The Next Era for the Harvard Club of Australia

Presentation
March 2018
KEY MESSAGES

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REASON FOR THE REVIEW

HCA is a very good club. In fact, it just won International Harvard Club of the Year for several reasons:

- Array of scholarship/fellowship programs
- Innovative funding through Program for Leaders
- Full calendar of intellectual-cultural-social events
- New mentoring program
- Rebound in membership numbers

However, notwithstanding this success, risks are threatening HCA’s ability to reach its full potential in the future:

- Only half the members participate in the Club, retention is too low, and only 8% of members contribute time to the Club
- The Club’s offering is less appealing to Young and College grads
- HCA’s contributions to Australia are relatively unknown
- Connections back to Harvard are ad hoc
- Economic model is fragile with dwindling dues/donations and variable P4L profits

Therefore, the 50th anniversary of the Menzies Scholarship was seen as an opportune moment to take stock and plot a long-term strategy, covering:

- Mission, vision, value proposition and shared values
- Full scope of Club programs for Members, for Australia and for Harvard
- Operating and economic model
INTERNATIONAL CLUB OF THE YEAR

Fellowship

Membership
- ~500 strong
- Representative mix
- Enrolment campaign
- Chapters

Range of events
25 events/yr, 700+ attendees
- Monday Club
- Sr Leaders Lunch
- Not-for-profit Lunch
- Harvard speakers
- Student singing troupe
- Cultural outings
- Canberra weekend
- Student farewell
- Networking
- Social gatherings
- Pres Christmas Drinks
- AGM

Mentoring program
- Young grads
- Growing

Philanthropy

Scholarships & fellowships
$4.4m awarded to 228 recipients
- Menzies 50 years!
- AHF medical researchers
- Not-for-profit leaders
- Public servants
- Indigenous students
- H.S. Principals
- Members P4L

Program for Leaders (P4L)
- HBS faculty
- 20 years
- 1500 participants
- >$3m raised

Endowment
- ANU, HCAF, HCAP
- $4m balance

Local courses
- Non-profit workshop
- Negotiation skills
HCA HIGHLY REPRESENTATIVE BY SCHOOL

Proportion of All Harvard alumni by school
Sample size = 2178

Proportion of current members by school
Sample size = 553

Sample size: All Harvard alumni = 2178, current members = 553
SOURCE: HCA Database- excludes HCAV
HCA HIGHLY REPRESENTATIVE BY GENDER TOO

**Gender mix by schools**
% of current members

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<tr>
<th></th>
<th>Alumni</th>
<th>Current members</th>
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<tbody>
<tr>
<td></td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Women</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Men</td>
<td></td>
<td></td>
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</tbody>
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**Alumni**

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<thead>
<tr>
<th>School</th>
<th>Women</th>
<th>Men</th>
</tr>
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<tbody>
<tr>
<td>College</td>
<td>40%</td>
<td>60%</td>
</tr>
<tr>
<td>GSAS</td>
<td>27%</td>
<td>73%</td>
</tr>
<tr>
<td>Law</td>
<td>44%</td>
<td>56%</td>
</tr>
<tr>
<td>HKS</td>
<td>31%</td>
<td>69%</td>
</tr>
<tr>
<td>HBS - MBA</td>
<td>21%</td>
<td>79%</td>
</tr>
<tr>
<td>HBS - Other</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>HMS/ HSPH</td>
<td>39%</td>
<td>61%</td>
</tr>
<tr>
<td>Education</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Design</td>
<td>32%</td>
<td>68%</td>
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<td>Other Schools</td>
<td>39%</td>
<td>61%</td>
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**Current members**

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<tr>
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<td>16%</td>
<td>84%</td>
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<td>HMS/ HSPH</td>
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<td>52%</td>
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<td>42%</td>
<td>58%</td>
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**SOURCE:** HCA Database- excludes HCAV
BUT MEMBERSHIP AND PARTICIPATION BELOW FULL POTENTIAL

**Total Alumni**: 2178

- **Member at Some Point (MSP)**: 1357
  - **Current Members**: 553
    - **Active and above**: 97
      - **Participators and above**: 263
        - **Contributors**: 45
  - **Enrolment Rate**: 62%
  - **Retention Rate**: 41%
  - **Participation Rate**: 48%
  - **Membership Rate**: 25%
  - **Contribution Rate**: 8%
  - **Loyalty Rate**: 18%

