

Business Plan 2017

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: 2016 Recap

Global Program

In 2016 Eisenhower Fellowships provided fellowships to 46 outstanding international leaders, men and women. Fellows participated in either the Spring Global Program (formerly known as the Multi Nation Program) or the fall Africa Program.

The inaugural Africa Program featured a number of firsts for Eisenhower Fellowships. We initiated an enhanced recruitment process forming steering committees comprised of prominent citizens in Ghana, Tanzania and Rwanda, complementing the existing committees in Kenya, Nigeria, South Africa and Zimbabwe.

For the first time, interested candidates applied to EF online, resulting in an unprecedented 800 applicants for 24 fellowships, the largest number of candidates in EF history. Software allowing candidates to apply directly to EF was developed and contributed by Pakistani Fellow Shahid Mahmud, as a gift to the organization. The enhanced recruitment process allowed for a much more diverse group of candidates from which to select the highest caliber Fellows.

The power and promise of EF was on full display in our Africa Program. Our Africa Fellows witnessed a pivotal moment in U.S. history, while making history themselves, as participants in the first EF regional program focused exclusively on the nations of Sub-Saharan Africa. The Fellows were honored by a Rose Garden visit with President Obama, the first sitting American president in 33 years to receive Eisenhower Fellows at the White House and only the fourth in EF history, following Presidents Eisenhower, Kennedy and Reagan. During their program, the Africa Fellows participated in the pilot of a new partnership between EF and the Pardee RAND Graduate School in Santa Monica, California. Eight Fellows attended a three-day immersion course with faculty and experts from the Rand Corporation, emphasizing policy implementation of their fellowship projects and their work back home.



Their fellowships culminated with a series of rousing Closing Seminar events in New York City. The week began with a highly productive meeting of the Global Network Council (GNC) and an exciting evening of interaction between the GNC Fellows and their new EF colleagues from Africa at a dinner in the Central Park Boathouse.

The festivities also featured GNC members welcoming the newest Eisenhower Fellows into the global network in a session at the City College of New York (CCNY) where they briefed the Africa Fellows on specific projects and invited them to participate. Later in the week, underscoring his strong support for the Africa Program, EF's Chairman, General Colin L. Powell, USA (Ret.), met with the Fellows at the Colin Powell School for Civic and Global Leadership at CCNY, where he framed a panel discussion with Fellows and faculty on political, economic and social trends in African society.

The Africa Program marked the beginning of a five-year effort to engage EF's global network and help shape, empower and connect the next generation of African leaders to create the kind of impact that EF was established to advance.

USA Program

EF programmed a diverse group of 10 USA Fellows to 15 countries in Asia, Europe, Latin America, Africa and Oceania in 2016. For the first time, a USA Fellow traveled to Ghana and Nigeria on fellowship, reinforcing EF's commitment to the continent. Fellows' overseas travels exposed them to new thoughts and ideas which they brought back and applied to the service of

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

In the spring, and again in the fall, Susan Eisenhower hosted a roundtable discussion with international Fellows as they passed through Washington, DC on fellowship. In October, this discussion was followed by a substantive panel organized by DC-based Eisenhower Fellows G. Nagesh Rao (USA '16) and Winston Chang (USA '15). The panel of experts discussed "Impact Investing and the Global Entrepreneurial Startup Economy" with Donna Harris, former CEO of 1776; Tien Wong, CEO of Entrepreneur Angel and Lore Systems; and Allie Burns, COO of Village Capital. The panel was well-received by the Africa Fellows and included outside guests and other network Fellows in attendance.

2016 also saw the successful continuation of the USA Program's focus on China. The second cohort of nine USA Fellows travelled throughout China in the fall as part of the Zhi-Xing China Eisenhower Fellowship Program, in partnership with the China Education Association for International Exchange. The Zhi-Xing Program doubled the size of the USA program in 2015, advancing EF's strategic objective to expose more American leaders to the world beyond our shores.



