



POWERED BY AOPA



2018

PROSPECTUS

YOU CAN FLY

CONTENTS

INTRODUCTION

Executive Summary	02
Problem Statement	04
2017 Milestones	06

INITIATIVES

High School	08
Flight Training	10
Flying Clubs	12
Rusty Pilots	14
You Can Fly Academy	16

TIMELINE AND LONG-TERM GOALS

Timeline	18
Long-Term Goals	19

FINANCES

Financial Projection	20
Fundraising Strategy	21

LOOKING FORWARD

Risk Management Strategy	22
Vision Statement	23

INTRODUCTION

EXECUTIVE SUMMARY

GET PEOPLE FLYING, AND KEEP THEM FLYING. THAT'S THE MISSION OF AOPA'S YOU CAN FLY PROGRAM—AND IT'S WORKING.

You Can Fly comprises four initiatives designed to reach pilots and future pilots at key moments in their journey. The High School initiative introduces students to careers in aviation through a rigorous four-year STEM-based curriculum. The Flight Training initiative helps flight schools and instructors improve the training experience

so more people who begin flying will successfully earn a pilot certificate. The Flying Clubs initiative helps pilots start new clubs and connect to existing clubs so they can enjoy more affordable access to aircraft and a community of people who share their interests. And the Rusty Pilots initiative removes barriers to re-entry, making it easier for lapsed pilots to get back in the air.

For each initiative, we've established aggressive, measurable goals that allow us to see the impact they're making. In 2017



alone, more than 700 ninth-graders took part in the first year of high school curriculum field testing; the Flight Training Experience Awards recognized 89 flight schools and 72 CFIs for delivering excellent customer experiences; 30 new flying clubs serving approximately 450 members were launched with the help of the You Can Fly team; and more than 38 percent of the lapsed pilots who attended a Rusty Pilots seminar went on to complete a flight review and return to active flying status.

While these short-term achievements are moving the needle, it will take a long-term effort to halt and ultimately reverse the decades-long decline in the pilot population.

While other organizations have recognized the need to get more people flying and some have taken steps in that direction, they have typically worked in isolation, failing to create the groundswell needed for real change. AOPA understands that nothing short of

“WE’VE MADE A
MEANINGFUL START. WE’VE
PROVEN THE YOU CAN FLY
PROGRAM WORKS. NOW
IT’S TIME TO CAPITALIZE ON
OUR MOMENTUM TO TURN
THE EARLY SUCCESSES
INTO LASTING ONES.”

—MARK BAKER
AOPA PRESIDENT AND CEO

a coordinated and sustained multi-point intervention will suffice and that no other organization is better placed to make the necessary commitment.

Continuing strong support from AOPA leadership, including the Board of Trustees and the AOPA Foundation Board of Advisors, along with ongoing philanthropic investments, will ensure the program can meet its full potential.



PROBLEM STATEMENT

THE CHALLENGES FACING GENERAL AVIATION ARE UNDENIABLE.

There's competition for time and share-of-wallet. Most people who begin flight training today will quit without earning a pilot certificate. Some pilots drift away from aviation simply because they don't have enough reasons to stay. Aircraft ownership is unattainable for some and access to rental aircraft can be limited. At the same time, the aviation industry is facing a shortage of pilots and the CFIs needed to train them.

The decades long decline in the pilot population paints an even more troubling picture.

In 1980, there were 827,071 active pilots. By 2017, there were 609,306—a 27 percent decline. In 1980, the FAA issued 50,458 new private pilot certificates. By 2017, that number was 17,752—a 65 percent decline.

AOPA research found that 70 to 80 percent of those who start flight training drop out without earning a pilot certificate. Among those who do earn a certificate, thousands simply stop flying each year. AOPA estimated that in 2015 there were nearly half a million lapsed pilots under the age of 70 in the United States.

In 1984, you could buy a new Cessna 172 for around \$91,000—less than twice

the average household income of almost \$48,000. In 2017, you could buy a new Cessna 172 for about \$380,000—more than 6.5 times the average household income of \$57,617.

