

Business Plan 2018

We Believe

We believe, as Dwight Eisenhower did, that Eisenhower Fellowships exists to *inspire* leaders around the world to challenge themselves, *envision* how they can effect positive change, *engage* others beyond their existing networks and *collaborate* with other like-minded leaders across national borders and regions to better the world around them.

Eisenhower Fellows and the positive impact they can have on their societies are at the heart of everything we do. We bring together innovative leaders from all fields and regions of the world, women and men of notable achievement who have the potential to do even more. We strive to ensure the professional, ethnic, racial, gender and geographic diversity of the Fellows and of the regions and nations where we operate.

Our mission begins with identifying outstanding ascendant, mid-career leaders who share President Eisenhower’s belief in the powerful possibilities of a more peaceful, prosperous and just world. We select Fellows who display the vision and passion to pursue concrete projects with real impact on their societies. We believe our work transcends national boundaries, linking outstanding international leaders with their counterparts in the United States to enhance international understanding and provide rich opportunities for collaboration within the influential Eisenhower Fellows global network.

Successful candidates for our program are leaders driven to advance their personal and professional growth who can articulate how they will use the fellowship to produce impactful change and who commit to lifelong engagement with the organization and its Fellows around the world. They apply what they learn from their meetings with peers and with experts in their respective fields to maximize their potential and produce sustained impact through a transformative fellowship experience.

Section 1: 2017 Recap

Global Program

In 2017, Eisenhower Fellowships (EF) provided fellowships to 45 outstanding international leaders; 26 Fellows participated in the spring Global Program (formerly known as the Multi Nation Program) and 19 in the fall Middle East and South Asia Program. Advancing EF’s goal of achieving gender parity, 44% of the participants (20 Fellows) were women.



The EF online application form was used to maximum advantage to increase awareness of the fellowship opportunity and promote transparency in the recruitment process. In the spring Global Program, recruitment efforts advanced EF's Africa presence with five Fellows from Ghana, Rwanda, Nigeria, and Tanzania. This was part of a five-year effort to help shape, empower and connect the next generation of African leaders with each other and the EF global network.



From their opening seminar in Philadelphia, the Fellows traveled extensively around the country. Each Fellow visited an average of ten cities, collectively traveling to more than 25 states in the continental U.S. Fellows gained high-level insight into American thinking and professional practice, shared insights and experiences and discussed potential collaborative projects. They participated in leadership development activities in Philadelphia and elsewhere, and in group meetings at government agencies such as the U.S. Small Business Administration; corporations such as United Technologies Corporation, Lutron and Salesforce; and institutions of higher learning such as Harvard and Stanford Universities.



The power and promise of EF was on full display in the fall Middle East and South Asia Program. Responding nimbly to the challenges posed to Middle East recruitment in the current geopolitical environment, EF expanded the program to include historically interconnected South Asia nations, while also introducing Myanmar for the first time to the family of participating EF countries. As the world watched the unfolding political upheaval in Myanmar, EF welcomed an exemplary inaugural cohort of five Burmese leaders. Representing an array of private firms and NGO organizations, the Fellows gained immensely from their exposure to American institutions and were much in demand to share timely insights on the evolving situation in their country. Aided by a group of leaders in Myanmar committed to helping EF identify pioneers and innovators poised to have significant, positive impact in their society, EF will continue to grow its chapter of Fellows in its newest country of operation.

Innovations in the Fellows' traditional opening seminars enhanced their fellowship experience. These included "Leader as Storyteller" sessions created and led by USA Fellow Quinn Bauriedel, Co-Founder & Co-Artistic Director of Philadelphia's renowned Pig Iron Theatre Company, and 'Deep-Dive Site Visits' hosted by USA Fellows at the organizations they direct on diverse topics. These included "Issues in Global Education," "Gender Parity: Challenges and Opportunity," "Urban Development - Philadelphia's Navy Yard Experience" and Philadelphia's Mural Arts Program. Global Fellows also had a unique opportunity to tour the new Museum of the American Revolution, where EF held a seminar discussion and dinner less than a month after its doors opened.