2016 Zhi-Xing China Eisenhower Fellows

In pursuit of this goal, EF expanded its USA network by adding two important hubs in Chicago and San Francisco led by distinguished Steering Committees comprised of local leaders and Eisenhower Fellows. EF selected six new Fellows for 2017 from Chicago and the San Francisco Bay Area to diversify the network.

Global Fellows Network

In 2016 EF intensified its efforts to foster collaboration among its Fellows through the Global Network Council, hosting a dynamic meeting that gathered 30 leading Fellows from 27 countries around the world in New York in November. The third annual GNC meeting focused on strengthening network engagement through regional sub-networks and the planning of a global conference on The Future of Work in Malaga, Spain in September, 2017. The Global Network Council unanimously and enthusiastically supported the creation of a new Eisenhower Youth Network that EF will launch in Malaga. Young people will be selected through our EF country



chapters while employing the standard guidelines for all EF national chapters, drafted in partnership between the GNC and EF staff.

In October, Eisenhower Fellows held a vibrant regional conference in Dublin to discuss the future of Europe after Brexit. Approximately 50 guests were in attendance from 10 European countries.

The Eisenhower Fellows of Indonesia hosted about 90 participants from four continents in Bali at the end of October for the third consecutive regional gathering of leaders from Southeast Asia. EF Day events were also held in Argentina, Brazil, Egypt, Hungary, Japan, Peru, Spain, Sri Lanka and the Philippines. In Madrid, the Spanish Fellows bestowed their First Amendment Award on five distinguished Spanish journalists in recognition of their work in service of freedom of the press. This EF Day event garnered extensive national news coverage across Spain and Latin America.



EF President George de Lama at the EF Day of Fellowship, Spain 2016

Cultivating partnerships, Elevating our profile

EF cultivated new partnerships with other prominent organizations in an effort to extend our strategic footprint and elevate our profile. In addition to our alliances with Pardee RAND and Perry World House at the University of Pennsylvania, EF forged a new content partnership with Knowledge@Wharton, an online platform at the Wharton School of Business. In the fall, Knowledge@Wharton interviewed seven Africa Fellows and shared the conversations with its audience of two million listeners. We advanced our content partnership with the Huffington Post, continuously nourishing the EF-dedicated page within the HuffPost site. This allowed Fellows all over the world to feature their expertise on myriad issues before a large global audience.

In 2016 EF also launched a partnership with Halloran Philanthropies, inviting Fellows around the world to collaborate on projects of impact with the private foundation led by EF Trustee Harry Halloran. In Chicago, the Institute of Politics at the University of Chicago, founded and led by former White House Senior Adviser David Axelrod, hosted Eisenhower Fellows for the third

straight year in 2016, as did the Nieman Foundation for Journalism at Harvard University. In October, we entered into a partnership with Salesforce.org, the San Francisco-based software giant that agreed to donate staff time and technology to build a new EF database in 2017. This will be a crucial tool in connecting our Fellows and helping EF advance its work around the world.

Led by our Fellows, EF has reinforced its reputation as a cutting-edge organization of diverse, dynamic doers by dramatically elevating our public profile, through widely disseminated online blogs, op-ed pieces and other print and digital commentary, including a front-page article in the *Philadelphia Inquirer* about the work of Fellow Ify Malo (Nigeria '15) in seeking justice for the girls kidnaped by the terrorist group Boko Haram in Nigeria.

Continuing a trend started last year, prominent American journalists traveled to Philadelphia to address the Fellows. In the spring, former NPR, PBS NewsHour and Al-Jazeera America correspondent and host Ray Suarez came up from Washington for a talk and reception with our Global Fellows. In the fall, *New York Times* columnist and author Roger Cohen joined our Africa Fellows in a City Hall event hosted by Philadelphia Mayor Jim Kenney and Eisenhower Fellow Cynthia Figueroa (USA '10), the city's Commissioner of Human Services.