**SOURCE**: HCA data (excl. HCAV)
PHILANTHROPY GOOD SELECTION BUT POOR ACQUITTAL

SOURCE: Council survey; HCA team analysis

MENZIES EXAMPLE
- 50-50 gender & close match to school mix
- But <33% members, of whom <25% active

Today's Performance

Implied Importance

- Funding
- Selection
- Oversight
- Audience
- Constitution
- Publicity
- Review
- Acquittal

Not on radar, taken for granted
Important and well done
Important but poorly done

0%
12.5%
25%

0.75
1.50
2.25
3.00
HOLISTIC SCOPE OF REVIEW

Why we exist

For Harvard
- Brand reputation
- Student apps
- Student assistance
- Latest news
- Etc.

For Members
- Events/speakers
- Networking/social
- Career help
- Personal dev
- Etc.

For Australia
- Philanthropy
- Academic fellows
- Community service
- Local courses
- Etc.

What we do

Operating model
- Structure
- Governance, mgt practices
- Capabilities, support, tools
- Values, behaviors
- Economics

Shared aspirations
- Mission
- Vision
- Goals & impact
- Value prop & benefits
- Values

How we work
COMPREHENSIVE REVIEW PROCESS

12 months duration

7 Council evening workshops
20 steerco meetings
1 Deputy Provost workshop

7 HCA core team members
150 days of McKinsey support

360 degree input
50 1-1 interviews
4 focus groups

58 on-line survey responses
7 analytical models
12 peer club profiles

172 ideas considered
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NEW 3-PART HCA MISSION

Mission
To make a difference as a Harvard community in Australia

For Harvard
To enhance Harvard's reputation in Australia & vice versa

For Members
To extend the unique Harvard experience through life’s journey

For Australia
To make a worthwhile contribution to Australian society
MEMBER VALUE PROPOSITION

“People like to affiliate with organizations which are influential. Harvard brand has ‘impact’.”

“Segment members according to needs not just demographics. Think about HCA’s offering along stages of life journey. “

“A warm welcome from current members is key to motivating new members to become active and to stay.”
IMPORTANCE OF WARM WELCOME

- 46% of members never attended an event
- 67% of members attended at least 1 event
- 75% of members attended at least 2 events

Sample size = 398 (Both lapsed and current members whom have joined from 2010 to 2016)

SOURCE: HCA Database- excludes HCAV
# NEW HCA CORE VALUES

## New set of HCA core values

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<th>Description</th>
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<td><strong>Inclusiveness.</strong></td>
<td><em>Harvard family DownUnder</em> Camaraderie as the ‘heart of the Club’; warm and welcoming, caring, friendly and fun; diverse (gender, age, school, geography); opportunities for all to contribute, SIGs; supportive of each other &amp; others, collaborative</td>
</tr>
<tr>
<td><strong>Empowerment.</strong></td>
<td><em>Club full of leaders</em> Initiative encouraged, innovation backed, accountability expected, governance supportive not controlling, contributions recognised</td>
</tr>
<tr>
<td><strong>Excellence.</strong></td>
<td><em>High quality in everything</em> High quality people, scholars, events, speakers, programs, reputation, communications; intellectually and socially stimulating; personal development; focus on impact, learning, improving; good value for efforts</td>
</tr>
<tr>
<td><strong>Integrity.</strong></td>
<td><em>‘How’ not just ‘what’</em> Honest in all dealings; transparent to all; independent and non-political; humble in our accomplishments</td>
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<td><strong>Generosity.</strong></td>
<td><em>Giving beats receiving</em> Philanthropy as the ‘soul of the Club’; real volunteer spirit; giving back to Harvard, Australia and the Club; finding your own way to give back</td>
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STRATEGY ON A PAGE

For Harvard
- To enhance Harvard’s reputation in Australia & vice versa
  - Promote H to best & brightest
  - Build relations w H students
  - Forge better links to H entities
  - Get more news & profs from H
  - Support dev of H office in Oz

