Veterans Services and Athletics. (PAE team)	Ongoing	
	(d)	Engage Deans and CLT in creating campaign Case for Support (SVP)		Fall 2023
	(e)	Continue to growing faculty/staff participation, securing gifts from campus leaders, and volunteer boards. (PAE team)	Ongoing	
	(f)	Establish philanthropic expectations in annual performance evaluations for administrative and academic leaders. (Provost)		Winter 2021
	(g)	Share the impact of philanthropy on campus through an internal marketing campaign. (DM)	Ongoing	
(2) Alumni Engagement: Purposefully engage alumni, increasing alumni involvement, pride, volunteerism, and giving.	(a)	Provide college specific life-long learning opportunities with virtual and/or in-person lectures as well as industry panels. (ED-AE)	Ongoing	
	(b)	Support alumni through value added career development opportunities, professional development programming and career coaching. (ED-ACE)	Ongoing	
	(c)	Highlight outstanding alumni in publications and on all platforms. (AD-ADE)	Ongoing	
	(d)	Offer in-person engagement opportunities at industry events, trade shows and on campus. Deliver events that are on brand and support ER's culture of excellence. (AE Team)	Ongoing	
	(e)	Engage alumni through volunteer networks and special interest groups. (AD-AP)	Ongoing	
	(f)	Engage students and young alumni with affinity programming (new team person required)	Fall 2027	
	(g)	Provide alumni with an outstanding customer service experience. (AE Team)	Ongoing	
	(h)	Solicit support for alumni events from external sponsors. (AE Team)	Ongoing	

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Strategies	Critical Tasks		Deadline	Date Completed
(3) Donor Base Growth and Retention: Grow donor base by identifying and engaging new individual and corporate prospects and establishing a culture of philanthropy. Improve donor retention through effective outreach and engagement.	(a)	Identify new prospects through (i) affinity data, (ii) wealth screening, (iii) referrals, (iv) prospect research that is validated through discovery and qualification visits, and (v) peer screening exercises. (Sr. BA)	Ongoing	
	(b)	Maintain contact information, record engagement activities and employment information. (PAE Team)	Ongoing	
	(c)	Adopt practices and protocols for major gift and annual fundraising goals creating pipeline of prospects for elevation to higher giving and build a culture of sustainable philanthropy. (SVP)	Ongoing	
	(d)	Review the implementation of Philanthropic Councils and establish goals for annual growth of the program. Formalize moving donors up the giving pyramid to lead and major gifts prospects. (SVP)	Ongoing	
	(e)	Improve reporting systems and delivery methods for gift receipts and endowment reports. Deliver accurate and on-time pledge statement, receipts and impact reports. (AVP-PAE)	Ongoing	
	(f)	Hire a Senior Executive Director for Corporate and Foundation Relations to capitalize on corporate interests, deliver university-wide proposals and develop a foundations relations program. (SVP)		Spring 2025
	(g)	Hire front line fundraising positions appropriate to the level of opportunity within the units. (SVP)	Ongoing	
	(h1)	Hire a Sr. Director for the annual fund to build a program. (SVP)		Fall 2023
	(h2)	Hire a Coordinator for the annual fund to assist the Sr. Director (SVP)	Summer 2027	
	(i)	Ensure scholarships are given to students in a timely manner and that the donor is thanked by the student when possible. (Stewardship team)	Ongoing	
	(j)	Provide event opportunities for donors and alumni to engage with leadership and each other. Specifically, scholarship luncheons, planned giving society events, campaign events, alumni dinners, etc... (new team member required)	Ongoing	
	(k)	To without question follow the donor intent in how funds are used, regularly reporting on the impact of donor philanthropy in a way that is meaningful to the donor. (Stewardship team)	Ongoing	








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(4) Comprehensive Campaign: Plan and execute ERAU's first comprehensive campaign with a focus on student and faculty support.	(a)	Establish campaign theme, university priorities, timeline and goals.		Fall 2023
	(b)	Update metrics for fundraising team based on experience and portfolios, while being reflective of the needs of the University. (SVP)		Summer 2023
	(c)	Implement CASE standards related to gift minimums, gift acceptance policies, prospect and budget management for increased financial responsibility and better productivity. (SVP)	Ongoing	
	(d)	Provide regular training for all staff reflective of their responsibilities and goals. (SVP)	Ongoing	
	(e)	Establish fundraising priorities for individual campus units and support these efforts with unit based case for supports and necessary collateral material. (PAE Team)		Fall 2025
	(f)	Rebuild the team - identifying staffing needs in strategic areas and hire top talent. (SVP)	Ongoing	
	(g)	Conduct a campaign feasibility study with 45 top prospects and through an electronic alumni survey. (SVP)		Winter 2024
	(h)	Identify a campaign Chair. (SVP)		Summer 2024
	(i)	Lead a principal gift initiative engaging President Butler and appropriate CLT members to discuss principal gift prospects and strategies that drive transformational giving. (SVP)	Ongoing	
	(j)	Increase awareness through social media and marketing. Create and execute campaign collateral, proposals, branding and a communications plan. (SD-MC)	Ongoing	
	(k)	Complete PAE website and campaign site. (SD-MC)		Summer 2025
	(l)	Create and execute a series of kick-off events that tie the campaign to the 100 year anniversary celebration. (PAE Team)	Ongoing	
	(m)	Create a collaborative team culture of excellence that integrates working groups, increases communication and work flow. Celebrate achievement. (SVP)	Ongoing	
	(n)	Improve work flow of the gift agreement process for rapid turn around to donors and campaign counting. (new position)		Fall 2025
	(o)	Pursue major gifts to support student scholarships, especially in support of establishing a more diverse student body. (FLF Team)	Ongoing	

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Performance Metrics	FY-23 baseline	FY-24 Goal	FY-25 Goal	FY-26 Goal	FY-27 Goal	FY-28 Goal
Metric 1 – Annual FY Development Productivity	\$21.2M	\$15.5M 	\$11M  	\$20M	\$20M	\$20M
Metric 2 – Total Donors	4,140	4,100 	4,200 	4,300	4,400	4,500
Metric 3 – Alumni Engagement	4,391	4,500 	4,500 	5,000	5,000	5,250

  Goal exceeded by 2x;
  Goal achieved;
  Goal achieved at 90-99% level;
  Goal not achieved