Prominent speakers contributed to Fellows' opening seminars and throughout their travels. In the spring, and again in the fall, Fellows had the unparalleled opportunity to engage with EF Chairman Gen. Colin L. Powell, USA (Retired). Trustee Susan Eisenhower hosted a roundtable discussion with international Fellows during their visit to Washington, DC. Fellows also found great value in presentations by Gidi Grinstein, Founder and President, The Reut Group; Gerald

Seib, Executive Washington Editor of the Wall Street Journal; and Thomas "Mack" McClarty, former White House Chief of Staff for President Bill Clinton. EF advanced its partnership with the RAND Corporation, which provided leadership training on policy implementation related to fellowship projects and created new strategic linkages for many Fellows with leading RAND researchers.

A record number of events were hosted in EF's seven USA hubs around the country to support their recruitment efforts and forge strong bonds between American and international Fellows. In what has become a regular series of encounters, Washington-based Fellows organized substantive panels on "Impact Investing and the Global Entrepreneurial Startup Economy" in the spring and a joint EF-Aspen Institute event, "Proliferating Civility via Leader to Leader Exchange," in the fall. Both were attended by other Eisenhower Fellows and special guests. In the fall, the Harvard Marshal's office organized dynamic breakfast meetings at the Middle East Initiative and the South Asia Institute, and Fellow John Della Volpe (USA '08) hosted a reception at the Institute of Politics at the Kennedy School of Government at Harvard University. In New York City, Carnegie Corporation president Vartan Gregorian and his staff spent a rich morning of conversation with our Middle East and South Asia Fellows about Carnegie's philanthropic model, and Investcorp Executive Chairman Mohammed Al Ardhi, an EF Trustee, introduced the Fellows to senior colleagues in this prestigious firm.

The extensive interaction between Global and USA Fellows enriched all involved. USA Agriculture Fellows generously organized several visits by Global Fellows and hosted some in their homes. Global Fellows served as EF ambassadors, speaking at organizations and universities around the country on their areas of expertise and shared insights into their countries and cultures.

The Fellows' required projects addressed a wide range of social, cultural and economic issues facing their countries and the world at large. Fellows' project topics included the use of e-payments technologies to improve financial inclusion and prevent criminal activity; a toolkit to assist rural businesses in developing sustainable practices; and professional digital journalism platforms that combat unverified news. Each Fellow's program was tailored to help them research their topic and possible approaches to implementation, and to meet with potential partners whose collaboration can help maximize their impact after returning home. Just one example: Through travel to Japan and Peru, USA Fellow Jill Reynolds studied ways to increase labor market participation by people with disabilities. Over the coming months, Reynolds will be using her learnings and contacts from her fellowship to bring a web-based hiring and training platform in use at her organization to companies that are specifically targeting and serving people with disabilities.

Impact evaluation became an increasingly integral component of programmatic activities, enabling EF to gauge its effectiveness in accomplishing desired objectives while continuously refining and enhancing its programs. During the post-program briefing with EF's President and Vice President, for example, the Middle East South and Asia Fellows recommended that each incoming global Fellow be assigned a USA Fellow as mentor to help guide them on project formulation and fellowship goals. This Fellow-generated program improvement is being implemented in the spring Global Program in 2018.

USA Program

Eisenhower Fellowships programmed a diverse group of 10 USA Fellows to 13 countries in Asia, Europe, Latin America, Africa and Oceania in 2017. For the first time in EF history, a USA Fellow traveled to Colombia, and for the first time in 12 years a Fellow traveled to Peru, reinforcing EF's engagement with Latin America. EF advanced its commitment to the continent of Africa by sending two Fellows to South Africa and two to Kenya. Two Fellows also traveled together to South Korea and completed their program through participation and a presentation at the Future of Work Conference in Málaga, Spain.

