FY 22 UPDATES

AUGUST 29, 2022

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 of aviation and aerospace, preparing 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 applied 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 will provide a transformative educational experience through fostering collaboration and teamwork, ethical and responsible behavior, a culture of research and discovery, and a focus on the development of the professional skills needed for success in a 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 five 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, and 5) Philanthropy and Alumni Engagement. 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.

Goal: Develop an enrollment vision and an associated management plan that supports ERAU's unique identity and mission.		
Strategies	**Critical Tasks (PERSON RESPONSIBLE)**	**Deadline**
Enrollment Strategy: Prepare a Strategic Enrollment Management Plan (SEMP) that will assist in meeting enrollment objectives.		
Annual Recruitment Cycle: Develop a process to annually implement the SEMP.		
Recruiting Structure: Optimize recruitment efforts to enroll new students consistent with the Strategic Enrollment Vision.		
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)** (c) Ensure current targeted academic, degree specific, need-based, and other awards are optimally aligned with ERAU goals. **(SVP-AAP, CLT)**	(a) Jun 2023 (c) Jun 2023
Transfer and Graduate Students: Increase transfer and tuition-paying graduate enrollments.	(b) Coordinate graduate enrollment responsibility between admissions and academic leadership; ensure parties are aligned with, and accountable for, goals. **(SVP-AAP)**	(b) Jun 2023
Retention/Persistence: Identify opportunities to improve retention prior to admission/ enrollment.	(c) Use predictive analytics to better position students for success before enrollment. **(SVP-CFO, SVP-AAP)**	(c) Jun 2023

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

Enrollment Management (Task Completion Timeline)

Goal: Develop an enrollment vision and an associated management plan that supports ERAU's unique identity and mission.		
Strategies	**Critical Tasks (PERSON RESPONSIBLE)**	**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)** (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)**	(a) Nov 2018 (b) Jun 2022
Annual Recruitment Cycle: Develop a process to annually implement the SEMP.	(a) Develop actions/decisions plan with dates/stakeholders for annual recruitment cycle [e.g., Feb – coordinate with Academics to identify goals by program]. **(SVP-AAP)** (b) Identify measurable targets and incorporate into regular cycle [IFS, diversity, class size, SAT, GPA]. **(SVP-AAP)**	(a) Nov 2018 (b) Nov 2018
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)** (b) Determine a supportive and responsive structure for enrollment marketing that meets the needs of enrollment, admissions, and marketing. **(SVP-CFO, VP-MC)** (c) Hire new partner for IFS and student search; incorporate all three campuses. **(SVP-CFO)** (d) Review/optimize creative & printing services – internal and external. **(SVP-CFO, VP-MC)**	(a) May 2021 (b) May 2021 (c) Aug 2017 (d) May 2021
Tuition and IFS Strategy: Recruit students in alignment with the SEMP and provide long term stewardship of the University's resources.	(b) Review institutional aid [e.g. Athletic aid, stipends, and waivers]; optimize award practices [e.g. timing, stacking, and restrictions] to meet ERAU goals. **(SVP-AAP, CLT)** (d) Increase philanthropic support [endowed/annual] for scholarships. **(SVP-PAE, SVP-CFO)**	(b) Jun 2022 (d) Jun 2022
Transfer and Graduate Students: Increase transfer and tuition-paying graduate enrollments.	(a) Create plan to 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)** (c) Improve admissions experience & timeliness [e.g. transfer credit evaluation]. **(SVP-AAP)**	(a) Jun 2022 (c) Jun 2022
Retention/Persistence: Identify opportunities to improve retention prior to admission/enrollment.	(a) Evaluate the viability of a bridge program(s)/extended orientation. **(SVP-AAP)** (b) Coordinate with Academics and SIT-2 to identify, assess, and mitigate skills gaps before arrival through online and summer programs. **(SVP-AAP)**	(a) Jan 2019 (b) Jun 2021

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

Enrollment Management (Performance Metrics)

Goal: Develop an enrollment vision and an associated management plan that supports ERAU's unique identity and mission.

