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	Pillar 1: Understanding ERAPPA Metrics							ERAPPA Strategic Plan 2026-2029
	Owner: VP of Technology and Communication							
	Goal/Objective	Desired 3-yr Outcome/Goal	Year 1 Milestones	KPI	Year 2 Milestons	KPI	Year 3 Milestones	KPI
	1.1 Website Engagement	Improve ERAPPA website performance and user engagement through centralized data, modernized platforms, and consistent digital communication practices.	Launch website analytics tracking; establish baseline metrics (traffic, session duration, page views); standardize website content and communication templates; begin user feedback surveys.	Launch analytics and establish documented baselines for engaged sessions and key page views by year-end; complete one accessibility and content review.	Implement website improvements based on analytics; integrate dashboards for real-time monitoring; optimize user experience and accessibility; align chapter websites where applicable.	Increase engaged sessions and key page views by at least 10% over the Year 1 baseline; complete one accessibility and content review; implement dashboard reporting.	Achieve sustained growth in engagement metrics; refine content strategy using data insights; maintain dashboard reporting and continuous website optimization.	Increase engaged sessions and key page views by at least 10% over Year 2 (at least 21% cumulative over the Year 1 baseline); complete one accessibility and content review.
	1.2 Membership Engagement	Increase member engagement by 25–40% through improved communication, digital tools, and data-informed outreach strategies across ERAPPA and its chapters.	Establish baseline membership engagement metrics (event attendance, app usage, newsletter performance); improve email distribution lists; begin member surveys and engagement tracking.	Establish documented baselines across email, events, surveys, and digital platforms; maintain newsletter open rate of at least 40% once baseline reporting begins.	Implement targeted communication strategies; enhance mobile app and digital tools; increase participation in events and programs; coordinate engagement efforts across chapters.	Increase the composite member-engagement measure by at least 10% over Year 1; maintain newsletter open rate of at least 40%.	Achieve measurable engagement growth (25–40%); refine strategies using data insights; maintain consistent communication and high member participation levels.	Achieve 25-40% cumulative growth in overall member engagement over the Year 1 baseline; maintain newsletter open rate of at least 40%.

	Pillar 2: Grow Institutional Membership							ERAPPA Strategic Plan 2026-2029
	Owner: VP of Membership & Community Engagement							
	Goal/Objectives	Desired 3-yr Outcome/Goal	Year 1 Milestones	KPI	Year 2 Milestones	KPI	Year 3 Milestones	KPI
	2.1 - Prep School Pipeline (baseline members and active prospects)	Establish a comprehensive and accurate pipeline of prep schools across the region to support targeted outreach and sustained membership growth.	Obtain and validate prep school lists from APPA, state DOE, and partner organizations; identify current members, active prospects, and unengaged prospects; establish baseline data tracking; begin outreach to at least 4 prospects per quarter.	Identify and categorize at least 90% of eligible regional prep schools; validate available contact data; conduct outreach to at least 4 qualified prospects per quarter (16 annually).	Refine and expand prospect database; improve data accuracy; strengthen relationships with prep school networks; maintain consistent outreach to at least 4 prospects per quarter; track engagement trends.	Maintain at least 90% pipeline coverage; revalidate contact information annually; conduct outreach to at least 4 qualified prospects per quarter and track responses/conversions.	Maintain a fully developed and continuously updated prep school pipeline; ensure consistent engagement with prospects; use data insights to optimize outreach and conversion strategies.	Maintain at least 90% pipeline coverage with annual validation; conduct outreach to at least 4 qualified prospects per quarter; use conversion data to prioritize prospects.
	2.2 - Prep School Membership Growth (gains and losses)	Increase prep school membership across ERAPPA through targeted engagement, marketing, and retention strategies.	Establish baseline membership data (current prep school members and trends); begin targeted marketing and outreach efforts; track quarterly gains and losses; convert initial prospects into members.	Establish the prep-school membership baseline; achieve positive net growth; begin tracking retention of newly recruited schools.	Increase number of prep school members through continued outreach and engagement; enhance marketing campaigns; improve onboarding and engagement of new members; monitor retention trends.	Achieve positive net growth over Year 1; maintain at least 85% retention of newly recruited schools; remain on pace for the Year 3 cumulative target.	Achieve sustained growth in prep school membership; demonstrate positive net membership gains; refine strategies using data insights; maintain strong retention and engagement levels.	Achieve at least 10% cumulative growth in prep-school members over the Year 1 baseline; maintain at least 85% retention of newly recruited schools.
