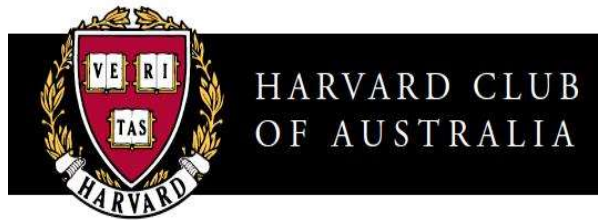


The Next Era for the Harvard Club of Australia



Presentation
March 2018

KEY MESSAGES

Context	A good to great story
Mission	Bolder ambitions for making a difference
Strategy	New ideas for Members, for Australia, for Harvard
Op model	A distributed leadership model
Implementation	Many ways to get involved

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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

International Harvard Club of the Year Award



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

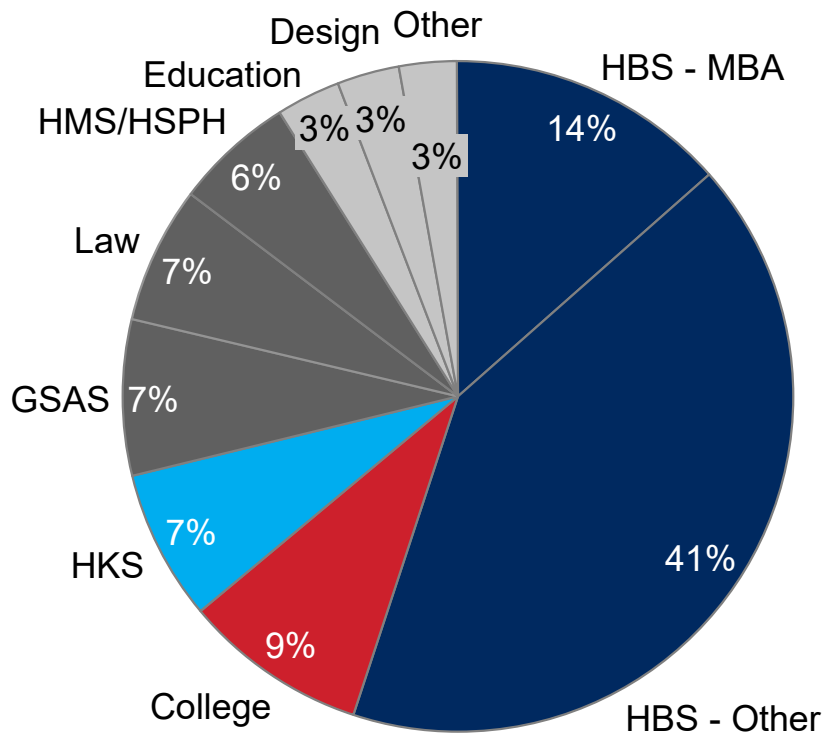
Local courses

- Non-profit workshop
- Negotiation skills

HCA HIGHLY REPRESENTATIVE BY SCHOOL

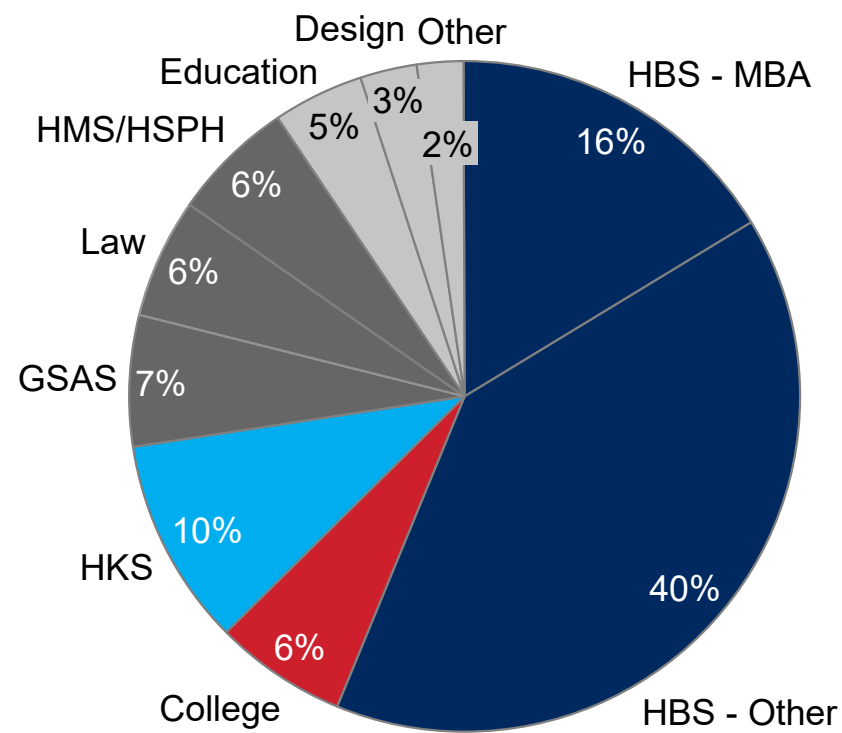
Proportion of All Harvard alumni by school