Performance Metrics	FY-18 (baseline)	FY-19	FY-20	FY-21	FY-22	FY-23
Metric 1 – New Student Enrollment Targets	2,413	2,370 🟢	2,400 🟢	2,495 🟢	2,590 🟢	2,684
Definition: New Undergraduate – Residential (degree-seeking) New Graduate - Residential	210	217 🟡	228 🟢	241 🔴	254 🟡	268
New Registrations- Worldwide (UG+GR)	23,227	23,200 🟡	23,450 🟢	23,700 🔴	23,950 🔴	24,200
Metric 2 – Demographics % (Residential Campuses) *Definition:* New International Enrollment (UG+GR)	11.1%	10.4% 🟢	10.4% 🟢	11.6% 🟡	12.8% 🔴	14.0%
New Female Enrollment (UG+GR)	24.8%	>22.3% 🟢	>22.3% 🟢	>23% 🟢	>23.7% 🟢	>24.3%
New underrepresented minorities (UG+GR)	34.7%	>34.3% 🟢	>34.3% 🟢	>35.1% 🟢	>35.9% 🟢	>36.7%
Metric 3 – Financial Aid *Definition:* Maximum Academic IFS (1st-time Residential UG Rate)	39.8%	36.5% 🟢	36.5% 🟢	36.5% 🟢	36.6% 🟢	36.6%

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 (PERSON RESPONSIBLE)**	**Deadline**
Success, Persistence & Graduation: Leverage technology to support success early in a student's career and provide opportunities for enhancing academic performance.	(e) Implement an Academic Degree Planning tool. **(CIO, R-DB, R-PC)**	(e) Jan 2023
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).	(b) Transform Advising using best practices. **(VP-AS-DB, AVP-IE)** ii. Phase 2: add advising staff to achieve appropriate advising case loads	(b) ii. Ongoing
Academic Programs and Policies: Ensure programs and policies provide positive impact on student experience and success.	(d) Continue to facilitate seamless transferability among campuses. **(R-DB, R-PC, R-WW}** (e) Implement a curriculum review process to enable alternative academic pathways for at-risk students. **(D-COAS-DB, D-COE-PC)**	(d) Ongoing (e) Ongoing
Student Services: Reimagine and implement services to provide integrated, seamless, user-friendly support and enable self-service access 24x7x365.	(g) Consolidate to a single catalog for the 3 ERAU campuses. **(R-DB, R-PC, R-WW)**	(g) Ongoing

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

Student Experience and Success (Task Completion Timeline)

Goal: Create lifetime success – through a holistic approach to student development and success, which transforms the student experience.		
Strategies	**Critical Tasks (PERSON RESPONSIBLE)**	**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;
	   i. Integrate ALEKS with curriculum. **(D-COAS-DB)**
	   ii. Refine process to drive more new students to remediate during placement testing **(D-COAS-DB)**
	   iii. Continue to integrate ALEKS with curriculum **(D-COAS-DB)**
	(b) Implement Retention CRM
	   i. Phase 1: professional advisors. **(CIO)**
	   ii. Phase 2: all advisors. **(CIO)**
	(c) Implement Customer Service software - case management & knowledgebase. **(CIO)**
	(d) Implement Campus Solutions "permissions/waitlists" functionality. **(R-PC)**
		(a)
		  i. Aug 2018
		  ii. Dec 2019
		  iii. Mar 2020
		(b)
		  i. Dec 2018
		  ii. Dec 2020
		(c) Jun 2018
		(d) Feb 2019

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)**
	   i. Phase 1: added Supplemental Instruction
	(b) Transform student advising using best practices; Recommendation approved. **(R-PC)**
	   i. Implement Advising Transformation recommendation
	(c) Gather student experience feedback;
	   i. Phase 1: Conduct student focus groups and listening sessions. **(AD-S-DB)**
	   ii. Phase 2: Conduct diversity and inclusion self-study. **(AD-S-DB)**
	   iii. Phase 3: Implement the approved D&A recommendations – CDIO. **(SVP-AAP)**
	(e) Create a culture of mentoring – Mentoring sub-committee formed to create recommendations. **(Dir-UGR-DB)**
	(f) Enhance tutoring;
	   i. Phase 1: develop process for continuous improvement. **(AVP-IE)**
	   ii. Phase 2: develop process for continuous improvement; expand tutoring at PC. **(D-COAS-DB, VC-AA-PC)**
	(g) Freshmen outreach; based on risk
	   i. Phase 1: develop process for continuous improvement. **(AVP-IE)**
	   ii. Phase 2: full automation of ALEKS; developed Virtual Bridge for greater student utilization. **(AVP-IE)**
	   iii. Phase 3: integration of RNL surveys into CRM. **(AVP-IE)**
	(h) Upgrade to new library system to provide students improved access and functionality for library resources. **(CIO)**
		(a) Apr 2018
		  i. Dec 2019
		(b) Feb 2019
		  i. Aug 2019
		(c)
		  i. May 2018
		  ii. Apr 2019
		  iii. Aug 2020
		(e) Dec 2021
		(f)
		  i. Dec 2018
		  ii. Dec 2021
		(g)
		  i. Jul 2019
		  ii. Nov 2020
		  iii. May 2022
		(h) Dec 2019