For Members
- To extend the unique H experience through life’s journey
  - Create ‘associate’ members
  - Form SIGs, extend Chapters
  - Round out event calendar
  - Provide prof dev opportunities
  - Offer card w prem privileges

For Australia
- To make a worthwhile contribution to Australian society
  - Introduce more scholarships
  - Focus on better acquittal & PR
  - Tap new fundraising sources
  - Offer more local H courses
  - Engage in community service

More awareness, more apps and more Aussies attending H
More members, more balance, more participation, more satis
More organizations benefitting from the H factor
MANY EXCITING NEW IDEAS

DINNER CLUB
SUMMER INTERNSHIPS
PL PLAN-ON-A-PAGE
STUDENTS & NEW GRADS
FREE BOOK
PRIZE
SIGs
MORE HARVARD PROFS
HIGH SCHOOL PRINCIPAL COURSE IN OZ
CAMARADERIE
HARVARD OFFICE IN OZ
SOMETHING FOR EVERYONE
MAKE A DIFF FOR MEMBERS FOR HARVARD FOR AUSTRALIA FOR CLUB
MORE HARVARD NEWS
ASSOCIATE MEMBERS
BOARD OBSERVER PROGRAM
ADVANCED LEADERSHIP INITIATIVE
APPS SEMINARS
CHAPTER REMIT
NEW IT SYSTEM
ACQUITTAL
MEMBERSHIP CARD
PUBLICITY
ANZ CLUB
BOARD, VPs, MISSION TEAMS, COUNCIL OF PLs
DONOR & SCHOLAR LUNCH
MEMBERSHIP FUNNEL
COMMUNITY PARTNERS
MASTER CLASSES
CAMPUS EVENTS
CORROBOREEE
NOMS COM AWARD COM
$250K FUNDRAISING CAMPAIGN
SPRIT OF HCA AWARD
TIERED OFFER
SOMETHING FOR HARVARD FOR AUSTRALIA FOR CLUB
HARVARD OFFICE IN OZ
COMMENTS ON A PAGE
EXPANDED MEMBERSHIP OFFER

Recognition

**Benefactor**
- Donation levels

**Crimson**
- 25 years

**Life**
- Bestowed

Members

**Students**
- Free

**New grads**
- 1st year free

**Today**
- Degrees
- 6 weeks
- Faculty/staff
- Scholars

**Short courses**
- 1 week residential course at Harvard

**Local courses**
- Harvard-taught courses in Australia

All alumni

**Non-members**
- Newsletter

**Overseas Aussies**
- Newsletter
NATIONAL SPECIAL INTEREST GROUPS BIG POTENTIAL

Long list of possibilities
- Harvard College
- Young grads
- Seniors
- Women
- Non-Sydney locations
- Public sector
- Not for profits
- Arts & culture
- Fine food & wine
- Innovation & Entrepreneurship
- Education
- Health & Life Sciences
- Menzies scholars
- Social equality/indigenous
- Environment
- Infrastructure
- Economic development
- Financial services
- Global politics, security
- Running or walking
- Sports
- Book club
- Community service
- Leadership
- Religion
- GLBTG
- Asia culture/affairs
- Ethnic groups
- Immigration, refugees
- Mental health
- Disability sector
- Globalisation, trade
- Etc

Criteria
- Member gap, critical mass
- Expressed interest
- Programs, events, school links

In discussion
- Young grads
- Women
- Harvard College
- Education
- Health & Life Sciences
- Public sector
- Innovation
- Arts & Culture
- Not-for-profits, community svc
- Public affairs

Any SIG idea welcomed -- Have a go!
# APPETITE FOR MORE EVENT VARIETY AND PROF DEVELOPMENT

% of respondents on-line survey

<table>
<thead>
<tr>
<th>Themes</th>
<th>Why join?</th>
<th>What like most?</th>
<th>What interests?</th>
<th>Why leave?</th>
<th>How re-engage?</th>
</tr>
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<tbody>
<tr>
<td>Overall offer</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>47</td>
<td>18</td>
</tr>
<tr>
<td>Harvard connection</td>
<td>23</td>
<td>15</td>
<td>27</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Fellowship/events</td>
<td>53</td>
<td>70</td>
<td>25</td>
<td>20</td>
<td>42</td>
</tr>
<tr>
<td>Professional development</td>
<td>19</td>
<td>15</td>
<td>19</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Contribute to Australia</td>
<td>6</td>
<td>0</td>
<td>18</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>Giving back</td>
<td>2</td>
<td>0</td>
<td>10</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Membership mix</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>23</td>
<td>12</td>
</tr>
<tr>
<td>Engagement/Comms</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Fees</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>5</td>
<td>5</td>
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SOURCE: On-line survey of lapsed and inactive members
PLAYING A BIGGER ROLE FOR HARVARD

