

AEF Strategic Planning

October 10, 2024

Myles Murphy



ASSOCIATION
OF OLD CROWS



2024 AEF Strategic Planning Team

- Myles Murphy
- Mick Riley
- Mark Schallheim
- Keith Everly
- Ken Dworkin
- Nino Amoroso
- Raul Blanche
- Glorianne O'Neilin
- Tim Kuehhas
- Shelley Frost
- Lauren Schoener-Gaynor
- International - TBD

2024 AEF Strategic Planning Subcommittees

<u>Subcommittee</u>	<u>Subcommittee Members</u>
Scholarships	Glorianne O’Neilin (staff), Nino Amoroso, Mick Riley
STEM	Lauren Schoener-Gaynor (staff), Mark Schallheim, Lisa Fruge
Other Education	Shelley Frost (staff), Keith Everly, Mick Riley
Fundraising	Ken Miller (staff), Shelley Frost (staff), Tim Kuehhas, Keith Everly

Subcommittees Meet Quarterly to Discuss Strategy and Progress

2024 AOC Education Foundation (AEF) Strategic Planning (2025-2029)

- First Team Meeting held March 20th to Discuss Best Way to get Organized and Formulate 5 year Strategy
 - Meeting Minutes Published
 - Discussed Key Areas that include Scholarships, STEM, Other Education, and Fundraising
 - Decided Breaking Up Overall AEF Strategy into Subcommittees is Best Way to Attack the Larger Strategy (Quarterly Meetings)
 - Discussed Huge Need in Fundraising Area
 - Perhaps New BOG Appointee Can Help us in This Area
 - Importance of Having a Full Time Paid Staff Member to Support the AEF
 - Explore AOC “Extra Funds” as a Source of Income
- First Draft of 5 Year AOC AEF Strategic Plan Completed for Team Review
 - Goals and SMART Objectives Being Incorporated into Strategic Plan
- AEF Strategic Planning Workshop held at AOC HQ on June 5th to Complete Goals and Objectives
 - Great Participation by All Committee Members

2024 AOC Education Foundation (AEF) Strategic Planning (2025-2029)

- Second Draft of 5 Year AOC AEF Strategic Plan Completed and Reviewed by the Team
 - Goals and SMART Objectives from June 5th Workshop Incorporated into Strategic Plan
- AOC Staff Decomposed the AEF Strategic Plan into a Final Strategic Plan and Draft AEF Operating Plan
- TEAMS meeting held October 3rd to review updated AEF Strategic Plan and discuss plans for AEF Operating Plan
- AEF Strategic Plan Finalized
- AEF Operating Plan Currently Being Developed
 - Operating Plan Provides Roadmap to Execute AEF Strategic Goals in 2025
 - Provides Flight Plan for 2026-2029
 - Identifies Budget and Staffing Requirements
 - Guides Committees and Staff Work Plans for the Year and Beyond

2025-2029 AEF Strategic Plan Goals

- Establish A Robust Fundraising Program To Ensure The Sustainability And Growth Of Scholarships And Educational Initiatives
- Expand And Enhance Our Scholarship Programs To Provide Financial Support To Aspiring EMSO Professionals
- Support And Enhance STEM Activities On Electromagnetism For Youth Engagement Across Chapters To Expose Young Students To The Exciting Possibilities Within The EMSO Domain
- Broadening Opportunities For Learning And Talent Development To Ensure A Steady Pipeline Of Skilled Professionals Entering The EMSO Workforce

Establish a Robust Fundraising Program- Objectives

- Conduct a thorough assessment of our current fundraising capabilities, donor base, and market opportunities. Develop a detailed fundraising plan in 2025 that outlines specific goals, strategies, and tactics to diversify our revenue streams and enhance donor engagement. The plan shall be targeted to attain \$1 Million in funds by 2029; details to be provided in the AEF Operating Plan.
- Recruit and train a dedicated fundraising team with expertise in various aspects of development, including major gifts, corporate sponsorships, and grant writing.
- Explore and develop multiple revenue channels, including individual giving, corporate partnerships, working with the Combined Federal Campaign (CFC), grant funding, and special events. Pilot new fundraising initiatives, such as online campaigns, peer-to-peer fundraising, and legacy giving programs, to tap into new donor segments and opportunities.
- Build and strengthen relationships with industry partners and individuals to create new funding opportunities.

