

Philanthropy and Alumni Engagement (Strategies, Critical Tasks and Timeline)

Updated August 11, 2021

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 (PERSON RESPONSIBLE)	Deadline
Organization: Achieve Divisional organizational excellence and engage the entire campus in support of philanthropy and alumni and donor engagement.	(h) Synchronize data from Advance and CRM; enact cooperative data sharing (SVP-PAE, SVP-A)	(h) Jun 2023
Engage Alumni: Purposefully engage alumni, increasing alumni involvement, pride, volunteerism, and giving.	(g) Reboot Alumni programming and communication strategy for campaign (SVP-PAE)	(g) Mar 2023
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) prospect research that is validated through discovery and qualification visits, and (v) peer screening exercises (SVP-PAE) (d) Establish an institutional culture of philanthropy by growing faculty/staff participation, securing sacrificial gifts from campus leaders, achieving 100% participation among giving (non-IAB) boards, and increasing the number of students who make gifts. (SVP-PAE) (f) Rebrand Annual Fund (SVP-PAE)	(a) Ongoing (d) Jul 2022 (f) Jan 2022
Generate Increased Major Gift Revenues: Launch programs for major giving, corporate/ foundation giving, donor relations, and planned giving and conduct mini campaigns.	(f) Create campaign collateral and communications plan (SVP-PAE) (h) Prepare for public launch of campaign (SVP-PAE) (j) Install best practice policies and procedures for conducting campaign (SVP-PAE)	(f) Jul 2022 (h) Mar 2023 (j) Jun 2022
Board of Trustees: Support the Board's leadership of philanthropy efforts.	(b) Secure BOT referrals and introductions to, and hosting of, donor prospects. (SVP-PAE) (c) Solicit BOT for gifts, including deferred gifts, to presidential priorities. (P, SVP-PAE)	(b) Jul 2022 (c) Jul 2022

Note: Completed tasks are summarized in corresponding Task Completion Timeline.

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Strategies	Critical Tasks (PERSON RESPONSIBLE)	Date Completed
Organization: Achieve Divisional organizational excellence and engage the entire campus in support of philanthropy and alumni and donor engagement.	<ul style="list-style-type: none"> (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) (b) Provide fundraising workshops for deans and central administrators. (SVP-PAE) (c) Reorganize and begin expanding PAE team and strengthen budget. (P, SVP-PAE) (d) Install best practices advancement policies, procedures, and systems. (SVP-PAE) (e) Begin developing compelling cases for support for university/units. (SVP-PAE, VP-MC) (f) Deploy a strategic communications plan for the Division and embed philanthropic mindset in <i>all</i> communications and activities. (SVP-PAE, VP-MC) (g) Complete phase 2 (final) expansion of team (SVP-PAE) 	<ul style="list-style-type: none"> (a) Sept 2018 (b) Aug 2019 (c) Aug 2018 (d) Jan 2019 (e) Nov 2018 (f) Sep 2018 (g) Nov 2019
Engage Alumni: Purposefully engage alumni, increasing alumni involvement, pride, volunteerism, and giving.	<ul style="list-style-type: none"> (a) Grow awareness of and highly visible pride in ERAU brand among alumni by launching a content management strategy and alumni recognition program. (SVP-PAE, VP-MC) (b) Begin delivering ongoing career development and other value to alumni. (SVP-PAE, CS) (c) Begin harnessing alumni human capital through strategic volunteerism. (SVP-PAE) (d) Install an alumni engagement scoring model and leverage it to achieve increased alumni giving. (SVP-PAE) (e) Establish Alumni Engagement Scoring goals (SVP-PAE) (f) Conduct comprehensive alumni attitudinal survey (SVP-PAE, with ERAU IR) 	<ul style="list-style-type: none"> (a) Jan 2019 (b) Jun 2018 (c) Feb 2019 (d) Sep 2018 (e) Oct 2019 (f) Apr 2020
Grow Donor Base: Grow donor base by identifying and engaging new prospects and establishing a culture of philanthropy.	<ul style="list-style-type: none"> (b) Launch effective programs of affinity-based fundraising, such as with parents. (SVP-PAE) (c) Attract expanding support through acquisition, retention and elevation of donors by establishing an increasingly effective annual giving program. (SVP-PAE) (e) Roll out leadership annual giving program (SVP-PAE) (g) Establish women's giving circle (SVP-PAE) (h) Complete initial population of College Philanthropy Councils (SVP-PAE) 	<ul style="list-style-type: none"> (b) May 2018 (c) Aug 2018 (e) Nov 2019 (g) Dec 2019 (h) May 2020

Philanthropy and Alumni Engagement (Task Completion Timeline)

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<p>Generate Increased Major Gift Revenues: Launch programs for major giving, corporate / foundation giving, donor relations, and planned giving and conduct mini-campaigns.</p>	<ul style="list-style-type: none"> (a) Produce resources for Presidential priorities through active, strategic solicitations and serial mini campaigns. Plan a business-focused mini-campaign. (P, SVP-PAE) (b) Roadmap and launch a best-practice corporate philanthropy program as part of a centralized, collaborative, integrated corporate relations program. (SVP-PAE) (c) Roadmap a best-practice foundation relations program; increase submissions. (SVP-PAE) (d) Launch a best-practice donor impact reporting program to grow lifetime giving. (SVP-PAE) (e) Roadmap and deploy a best practice planned giving program. (SVP-PAE) (g) Revamp administration of scholarship program. (SVP-PAE) (i) Develop and deploy a comprehensive planned giving marketing strategy (SVP-PAE) 	<ul style="list-style-type: none"> (a) Sep 2018 (b) Mar 2019 (c) Sep 2018 (d) Nov 2020 (e) Sep 2018 (g) Oct 2020 (i) Jan 2020
<p>Board of Trustees: Support the Board’s leadership of philanthropy efforts.</p>		

Note: Tasks in progress are summarized in corresponding Strategies, Critical Tasks and Timeline.

Philanthropy and Alumni Engagement (Performance Metrics)

Updated August 11, 2021

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.

Performance Metrics	FY-18 (baseline)	FY-19	FY-20	FY-21	FY-22	FY-23
Metric 1 – Total Productivity 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>	5.2M	\$12M ●●	\$20M ●	\$20M ●	\$20M	\$20M
Metric 2 – Total Donors <i>Definition: New & consecutive-year donors, annually.</i>	3,505	3,700 ●●	3,900 ●	4,100 ●	4,300	4,500
Metric 3 – Gifts of \$50,000+ per year <i>Definition: Uses metric 1 definition.</i>	13	21 ●	25 ●	30 ●	38	50
Metric 4 – Financial Aid <i>Definition: Philanthropic General Scholarship (Term/Endowed)</i>	\$0.6M / \$0.8M	\$525K / \$1.05M ●● / ●●	\$800K / \$1.75M ● / ●●	\$1.0M / \$2.5M ● / ●	\$1.3M / \$3.7M	\$1.5M / \$5.0M

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