Pre Harvard
- More publicity
- Book Prize
- Overseas study fairs
- Summer School
- Application seminars
- Candidate interviews
- Offeree cultivation
- Scholarship programs
- Farewell event

At Harvard
- Free HCA membership
- ANZ Club links
- On-campus events
- Reunion weekend cocktails w HCA leaders
- Australia Day BBQ
- Summer internships
- Summer break event back in Australia
- Hosting of touring students
- Chair of Australian Studies links

Post Harvard
- Free 1st year HCA
- Job search support, members database
- Networking, buddies
- Harvard news, research, publications, school websites
- HAA travel & other programs
- Visiting professors
- Harvard on-line courses curated
- Harvard taught courses in Australia
EXTENDING IMPACT FOR AUSTRALIA

Past Philanthropy

Scholarships & fellowships
$4.4m awarded to 228 recipients
- Menzies 50 years!
- AHF medical researchers
- Not-for-profit leaders
- Public servants
- Indigenous students
- H.S. Principals
- Members P4L

Program for Leaders (P4L)
- HBS faculty
- 20 years
- 1500 participants
- >$3m raised

Endowment
- ANU, HCAF, HCAP
- $4m balance

Local courses
- Non-profit workshop
- Negotiation skills

Future Philanthropy

More scholarships & fellowships
+ Summer internships
+ New Venture Competition
+ Advanced Leadership Initiative
+ War veterans

Better payback
+ Publicity
+ Acquittal

More fundraising
+ $250k campaign
+ Partnerships

More local courses
+ H.S. Principals
+ Health Sciences
+ Others?

New community service
+ Community Partners
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NEW 6-PERSON BOARD TO GOVERN THE CLUB

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<th>VP for Harvard</th>
<th>VP for Members</th>
<th>VP for Australia</th>
<th>VP for Club</th>
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<tr>
<td>Geographies +SA, &gt;events</td>
<td>HAA rep, HBS alumni rep</td>
<td>Membership: offer, card with privileges, booklet, enrolment, induction, retention.</td>
<td>HCAP Board, governance</td>
<td>Treasurer, finance, reporting, governance, compliance</td>
</tr>
<tr>
<td>SIGs full mission</td>
<td>US-centric: Chair of A Studies H Uni, schools, profs, news, student rels</td>
<td>Events: H speakers, intellectual, cultural, social, celebratory, chapters, SIGs</td>
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<td>Local office development, links</td>
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<td></td>
<td></td>
<td>Comms: newsletter, content, social media, PR strategy, Harvard stories</td>
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For Subs (go to market)

For Harvard

For Members <<< (programs) >>>

For Australia >>>>>>>>>>>>

For Club (support enablers)
NEW DISTRIBUTED PROGRAM LEADER (PL) MODEL WILL BE KEY

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<td>Council of all Program Leaders (PLs)</td>
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<tr>
<td>Current PLs New PLs</td>
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### Many Exciting Program Leader (PL) Roles

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#### VP for Subs
- Chapters
  - Qld
  - ACT
  - WA
  - SA
- SIGs
  - Young
  - Health
  - Education
  - Public Affairs
  - Not for Profits
  - Harvard College
- Affiliates
  - HCAV
  - HBS NZ

#### VP for Harvard
- Alumni Assoc liaisons
  - HAA
  - HBS
- Harvard liaisons (in Aus)
  - H College
  - Grad schools
- Student liaisons (on campus)
  - H College
  - HBS ANZ Club
- Other
  - Panel rep on Chair of Australian Studies
  - Book Prize
  - Harvard news, student and professor data