	2.3 - New Institutional Members (monthly tracking)	Increase overall institutional membership across ERAPPA through coordinated outreach, marketing, and collaboration with APPA and partner committees.	Establish baseline membership data; coordinate with APPA to obtain membership and prospect lists; assign one committee member per chapter for outreach; begin targeted marketing and outreach campaigns; track new members monthly.	Establish baseline institutional membership and track gains/losses monthly; achieve at least 3% net growth; document an outreach contact or assigned chapter representative for at least 90% of active prospects.	Expand outreach efforts across all chapters; strengthen collaboration with business partner liaison committee and APPA; improve tracking database and reporting; increase number of new institutional members through consistent marketing and engagement.	Continue monthly tracking; achieve at least 3% net growth over Year 1; maintain documented outreach ownership for at least 90% of active prospects.	Achieve sustained growth in institutional membership; refine outreach and marketing strategies using data insights; maintain consistent member acquisition and engagement practices across all chapters.	Continue monthly tracking; achieve at least 3% net growth over Year 2 (approximately 9.3% cumulative if achieved annually); maintain documented outreach ownership for at least 90% of active prospects.
	2.4 - Non-Member Institution Database (complete and validated dataset)	Develop a complete, accurate, and actionable database of non-member colleges and universities to support targeted outreach and institutional membership growth.	Obtain non-member institution data from APPA and other sources; compile initial database; assign one committee member per chapter to support data collection; validate and clean data for accuracy; begin identifying outreach targets.	Build the database to cover at least 90% of identified non-member institutions by year-end; establish required fields and an annual verification process.	Verify and refine database accuracy; analyze data to segment institutions by size, type, and engagement potential; begin targeted outreach campaigns based on insights; expand database if gaps are identified.	Achieve at least 95% completeness and accuracy for required fields; segment institutions for targeted outreach; complete annual record verification.	Maintain a fully validated and continuously updated database; integrate data into ongoing membership outreach strategies; use insights to improve conversion of non-member institutions into ERAPPA members.	Maintain at least 95% completeness and accuracy; verify/update records annually; document additions, removals, and conversions to membership.
	2.5 - Lapsed Member Tracking and Recovery (monthly monitoring and renewal rate)	Achieve a 10% annual increase in re-engaged and renewed lapsed members through accurate tracking, targeted outreach, and consistent engagement strategies.	Develop and validate a complete list of lapsed members and lapse dates; establish monthly tracking and reporting; conduct initial outreach (email check-ins); begin re-engagement efforts; target 2% quarterly renewal rate.	Contact at least 90% of newly lapsed institutions within 90 days; achieve at least a 2% quarterly recovery rate; establish baseline re-engagement/renewal results.	Enhance outreach strategies using data insights; increase renewal rates through targeted campaigns; collaborate with chapters for personalized engagement; maintain consistent monthly tracking and reporting.	Contact at least 90% within 90 days; achieve at least a 2% quarterly recovery rate; increase re-engaged or renewed lapsed members by at least 10% over Year 1.	Achieve sustained re-engagement growth meeting or exceeding 10% annually; refine and standardize renewal strategies; maintain accurate tracking and consistent member recovery processes.	Contact at least 90% within 90 days; achieve at least a 2% quarterly recovery rate; increase re-engaged or renewed lapsed members by at least 10% over Year 2.
	2.6 - Lapsed Member Insights (reason for lapse and engagement drivers)	Identify and understand key drivers of membership lapse to improve retention strategies and reduce future attrition.	Begin collecting data on reasons for member lapse through surveys and outreach; categorize common drivers (cost, education, networking, etc.); establish baseline insights despite limited initial data.	Capture a lapse reason from at least 40% of contacted institutions; identify the top 3 lapse drivers; implement at least 2 targeted retention actions.	Improve data collection methods for lapse reasons; increase response rates to surveys and feedback requests; analyze trends and identify key retention challenges; collaborate with technology and PD committees.	Capture a lapse reason from at least 50% of contacted institutions; identify the top 3 lapse drivers; implement at least 2 targeted retention actions and evaluate results.	Use lapse insights to inform retention and engagement strategies; reduce membership attrition through targeted improvements; integrate findings into ongoing membership planning and outreach.	Capture a lapse reason from at least 60% of contacted institutions; identify the top 3 lapse drivers; implement at least 2 targeted retention actions and incorporate findings into ongoing planning.