Sample size = 2178



Proportion of current members by school

Sample size = 553

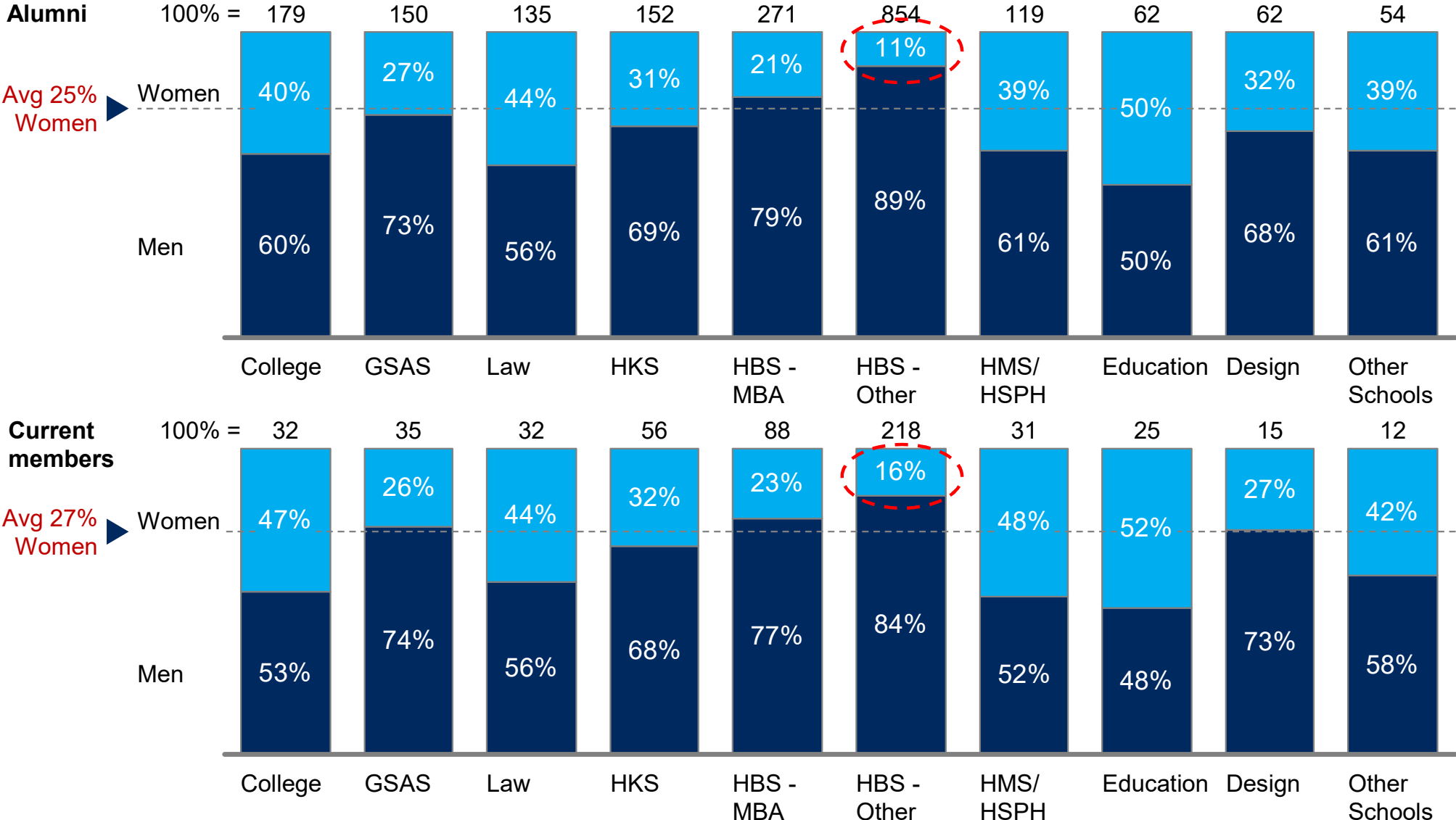


Sample size: All Harvard alumni = 2178, current members = 553
 SOURCE: HCA Database- excludes HCAV