Expand and Enhance Scholarship Programs- Objectives

- Review and assess our current scholarship offerings to identify areas for expansion and enhancement including various needs and career stages, such as undergraduate, graduate, and professional development scholarships.
- Launch an extensive outreach campaign to raise awareness about our scholarship programs among potential applicants, industry, and educational institutions.
- Continuously evaluate and refine the programs based on feedback from recipients and stakeholders to ensure they meet evolving needs and expectations.
- Expand the Future 5 program to include international members and recognize winners at international conferences.
- Work closely with the AOC BOD to ensure the scholarship program has adequate funds to execute all objectives.

Support and Enhance STEM Activities- Objectives

- Encourage chapters to implement a diverse range of STEM programs, including science fairs, workshops, and interactive demonstrations that highlight the electromagnetic spectrum. Create age-appropriate activities that engage students in meaningful and relevant ways.
- Establish relationships with existing international STEM programs that have proven successful (e.g., International Science & Engineering Fair (ISEF), USA Science & Engineering Festival, and Griffiss Institute) and determine how we can integrate electromagnetic activities into their existing programs.
- Launch targeted outreach campaigns to raise awareness about our STEM programs among students, parents, and educators, emphasizing the value and impact of pursuing STEM careers, specifically in the electromagnetic sciences including online content.

Broaden Opportunities for Learning & Talent Development- Objectives

- Leverage partnerships with EMSO stakeholders across government, military, industry, and academia (including museums).
- Engage government and military stakeholders to identify EMSO challenges that can be shared with universities and programs that work with universities (e.g. VICEROY). Collaborate with universities to support relevant graduate and postgraduate research in the electromagnetic sciences.
- Collaborate with EMSO stakeholders across government, military, industry, and academia to address workforce and talent pipeline challenges.
- Encourage Chapters to establish mentorship programs and events where industry professionals can guide and inspire students, sharing their experiences.
- Engage with congressional representatives, education committees, and relevant stakeholders to build support for the introduction of a bill that mandates the inclusion of electromagnetic sciences in high school and undergraduate curricula.
- Regularly review and update programs based on feedback and industry changes to ensure they remain relevant and impactful.

2025 AEF Operating Plan with 2026-2029 Flight Plan

- Hire a Dedicated AEF person in Year One; One Finance Person in Year Two
- 9 Regional Scholarships and Two HQ scholarships by 2029
- Student-led Research Support
- STEM Activities
- Museum Support
- Important Factors
 - Importance of a Dedicated Fundraising Committee
 - Committee Leadership is Key
 - Require Significant Donations Every Year
 - Hire a Dedicated AEF Person in Year One; One Finance Person in Year Two
 - With all of Above, There Will Still Have to be a Contribution from the Reserve Fund

2025 AEF Job Description (Draft)

- This Position will Implement the Approved Strategic Plan with Committees Leading the Way
- Oversee the Organization of the AEF from the Ground Up Including Governing Documents and Infrastructure
- Support All Committees to:
 - Oversee the Development and Administration of Scholarships, Future 5 Program, STEM, and Other Development Initiatives
 - Create an Active and Dedicated Fundraising Committee
 - Create and Execute Fundraising Plans
 - Assist In Solicitation of Donors
 - Manage Donor Recognition and Stewardship Programs
 - Develop Communication Strategies to Promote Programs, Scholarship, And Fundraising Efforts
 - Manage the AEF's Annual Budget

2025-2029 Budget (Draft)