Pillar 3: Redefine the Professional Development Program						ERAPPA Strategic Plan 2026-2029		
Owner: VP of Professional Development								
	Goals/Objectives	Desired 3-yr Outcome/Goal	Year 1 Milestones	KPI	Year 2 Milestons	KPI	Year 3 Milestones	KPI
	3.1 - PD Leadership Training and Data Readiness (tools, membership data, participation tracking)	Establish a fully trained PD leadership network supported by accurate membership data, institutional contacts, and reliable professional development participation tracking.	Train >90% of ERAPPA and Chapter PD leaders on APPA tools; consolidate membership data across ERAPPA, Chapters, and APPA; identify institutional contacts; begin collecting historical training data and establish baseline tracking	Train at least 90% of ERAPPA and Chapter PD leaders on APPA tools; establish participation tracking system; verify 75% of institutional contacts and membership data.	Implement semi-annual verification of institutional data; improve data accuracy and completeness; expand historical training dataset; ensure leadership consistently uses tools for reporting and planning.	Verify 85% of institutional contacts and membership data; implement annual reporting process; maintain 90% leader training completion.	Achieve 100% verified institutional data annually; maintain complete participation dataset (3-year history); enable fully data-driven decision-making for PD programs.	Verify 100% of institutional contacts annually; maintain complete 3-year participation dataset; 95%+ data accuracy and reporting compliance.
	3.2 - Professional Development Pathway Awareness (member recognition and adoption)	Ensure all ERAPPA members understand and engage with clearly defined professional development pathways aligned to career stages and business partner roles.	Develop and publish draft professional development pathways (entry-level, mid-career, senior leadership, business partners); begin communication and promotion; achieve 50% member awareness.	Publish career pathways and achieve 50% member awareness.	Refine pathways based on feedback; expand communication and marketing; integrate pathways across chapters; achieve 75% member awareness.	Achieve 75% member awareness through coordinated chapter communications and marketing.	Achieve 100% pathway awareness among members; maintain consistent communication and integration into all PD programming and engagement efforts.	Achieve 90-100% awareness of PD pathways among members and business partners.
	3.3 - Aligned Professional Development Programming (pathway-based offerings)	Ensure all ERAPPA, Chapter, and APPA professional development offerings are aligned with defined pathways and meet the needs of members at every career stage.	Map existing ERAPPA, Chapter, and APPA offerings to defined pathways; identify gaps in programming; begin coordination with chapters to align training opportunities.	Map 50% of ERAPPA, Chapter, and APPA programs to defined pathways; identify programming gaps.	Ensure each pathway has at least 2 aligned learning opportunities annually; strengthen coordination with chapters; monitor participation and engagement trends.	Map 75% of programs; ensure each pathway includes at least two learning opportunities annually.	Maintain full alignment across all pathways; continuously refine programming based on data and participation trends; ensure consistent delivery of relevant training opportunities.	Map 100% of professional development programs to established pathways and review alignment annually.
	3.4 - Professional Development Engagement and Impact (participation, career outcomes, ROI)	Demonstrate measurable impact of professional development through increased participation, career advancement outcomes, and clear return on investment for members and institutions.	Develop communication and marketing plan for PD; create initial dashboards to track participation and KPIs; begin collecting engagement data and career impact indicators.	Establish baseline participation, satisfaction, and career impact metrics; create dashboard and reporting process.	Train 100% of PD leadership on communication and marketing strategy; expand reporting on participation and trends; begin sharing impact insights with members and stakeholders.	Increase participation by 5% over baseline; publish initial success stories and outcome metrics.	Achieve ≥10% year-over-year participation growth; document and share career impact stories; demonstrate ROI through engagement data, surveys, and institutional participation metrics.	Achieve 10% annual participation growth, maintain 85%+ satisfaction, and publish an annual PD impact report demonstrating ROI and career advancement outcomes.