HCA HIGHLY REPRESENTATIVE BY GENDER TOO

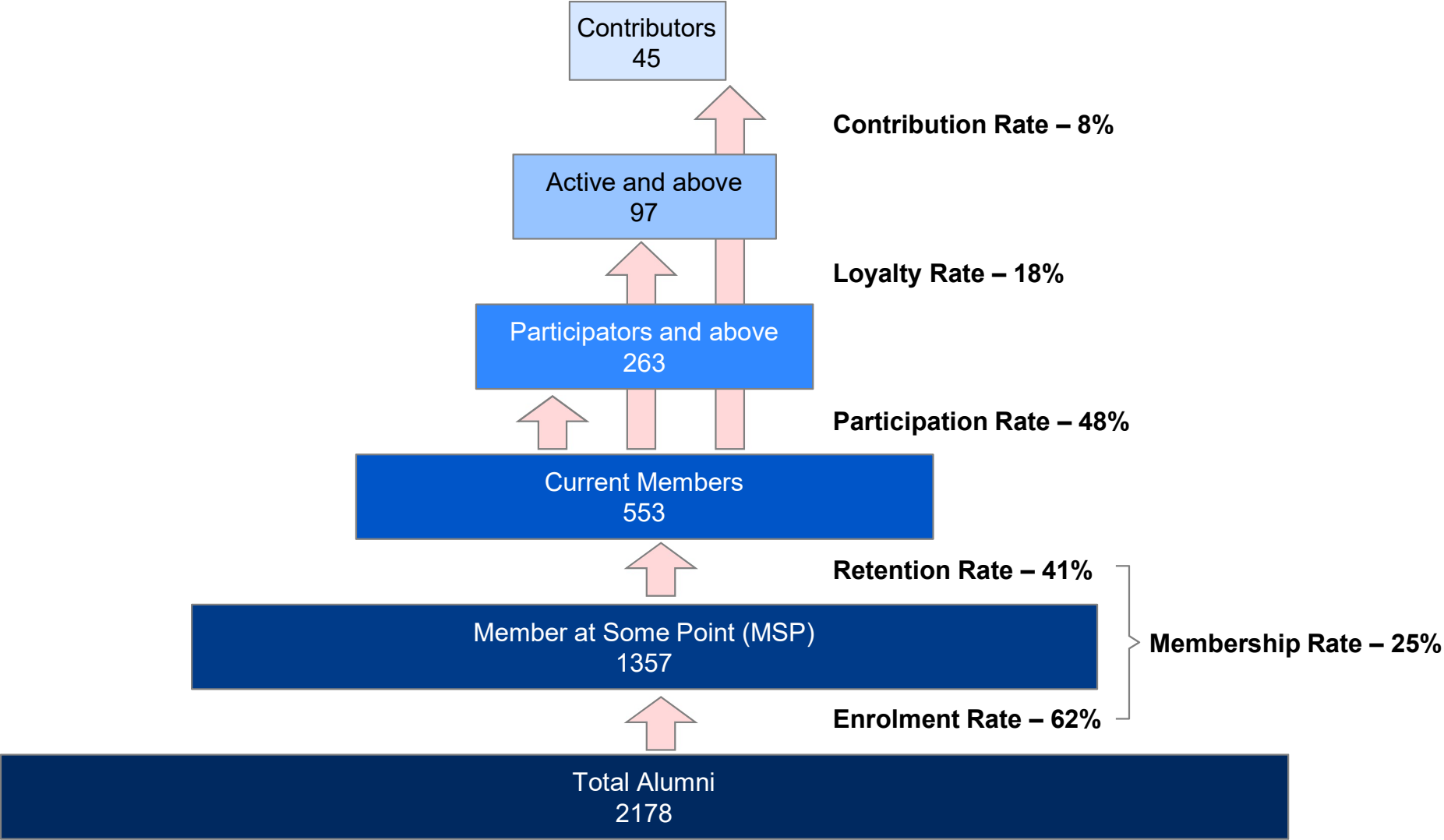
Gender mix by schools

% of current members



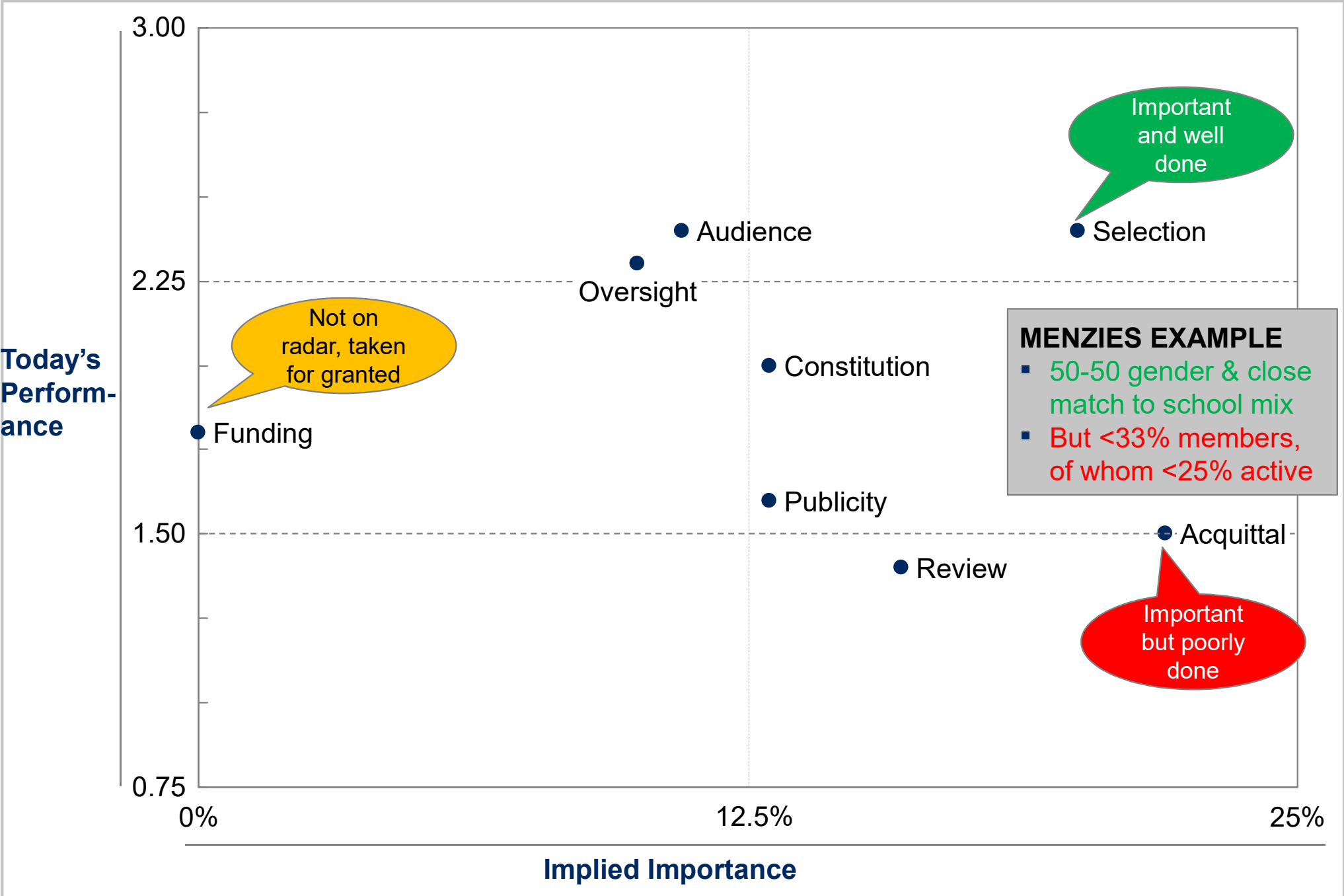
SOURCE: HCA Database- excludes HCAV

BUT MEMBERSHIP AND PARTICIPATION BELOW FULL POTENTIAL



SOURCE: HCA data (excl. HCAV)

PHILANTHROPY GOOD SELECTION BUT POOR ACQUITTAL



SOURCE: Council survey; HCA team analysis

HOLISTIC SCOPE OF REVIEW

Why we exist

Shared aspirations

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

What we do

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.