**Dr. Deane Marchbein
accepts the Eisenhower
Medal for Leadership and
Service on behalf of Doctors
Without Borders**



**New York Times columnist Roger Cohen and
the 2016 Africa Fellows**

Celebrated NPR and ABC News correspondent Deborah Amos emceed EF's Annual Awards dinner in May, the capstone event for Fellows from our spring Global Program and 2015 USA and Zhi-Xing Programs. General Powell awarded the Dwight D. Eisenhower Medal for Leadership and Service to Doctors Without Borders, for its humanitarian work under dangerous conditions around the world. General Powell honored Shahid Mahmud (Pakistan '01) with the 2016 Distinguished Fellow Award. Trustee Susan Eisenhower, the granddaughter of President Eisenhower, capped an electric evening with an eloquent address about the human heart of EF and her family's pride in how its work carries her grandfather's legacy around the world.

Throughout the year, the amazing leaders of Eisenhower Fellowships were the recipients of widespread media coverage in Spain; prominent interviews by major news organizations in Europe, Africa and Asia; and national television and radio exposure across the United States. This unprecedented exposure and output of EF-generated content and intellectual property was culminated by our publication in November of a hard-cover book in partnership with This I Believe, “Building Bridges, One Leader at a Time. This I Believe: Personal Essays by the Women and Men of Eisenhower Fellowships.” Launched at a well-attended event in November at the City College of New York during the Closing Seminar for our Africa Fellows, this collection of nearly 40 essays by Eisenhower Fellows was driven by the passion and support of EF trustee Keith Wheelock, who sought to honor two organizations created by the vision of his father, EF co-founder Ward Wheelock.



Eisenhower Fellowships Poll of Global Leaders/EF Program Impact Metrics

EF developed a Fellow survey in partnership with Fellow John Della Volpe (USA '08), Director of Polling at the Institute of Politics at Harvard University and Founder and CEO of SocialSphere, Inc., a data and social media analytics company. Della Volpe distributed the poll to the nearly 1,500 active Eisenhower Fellows around the world. Results of the inaugural Eisenhower Fellowships poll of Global Leaders were published in February 2017. Della Volpe donated his talent and services to conduct the poll, tally the results and coordinate the media outreach to promote its release. As part of the same survey, SocialSphere sent our Fellows a detailed questionnaire with metrics to help measure the impact the fellowship has had on the Fellows and their work, as well as their engagement with EF and with the global network.

Development and Administration

Our external auditor reported in the 2016 audit that EF received a clean, unmodified opinion. Our financial statements present fairly, in all material respects, our financial position, in conformity with U.S. generally accepted accounting principles. 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 2017

Over the next four years, our primary strategic objective is to maximize the impact of Eisenhower Fellowships. In 2016, the EF Board of Trustees approved the five-year strategic plan. The 2017 goals are aligned with the goals outlined in the five-year strategic plan.

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 2017

- 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 65 Global and USA Fellows in 2017: 25 in the Spring Global Program, 20 in the fall Middle East/South Asia (MESA) Program, 10 USA Fellows and 10 Zhi Xing USA Fellows.
 - 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 a new 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 and possibly Asia in 2017, and through EF events and collaborations.
 - Building on the strength of our programs in Southeast Asia, where there are nearly 200 active Fellows, organize a new program in Myanmar with the objective of hosting our first Fellows from the country in 2017.
 - Nurture the Africa network and integrate the 2016 Africa Fellows into the global EF network through participation in the Malaga Future of Work conference in September 2017.
 - Raise the profile of the organization by increasing the exposure of the Fellows through public forums and events such as the Future of Work conference in Malaga in September; regular media interviews; news articles in local, national and international media; Fellows blogs; the EF-Huffington Post partnership; 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.
- 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.

- Use the EF global Future of Work conference in Malaga, Spain in September to strengthen the engagement of the global Fellows network and advance concrete projects with real-world impact.