#### VP for Members
- Membership
  - Enrolment
  - HCA offer/booklet
  - Membership card
- Events
  - Monday Club
  - Leaders Lunch
  - Speaker program including H profs
  - Major and social events
  - Arts, culture, student performances
  - Corroboree
  - Dinner Club
- Professional dev
  - Buddy program
  - Mentoring
  - Masterclasses

#### VP for Australia
- HCAP
- Scholarships
  - Menzies
  - Aus-H Fellowship
  - Wolfensohn Public Servants
  - Non-profit leaders
  - Roberta Sykes indigenous
  - HS Principals
  - Clive Gard P4L
- Fundraising
  - Campaign
  - Major donors
- Local courses
  - Program for Leaders
  - Non-profit
  - HS Principals
- Community Svc
  - Indigenous
  - Community Partners

#### VP for Club
- Governance
  - Finance
  - Planning
- Communications
  - Strategy & PR
  - News content
  - Newsletter
  - Social media
- Support
  - Technology platform
OP MODEL ON A PAGE

**Structure**
- Board governance (Pres+5VPs)
- Mission teams (x5)
- Council of all Program Leaders
- Noms Com, Administrator
- HCA Philanthropy (HCAP)

**Capabilities**
- Skill injections
- Partnerships
- Systems, databases, tools, IP
- Digital collaboration platform
- More admin support

**Processes**
- Planning incl PL plan-on-a-page
- Oversight incl meeting cycle
- Stewardship incl Constitution
- Organisation & succession
- Communications & calendar

**Values**
- Inclusiveness
- Empowerment
- Excellence
- Integrity
- Generosity

Volunteer professionalism
Making a difference
### KEY MESSAGES

<table>
<thead>
<tr>
<th>Category</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context</td>
<td>A good to great story</td>
</tr>
<tr>
<td>Mission</td>
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</tr>
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</tr>
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<td>Op model</td>
<td>A distributed leadership model</td>
</tr>
<tr>
<td>Implementation</td>
<td>Many ways to get involved</td>
</tr>
</tbody>
</table>
STAGED IMPLEMENTATION

1H ‘18

- SIG pilots (eg Young)
- More SIGs
- Chapters with broader remit
- SIGs with broader remit
- More & better SIGs

2H ‘18

- Curated H news
- Students free
- On campus events
- Summer interns
- Book Prize
- Apps seminars
- Harvard office in Oz

2019

- New offer
- Alumni circles
- Mentoring scale-up
- Associates
- Masterclasses
- Events variety
- More H pros
- Career help
- Member card
- Continued innovation

Beyond

- Fundraising, donors
- HS Principal course
- Philanthropy PR
- Scholarship best practices, acquittal
- Innovating P4L
- Another local H course
- New scholarships
- Community Partners

- New structure
- New op processes
- Values
- New IT platform
- Rev Constitution
- Varied coms
- Codifying tools/IP
- New capabilities
LOTS OF WAYS TO GET INVOLVED

1. Give us feedback on the new strategy and Op Model – we want to get it right for you

2. Spread the word to other Harvard alums

3. Attend an event or masterclass – and bring a fellow alum

4. Get involved in a SIG…. or start one!

5. Take on a PL role or contribute to a program

6. Make a donation to the Club
PRIORITY PL ROLES TO FILL – KEY CONTACTS LISTED

Noms Com
Justin Greiner
Elizabeth Carr
Lisa George
Sarah Tesar
David Pumphrey

President
Justin Greiner

Admin
Suzie Ruse

VP for Subs
Elizabeth Carr (Acting)

VP for Harvard
Peter Hasko (Acting)

VP for Members
Charlie Graham (Acting)

VP for Australia
Chris Smith (Acting)

VP for Club
Tom Saar (Acting)

PL roles…
- Public Affairs SIG
- Not-for-profit SIG
- Harvard College SIG
- Other SIGs if interested

PL roles…
- Graduate schools liaison
- Panel rep on Chair of Australian Studies
- Book Prize
- Harvard news, student and professor data

PL roles…
- Speaker program
- Major and social events
- Masterclasses
- Buddy program
- Membership card
- HCA booklet

PL roles…
- Roberta Sykes scholarship
- Fundraising campaign
- Major donors campaign
- Indigenous program

PL roles…
- Technology platform
## KEY MESSAGES

<table>
<thead>
<tr>
<th>Context</th>
<th>A good to great story</th>
</tr>
</thead>
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<tr>
<td>Mission</td>
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<td>A distributed leadership model</td>
</tr>
<tr>
<td>Implementation</td>
<td>Many ways to get involved</td>
</tr>
</tbody>
</table>
### WHY MEMBERS LAPSED OR INACTIVE

Which factors explain why you are an inactive member of HCA or let your membership lapse?