Academic Programs and Policies: Ensure programs and policies provide positive impact on student experience and success.	(b) Review course cap policies/practices to provide a more positive student impact. (AP) (c) Ensure all courses have student assessments and implement early alert process for PC. **(VC-AA-PC, D-COAS-DB, D-COA-DB, D-COE-PC)**	(b) Dec 2021 (c) Nov 2020

Student Experience and Success (Task Completion Timeline)

Goal: Create lifetime success – through a holistic approach to student development and success, which transforms the student experience.		
Strategies	**Critical Tasks (PERSON RESPONSIBLE)**	**Date Completed**

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:
	   i. DB: PHASE 1: Create single physical location for student business. **(AVP-IE)**
	   ii. DB: PHASE 2: Process review of registration barriers and other high-volume transactions – focus on providing self-service. **(AVP-IE)**
	   iii. PC: Plan for new building using lessons learned approach from DB. **(VC-AA-PC)**
	(e) Develop student communications strategy – will form subcommittee. **(AVP-IE)**
	(f) Develop service excellence training for all. **(AVP-IE)**
		(a) Jun 2018
		(b) Nov 2017
		(c) Jan 2017
		(d)
		
		  i. Jun 2018
		  ii. Dec 2019
		  iii. 2021
		
		(e) Dec 2021
		(f) May 2018

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

Student Experience and Success (Performance Metrics)

Goal: Create lifetime success – through a holistic approach to student development and success, which transforms the student experience.						
Performance Metrics	**FY-18 (baseline)**	**FY-19**	**FY-20**	**FY-21**	**FY-22**	**FY-23**
Metric 1 - Undergraduate 4-year graduation rate *Definition: first time, full-time degree seeking cohort.*	35%	36% 🟢	38% 🟡	40% 🟢	42% 🟢	44%
Metric 2 - Undergraduate 6-year graduation rate *Definition: first time, full-time degree seeking cohort.*	59%	59% 🟢	61% 🟢	64% 🟡	67% 🟡	70%
Metric 3 - Undergraduate 1st Year retention rate *Definition: first time, full-time degree seeking cohort.*	82%	82% 🟡	83% 🟡	85% 🟡	87% 🟡	88%
Metric 4 - Undergraduate 2nd Year retention rate *Definition: first time, full-time degree seeking cohort.*	73%	67% 🟢	68% 🟢	69% 🟢	70% 🟢	72%
Metric 5 - First Year Completion of 24 Credits (%) *Definition: % of first time, full-time degree seeking students completing 24 ERAU credit hours or greater.*	91%	86% 🟢	87% 🟢	88% 🟢	90% 🟢	91%
Metric 6 - Worldwide Average Courseload *Definition: Average number of courses taken per undergraduate student per year.*	4.0	4.3 🔴	4.8 🔴	5.2 🔴	5.6 🔴	6.0

🟢🟢 Goal exceeded by 2X; 🟢 Goal achieved; 🟡 Goal achieved at 90 - 99% level; 🔴 Goal not achieved

Goal: To achieve international recognition as the leading aeronautical university through strategic global engagement with business and academia.		
Strategies	**Critical Tasks (PERSON RESPONSIBLE)**	**Deadline**
Environment: Provide an educational and work environment that develops globally competent staff, students and faculty who understand, and excel in, an international discipline.	(b) Create and promote learning outcomes in all majors applied to multimodal international experiences. **(D-ALL-ALL)** (d) Institutionalize ERAU's global engagement through policies and procedures, promotion and tenure and budget. **(SVP-AAP, FS)** (e) Increase the number of linkage programs **(SVP-AAP)**	(b) Jun 2023 (d) Jun 2023 (e) Ongoing
Locations: Expand ERAU's global brand by identifying select locations for expansion.	(a) Identify sustainable market opportunities and services. **(C-WW, D-ISS)** (b) Develop strategic global partnerships and services. **(C-WW)** (c) Pursue collaborative research and international funding opportunities. **(SVP-AAP)**	(a) Ongoing (b) Ongoing (c) Ongoing

