

Business Plan 2016

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 peers and in their meetings with experts in their respective fields to maximize their potential and produce sustained impact through a transformative fellowship experience.

Section 1: 2015 Recap

International Program

In 2015, we provided fellowships to 48 outstanding leaders, men and women who comprised our spring 2015 Multi-Nation Program (MNP) and fall Women's Leadership Program (WLP). Of the 48, 32 of the Fellows are women. The WLP included for the first time in recent EF history a requirement that Fellows mentor other emerging leaders, and included several sessions about mentoring to prepare the Fellows to assume this responsibility post-fellowship. The program concluded with a highly successful global Women's Leadership Forum in Miami.



To enhance the mentorship component of the program, we engaged the services of an outside expert, Victoria Budson, Executive Director of the Women and Public Policy Program at the Harvard Kennedy School of Government. In addition, Fellows from previous programs contributed their expertise to the mentorship dimension of the WLP. Following on the success of the project element of the fall 2014 Innovation Program, all 2015 Fellows were required to pursue a defined project during their fellowship program. In both the spring and fall international programs, the Opening and Closing Seminars, and the mid-program retreat provided sessions to allow Fellows to collaborate and share feedback on project concepts.

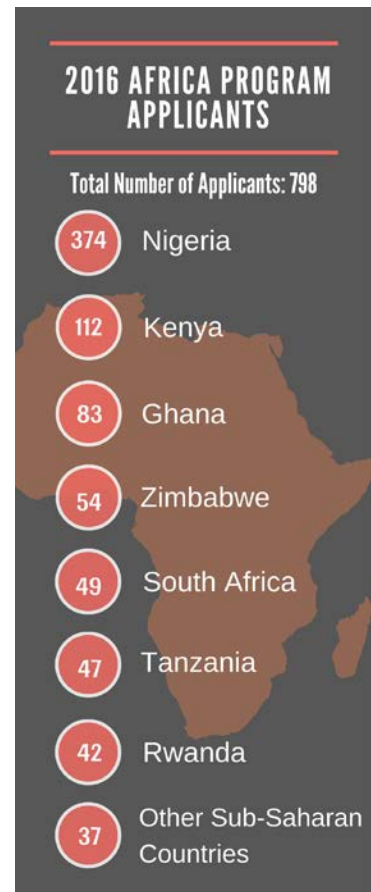
In 2015 we also incorporated new innovations in Fellow recruitment and selection, marked by advances in technology and expansion of the at-large nomination process. This resulted in the selection of 25 outstanding Fellows for the fall program and an additional seven fellowships for women leaders in the 2016 Multi-Nation Program.

We applied this enhanced recruitment process in our preparations throughout the year for our inaugural EF Africa Program in fall 2016. EF formed steering committees comprised of prominent citizens in Ghana, Tanzania and Rwanda, complementing those in Kenya, Nigeria, South Africa and Zimbabwe where our Fellows have been re-energized by this first Africa Program.

Interested leaders from these nations applied directly to EF online, resulting in an unprecedented outpouring of nearly 800 applications for 25 fellowships, by far the largest number in EF history. The software that allowed these candidates to apply directly to EF was developed exclusively for us and contributed as a gift to the organization by Pakistani Fellow Shahid Mahmud. This open and transparent recruitment process has enhanced our Africa Program before it even begins by providing a deep and diverse universe of candidates from which to select the highest caliber Fellows.

In 2015 we began intensive work on a strategic review of our programs, looking to see where we can have the most impact, geographically and thematically. In spring of 2016, we will present to the Executive Committee of the Board of Trustees the first five-year EF strategic plan in 15 years.

This includes exploring ways to broaden our recruitment of



candidates, so that aspiring Fellows continue to approach us wanting to be part of our global network.

We want to enhance our recruitment process in a way that nourishes existing nominating committees and increases the diversity of our candidates. It will help us greatly expand our reach and generate publicity across the world, as it already has in Africa.