AOC Educational Foundation 2025-2029 Draft Budget						
	2025 BUDGET	2026 BUDGET	2027 BUDGET	2028 BUDGET	2029 BUDGET	
Income						
STEM Sponsorships						
Scholarship	\$ 25,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	
CFC (Combined Federal Campaign)						
General Donations	\$ 50,000	\$ 125,000	\$ 175,000	\$ 225,000	\$ 325,000	
TOTAL	\$ 75,000	\$ 175,000	\$ 225,000	\$ 275,000	\$ 375,000	
Expenses						
LABOR and BENEFITS						
AEF Manager	\$ 115,000	\$ 118,450	\$ 122,004	\$ 125,664	\$ 129,434	
PT Finance/Accounting		\$ 45,000	\$ 46,350	\$ 47,741	\$ 49,173	
AEF Assistant				\$ 85,000	\$ 87,550	
STEM						
STEM competition awards						
Misc						
Chapter STEM Support	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	
Scholarships						
Future Five Program (US and International)	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	
Raytheon scholarship	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	
Other scholarships		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	
Regional Chapter Flow Up Scholarships			\$ 90,000	\$ 90,000	\$ 90,000	
General						
University Donations/Museums	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	
Miscellaneous	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	
TOTAL	\$ 166,000	\$ 239,450	\$ 334,354	\$ 424,404	\$ 432,156	
Profit/Loss	\$ (91,000)	\$ (64,450)	\$ (109,354)	\$ (149,404)	\$ (57,156)	

2024 AEF Subcommittees Upcoming Meetings

<u>Subcommittee</u>	<u>Scheduled Meeting</u>
Scholarships	Oct 22
STEM	Oct 29
Other Education	Nov 5
Fundraising	Nov 12

Questions? Comments?

Back Up

AOC Educational Foundation BOG

AOC EXCOM

- President
- VP
- Secretary
- Treasurer
- Others
- BOG Lead (Proposed)**

AOC President

Regional Directors

BOG Lead

Appointed Directors

Executive Director

Project Committee Leads

Scholarships

STEM

Other Educ.

Fundraising

International

Sample Projects

- Chapter Scholarships
- Sponsored Scholarships
- Future 5

- Chapter STEM Events/Community Interaction
- Industry & Government Events
- Special Events
- Challenges
- Collaboration

- Young Crows
- Mentoring
- Museums
- Website
- University Engagement: Labs, Research, Internships, and EMS Education
- Studies & Research Projects

- CFC
- Marketing for Scholarship & STEM Sponsors,
- Grants
- Endowments
- Other Donations
- Paid Studies & Research (AEF coordinates others)

- TBD

Training & Education Strategic Partnership*

Membership

Marketing & Communication

Meeting & Events

Advocacy & Industry

* Coordinate & collaborate between AOC & AEF Education Programs

- Notes: (1) Current BOG is AOC EXCOM, AOC Regional Directors, 2 appointed Governors & AOC ED (non-voting)
 (2) Governors re-evaluated & should focus on Governors that can contribute funding or expertise
 (3) AEF is currently dependent on Staff (AOC provided), AOC funding, & consistent sponsorship/donations

AOC Educational Foundation (AEF) Staff

(FUTURE Potential 5 Year Goal) (DRAFT)

AOC EXCOM

President

VP

Secretary

Treasurer

Others

BOG Lead?

AEF Lead

Project Committee Leads

Student Programs

- Scholarships
- STEM
- Chapter Coordination

Sample Projects

Other Educational Programs

- Young Crows
- Mentoring
- Museums
- University Engagement: Labs, Research, Internships, & EMS Education
- Studies & Research Projects

Financial Coord. w/AOC & Funding

- CFC
- Other Donations
- Marketing for Scholarship & STEM Sponsors,
- Grants
- Endowments
- Paid Studies & Research (AEF coordinates)

International Programs

- TBD

AOC Staff

ED +

Training & Education Strategic Partnership*

Membership

Marketing & Communication

Meeting & Events

Advocacy & Industry

* Coordinates & collaborates between AOC & AEF Education Programs

- Note:
- (1) Staff coordinates resources with AOC, AEF pays its share.
 - (2) Created gradually over time. Focus on funding/sponsorship first and then on programs.
 - (3) AEF programs need to be rolled out in alignment with AOC/AEF strategy