<table>
<thead>
<tr>
<th>Theme</th>
<th>Reason for leaving</th>
<th>Percent respondents (n=58)</th>
<th>Theme Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall offer</td>
<td>Too busy with other obligations</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Not enough on offer</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td></td>
<td>I live away from major city</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td></td>
<td>I get similar benefits elsewhere</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td></td>
<td>I see it as 'making a donation'</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Harvard connection</td>
<td>I choose to affiliate directly with Harvard</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Not interested in maintaining affiliation</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Fellowship/ events</td>
<td>Events not of interest</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Events held at inconvenient times</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Membership mix</td>
<td>Too few like-minded alums</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Too few alums in my age group</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Too few women</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Engagemnt/ Comms</td>
<td>Ineffective communication</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Fees</td>
<td>Event costs too high</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Membership fee too high</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>
## EXPANDED MEMBERSHIP OFFER GIVES & GETS

<table>
<thead>
<tr>
<th>Category</th>
<th>What you get</th>
<th>What you pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Quarterly newsletter (join now, donate now button)</td>
<td>Free</td>
</tr>
<tr>
<td></td>
<td>HAA offers (eg global networking nite, travel tours)</td>
<td></td>
</tr>
<tr>
<td>Student &amp; grads</td>
<td><strong>Full member</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Degree holder</td>
<td>$100/year</td>
</tr>
<tr>
<td></td>
<td>▪ 6wk res program</td>
<td>$275/3yr</td>
</tr>
<tr>
<td></td>
<td>▪ Faculty &amp; staff</td>
<td>+</td>
</tr>
<tr>
<td></td>
<td>▪ Scholar/fellow</td>
<td>Event charge</td>
</tr>
<tr>
<td></td>
<td>Card w privileges; reciprocal Club rights</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Events, invite guest, SIGs, H news/links</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Networking, masterclasses, mentoring, database</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nominate for NFP award, attend P4L at discount</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Give back, follow passion, sit on selection panels,</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>New grad</strong></td>
<td>Free1&lt;sup&gt;st&lt;/sup&gt; year</td>
</tr>
<tr>
<td></td>
<td>▪ 1&lt;sup&gt;st&lt;/sup&gt; year back</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Crimson buddy assigned</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Welcome to Australia event</td>
<td></td>
</tr>
<tr>
<td>Today</td>
<td><strong>Full member</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Degree holder</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ 6wk res program</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Faculty &amp; staff</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Scholar/fellow</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Card, w privileges; reciprocal Club rights</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Events, invite guest, SIGs, H news/links</td>
<td></td>
</tr>
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<td></td>
<td>Networking, masterclasses, mentoring, database</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nominate for NFP award, attend P4L at discount</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Give back, follow passion, sit on selection panels,</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Short courses</strong></td>
<td>Same as full member</td>
</tr>
<tr>
<td></td>
<td>▪ 1wk res program</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Very similar to full member, except:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Ineligible for Board &amp; sitting on selection panels</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Ineligible for Clive Gard scholarship, P4L discount</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- No reciprocal rights to overseas Clubs/events</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Local courses</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ HCA P4L &amp; other course</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Benefactor</strong></td>
<td>Normal fee</td>
</tr>
<tr>
<td></td>
<td>▪ Donation levels</td>
<td>Donation</td>
</tr>
<tr>
<td></td>
<td>(100, 250, 500, 1k, 5k)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Annual recognition event, name in annual report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Appreciation lunch for major donors w/ scholars</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preference for scholar selection panels</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Crimson</strong></td>
<td>Normal fee</td>
</tr>
<tr>
<td></td>
<td>▪ 25 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Buddy new grads, welcome event</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preference for scholar selection panels</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Annual recognition event, Annual report</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Life member</strong></td>
<td>Free dues, free events</td>
</tr>
<tr>
<td></td>
<td>▪ Bestowed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>‘This is your life’ ceremony</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Recognition</strong></td>
<td></td>
</tr>
</tbody>
</table>
PHILANTHROPY PROGRAM ASSESSMENT