USA Program



EF programmed a diverse group of nine USA Fellows to 19 countries in Asia, Europe, Latin America and Oceania in 2015. Their overseas travels exposed them to new ideas that they brought back and applied in the service of their communities. Once again, USA Fellows' presence overseas galvanized the Eisenhower Fellows they encountered in their destination countries, deepening their ties with the organization. USA Fellows' contributions to programming and the hospitality they show towards visiting international Fellows are an increasingly important part of the collaborative sense of purpose we foster among Fellows from around the world.

2015 also saw the launch of a historic new component of our USA Program focused exclusively on China. The first cohort of 10 USA Fellows travelled throughout China in the fall to inaugurate this new initiative, the Zhi-Xing China Eisenhower Fellowship Program, in partnership with the China Education Association for International Exchange (CEAIE). The Zhi-Xing Program doubled the size of the USA program in 2015 and was fully sponsored by our Chinese counterparts. This is the first step of a larger EF strategic objective to expand the USA program.

As the next step in pursuing this objective, EF began the expansion of its USA Program Hubs to other strategically important areas of the United States. Our goal is to achieve a significant representation of Fellows and chapters across the country, helping elevate the organization's viability and prominence beyond its current audience of US stakeholders. Our plan is to open four new hubs in the next 2 years: Chicago and San Francisco in 2016, followed by Los Angeles and Miami in 2017, using the Women's Leadership Forum as a springboard for the latter. A steering committee for the Chicago hub has been formed, led by Chairman Ivo Daalder, president of the Chicago Council on Global Affairs and former US Ambassador to NATO. In the San Francisco Bay area, with the support of longtime EF Trustee Hap Wagner, we have the nucleus of an EF steering committee committed to helping us. Both new USA hubs are scheduled to be up and running by the end of the year, extending EF's national footprint.

Global Fellows Network

In 2015 we took significant steps to reinvigorate the former Alumni Advisory Council, now the Global Network Council (GNC). The GNC met in person and by teleconference five times since it was formed in fall 2014 to provide Fellows' invaluable input to our vision and mission. In November, the GNC held a highly productive meeting in Miami, the largest such gathering in EF history, where the future direction of Eisenhower Fellowships was discussed. In its first year in existence, the GNC has generated fresh new thinking on topics and sectors for future EF events, conferences and programs and helped put together the key features and specifications for a new customized EF website.

We have also been cultivating partnerships with other prominent organizations to help us stretch our strategic footprint and elevate our profile. Toward that end, we entered into a new strategic content partnership with the Huffington Post, which has created an EF platform within the Huffpost site. This will allow Fellows all over the world to feature their expertise on a myriad of issues, focusing on the paradigm of "what works," an approach our Fellows' network is uniquely positioned to address.

In October, the Nieman Foundation for Journalism at Harvard University hosted the Fellows from our fall WLP where Eisenhower and Nieman Fellows from around the world exchanged views and ideas and forged new relationships, further strengthening EF's profile with key players in US media.

Other potential future partners include Transparency International (TI), where EF Fellow Jose Ugaz (Peru '04) is Chair of the TI Board of Directors. Three other Eisenhower Fellows also serve on this 12-person global body, including the TI Vice Chair, Elena Panfilova (Russia '09). At the GNC meeting in Miami, Jose proposed a strategic partnership between TI and EF and we plan to cooperate on a pilot project in 2016.



Additional partnerships include EF's Global Leadership Consortium with Ashoka, the Kellogg Foundation, the German Marshall Fund and the Loeb Fellows at Harvard, EF's partners in organizing our dynamic global forum on women's leadership issues in Miami. The conference, titled "*Global Networks Forum: Making Strides, Advancing Women's Leadership*," brought together more than 220 registrants from 41 countries.

The assembled leaders heard from more than 60 prominent speakers, including Dr. Phumzile Mlambo Ngucka, Executive Director, UN Women and Under-Secretary General of the United Nations; former Cabinet Secretary Donna Shalala, President of the Clinton Foundation; Gov. Christine Todd Whitman, Chair of the EF Women's Leadership Steering Committee and Chair of the Executive Committee of the EF Board of Trustees; and Pulitzer Prize winner Ann Marie Lipinski, Curator of the Nieman Foundation, former Editor of the Chicago Tribune and Co-Chair of the Pulitzer Prize Board.