How we work

Operating model

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

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

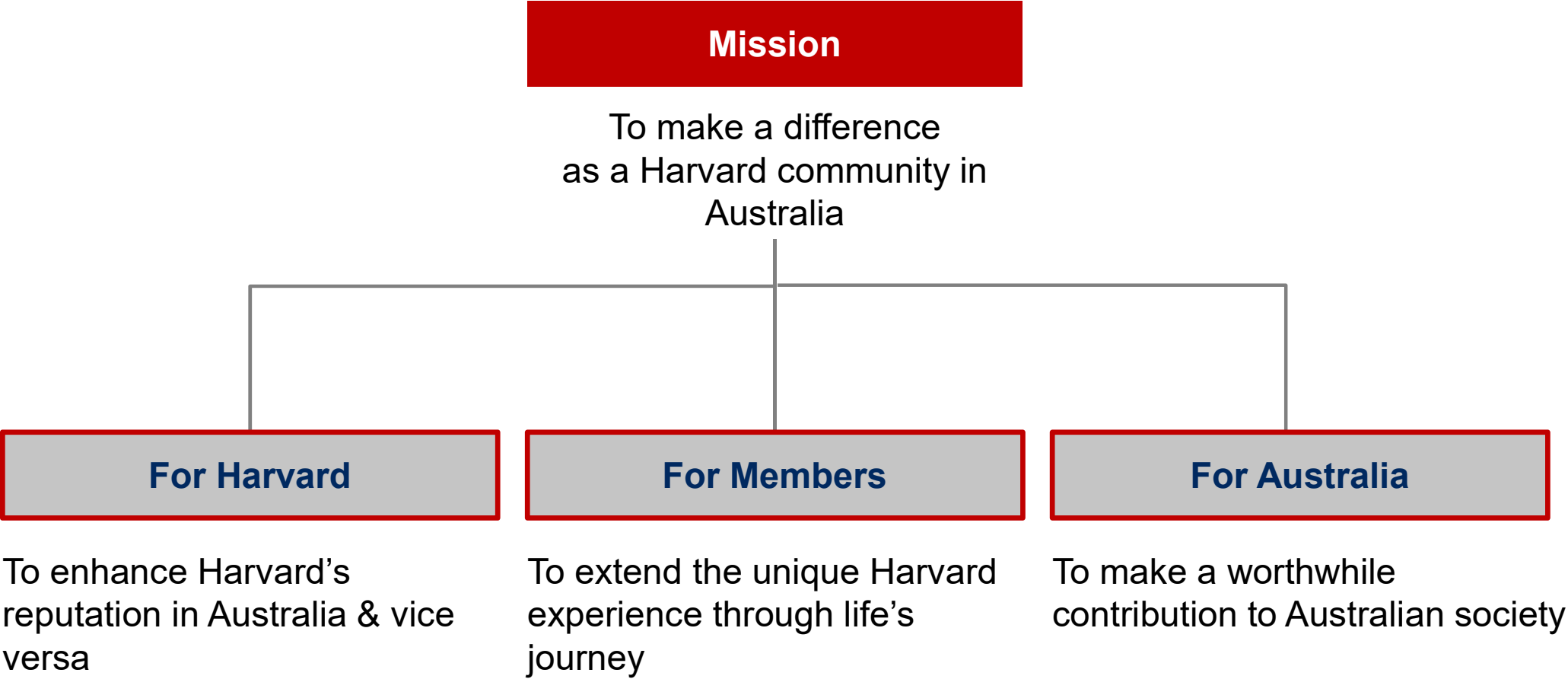
12 peer club profiles

172 ideas considered

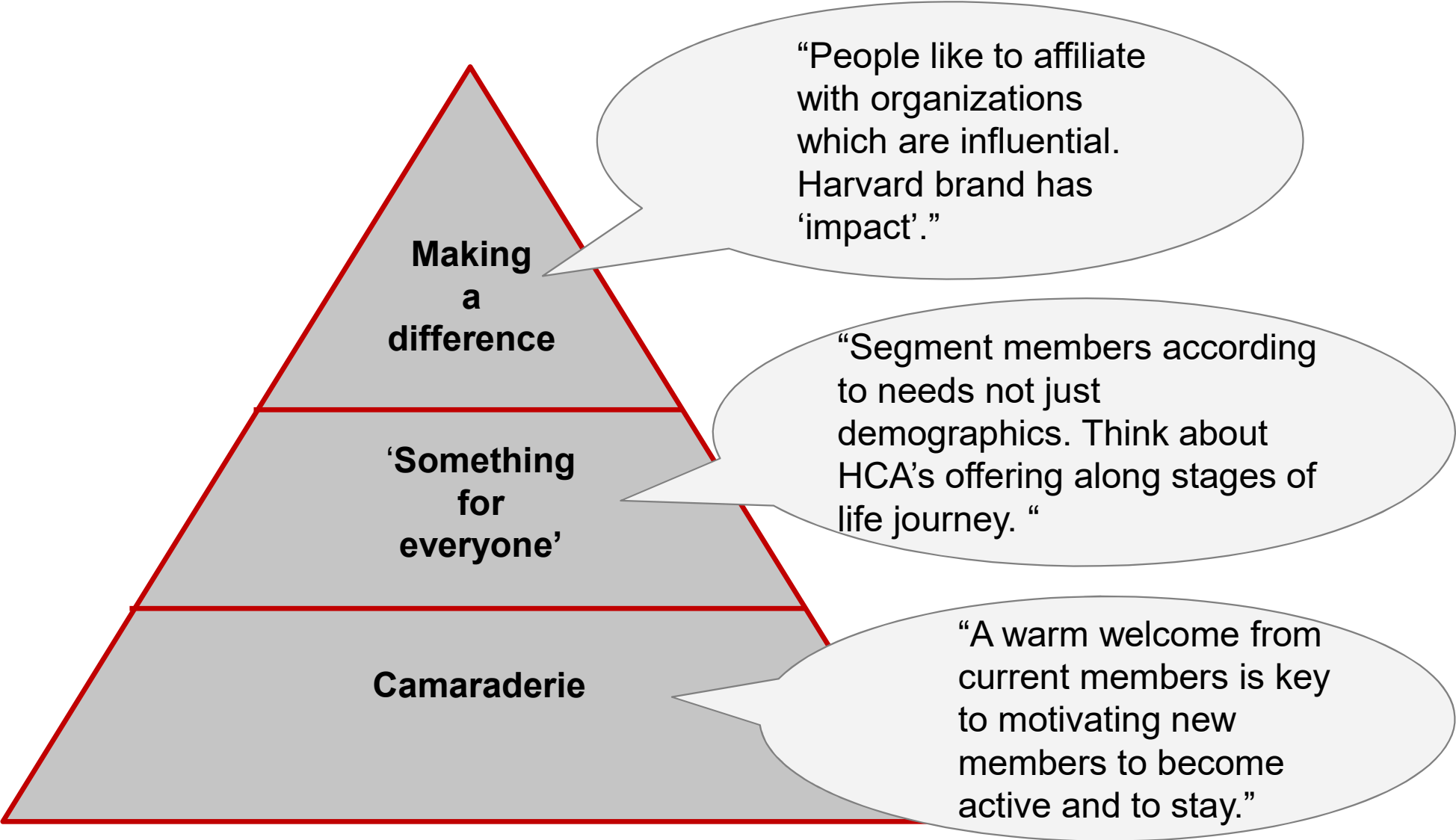
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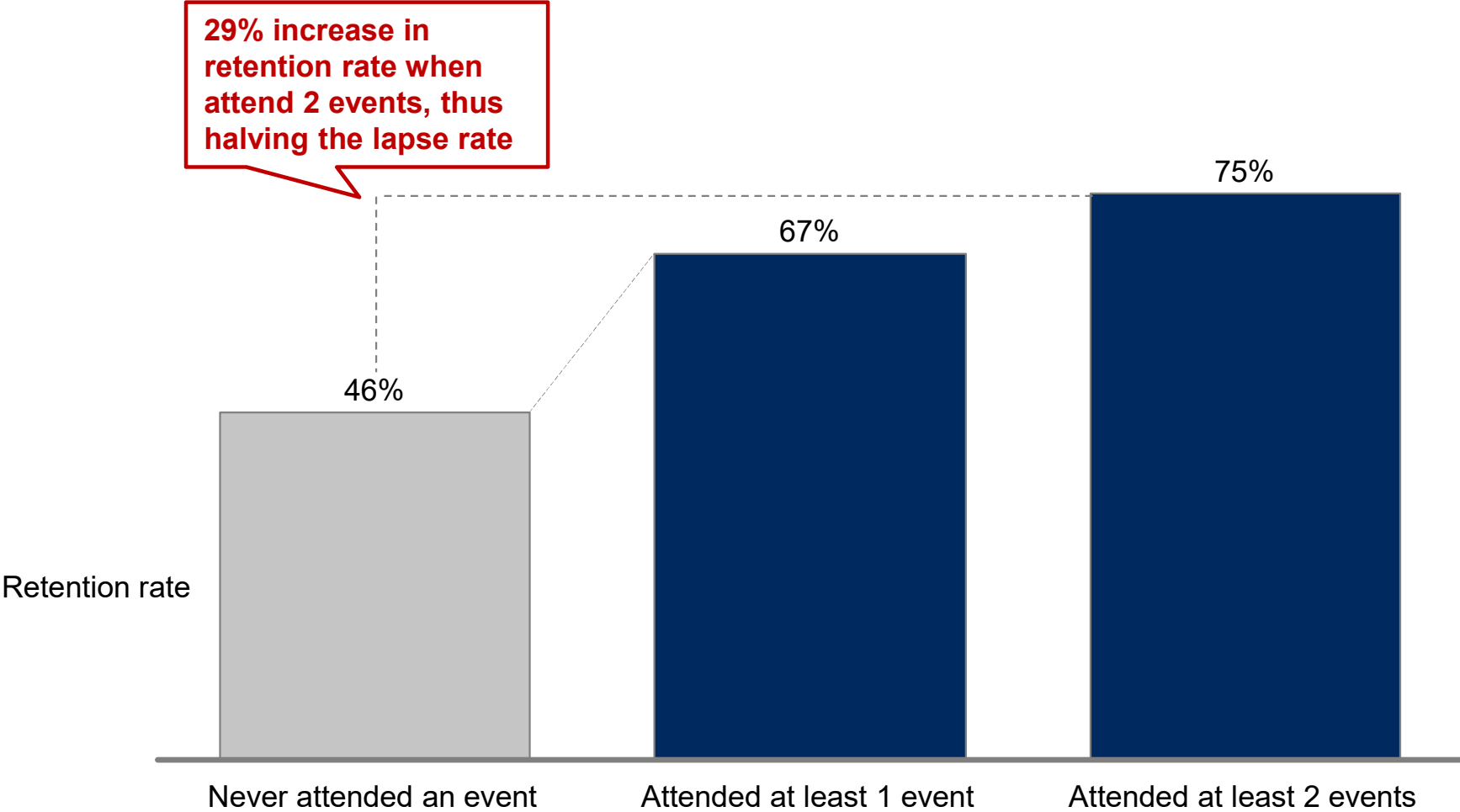
NEW 3-PART HCA MISSION