And the number of piston general aviation aircraft is declining, making access increasingly difficult and costly. The FAA Aerospace Forecast for the 2017-2037 fiscal years predicts that the number of active GA piston aircraft will decline by .8 percent each year, leaving the fleet 22,500 airplanes smaller by the end of the forecast period. “Unfavorable pilot demographics, overall increasing cost of aircraft ownership, coupled with new aircraft deliveries not keeping pace with retirements of the aging fleet are the drivers of the decline,” the forecast states.

Even as the number of aircraft suitable for training is dropping, the demand for pilots is growing. Boeing's most recent Pilot and Technician Outlook predicts that North America will need 117,000 new pilots between 2017 and 2036. Globally, approximately 31,000 new pilots will be needed each year—a heavy lift considering that the FAA issued just 4,449 new Airline Transport Pilot certificates in 2017.







2017 MILESTONES

700+  **STUDENTS**

TESTING THE AOPA-CREATED 9th GRADE CURRICULUM



\$115,000
AWARDED

IN YOU CAN FLY HIGH SCHOOL SCHOLARSHIPS

FLIGHT TRAINING EXCELLENCE SURVEY & AWARDS



89 SCHOOLS

72 CFIs



RECOGNIZED FOR OUTSTANDING SERVICE

30

NEW

**FLYING CLUBS
CREATED**

+1,500 FLYING CLUBS



IN AOPA'S FLYING CLUB FINDER

+1,800 RUSTY PILOTS

RETURNED TO ACTIVE FLYING



4.5
MILLION

raised
for You
Can Fly



HIGH SCHOOL

INITIATIVE

AOPA's High School initiative was designed to rebuild the pilot population and the aviation industry from the ground up. By providing high-quality STEM-based aviation education to high school students nationwide, AOPA is opening the door to aviation careers for thousands of teens. The courses are designed to capture the imagination and give students from diverse backgrounds the tools to pursue advanced education and careers in aviation fields.

Working with professional curriculum designers, AOPA is creating a four-year high school STEM program that falls along two tracks—pilot and unmanned aircraft systems or drones. The program conforms to national math and science standards and, in keeping with career and technical education best practices, will lead to a certification or industry-accepted test, such as the FAA Private Pilot knowledge test or a Part 107 drone pilot certification.

More than 700 students from a diverse collection of rural, suburban, and inner-city public and private schools are field testing the ninth-grade course in the 2017-2018 school year. The course includes detailed lesson plans, student activities and projects, evaluations, and more. Initial teacher feedback has been excellent.

The ninth-grade course will be available for any high school to use free of charge beginning in the 2018-2019 school year. To help participating educators provide the best possible experience for their students, AOPA provides a three-day teacher workshop at the You Can Fly Academy to familiarize teachers with aviation-specific terms and information, lessons, and activities used in the curriculum.

Additional courses for grades 10 through 12 will be rolled out each year, with the tenth-grade courses field testing in the 2018-2019 school year.

2017 HIGHLIGHTS

- 700+ students in 29 schools field tested ninth-grade course
- \$115,000 in scholarships awarded
- +250 educators, principals, superintendents and other decision-makers participated in the third annual AOPA Aviation STEM Symposium

2018 GOALS

- Complete development and begin field testing the tenth-grade courses
- Double the number of students using the ninth-grade course
- Award at least \$100,000 in high school scholarships
- Grow AOPA Aviation STEM Symposium attendance





FLIGHT TRAINING

INITIATIVE



At the heart of this initiative is the Flight Training Network, which is being designed as a comprehensive resource solution for flight schools. The goal is to help flight schools provide the kind of training experiences that keep students coming back for more, reducing the student dropout rate, and creating more pilots. Just as there is no magic bullet for reversing the downward trend in the pilot population, there is no single solution for creating a great flight training experience. That's why the Flight Training Network will actively address the variety of reasons that cause individuals to drop out of training before earning a certificate.