SOURCE: Council assessment survey of philanthropy programs
MENZIES PROFILE FAIRLY REPRESENTATIVE

### Menzies by gender

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>HCA membership</td>
<td>73%</td>
<td>27%</td>
</tr>
<tr>
<td>All Menzies scholars</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>Menzies last 20 year</td>
<td>51%</td>
<td>49%</td>
</tr>
</tbody>
</table>

### Menzies by school

<table>
<thead>
<tr>
<th></th>
<th>HCA w/o HC &amp; Exec Ed</th>
<th>All Menzies scholars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Design</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Education</td>
<td>11%</td>
<td>20%</td>
</tr>
<tr>
<td>HMS/HSPH</td>
<td>11%</td>
<td>17%</td>
</tr>
<tr>
<td>Law</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>GSAS</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>HKS</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>MBA</td>
<td>30%</td>
<td>22%</td>
</tr>
</tbody>
</table>

**SOURCE:** HCA team analysis
MENZIES SCHOLAR POOR ACQUITTAL

Activity level of all Menzies scholars

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Lost</th>
<th>Deceased</th>
<th>Victoria</th>
<th>Current students</th>
<th>Overseas</th>
<th>Potential members 43%</th>
<th>Non-members 20%</th>
<th>Members</th>
<th>Inactive</th>
<th>Active</th>
<th>Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>84</td>
<td>14</td>
<td>1</td>
<td>9</td>
<td>6</td>
<td>18</td>
<td>36</td>
<td>19</td>
<td>17</td>
<td>13</td>
<td></td>
<td>3</td>
</tr>
</tbody>
</table>

100%
CONTRIBUTORS TIME COMMITMENT

Strategic projects (S=0 of 140)
- Education initiative: 140

Governance (S=168 of 733)
- Council Board mtgs: 298
- Council Board prep: 179
- HCA foundation: 20
- Accounting: 108
- Website/database: 106
- Training: 22

Giving back (S=0 of 40)
- Donors: 14
- Partners: 26

Contributing to Australia (S=40 of 489)
- Program org.: 273
- Panels: 185
- Publicity: 27
- AHF links: 4

100% = 4163 hrs (520 days)
- Governance (733)
- Giving back (40)
- Contributing to Australia (489)
- Leadership program (615)
- Fellowship (1514)
- Harvard connection (628)
- Strategic projects (140)

Harvard connection (S=26 of 628)
- Harvard: 244
- HAA: 84
- HAA events: 197
- Comms clubs: 24
- HC apps: 79

Fellowship (S=470 of 1514)
- Events: 543
- Recruiting: 136
- On-boarding: 64
- Newsletters: 87
- Hosting visitors: 120
- Student groups: 52
- Email comms: 202
- Mentoring: 224
- Career advice: 86

Leadership program (S=400 of 615)
- Suzie: 400
- Melinda: 192
- Others: 23

SOURCE: Time commitment survey
COUNCIL MEETINGS TIME USAGE

Past Council meeting time allocation

<table>
<thead>
<tr>
<th>Category</th>
<th>Time Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Members</td>
<td>36%</td>
</tr>
<tr>
<td>For Australia</td>
<td>8%</td>
</tr>
<tr>
<td>For Subs</td>
<td>10%</td>
</tr>
<tr>
<td>For Harvard</td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
</tr>
<tr>
<td></td>
<td>100%</td>
</tr>
</tbody>
</table>

- **Meetings consistent:** Bi-monthly, 90min long, on-time, minutes
- **Attended by 2/3rds.**
- **Largely a ‘For Members’ meeting, incl Chapter events.** Could be delegated?
- **HCAP & PLs successfully reduced Scholarship time to just key issues.**
- **Strategy 2% until 2017 when jumped to 32%. Crowding out Chapters and Events.**
- **Only 6% on Financials**
- **No time on ‘For Harvard’**

SOURCE: Council agendas and minutes analysis