Development and Administration

George de Lama completed his first full year as EF's 10th President.

Erin Hillman was named Vice President for Programs and Operations in November. Erin was promoted after more than 16 years of service as an International Program Officer, head of our USA Fellowship Program and, most recently, Senior Director of all EF Fellowship Programs. She assumed her new responsibilities on January 1.

In an effort to solidify the staffing base and maximize productivity, the practice of compressed schedules ended for Program Officers. In addition, a Director of Communications and an Executive Director of Advancement and External Relations were hired and there were several internal promotions to fill new and existing positions to enhance EF's ability to meet our ambitious goals.

To make physical room for the new staff members, some minor renovations and changes within the EF building were made to bring departments into closer proximity to one another.

Total non-endowment revenue for 2015 was \$2.729 million. The endowment was down 2.9% in 2015 versus the weighted market benchmark of (1.4%). EF welcomed new trustees to our board:

Susan Hakkarainen, Co-Chairman & Co-CEO at Lutron Electronics Company, Inc.

Alan Fleischmann, President & CEO at Laurel Strategies Inc.

Peder Nielson, President and CEO of Novozymes

Elizabeth Vazquez, CEO and Co-Founder at WEConnect International

Our external auditor reported in the 2015 Audit that EF received a clean, unmodified opinion. Once again, our financial statements present fairly, in all material respects, our financial position, in conformity with U.S. generally accepted accounting principles.

Section 2: Goals for 2016

- 1. Identify innovative, outstanding leaders from around the world and offer them a dynamic, transformational fellowship experience leading to lifetime engagement in the EF global network.***



- 2. 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.***
- 3. Strengthen and operate a world-class organization marked by the highest standards of excellence in its***

management of high-impact programs, high-performing staff and sound fiscal and financial practices.

4. *Expand the multi-year funding base, identify major potential new sources of individual gifts and other new funding and increase the revenues from existing donors in order to grow the organization's endowment and support a robust international and national fellowship program.*
5. *Engage Fellows and other key stakeholders to refine and evolve the organization's vision and mission with an eye towards maximizing EF's real-world impact, raising its visibility and placing the organization on a more firm, long-term financial footing.*

Section 3: Action Plan for 2016

1) *Identify innovative, outstanding leaders from around the world and offer them a dynamic, transformational fellowship experience leading to lifetime engagement in the EF global network.*

- Program 24 Fellows in the MNP in the spring, 25 Fellows in the Africa Program this fall and 20 USA Fellows, providing each Fellow with an individually-designed experience that broadens his or her professional and leadership skills, creates personal commitment to continued engagement after the fellowship and maximizes programmatic impact.



- Require Fellows to identify and work towards a project during their fellowship that produces real-world impact when they return to their societies and proactively seek opportunities for leveraging the global EF network.
- Build upon the mentorship component of the fellowship program initiated in the 2015 Fall WLP. This is a commitment that all Fellows must embrace going forward—that they mentor young leaders when they return home. This requirement is a way to help nourish a new generation of leaders, and, in the process, increase organizational impact.
- Launch the second Zhi-Xing China Eisenhower Fellowship Program, sending 10 U.S. Fellows to China for a one-month fellowship in partnership with the China Education Association for International Exchange. This second program will incorporate learnings from the successful inaugural program in 2015.

- Implement processes to ensure a common understanding of our expectations for fellowship nominees. Share key qualities and characteristics of some of the most successful Fellows in recent years with nominating committees as case studies.
- Use the online application software for all EF international recruitments. This software, developed and donated by Eisenhower Fellow Shahid Mahmud, was piloted in 2015 for our Africa Program.
- Broaden the reach of the USA program by expanding the number of USA Hubs. Chicago and San Francisco will be firmly established in 2016 and work will begin to establish two additional hubs in Miami and Los Angeles the following year. In addition to increasing our strategic footprint and making our USA program truly national, the expansion of the USA Program Hubs will have the added benefit of cultivating additional programming resources for international Fellows traveling in the United States.

