

## 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 |
|---|----------------|--|-----------|----------------|
| <b>(1) Institutional Engagement:</b> 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)  |           | Winter 2024    |
|   | (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   |                |
| <b>(2) Alumni Engagement:</b> 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 2024 |                |
|   | (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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| <p><b>(3) Donor Base Growth and Retention:</b> 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.</p> | (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)                                    | Fall 2024   |                |
|  | (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)                                  | Winter 2024 |                |
|  | (g)            | Hire front line fundraising positions appropriate to the level of opportunity within the units. (SVP)   | Fall 2024   |                |
|  | (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 2025 |                |
|  | (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) | Fall 2024   |                |
|  | (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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| <b>(4) Comprehensive Campaign:</b> 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)              | Ongoing     |                |
|  | (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)   | Ongoing     |                |
|  | (l)            | Create and execute a series of kick-off events that tie the campaign to the 100 year anniversary celebration. (PAE Team)  | Winter 2025 |                |
|  | (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<br>baseline | FY-24<br>Goal                                   | FY-25<br>Goal | FY-26<br>Goal | FY-27<br>Goal | FY-28<br>Goal |
|--|-------------------|---|---------------|---------------|---------------|---------------|
| <b>Metric 1 – Annual FY Development Productivity</b> | \$21.2M           | \$15.5M<br><span style="color: green;">●</span> | \$11M         | \$20M         | \$20M         | \$20M         |
| <b>Metric 2 – Total Donors</b>                       | 4,140             | 4,100<br><span style="color: yellow;">●</span>  | 4,200         | 4,300         | 4,400         | 4,500         |
| <b>Metric 3 – Alumni Engagement</b>                  | 4,391             | 4,500<br><span style="color: green;">●</span>   | 4,500         | 5,000         | 5,000         | 5,250         |

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