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

Goal: To achieve international recognition as the leading aeronautical university through strategic global engagement with business and academia.		
Strategies	**Critical Tasks (PERSON RESPONSIBLE)**	**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)** (c) Evaluate and implement safety and security policies/processes for global programs. **(D-ISS)**	(a) Mar 2018 (c) Mar 2020
Locations: Expand ERAU's global brand by identifying select locations for expansion.	(d) Establish a centralized clearinghouse for global, cultural and linguistic assets and programs services. **(D-ISS)**	(d) May 2019

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

Goal: To Achieve international recognition as the leading aeronautical university through strategic global engagement with business and academia.						
Performance Metrics	**FY-18 (baseline)**	**FY-19**	**FY-20**	**FY-21**	**FY-22**	**FY-23**
Metric 1- International Experience *Definition: Study, internship and research abroad, student and faculty exchange, co-curricular activities, language studies, international volunteer.*	742	800 🟡	840 🔴	880 🔴	920 🟢	1,000
Metric 2- Global Linkage Programs *Definition: 3+1+1, 2+2, dual enrollment, agent contracts, government sponsored students.*	136	130 🟢🟢	245 🟢🟢	280 🟢🟢	840 🔴	700

🟢🟢 Goal exceeded by 2X; 🟢 Goal achieved; 🟡 Goal achieved at 90 - 99% level; 🔴 Goal not achieved

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 (PERSON RESPONSIBLE)**	**Deadline**
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.	(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)** (f) Recognize researchers through prestigious awards. **(SVP-AAP)** (g) Leverage Worldwide global educational network to become a leader in international research collaboration. **(C-WW)**	(e) Ongoing (f) Ongoing (g) Ongoing
Graduate Programs: Identify and support select, signature graduate programs and recruit a research-ready graduate student body.	(b) Require R1-competitive stipends/benefits for all graduate assistants. **(SVP-AAP, PI)** (c) Expand online graduate programs and professional development offerings in select areas in which ERAU has a competitive advantage. **(SVP-AAP, C-WW)**	(b) Ongoing (c) Ongoing
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)** (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)**	(a) Ongoing (c) Ongoing
Innovation: Accelerate innovation and strengthen industry partnerships.	(c) Recognize and reward disclosures, patents, and contribution to the University innovation ecosystem. **(SVP-AAP, D-ALL-ALL)** (d) Integrate entrepreneurship into curriculum as an educational learning outcome. **(SVP-AAP, D-ALL-ALL)**	(c) Ongoing (d) Ongoing

Note: Completed tasks are summarized in corresponding Task Completion 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 (PERSON RESPONSIBLE)**	**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)** (b) Reward highly successful, well-funded faculty with competitive compensation. **(SVP-AAP, D-ALL-ALL)** (c) Increase internal research and development funding in areas with high ROI. **(SVP-AAP)** (d) Create customer-centric research support infrastructure. **(SVP-CFO, SVP-AAP)**	(a) Jan 2019 (b) Mar 2019 (c) Feb 2019 (d) Mar 2019
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)** (d) Provide staff support to increase the number of competitive applications for prestigious scholarships and fellowships**. (SVP-AAP)**	(a) Aug 2018 (d) Mar 2019
Undergraduate Discovery: Make ERAU a national model for integrating research as a critical element to enrich the undergraduate curriculum and spur innovation.	(b) Provide staff support to increase the number of competitive applications for prestigious scholarships and fellowships. **(SVP-AAP, C-ALL, CAO-ALL)**	(b) Mar 2019
Innovation: Accelerate innovation and strengthen industry partnerships.	(a) Establish a University Corporate Relations and Business Development Office. **(P)** (b) Create a University-level fund to invest in student and faculty business startups. **(SVP-AAP)**	(a) Mar 2019 (b) Jul 2018

Note: Tasks in progress are summarized in corresponding 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.						
Performance Metrics	**FY-18 (baseline)**	**FY-19**	**FY-20**	**FY-21**	**FY-22**	**FY-23**
Metric 1 - Research Productivity *Definition: Annual research expenditures.*	22.3M	$21.6.M 🔴	$23.0M 🟢	$25.5M 🟢	$29.0M 🟢	$32.0M
Metric 2 - Presidential Faculty Fellows *Definition: Number of faculty hired under Presidential Faculty Fellows program.*	-	1 🔴	3 🔴	3 🔴	5 🔴	8
Metric 3 - Doctoral Production *Definition: Number of PhD graduates per year.*	12	4 🟢🟢	8 🟢🟢	12 🟢	16 🟢🟢	20
Metric 4 - Undergraduate Discovery and Innovation *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.*	96.8%	40% 🟢	50% 🟢	60% 🟢	98.5% 🟢	99.0%
Metric 5 - Business Partnerships *Definition: Number of SBIR and STTR grant applications awarded.*	2	1 🔴	2 🟢🟢	3 🟢🟢	4 🟢🟢	5