American Fellows' travels overseas exposed them to new thoughts and ideas that they brought back and applied to better their communities. USA Fellows engaged with Eisenhower Fellows they encountered in their destination countries, deepening their ties with the organization. USA Fellows also had the opportunity to engage with the 2017 Youth Network Leaders while they were in their countries.

In 2017, for the third consecutive year, a cohort of USA Fellows traveled throughout China in June as part of the Zhi-Xing China Eisenhower Fellowship Program, in partnership with the China Education Association for International Exchange. The Zhi-Xing Program, launched in 2015, doubled the size of the USA program, advancing EF's strategic objective to expose more American leaders to the world beyond our shores.



EF expanded its USA network in 2017 by adding a seventh national hub in Los Angeles, led by a distinguished Steering Committee comprised of local leaders and Eisenhower Fellows. EF selected one USA Fellow from Los Angeles who will travel overseas in 2018. During the fall Middle East and South Asia Program, the Los Angeles hub hosted its inaugural event for visiting Fellows. Fellows and Trustees in USA hubs in Chicago, New England, North Carolina, San Francisco and St. Louis also all hosted events for visiting international Fellows in their cities.

USA Fellows' contributions to programming and their hospitality to visiting international Fellows are an increasingly important part of the collaborative sense of purpose among Fellows around the world. On average, nearly 20% of fellowship meetings arranged for international Fellows in the U.S. are scheduled with, or with the help of, EF's nationwide network of more than 300 American Fellows.

Global Fellows Network



2017 was a landmark year of dynamic conferences, forums and events for the EF Global Network. With a growing focus on impact, regional conferences in South Asia and Latin America in the first half of the year brought together more than 300 participants to discuss relevant issues of sustainable development and international understanding. Organized by Fellows from the EF Pakistan and India chapters, the “South Asia Rising”

conference in Dubai in February was the largest regional conference in Eisenhower Fellowships' history, attracting nearly 240 participants and Fellows from 19 countries. In October, Eisenhower Fellows in Chile hosted “Next Challenges for Latin America” with 50 Fellows from eight different countries, the eighth regional conference to be hosted by Fellows in Latin America.

A global conference on the Future of Work co-hosted by Jordanian and Spanish Fellows in Málaga, Spain in September welcomed 329 participants from 49 countries. Featuring internationally renowned thought leaders, private and government sector innovators and trailblazers, and social and civil society leaders, the conference provided opportunity for learning, connecting and networking. Seventeen different projects focused on improving global conditions related to the Future of Work were presented by Fellows through the newly designed iLabs, interactive sessions that promoted collaboration and project development. To nurture the Africa network and integrate the 2016 Africa Fellows into the global EF network, 16 Fellows from this program participated in the Málaga conference, and met to map the mobilization of Fellows across the continent.



EF also launched its inaugural Youth Leaders Network, with 32 exceptional young leaders under the age of 25 from 20 countries. With significant support from the Global Network Council and Fellows' chapters around the world, EF welcomed the Youth Leaders to Málaga, where they met with Fellows who will serve as their mentors for the next year, assisting with career and project advice. In keeping with the theme of youth and employment, EF publicly released a global poll focused on millennials in the workplace. Results were presented at the Future of Work conference in Málaga by USA Fellow John Della Volpe, Director of Polling at the Institute of Politics at the Kennedy School at Harvard. Della Volpe is also the Founder and CEO of SocialSphere, Inc., a Cambridge, Massachusetts, data and social media analytics company.

EF Day events across the globe took place in various formats. Fellows' Chapters in the Philippines, Japan, Kenya, Finland, New Zealand and Ireland each hosted special events to further the mission of the organization. Spanish Fellows hosted their First Amendment Awards to Spanish-language journalists in New York City, the fifth year they presented these annual prizes.



