

## Philanthropy and Alumni Engagement

**Goal 5: Establish a culture of philanthropy that supports ERAU's advancement and aligns with the goals of its Strategic Plan.**

Strategies	Critical Tasks	Deadline
<b>(1) Institutional Engagement:</b> Engage the entire University in support of philanthropy and alumni and donor engagement.	(a) Improve Faculty and Staff Campaign and University Giving Day.	Ongoing
	(b) Build an educational training program around the fundraising process making it accessible for the campus community.	Ongoing
	(c) Partner and engage with Enrollment Management, Student Groups, Career Services, the Library, Veterans Services and Athletics.	Ongoing
	(d) Engage Deans and CLT in creating campaign Case for Support	Completed
	(e) Establish philanthropic expectations in annual performance evaluations for administrative and academic leaders.	Completed
<b>(2) Alumni Engagement:</b> Purposefully engage alumni, increasing alumni involvement, pride, volunteerism, and giving.	(a) Provide college specific learning opportunities with virtual and in-person lectures and industry talks.	Dec 23
	(b) Support alumni through value added career services, continuous learning and networking opportunities.	Ongoing
	(c) Solicit support for alumni events from external sponsors.	Ongoing
	(d) Offer in person engagement at industry events, trade shows and on campus.	Ongoing
<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.	(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.	Ongoing
	(b) Adopt practices and protocols for major gift and annual fundraising goals to create the pipeline of prospects for elevation to higher giving and build a culture of sustainable philanthropy.	Completed
	(c) Review the implementation of Philanthropic Councils and establish realistic goals for annual growth of the program. Formalize moving donors up the giving pyramid to lead and major gifts prospects.	Ongoing
	(d) Hire Director for CFR and create institution wide corporate and foundations relations program.	Aug 24
	(e) Improve stewardship of gifts at all levels from annual fund to gift planning.	Ongoing
	(f) Establish an institutional culture of philanthropy by growing faculty/staff participation, securing gifts from campus leaders, achieving 100% participation among giving (non-IAB) boards, and increasing the number of students who make gifts.	Ongoing
	(g) Hire a Senior Director for the annual fund and build out the annual fund program.	Sep 24

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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)	Hire Senior Vice President for Philanthropy and Alumni Engagement.	Completed
	(b)	Review and revamp new goals and metrics for the major gift fundraising team, based on experience and portfolios, and reflective of the need of ERAU to build a pipeline of major gift donors through significant discovery work.	Completed
	(c)	Re-establish protocols and best practices related to prospect management as well as pipeline and portfolio reviews to better organize and manage frontline fundraising efforts and share successes and challenges as a team.	Completed
	(d)	Provide a training program for the frontline fundraising staff at ERAU on best practices of a disciplined major gift fundraising program to accelerate prospect qualification and cultivation efforts and building long-term philanthropic - rather than transactional giving - relationships with donors.	Completed
	(e)	Review and reset of portfolio size and composition to ensure that the University's best prospects are under management and that gift officers are assigned portfolios of the size and composition that will yield the greatest success.	Completed
	(f)	Rebuild team - review current staffing, identify staffing needs and refill vacancies to address. Strengthen the team culture in the department including setting shared goals for the entire department to better integrate teams and build collaboration.	Ongoing
	(g)	Campaign preparation - refine campaign goals and timelines, finalize the final case for the campaign with academic leadership, begin relationship building with key prospects, conduct pre-solicitation visits with the President with select prospects.	Ongoing
	(h)	Identify a campaign Chair	Dec 24
	(i)	Form a PAE team to manage the strategic development of prospects, meeting monthly with President Butler and appropriate CLT members to discuss the University's principal gift prospects and strategies to drive transformational giving	Ongoing
	(j)	Create campaign collateral and communications plan.	Jan 25
	(k)	Prepare for public launch of campaign.	Jan 26
	(l)	Install best practice policies and procedures for conducting campaign.	Ongoing
	(m)	Pursue major gifts to support student scholarships, especially in support of establishing a more diverse student body.	Ongoing

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Performance Metrics	FY-22 actuals	FY-23 baseline <sup>1</sup>	FY-24 Goal	FY-25 Goal	FY-26 Goal	FY-27 Goal	FY-28 Goal
Metric 1 - Development Productivity	\$35.8M	\$22M	\$10.0M	\$11.0M	\$12.1M	\$13.3M	\$14.6M
Metric 2 - Total Donors	3,813	3,900	4,000	4,200	4,400	4,600	5,000
Metric 3 - Gifts of \$50,000 or more	21	32	25	30	30	40	40
Metric 4a - Gifts in Support of Student Financial Aid (Annual Cash)	\$1.19M	TBD	\$1.5M	\$1.8M	\$2.0M	\$2.2M	\$2.5M
Metric 4b - Gifts in Support of Student Financial Aid (Endowed)	\$5.64M	TBD	\$4.0M	\$4.5M	\$5.0M	\$5.5M	\$6.0M