🟢🟢 Goal exceeded by 2X; 🟢 Goal achieved; 🟡 Goal achieved at 90 - 99% level; 🔴 Goal not achieved

Philanthropy and Alumni Engagement (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 (PERSON RESPONSIBLE)	Deadline
Organization: Achieve Divisional organizational excellence and engage the entire campus in support of philanthropy and alumni and donor engagement.		
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)**	(a) Ongoing (d) Jul 2023
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) Oct 2022 (h) Mar 2023 (j) Oct 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) Jan 2023 (c) Jan 2023

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

Philanthropy and Alumni Engagement (Task Completion 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 (PERSON RESPONSIBLE)	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)** (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 *all* communications and activities. **(SVP-PAE, VP-MC)** (g) Complete phase 2 (final) expansion of team **(SVP-PAE)** (h) Synchronize data from Advance and CRM; enact cooperative data sharing **(SVP-PAE, SVP-A)** – *cancelled – implementing new CRM instead*	(a) Sept 2018 (b) Aug 2019 (c) Aug 2018 (d) Jan 2019 (e) Nov 2018 (f) Sep 2018 (g) Nov 2019 (h) Jan 2022
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-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)**	(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.	(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)** (f) Rebrand Annual Fund **(SVP-PAE)** - *cancelled* (g) Establish women's giving circle **(SVP-PAE)** (h) Complete initial population of College Philanthropy Councils **(SVP-PAE)**	(b) May 2018 (c) Aug 2018 (e) Nov 2019 (f) Jan 2022 (g) Dec 2019 (g) May 2020

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)**	**Date Completed**
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-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)**	(a) Sep 2018 (b) Mar 2019 (c) Sep 2018 (d) Nov 2020 (e) Sep 2018 (g) Oct 2020 (i) Jan 2020
Board of Trustees: Support the Board's leadership of philanthropy efforts.		

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

Philanthropy and Alumni Engagement (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.

Performance Metrics	FY-18 (baseline)	FY-19	FY-20	FY-21	FY-22	FY-23
Metric 1 – Total Productivity **Annual FY Development Productivity** *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).	5.2M	$12M 🟢🟢	$20M 🔴	$20M 🔴	$20M 🟢	$20M
Metric 2 – Total Donors *Definition:* New & consecutive-year donors, annually.	3,505	3,700 🟢🟢	3,900 🔴	4,100 🟢	4,300 🔴	4,500
Metric 3 – Gifts of $50,000+ per year *Definition:* Uses metric 1 definition.	13	21 🟢	25 🟢	30 🟡	38 🔴	50
Metric 4 – Financial Aid *Definition:* Philanthropic General Scholarship (Term/Endowed)	$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

Abbreviations Legend

AC:	Academic Council
ALL:	All Campuses or All Colleges
AD-5-XX:	Assistant Dean of Students-Campus
ALEKS:	Assessment and Learning in Knowledge Spaces
AVP-IE:	Associate VP Institutional Efficiency
BOT:	Board of Trustees
CS:	Career Services
CR:	Corporate Relations
CRM:	Customer Relationship Management
C-XX:	Chancellor-Campus
CLT:	Core Leadership Team
CIO:	Chief Information Officer
CAO-XX:	Chief Academic Officer-Campus
D-XXX-XX:	Dean-College-Campus
D-EM-XX:	Dean Enrollment Management-Campus
D-ISS:	Dean International Student Services
Dir-UGR-XX:	Director Undergraduate Advising-Campus
FS:	Faculty Senate
IR:	Institutional Research
SVP-AAP:	Sr. VP Academic Affairs and Provost
SVP-CFO:	Sr. VP and Chief Financial Officer
SVP-A:	Sr. VP Administration
SVP-PAE:	Sr. VP Philanthropy and Alumni Engagement
VP-MC:	VP Marketing and Communications
P:	President
PI:	Principal Investigator
R-XX:	Registrar-Campus
VC-AA-PC:	Vice Chancellor Academic Affairs Prescott
VP-AS-XX:	Vice Provost Academic Support-Campus