Cultivating partnerships, Elevating our profile



EF strengthened partnerships forged in recent years. The partnership with the RAND Corporation and the Pardee RAND Graduate School expanded to incorporate in-depth policy development training for global Fellows and more than 40 strategic linkages between Fellows and prominent RAND experts. Knowledge@Wharton, an online platform at the Wharton School of Business, has fast become a standard feature of EF programming with 17 Fellows interviewed in 2017. Conversations ranging from financial literacy to corporate sustainability are shared with Knowledge@Wharton's two million listeners as well as with EF's expanding social media network. EF advanced its content partnership with the Huffington Post, publishing articles authored by global and USA Fellows on EF's dedicated page on topics of critical relevance to our global readership, including artificial intelligence, immigration, sustainability and innovation.

EF increased its social media presence and effectiveness with new strategies and the enthusiastic participation of our new Youth Leaders Network, growing our Facebook followers by 15%, Twitter by 33%, LinkedIn by 21% and Instagram by 97%. The Future of Work conference in Málaga, Spain had significant impact, with live tweeting and a successful livestream on YouTube, leading to a local Twitter surge and the highest level of engagement seen on all our social media accounts.



Eisenhower Fellowships Poll of Global Leaders/EF Program Impact Metrics

At the end of 2016, EF developed a Fellow survey to measure impressions of global conditions, challenges and opportunities, partnering with USA Fellow John Della Volpe. Della Volpe distributed the poll to the nearly 1,600 active Eisenhower Fellows around the world. Results of the inaugural Eisenhower Fellowships' poll of Global Leaders were published in February 2017. Further data collection took place in June 2017 (garnering 700 responses from Fellows worldwide) through distribution of a detailed questionnaire with metrics to help measure the impact the fellowship has had on Fellows and their work, as well as their engagement with EF and the global network. Results from this survey will be used as a baseline for the development of an impact evaluation study to be carried out in 2018 by an independent consultant.



Finance and Administration

In 2017 EF embarked on the design of a new Salesforce Customer Relationship Management system, replacing an old database system in use for more than a decade. The new system will be rolled out in 2018 and one of the many needs it will fill is scheduling itineraries for Fellows. The old system only tracked Fellows while in the US, and this will now be extended to other country coordinators, allowing EF to track appointments of USA Fellows traveling overseas. The system is accessible through the web using any digital device, including personal cell phones and computers.

The new system will help EF meet its need for a more robust directory of Fellows, Trustees and friends of EF. The user-friendly interface will allow people to search for others in specific locations, fields of interest or program years. The new technology will also allow Fellows to collaborate on projects defined in their fellowship or afterwards. This technology was piloted during the Future of Work Conference in Spain in September. The software will allow the development department to track and monitor pledges and donations real-time and prepare charts and graphs to easily show progress towards revenue goals; this component will be completed by the end of 2018.



Over the last year, the EF Finance department advanced its work to automate processes to make information more readily available to staff. This includes electronic time sheets and vacation/sick day balances, electronic pay vouchers and, soon, electronic capture of expenses.

Our external auditor reported in the 2017 audit that EF received a clean, unmodified opinion. EF's financial statements present fairly, in all material respects, our financial position, in conformity with U.S. generally accepted accounting principles. For the fourth year in a row,

Eisenhower Fellowships received the top four-star rating from Charity Navigator for its exceptional transparency, financial health and public accountability, exceeding industry standards and most charities in our field.

Section 2: Goals for 2018

Over the next three years, our primary strategic objective is to maximize the impact of Eisenhower Fellowships. The 2018 goals are aligned with the goals outlined in the five-year strategic plan approved by the Board of Trustees in 2016.