- Support deepened integration of International and USA Fellows and their respective programs, as well as their cohort experiences. In fall of 2015 we integrated the Zhi-Xing China USA Fellows and the WLP Fellows at the Opening Seminar as a continuation of the spring integration process. In 2016 we will continue this model during both spring and fall Opening Seminars.



- Select the top 25 candidates to participate in the 2016 fall Africa Program, the first regional program in EF's history focusing exclusively on Africa. These candidates were vetted from nearly 800 applicants (ordinarily a regional program attracts between 75-100 applications). EF will design and host a unique closing seminar in November for this cohort, in conjunction with the City College of New York's Colin Powell School for Civic and Global Leadership.
- Further refine the methodology for evaluating individual Fellows, their programs and the results of their individual projects with the aim of continuously improving the fellowship experience and increasing our programmatic impact.

2) ***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.***

- Support the EF Global Network Council's (GNC) regular communication and GNC Working Groups' efforts to increase Fellows engagement and achieve EF's strategic objectives. Optimize use of information and communications technology to explore more

effective recruitment and nomination processes and support Fellows' collaborations across countries and sectors. Explore the possible establishment of regional Fellows' bodies to help coordinate collaboration between country associations.

- Support the efforts of individual International and USA Fellows' associations, with the objective of improving their recruitment and nomination processes and fostering Fellows' collaborations that produce real-world impact.
- Build new connections between EF International and USA Programs, proactively seeking opportunities for contact and collaboration between our global and USA Fellows and advancing integration through the organization's structural and programmatic support.
- Work with Fellows in selected countries on strategically planning EF Day programs and events to enhance collaboration, innovation and regional considerations.
- In consultation with the GNC, prepare guidelines, suggest procedures, and facilitate greater interaction at chapter and regional level.



- Advance the pilot for professional peers begun with the WLP that saw Fellows overseas provide guidance to current Fellows before and after their program. Add more Fellows from the EF network and organize mentorship and executive leadership coaching opportunities, seeking to broaden the scope beyond the Women's Leadership Initiative.
- Analyze the 2015 Miami Forum outcomes and formulate plan for further advancing EF's prominence in women's executive leadership as a mainstream part of all EF programs. Develop opportunities for EF women to interact with GLC partners to further broaden and strengthen networks and design space to advance conversations on women's leadership as part of the larger menu of topics at EF conferences and events.
- In consultation with the GNC, continuously review themes for international and regional conferences, events, and programs.



- Proactively identify opportunities to advance the work of EF through new strategic partnerships with other prominent public, private and nonprofit organizations, focused around our mission.
- Work with EF staff and Fellows to refine our institutional narrative,

placing Fellows at the core of our brand with the goal of raising the organization's profile and broadening its reach. Find innovative ways to feature Fellows' impact with the aim of increasing EF's public relevance, bolstering its reputation, attracting the best Fellows and new sources of funding as well as promoting Fellows engagement beyond their fellowship.

- Create and implement a strategic communications plan to strengthen consistent media relations and content development. This will employ marketing and social media tools and strategies, including a review of existing collateral and branding.
- Launch a new EF website and complementary virtual closed community for Fellows, ensuring a dynamic, multimedia experience integrating existent independently developed platforms. The objective is a smooth, enhanced user experience and increased engagement within the network and with the public at large.
- Implement EF's strategic content partnership with The Huffington Post –with a special focus on “what works”- in alignment with EF strategic goals, events, program recruitment cycles, and global news events that can help reinforce EF Fellows' enormous knowledge and influence.

3) *Strengthen and operate a world-class organization marked by the highest standards of excellence in its management of high-impact programs, high-performing staff and sound fiscal and financial practices.*

- Complete the second phase of the reorganization of the EF staff to strengthen the organization's management structure, enhance its fundraising capabilities, improve its external communications, increase the effectiveness of its operations and promote a collaborative culture of continuous improvement.
- Implement the results of the tri-annual Quatt salary comparison survey to ensure EF stays competitive with other comparable organizations in the area in order to attract and retain the best possible talent.
- Examine all expenses/vendors to ensure we are receiving the highest level of service at the best possible cost.
- Design and implement an improved staff performance evaluation system based on redefined job responsibilities that will serve as a tool to enhance staff members' professional development and support an effective approach to compensation policies that feature merit pay increases.
- Implement the recommendations of EF staff task forces to modernize our website and social media and IT capabilities; improve our internal communications; make better use of EF's human resources; promote staff professional growth and development; and increase EF's engagement with Philadelphia.