An adaptive, individualized learning app will deliver lesson plans to students and their instructors with the tasks for each flight lesson automatically selected based on past student performance and educational principles. Student performance will be scored on a standardized scale and instructors will have immediate access to scoring standards, teaching tips, and more. Because the scoring can be done with the touch of a screen right in the cockpit and easily synchronized on landing, record keeping is efficient, simple, and seamless. If one CFI leaves and another takes over, the new instructor knows exactly where every student is in the training process, can immediately access each student's past performance, and can keep the student progressing without costly and time-consuming repetition. Progress charts make it

easy for students and instructors to see how far they've come and what they must do to achieve their goals. The transparency, adaptability, and comprehensiveness of the app will minimize many of the frustrations that research has shown lead to student dropout rates. And because the system provides structure that may be missing from Part 61 flight training programs, no student at a Network school will ever show up for a flight lesson and hear, "Uh, what were you working on?"

In addition to the adaptive learning system, the Network will deliver an easier, more effective way for flight schools to get and retain clients and run the business. Lead generation and training programs for flight school owners, CFIs, and front-desk staff will also be available to Network members. Courses will cover such topics as customer experience and marketing, with additional courses being added over time. Back-end support that includes connected accounting, invoicing, scheduling, customer management, and maintenance tracking will save schools time and frustration when it comes to managing the business.

As these resources are being built out over the next few years, the Flight Training initiative will continue to encourage the use of best practices and recognize schools and CFIs that deliver high-quality customer experiences through the Flight Training Experience Survey and Awards.

2017 HIGHLIGHTS

- First meeting of the Flight Training Advisory Board
- Vendor selected to create technical requirements for adaptive learning app
- 1,048 flight schools and 2,012 CFIs evaluated through Flight Training Experience Surveys
- 89 flight schools and 72 CFIs recognized with Flight Training Experience Awards

2018 GOALS

- Complete requirements and begin building adaptive learning app
- Develop and test customer experience training program
- Receive 6,800 completed Flight Training Experience Surveys



FLYING CLUBS

INITIATIVE

Fly more affordably. Enjoy greater flexibility and access to aircraft. Be part of a vibrant community of pilots. These are just a few of the things aviators want from their flying. And flying clubs can deliver them all.

Flying clubs are a force multiplier for general aviation. They help make the best use of the shrinking fleet of piston-powered general aviation aircraft, give pilots a reason to go to the airport, and deliver the freedom to use an airplane for extended trips. They reduce the cost of flying, and they provide the community and support pilots want.

The Flying Clubs initiative focuses on promoting and building flying clubs so more pilots can enjoy the benefits of shared ownership and community. Since its inception, the program has launched 65 new clubs serving an estimated 960 pilots in locations nationwide.

The AOPA Flying Club Finder helps pilots identify existing clubs in their area, and more than 1,500 clubs nationwide are currently listed. Online resources provide tools to help pilots start clubs of their own. *Maximum Fun, Minimum Cost* seminars give interested pilots information about the benefits of club membership as well as an overview of what it takes to start a club. For those who want to take the next step, You Can Fly Ambassadors provide in-person help with everything from choosing a club structure to writing bylaws to buying an airplane.

2017 HIGHLIGHTS

- 30 new flying clubs started
- 141 flying clubs surveyed to establish baseline health
- 34 *Maximum Fun, Minimum Cost* seminars delivered

2018 GOALS

- Increase the total number of pilots in flying clubs in the Network by 5 percent
- Increase the average hours flown per flying club in the Network by 5 percent
- Launch 35 new flying clubs
- Hold intensive Boot Camp seminars for clubs in formation
- Deliver 40 *Maximum Fun, Minimum Cost* seminars





RUSTY PILOTS

INITIATIVE

Pilots love to fly. But sometimes, life gets in the way. Each year, thousands of pilots stop flying for one reason or another. And while many pilots intend to get back in the air when the time is right, the path forward can be confusing.

The Rusty Pilots initiative is changing that by making it easy for lapsed pilots to return to the air. Each Rusty Pilots seminar provides approximately three hours of fun, interactive ground training on topics required for the flight review, and participants receive an instructor's endorsement for that training. Seminars are held at flight schools around the country, giving attendees the opportunity to meet local CFIs and schedule additional training.

To make it easy for flight schools to host an event, AOPA provides presenters, helps identify lapsed pilots in the area, and provides marketing and follow-up support at no charge.