MEMBER VALUE PROPOSITION



IMPORTANCE OF WARM WELCOME



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



Inclusiveness. *Harvard family DownUnder*

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 & others, collaborative



Empowerment. *Club full of leaders*

Initiative encouraged, innovation backed, accountability expected, governance supportive not controlling, contributions recognised



Excellence. *High quality in everything*

High quality people, scholars, events, speakers, programs, reputation, communications; intellectually and socially stimulating; personal development; focus on impact, learning, improving; good value for efforts



Integrity. *'How' not just 'what'*

Honest in all dealings; transparent to all; independent and non-political; humble in our accomplishments



Generosity. *Giving beats receiving*

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

KEY MESSAGES

Context A good to great story

Mission Bolder ambitions for making a difference

Strategy New ideas for Members, for Australia, for Harvard

Op model A distributed leadership model

Implementation Many ways to get involved

STRATEGY ON A PAGE

Make a Difference

For Harvard

To enhance Harvard's reputation in Australia & vice versa

by

- 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

so

More awareness, more apps and more Aussies attending H

For Members

To extend the unique H experience through life's journey

by

- Create 'associate' members
- Form SIGs, extend Chapters
- Round out event calendar
- Provide prof dev opportunities
- Offer card w prem privileges

so

More members, more balance, more participation, more satis

For Australia

To make a worthwhile contribution to Australian society

by

- Introduce more scholarships
- Focus on better acquittal & PR
- Tap new fundraising sources
- Offer more local H courses
- Engage in community service

so

More organizations benefitting from the H factor

MANY EXCITING NEW IDEAS

DINNER CLUB

SUMMER
INTERNSHIPS

CAMARADERIE

HARVARD
OFFICE IN OZ

MORE HARVARD
NEWS

ASSOCIATE
MEMBERS

BOARD
OBSERVER
PROGRAM

PL PLAN-
ON-A-PAGE

\$250K
FUNDRAISING
CAMPAIGN

SOMETHING
FOR EVERYONE

ADVANCED
LEADERSHIP
INITIATIVE

CHAPTER
REMIT

STUDENTS &
NEW GRADS

FREE

SPIRIT OF
HCA AWARD

MAKE A DIFF
FOR MEMBERS
FOR HARVARD
FOR AUSTRALIA
FOR CLUB

APPS
SEMINARS

NEW IT
SYSTEM

ACQUITTAL

BOOK
PRIZE

TIERED OFFER

MEMBERSHIP
CARD

SIGs

NOMS COM
AWARD COM

CORROBOREE

PUBLICITY

MORE HARVARD PROFS

COMMUNITY
PARTNERS

BOARD, VPs,
MISSION TEAMS,
COUNCIL OF PLs

ANZ
CLUB

HIGH SCHOOL
PRINCIPAL
COURSE IN OZ

CAMPUS
EVENTS

MASTER
CLASSES

DONOR &
SCHOLAR
LUNCH

MEMBERSHIP
FUNNEL

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

Any SIG idea welcomed --
Have a go!

In discussion

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

APPETITE FOR MORE EVENT VARIETY AND PROF DEVELOPMENT

% of respondents on-line survey



Themes	1	2	3	4	5
Overall offer	0	0	0	47	18
Harvard connection	23	15	27	2	2
Fellowship/events	53	70	25	20	42
Professional development	19	15	19	0	3
Contribute to Australia	0	0	18	0	8
Giving back	2	0	10	0	3
Membership mix	0	0	0	23	12
Engagement/Comms	0	0	0	3	7
Fees	2	0	2	5	5

Discussion forums
SIG events
New formats

More mentoring
Masterclasses
Career help

Fellowship/events

Professional development

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

KEY MESSAGES

Context

A good to great story

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Implementation

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NEW 6-PERSON BOARD TO GOVERN THE CLUB