- Update EF's in-house information technology to ensure we remain up to date with the ever changing technology in the world.
- Engage the Executive Committee of the EF Board of Trustees in regular communications to keep members abreast of organizational developments and seek their advice and consent on major initiatives, projects and programs.
- Proactively seek new candidates to join the EF Board of Trustees, including the Executive Committee, who can bring new perspectives and diversity to the governance of the organization.
- Advance the next phase of the review of EF long-term governance. Revisit the status of EF Trustees based on their contributions to the organization in three areas: financial support they provide or help secure; the prestige their Board membership brings to EF; and their engagement with Fellows or other participation in EF programs.

4) *Expand the multi-year funding base, identify major potential new sources of individual gifts and other new funding and increase the revenues from existing donors in order to grow the organization's endowment and support a robust international and national fellowship program.*

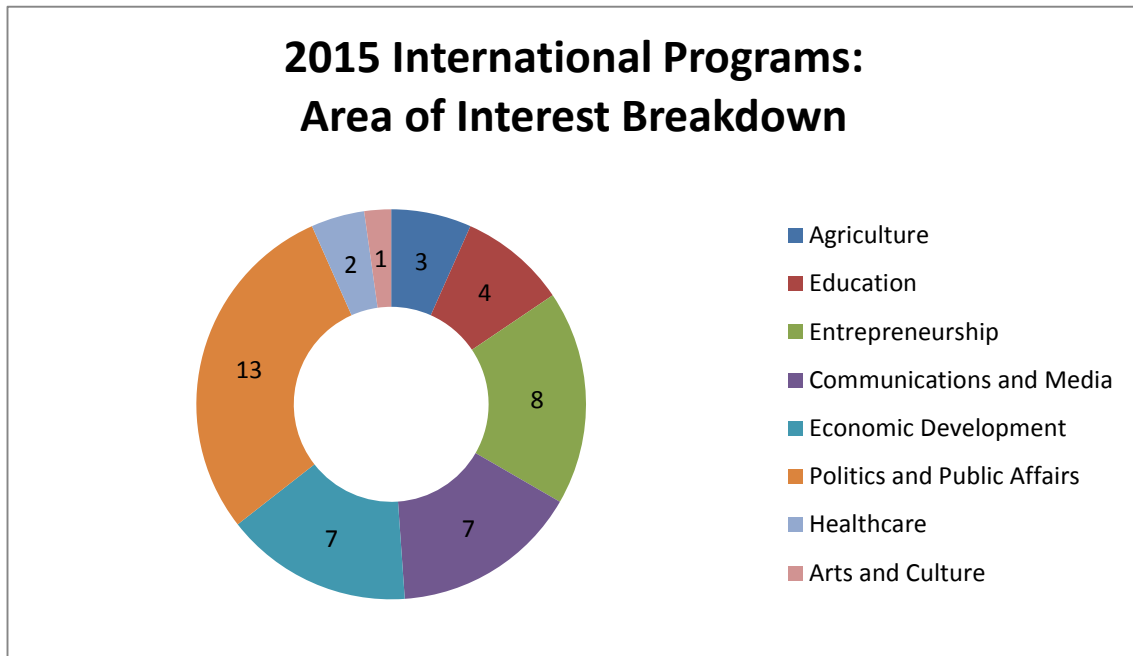
- Create new EF Giving Circles and intensify efforts to develop and cultivate a strong pipeline of major individual donors, corporations and foundations ready to support EF's funding priorities.
- Strengthen EF's overall stakeholder engagement by creating opportunities for donors and prospects to participate in the global EF network through events, volunteer opportunities and financial support.
- Cultivate prospective major donors on an individual basis, with



mechanisms through which they can offer input on EF's programmatic, engagement, development and communications efforts.