Over the next year we will work to:

- 1) Identify and select innovative, outstanding Fellows from a deepened and diverse pool of candidates and offer them a dynamic, transformational fellowship experience leading to lifetime engagement with the EF global network.
- 2) Strengthen EF's global network and support increased collaboration between our Global Fellows to achieve sustainable, real-world impact across sectors, borders and regions.
- 3) Maximize EF's real-world impact through the requirement that Fellows identify and execute concrete projects after they return home and leverage their talents through mentorship and collaboration with the network and other partners.
- 4) Expand our USA Program and support increased collaboration between Global and USA Fellows during and after their fellowship experience.
- 5) Reform governance, grow the endowment and rebrand EF as a modern, dynamic and diverse organization of innovative change agents that works with prominent partners and engaged supporters to create sustained long-term impact.

Section 3: Action Plan for 2018

- 1) Identify and select innovative, outstanding Fellows from a deepened and diverse pool of candidates and offer them a dynamic, transformational fellowship experience leading to lifetime engagement with the EF global network.
 - The goal is to host at least 77 Global and USA Fellows in 2018: 25 in the Spring Global Program, 22 in the fall Innovation Program, 11 USA Fellows, nine Zhi Xing USA Fellows and 10 Saudi Fellows in a new EF Saudi Arabia Program.
 - Provide Fellows with the opportunities, tools and support that will help them collaborate with one another and achieve sustainable, real-world impact across sectors and national borders through their project requirement, mentoring and aggressive follow-up.
 - Develop metrics and plan and implement an independent, outside, data-driven evaluation of international and USA programs that will help EF assess its effectiveness, maximize its impact and better communicate the reach and relevance of our organization to external and internal audiences.
- 2) Strengthen EF's global network and support increased collaboration between our Global Fellows to achieve sustainable, real-world impact across sectors, borders and regions.
 - Strengthen and promote deeper engagement of the Fellows network by supporting new initiatives for regional subgroupings of international Fellows in Europe, Asia and Latin America through EF events and collaborations.
 - Building on the strength of our programs in Southeast Asia, where there are nearly 200 active Fellows, integrate our five new Fellows from Myanmar into this regional network.
 - Nurture the Africa network and further integrate the 2016 Africa Fellows into the global EF network through participation in the 2018 Annual Meeting Day events in Philadelphia in May.
 - Raise the profile of the organization by increasing the exposure of the Fellows through public forums and events; regular media interviews; news articles in local, national and international media; Fellows blogs; and by organizing regular EF encounters with leading national journalists to put the organization on their radar.
 - Expand the use of EF's new direct fellowship application process to spread the word about EF and diversify and deepen our pool of applicants.
- 3) Maximize EF's real-world impact through the requirement that Fellows identify and execute concrete projects after they return home and leverage their talents through mentorship and collaboration with the network and other partners.