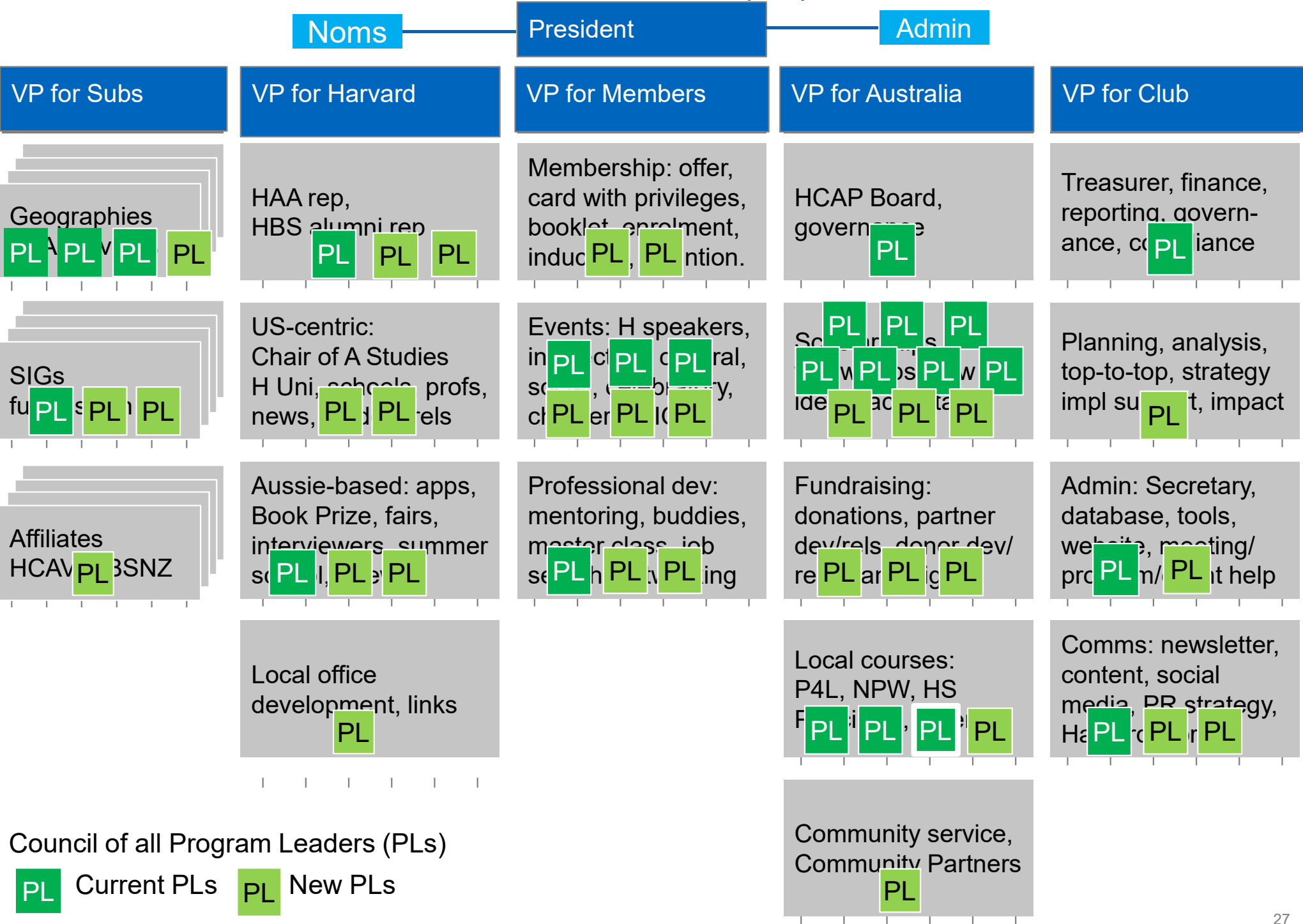
Noms

President

Admin

VP for Subs	VP for Harvard	VP for Members	VP for Australia	VP for Club
Geographies +SA, >events	HAA rep, HBS alumni rep	Membership: offer, card with privileges, booklet, enrolment, induction, retention.	HCAP Board, governance	Treasurer, finance, reporting, governance, compliance
SIGs full mission	US-centric: Chair of A Studies H Uni, schools, profs, news, student rels	Events: H speakers, intellectual, cultural, social, celebratory, chapters, SIGs	Scholarships, fellowships, new ideas, acquittal	Planning, analysis, top-to-top, strategy impl support, impact
Affiliates HCAV, HBSNZ	Aussie-based: apps, Book Prize, fairs, interviewers, summer school, farewell	Professional dev: mentoring, buddies, master class, job search, networking	Fundraising: donations, partner dev/rels, donor dev/rels, campaign	Admin: Secretary, database, tools, website, meeting/program/event help
	Local office development, links		Local courses: P4L, NPW, HS Principals, others	Comms: newsletter, content, social media, PR strategy, Harvard stories
			Community service, Community Partners	

NEW DISTRIBUTED PROGRAM LEADER (PL) MODEL WILL BE KEY



MANY EXCITING PROGRAM LEADER (PL) ROLES

Noms

President

Admin

VP for Subs

VP for Harvard

VP for Members

VP for Australia

VP for Club

▪ Chapters

- Qld
- ACT
- WA
- SA

▪ SIGs

- Young
- Health
- Education
- Public Affairs
- Not for Profits
- Harvard College

▪ Affiliates

- HCAV
- HBS NZ

▪ 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

▪ 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

▪ 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

▪ 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

Volunteer
professionalism



Making a
difference

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

KEY MESSAGES

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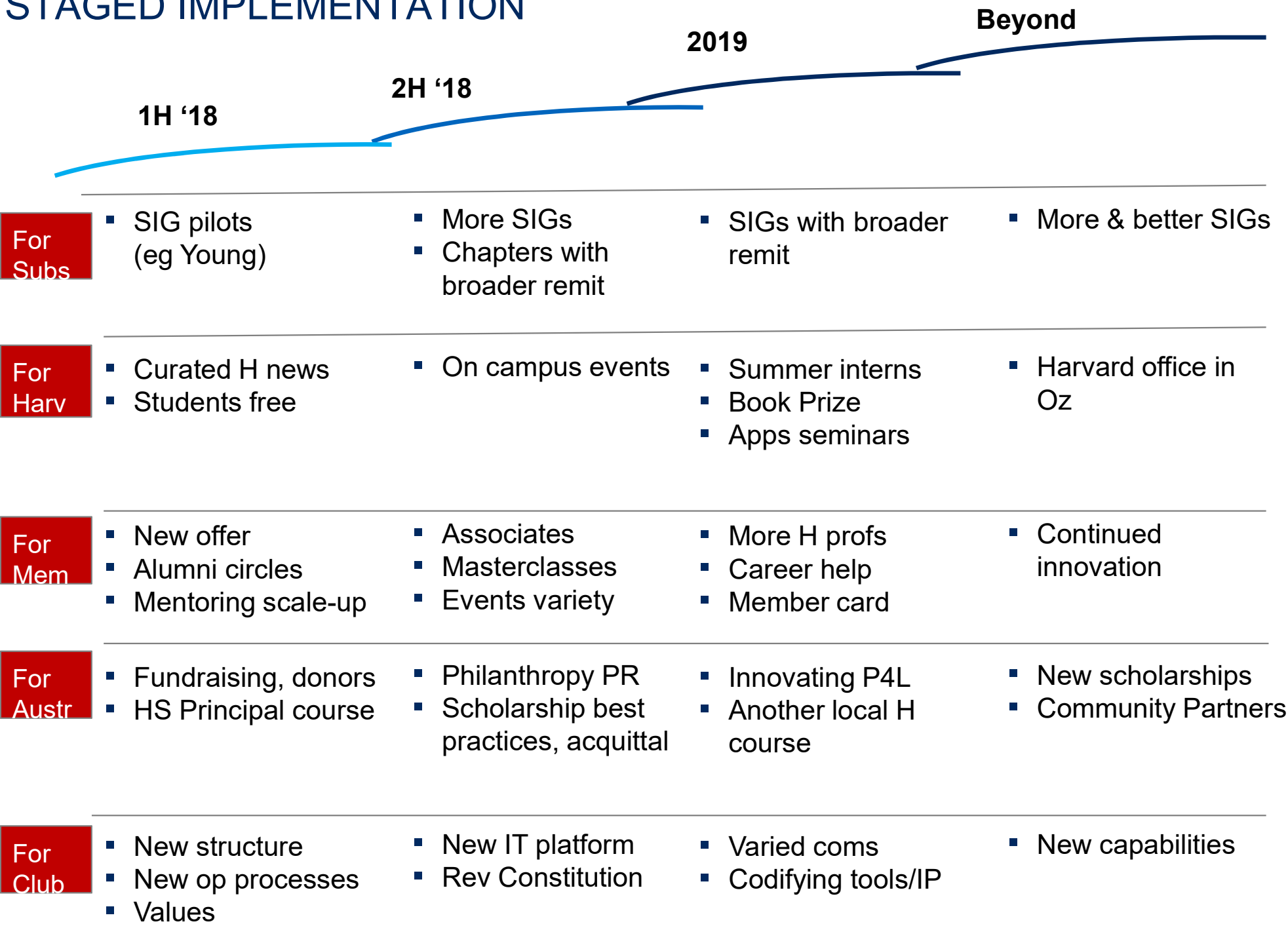
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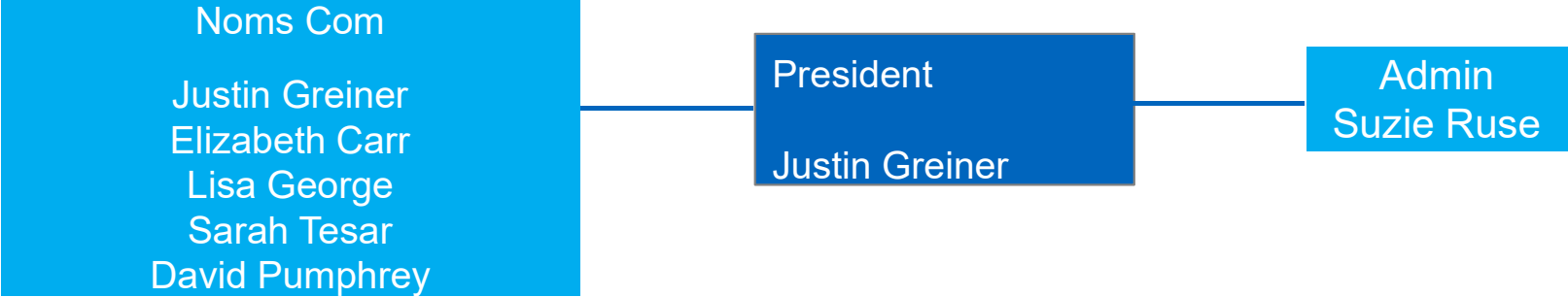
STAGED IMPLEMENTATION