The advent of BasicMed in 2017 brought tens of thousands of pilots back to aviation. To meet the demand created by these aviators, Rusty Pilots ramped up to unprecedented levels, offering 70 percent more seminars in 2017 than in the previous year.

On average, seminar attendees have been away from the cockpit for about eight years, but a Rusty Pilots event is often the only catalyst they need to return to active flying. In fact, more than 38 percent of lapsed pilots who attended a seminar in 2017 reported that they went on to complete a flight review. Since the program's inception, we estimate that more than 4,600 participants have returned to active flying status.

2017 HIGHLIGHTS

- 266 seminars held nationwide
- 8,270 total attendees, including 5,054 truly "rusty" pilots
- 38% of truly "rusty" attendees completed a flight review
- Estimated 1,895 rusty pilots returned to active flying status in 2017

2018 GOALS

- Reach previously unserved markets with in-person Rusty Pilots seminars
- Launch an online Rusty Pilots course to serve those who can't attend a seminar
- Help thousands of additional pilots return to active flying status







YOU CAN FLY ACADEMY





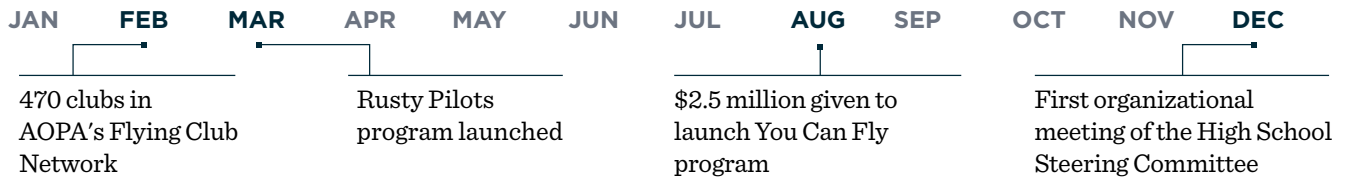
The You Can Fly Academy has opened its doors, serving as both a source and a destination for aviation learning. The 19,000-square-foot space adjacent to AOPA's headquarters building features a 73-seat state-of-the-art auditorium, three large classrooms, a full-motion flight simulator, a distance learning studio, and a sound-room. The Academy also boasts spaces for meetings, briefing rooms, and a catering kitchen for events. A model flight school lobby greets guests and serves as a space for practical training in customer service and merchandising.

The staff of AOPA's You Can Fly program and Air Safety Institute moved into the space in November 2017 and quickly put it to work for the aviation community. In its first few weeks the Academy hosted Rusty Pilots and safety seminars, flight instructor refresher training, and numerous podcast recordings. We expect to have several thousand visitors to the Academy in 2018 as we host large events, such as the three-day Redbird Migration conference and multi-day teacher training programs for schools using AOPA's high school curriculum.