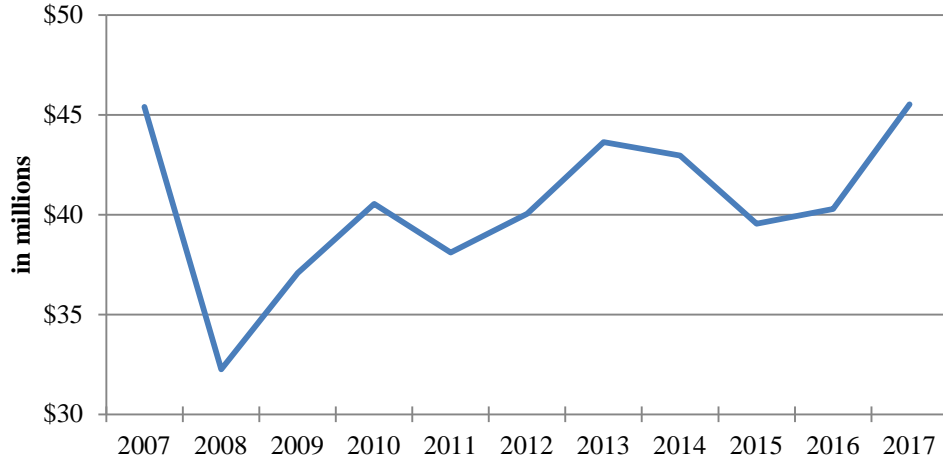
- Collect and promote the stories of the real-world impact that Eisenhower Fellows are having across the globe.
 - Implement a strategy to build upon the momentum created by the successful pilot of the new Eisenhower Youth Network at the Málaga conference that advances mentoring and builds into the organization a youth component that will extend EF's strategic footprint.
- 4) Expand our USA Program and support increased collaboration between Global and USA Fellows during and after their fellowship experience.
- Building on the launching of new International Leadership Initiatives in Chicago and San Francisco in 2016 and Los Angeles in 2017, EF will establish an eighth national hub in Miami that would help serve as an EF gateway to Latin America.
 - Advance the development of mini-hubs in Washington, D.C. and Austin, Texas that have arisen organically over the last three years through intensified engagement by Fellows, a growing annual number of local fellowship candidates and a quietly, steadily increasing number of events EF has hosted in these two cities. This would include planning future events such as the ones EF has organized in Washington recently with our Chairman, General Colin L. Powell, USA (Retired), Trustee Susan Eisenhower, Northern Trust Bank and McLarty Associates and its founder, former White House Chief of Staff Thomas L. "Mack" McLarty. In Texas, EF will seek to leverage USA and Global Fellows' participation at Austin's South-by-Southwest conference to promote the work of Eisenhower Fellowships before an influential national audience of innovators and change agents.
 - Long-term, lay the foundation to establish full-fledged EF national hubs in Washington, Austin and New York City that would help promote the organization's work and increase the geographic diversity of our USA Fellows.
- 5) Reform our governance, grow our endowment and rebrand EF as a modern, dynamic and diverse organization of innovative change agents that works with prominent partners and engaged supporters to create sustained long-term impact.
- Present and implement a 2018 budget that will meet all revenue and expense targets, building upon the work and new contacts EF made in 2017 to advance the outreach to potential new funders to support a robust international and national fellowship program.
 - Identify major new sources of individual gifts and other new funding in order to grow the organization's endowment.
 - Deliver a 2017 audit that will once again meet and exceed the high accounting standards set forth for non-profits, achieving the Charity Navigator definition of a 4-star charity.
 - Maintain the highest standards of risk mitigation for Fellow, staff and trustee information and protect personal data, continuously monitoring and where necessary updating or upgrading EF technology, internal control systems and practices.

- Attract and retain high-quality staff.
- Proactively support and seek opportunities for broadened employee experiences and training to advance personal development and job performance.
- Seek new content and program partnerships with other prominent institutions to enhance and enrich the Eisenhower Fellowship experience.
- Revamp the EF database with a customized Salesforce platform to collect and present data in a format that is easily accessible to potential Fellows, donors and the general public. The goal is to fully implement this project by the end of 2018, and a full-day training on Salesforce was conducted in January 2018. A group of staff will be trained in WordPress in the first quarter of the year to augment the current website until a full website overhaul is possible.

Section 4: Projected Budget and Finance

	2017		2018
	Budget	Year End	Budget
Revenue			
Contributions for Operations	3,590	3,518	3,945
Endowment Draw	1,856	1,883	1,882
Total Operating Income	5,446	5,401	5,827
Expenses			
Programs	2,129	2,076	2,284
Personnel	2,658	2,675	2,779
Professional Services	196	216	245
Administration	140	133	162
Building & Maintenance	219	187	233
Special Events	105	114	124
Total Expenses	5,446	5,401	5,827
Endowment Draw %	4.55%	4.50%	4.50%
3 Year Average	4.88%	4.85%	4.51%
Fellow & Spouse Headcounts			
Spring Fellows	26	26	25
Fall Fellows	20	19	22
USA Fellows	10.5	10.5	11
Zhi-Xing Fellows	10	8	9
Saudi Fellows	-	-	10
Total Spouses	12	17	18
Total Fellows	66.5	63.5	77
Total Spouses	12	17	18

Endowment Value



Endowment Return v. Benchmark