- Launch EF's first Planned Giving Campaign by the end of the year and work to lay the foundation for a Capital Campaign by 2018.
 - Pursue individual outreach to potential major donors overseas within the EF global Fellows network and enlist leaders of the Fellows network to help coordinate other fundraising efforts among Fellows within their countries and/or regions.
 - Secure sponsorship for the fall 2016 Africa Program. Engage potential donors on the continent and in the US to elicit broader financial support for EF's five-year Africa initiative.
 - Work in conjunction with USA Programs, our existing hubs and the newly established Hub committees in San Francisco and Chicago to identify potential new contributors and expand our US donor base.
 - Explore the possibility of establishing regional bodies of Fellows to support EF headquarters' fundraising initiatives, as proposed by the Global Networks Council at the November 2015 meeting.
 - Enlist the active engagement of the expanded Development Committee and other Trustees in support of EF's overall funding efforts.
 - Raise new revenue by attracting sponsorships to planned program events, including conferences, luncheons and dinners and by recruiting firms in USA Program Hubs.
- 5) ***Engage Fellows and other key stakeholders to refine and evolve the organization's vision and mission with an eye towards maximizing EF's real-world impact, raising its visibility and placing the organization on a more firm, long-term financial footing.***
- Mainstreaming the former Consequential Outcomes initiative of 2012-2013, require Fellows to formulate a project that produces demonstrable impact, preferably in collaboration with other Fellows, as a core requirement of the Eisenhower Fellowship program and experience.
 - Building on the work begun in fall 2014 with EF staff and the GNC, complete a strategic review identifying where EF can focus its operations to maximize its impact, both geographically and thematically.
 - In analyzing the geographic aspect of future operations, focus will be based on important criteria that include: geopolitical importance; opportunity to maximize EF's programmatic impact; potential for fruitful partnerships that leverage EF's convening ability and potential impact; potential for raising EF's profile and visibility; level of attractiveness and value

proposition for potential new donors; and the level of engagement with the organization of Fellows in that country or region.



- In selecting themes for future emphasis, identify sectors and thematic areas where the EF global network is positioned to provide thought leadership and a positive impact on global or regional issues that can bring together Fellows from across the world and extend the organization’s strategic footprint. Themes for conferences, events and programs should be selected with the aim of strengthening a robust organization whose work is forward-looking, externally focused and sustainable in its programmatic impact and financial support.
- Building on the work begun in 2014 with the EF staff, work with the GNC Working Group on Communication and Engagement to refine the organization’s vision and mission statements so they more accurately reflect EF’s evolving challenges and renewed emphasis on producing real-world impacts.
- Employ a refined EF vision and mission statement to help reposition and rebrand the organization as the world’s pre-eminent international midcareer fellowship program, marked by an extraordinary global network of influential Fellows committed to lifelong engagement with a program that produces real-world impact across countries and regions.
- Articulate a refined value proposition, customized for potential supporters, from a rebranded EF that reflects and emphasizes the organization’s evolution and engages potential new donors who will value our work and their association with our programs.
- Develop new metrics by the end of the year to evaluate our International and USA programs that can help EF assess its effectiveness, maximize its impact and better

communicate the reach and relevance of our organization to external and internal audiences.

Section 4: Projected Budget and Finance

	2015		2016
	Budget	Year End	Budget
Revenue			
Contributions for Operations	3,300	2,729	3,262
Endowment Draw	1,993	2,367	2,027
Total Operating Income	5,293	5,096	5,289
Expenses			
Programs	2,125	2,040	2,078
Personnel	2,572	2,395	2,608
Professional Services	182	232	175
Administration	121	135	139
Building & Maintenance	203	207	195
Special Events	91	87	94
Total Expenses	5,293	5,096	5,289
Endowment Draw %	4.7%	5.5%	4.9%
3 Year Average	4.2%	4.5%	4.6%
Fellow & Spouse Headcounts			
MNP Fellows	23	23	24
Fall Fellows	25	25	25
USA Fellows	9	8.5	10.5
Zhi-Xing Fellows	8	10	10
Total Spouses	22	20	24
Total Fellows	65	66.5	69.5
Total Spouses	22	20	24