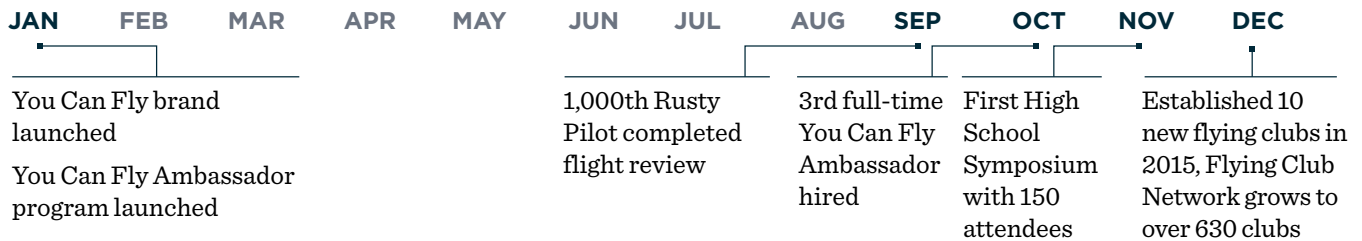


TIMELINE

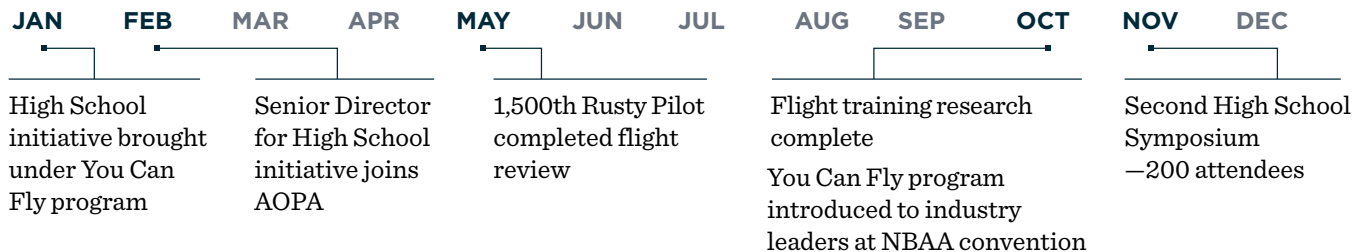
2014 PRE-YOU CAN FLY



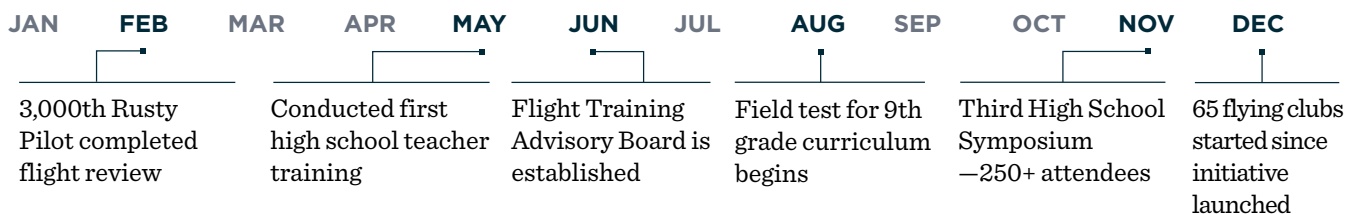
2015 YOU CAN FLY



2016 YOU CAN FLY



2017 YOU CAN FLY



LONG-TERM GOALS



2023

MAJOR GOALS

HIGH SCHOOL

More than 6,800 students will have participated in AOPA's aviation STEM courses.

FLIGHT TRAINING

More than 300 flight schools will be enrolled in AOPA's Flight Training Network. Network schools are seeing a 10 percent greater student pilot completion rate.

FLYING CLUBS

The number of members in clubs within AOPA's Flying Club Network grows to 20,000, representing a five percent increase each year.

RUSTY PILOTS

More than 9,000 pilots will have completed a flight review.



FINANCIAL PROJECTION

This financial projection includes historic information as well as our current assumptions and estimates based on plans to develop, implement, and expand the You Can Fly initiatives over the next several years.



Amounts in \$000's

	2014 ACTUALS	2015 ACTUALS	2016 ACTUALS	2017 ACTUALS	2018 FORECAST	2019 FORECAST	2020 FORECAST	2014-20 TOTAL	2014-20 % OF TOTAL
Flying Clubs	\$249	\$675	\$823	\$1,051	\$1,297	\$1,321	\$901	\$6,317	24%
Rusty Pilots	348	537	448	958	915	849	865	4,920	19%
High School	-	-	428	972	1,804	1,955	1,754	6,913	27%
Flight Training	-	-	655	633	1,206	2,221	3,121	7,836	30%
TOTAL	\$597	\$1,212	\$2,354	\$3,614	\$5,223	\$6,347	\$6,641	\$25,988	-

Note: The figures for 2018 and beyond are estimates based on our current knowledge of initiative designs. The numbers will be adjusted over time as we learn from research and experience.

FUNDRAISING STRATEGY

The AOPA Foundation raised more than \$4.5 million for the You Can Fly (YCF) program in 2017. That included more than \$2 million from a You Can Fly fundraising challenge, which was a 1:1 matching grant from the Ray Foundation, established by the late aviator and philanthropist James C. Ray. Since the program's inception in 2014, the AOPA Foundation has raised \$11.2 million to support You Can Fly initiatives.