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



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

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APPENDIX

WHY MEMBERS LAPSED OR INACTIVE

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

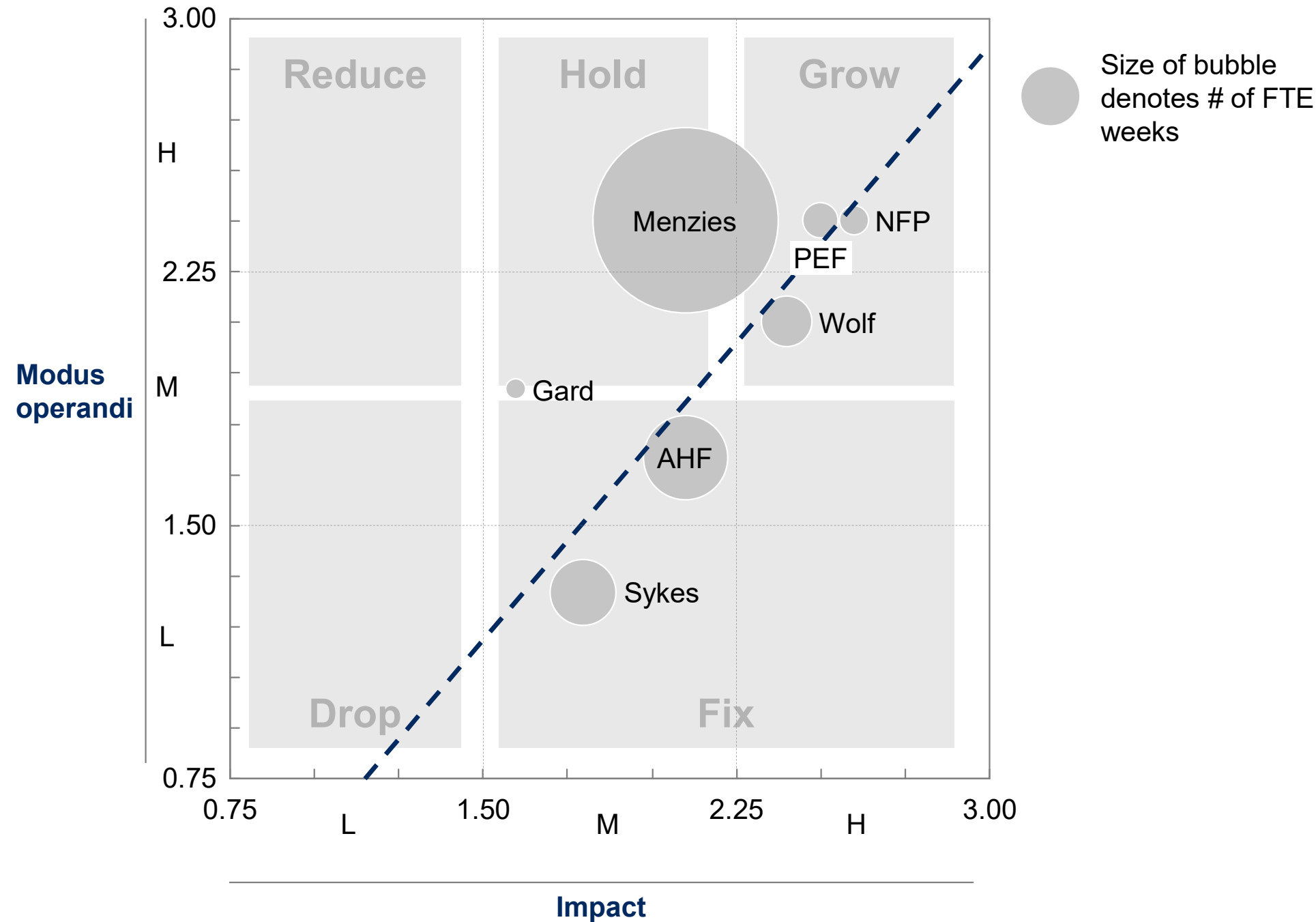
Theme	Reason for leaving	Percent respondents (n=58)	Theme Total
Overall offer	Too busy with other obligations	25	47
	Not enough on offer	8	
	I live away from major city	7	
	I get similar benefits elsewhere	6	
	I see it as 'making a donation'	1	
Harvard connection	I choose to affiliate directly with Harvard	2	2
	Not interested in maintaining affiliation	0	
Fellowship/ events	Events not of interest	12	20
	Events held at inconvenient times	9	
Membership mix	Too few like-minded alums	12	23
	Too few alums in my age group	9	
	Too few women	2	
Engagement/ Comms	Ineffective communication	3	3
Fees	Event costs too high	3	5
	Membership fee too high	2	