	Pillar 4: Refine the Annual Meeting							ERAPPA Strategic Plan 2026-2029
	Owner: VP of Annual Meetings							
	Goals/Objectives	Desired 3-yr Outcome/Goal	Year 1 Milestones	KPI	Year 2 Milestons	KPI	Year 3 Milestones	KPI
	4.1 - Conference Contracted Services Cost (planner services trend and scope control)	Reduce overall annual meeting costs by refining contracted services, eliminating unnecessary scope, and improving vendor selection through data-driven decision-making.	Collect and review past 4+ years of conference planner contracts and invoices; identify cost trends, scope creep, and value of services; gather projected costs for upcoming meetings.	Compile at least 4 years of contracted-services data; establish total cost, scope, and cost-per-attendee benchmarks; document attendee-satisfaction baseline.	Develop KPIs and benchmarks for contracted services; review findings with host committees and Board; identify opportunities to reduce scope or renegotiate services.	Use benchmarks in host-committee/Board review and RFP or scope decisions; implement selected cost controls; maintain attendee satisfaction at or above baseline.	Implement refined RFP process and service standards; reduce unnecessary services while maintaining quality; evaluate cost savings and adjust strategy based on outcomes.	Reduce contracted-services cost per attendee by 5-10% from the Year 1 benchmark while maintaining attendee satisfaction at or above baseline.
	4.2 - Food & Beverage Cost Efficiency (cost per attendee and value perception)	Optimize food and beverage spending to ensure cost efficiency while maintaining attendee satisfaction and perceived value.	Analyze past F&B expenses including cost per attendee, total budget percentage, and high-cost items; begin collecting attendee feedback on value and satisfaction.	Establish F&B cost per attendee, F&B as a percentage of total meeting expense, and attendee satisfaction with quality/value.	Establish benchmarks for F&B spending; adjust menu selections and event structure to improve cost efficiency; continue measuring attendee perception of value.	Contain or reduce F&B cost per attendee against the Year 1 baseline; maintain at least 85% attendee satisfaction; document menu/event-structure changes.	Achieve optimized F&B cost structure aligned with budget targets and attendee expectations; maintain balance between cost savings and experience quality.	Maintain F&B cost per attendee at or below the Year 1 baseline, adjusted for documented market changes where appropriate; maintain at least 85% attendee satisfaction.
	4.3 - Monday Night Event Value and ROI (attendance, cost, and perceived impact)	Determine the value and effectiveness of the Monday night event and implement the most cost-effective and meaningful format for attendees.	Gather historical data on Monday night events (cost, attendance, effort required); survey host committees and attendees on perceived value; compare against alternative options (e.g., free evening).	Establish participation, cost per participant, and satisfaction baselines; compare the current event with at least one lower-cost alternative using survey and cost data.	Analyze survey results and cost data; present recommendations to Board; test adjustments or alternative formats for the event.	Test or implement the Board-selected format; target at least 60% participation and 80% satisfaction, or document results of the lower-cost alternative.	Implement selected event format; evaluate success based on cost savings, participation, and attendee satisfaction; refine approach as needed.	Achieve at least 60% participation and 80% satisfaction with the retained format, or adopt a lower-cost alternative supported by participation, satisfaction, and cost data.
	4.4 - Exhibit Hall Efficiency (hours, engagement, and cost effectiveness)	Optimize exhibit hall scheduling and format to improve engagement while reducing unnecessary operational costs.	Review historical exhibit hall schedules and attendance patterns; analyze current and projected costs; identify inefficiencies in scheduling and engagement opportunities.	Establish baselines for exhibit-hall attendance, exhibitor satisfaction, cost per operating hour, and attendee engagement per operating hour.	Develop and present recommendations for improved scheduling and structure; consider reducing hours or restructuring participation opportunities; align with exhibitor and attendee needs.	Implement schedule/format changes; achieve at least 85% exhibitor satisfaction; improve engagement per operating hour over Year 1 and document cost or hour reductions.	Implement revised exhibit hall structure; evaluate impact on engagement and cost; make adjustments based on performance and feedback.	Maintain at least 85% exhibitor satisfaction; improve engagement per operating hour over Year 2; reduce unnecessary operating time or cost compared with the Year 1 baseline.