In 2017, we reached out to a greater number of individual donors to support You Can Fly. AOPA's membership of more than 300,000 pilots, aircraft owners, and aviation enthusiasts is a generous and engaged force within the aviation industry. They understand the critical need for the ambitious and multifaceted You Can Fly program. We will leverage their support as we expand our efforts to engage new donors for You Can Fly in 2018.

As the You Can Fly program ramped up in 2017, AOPA Foundation communication efforts did as well. Quarterly reports were sent to current and prospective donors, AOPA Pilot magazine and AOPA Live promoted the program's successes, and regional AOPA Foundation events brought together key donors to hear updates from the AOPA and You Can Fly senior management team.

In 2018, our goal is to raise more than \$5 million in support of the YCF program. As an endorsement of the program and in recognition of AOPA's "outstanding performance of YCF, and AOPA's terrific stewardship

of prior grants," the directors of the Ray Foundation have again announced a new 1:1 matching grant for 2018 with a larger goal than in past years. The Ray Foundation will grant \$1.4 million upon the successful conclusion of the challenge to raise \$1.4 million by July 25, 2018.

Additionally, we are expanding our fundraising outreach to include corporations and foundations in the coming year.

The AOPA Board of Trustees and AOPA Foundation Board of Advisors remain fully committed and supportive of these fundraising efforts to bolster You Can Fly.



RISK MANAGEMENT

Although the You Can Fly initiatives work hand-in-hand, they also operate independently so that one or more of the initiatives can be modified or adapted without hampering the work of the program as a whole.

A series of off-ramp metrics will help the team determine when an initiative may need to be modified, reframed, or terminated. And as the initiatives grow and evolve, we will make adjustments to suit the changing environment. For example, in 2017 we dramatically increased the number of Rusty Pilots seminars held in anticipation of a rush of lapsed pilots returning to the cockpit under BasicMed. With much of that pent-up demand now met, we will be reducing the number of seminars in 2018 to a more sustainable level and we anticipate similar adjustments in coming years to ensure the program size is optimal.

To mitigate the risk associated with building the Flight Training Network, we have divided key elements of the project into manageable pieces—first working with consultants to develop detailed requirements for technology to ensure that we have realistic expectations regarding the time, money, and effort needed to build a solution. We are also examining potential partnerships that will allow us to take advantage of the things our industry does well, freeing us to focus on making meaningful change where it's needed most. And, by staying in close contact with the members of our Flight Training Advisory Board, we can ensure that the solutions we provide are those most needed by flight schools.

As we have thus far, we will continue to carefully monitor metrics and milestones to ensure that each initiative is achieving its goals. With consistent, disciplined oversight, we can quickly determine if we need to shift our approach.



VISION STATEMENT



A vibrant, growing, and self-sustaining community of active pilots. That's the ultimate goal, and the You Can Fly Program is already moving us in that direction.

High school students in diverse communities are learning about aviation and the many career possibilities it holds. We are building the tools to modernize and simplify the flight training process to deliver the kind of experience today's student pilots want and expect. Thousands more pilots have access to the pleasures of aircraft ownership and community through flying clubs. And we're closing in on a major milestone—5,000 formerly rusty pilots completed a flight review.

We've made a meaningful start. Now we must continue to sustain and expand these gains.

As the high school curriculum develops into a four-year program, thousands of students will have the chance to discover aviation. As we build the Flight Training

Network, we can expect to see dropout rates decline so that more of the students who start training become pilots. As the number of flying clubs grows, more pilots nationwide will have affordable access to aircraft. And as the number of Rusty Pilots seminars continues to mount, we'll see pilots continuing to return to the air.

We need thousands more active pilots to build a vibrant, self-sustaining community of aviators. Those people are out there now. Some are already pilots who have stopped flying or are looking for more affordable access to aircraft. Others are still dreaming of flying or searching for a career they can love. All of them are part of the solution. Our task is to connect with those individuals, feed their interest in aviation, and make it easier to join or rejoin our community.

We can create the aviation community we want to see. In fact, we've already begun.







**HAVE QUESTIONS?
PLEASE CONTACT
JENNIFER STORM**

Vice President of the AOPA Foundation

JENNIFER.STORM@AOPA.ORG | 301.695.2269



AOPA FOUNDATION