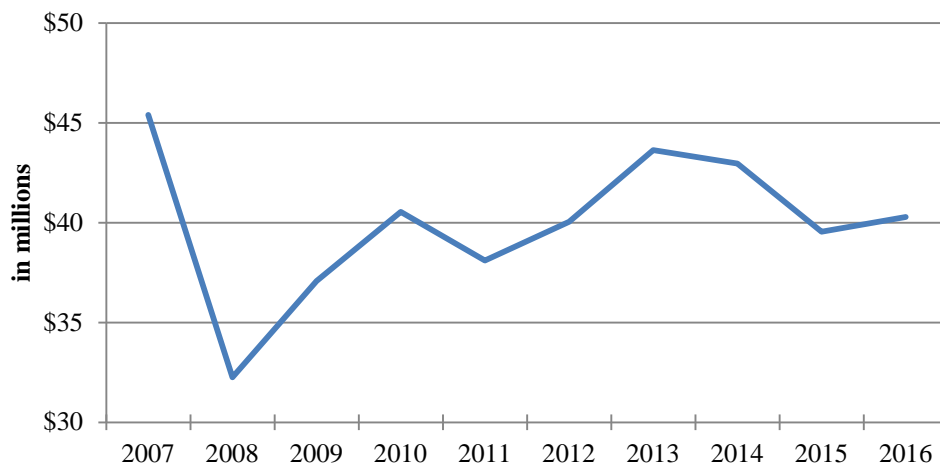
- Create a new Eisenhower Youth Network at the Malaga conference to advance mentoring and build into the organization a youth component that will extend EF's strategic footprint and build on the mentorship component of our programs established in 2015.
 - Advance the Pardee RAND Graduate School-EF partnership to contribute to the advancement of Fellow projects.
- 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, expand the USA Program by introducing new hubs in Los Angeles and Miami.
 - Use the two-year expansion of EF USA hubs to extend our national footprint, while continuing to spread the word about EF and engage new stakeholders.
 - 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 2017 budget that will meet all revenue and expense targets, building upon the work and new contacts EF made in 2016 to advance the outreach to potential new funders to support a robust international and national fellowship program.
 - Present plans for a Capital Campaign to the Executive Committee in March 2017.
 - Identify major new sources of individual gifts and other new funding and increase the revenues from existing donors in order to grow the organization's endowment.
 - Deliver a 2016 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. This includes seeking opportunities for staff members to work on broader projects outside their immediate areas to aid their personal growth and immerse them in the wider work of the organization.
- Provide staff with upgraded data content management system, new laptops and other digital tools to more effectively engage the Global Fellows Network and provide accurate and relevant data to Fellows, trustees and the general public.
- Seek new content and program partnerships with other prominent institutions to enhance and enrich the Eisenhower Fellowship experience.
- Revamp the EF website to present data in a format that is easily accessible to potential Fellows, donors and the general public. This project will take place in two steps, after the database is completed.

Section 4: Projected Budget and Finance

	2016		2017
	Budget	Year End	Budget
Revenue			
Contributions for Operations	3,262	3,264	3,590
Endowment Draw	2,027	1,900	1,856
Total Operating Income	5,289	5,164	5,446
Expenses			
Programs	2,078	1,953	2,129
Personnel	2,608	2,609	2,658
Professional Services	175	181	196
Administration	139	137	140
Building & Maintenance	195	191	219
Special Events	94	93	105
Total Expenses	5,289	5,164	5,446
Endowment Draw %	4.86%	4.54%	4.55%
3 Year Average	4.64%	4.54%	4.88%
Fellow & Spouse Headcounts			
Spring Fellows	24	22	26
Fall Fellows	25	24	20
USA Fellows	10.5	10	10.5
Zhi-Xing Fellows	10	9	10
Total Spouses	24	28	12
Total Fellows	69.5	65	66.5
Total Spouses	24	28	12

Endowment Value



Endowment Return v. Benchmark