	Pillar 5: Assess In Person Committee Meetings							ERAPPA Strategic Plan 2026-2029
	Owner: VP of Annual Meetings							
	Goals/Objectives	Desired 3-yr Outcome/Goal	Year 1 Milestones	KPI	Year 2 Milestones	KPI	Year 3 Milestones	KPI
	5.1 - Mid-Year Meeting (MYM) Value and Attendee Experience	Enhance the value and effectiveness of the MYM by incorporating professional development, improving agenda quality, and increasing collaboration between committees.	Survey past and current attendees on MYM value; identify gaps in professional development and agenda quality; begin planning enhancements including PD sessions and VP-led agendas.	Establish satisfaction baselines; achieve at least 85% satisfaction with value, agenda quality, and collaboration; include at least 1 professional-development component; document participation by every represented committee.	Implement enhanced MYM structure including professional development programming and improved agenda format; increase collaboration across committees; gather post-event feedback.	Maintain at least 85% satisfaction; include at least 1 professional-development component; document participation by every represented committee and implement agenda/collaboration enhancements.	Achieve consistently improved attendee satisfaction and perceived value; refine MYM structure based on feedback; maintain strong collaboration and high-quality programming.	Maintain or improve satisfaction at or above 85%; include at least 1 professional-development component; document participation by every represented committee and sustain the enhanced meeting structure.
	5.2 - Mid-Year Meeting Cost Optimization (event structure and activities)	Reduce overall MYM costs through thoughtful evaluation and adjustment of meeting structure, events, and resource allocation.	Gather historical cost data related to MYM events and activities; identify high-cost components; establish baseline spending and cost drivers.	Establish total-cost and cost-per-attendee baselines and identify major cost drivers; maintain attendee satisfaction at or above 85%.	Evaluate and adjust meeting structure and activities to reduce costs while maintaining value; implement targeted reductions or eliminations.	Implement targeted cost reductions; demonstrate progress toward a 5-10% reduction in cost per attendee while maintaining or improving satisfaction.	Achieve measurable cost reductions while maintaining or improving attendee satisfaction; refine cost management strategies based on outcomes.	Reduce cost per attendee by 5-10% from the Year 1 baseline while maintaining or improving attendee satisfaction.
	5.3 - Team Building and Event Cost Tracking (MYM and AM)	Improve transparency and control over team building and event-related costs while ensuring alignment with attendee value and meeting objectives.	Collect and analyze past 3+ years of team building and event cost data (MYM and AM); establish cost per attendee and percentage of overall budget; identify trends.	Track 100% of team-building and event expenses for the Mid-Year and Annual Meetings; report cost per attendee and percentage of total meeting cost.	Develop benchmarks for team building expenses; compare costs across meetings and categories; align spending with strategic priorities and attendee value.	Continue 100% expense tracking and annual reporting; establish Board-approved spending benchmarks by year-end.	Maintain consistent tracking and cost control; ensure all team building activities demonstrate measurable value relative to cost; optimize spending decisions.	Continue 100% expense tracking; report performance against Board-approved benchmarks and document corrective action for material variances.
	5.4 - Meeting Cost vs Value Analysis (team building compared to core expenses)	Ensure all meeting-related expenses are aligned with attendee value by comparing team building costs to core expenses such as venue, food, and transportation.	Compare team building costs to major expense categories (venue, food, transportation, etc.); begin collecting attendee feedback on perceived value.	Evaluate all major meeting activities using cost, participation, and satisfaction data; establish the agreed value-rating methodology and threshold.	Use data to evaluate cost-effectiveness of activities; identify opportunities to shift resources toward higher-value areas; refine budget allocation strategies.	Achieve at least an 80% value rating for retained activities; redirect, redesign, or eliminate spending on activities below the threshold.	Demonstrate optimized allocation of meeting resources; maintain balance between cost efficiency and attendee experience; use data to guide ongoing decisions.	Maintain at least an 80% value rating for retained activities; document annual reallocation or elimination decisions for activities below the threshold.
	5.5 - Meeting Feedback and Continuous Improvement (survey-based performance tracking)	Establish a continuous improvement process using attendee feedback to enhance meeting content, structure, and overall value year over year.	Implement post-event surveys for MYM and AM attendees; gather feedback on content, timing, and overall value; establish baseline satisfaction metrics.	Achieve at least a 50% survey response rate and 85% overall satisfaction; document and implement at least 2 improvements based on feedback.	Track and trend survey results over time; implement incremental improvements based on feedback; refine survey approach to capture deeper insights.	Achieve at least a 50% response rate; maintain or improve satisfaction at or above 85%; document and implement at least 2 improvements and report follow-up results.	Achieve measurable improvements in attendee satisfaction; maintain a structured feedback loop; use data to continuously enhance meeting effectiveness and value.	Achieve at least a 50% response rate; maintain or improve satisfaction at or above 85%; document and implement at least 2 improvements and sustain a formal feedback loop.