SOURCE: Online survey

EXPANDED MEMBERSHIP OFFER GIVES & GETS

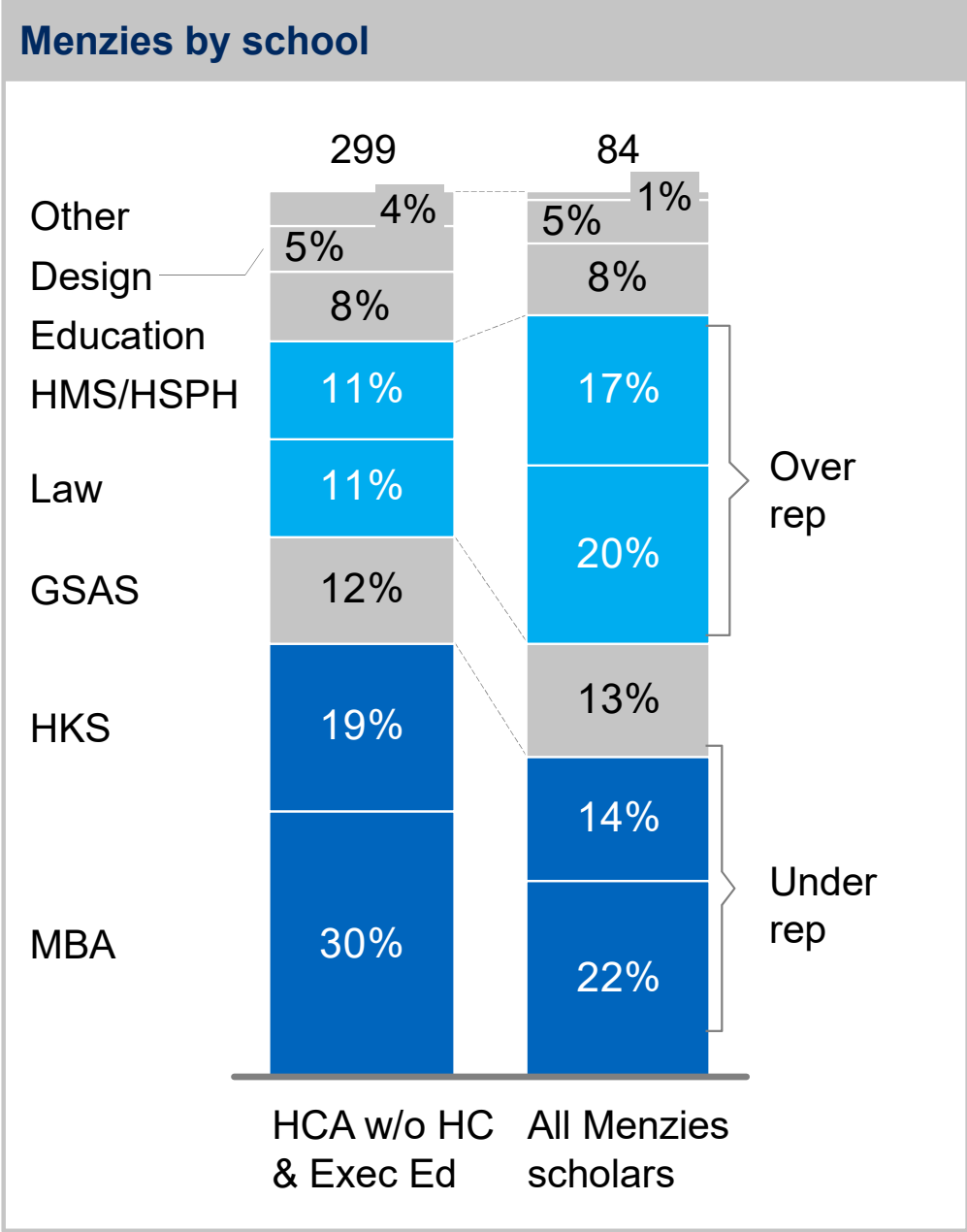
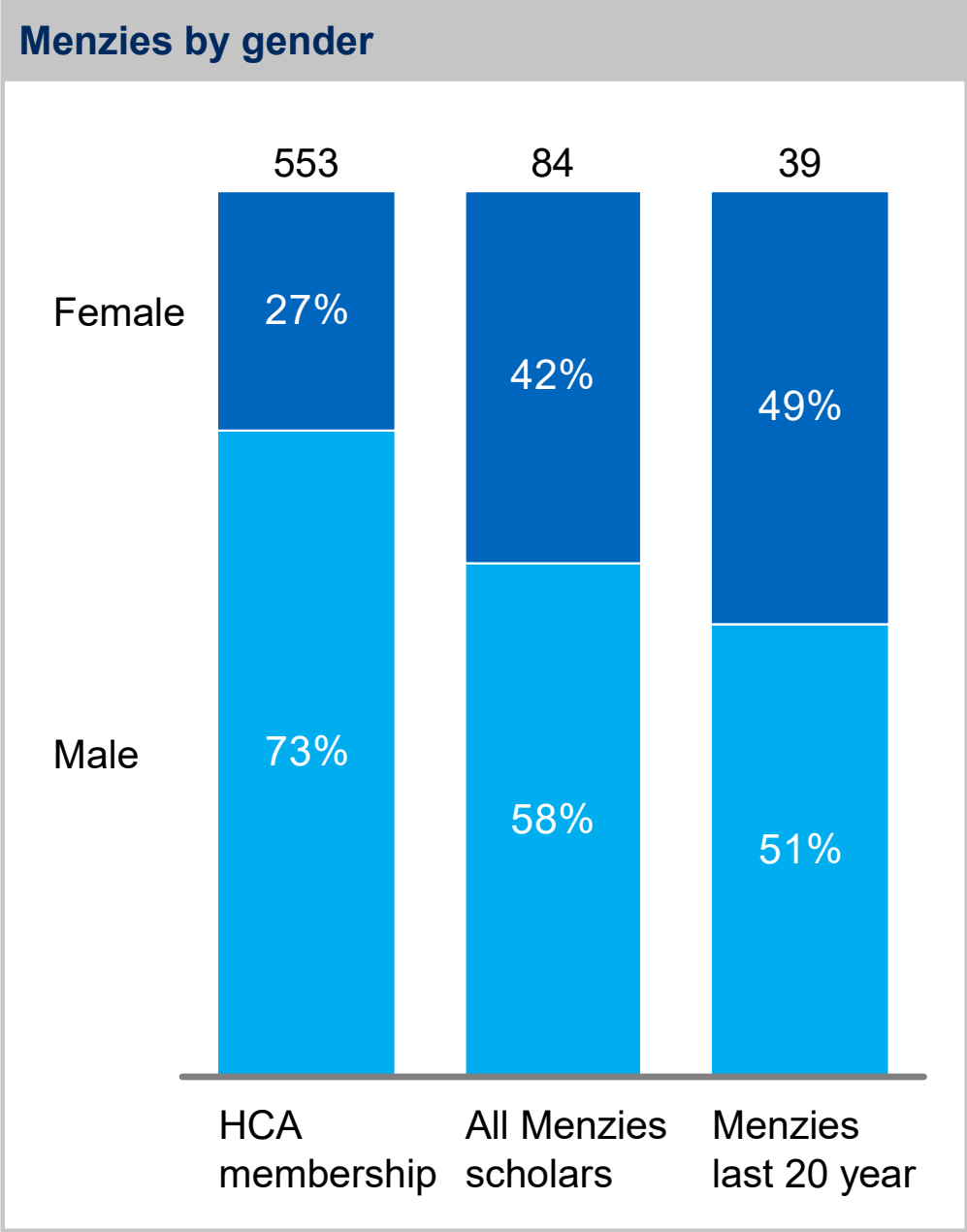
	Category	What you get	What you pay
All	All alumni, (incl Aussies overseas)	Quarterly newsletter (join now, donate now button) HAA offers (eg global networking nite, travel tours)	Free
Student & grads	Student	Quarterly newsletter Farewell event, Cambridge-based events Eligible for Summer internship program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

PHILANTHROPY PROGRAM ASSESSMENT



SOURCE: Council assessment survey of philanthropy programs

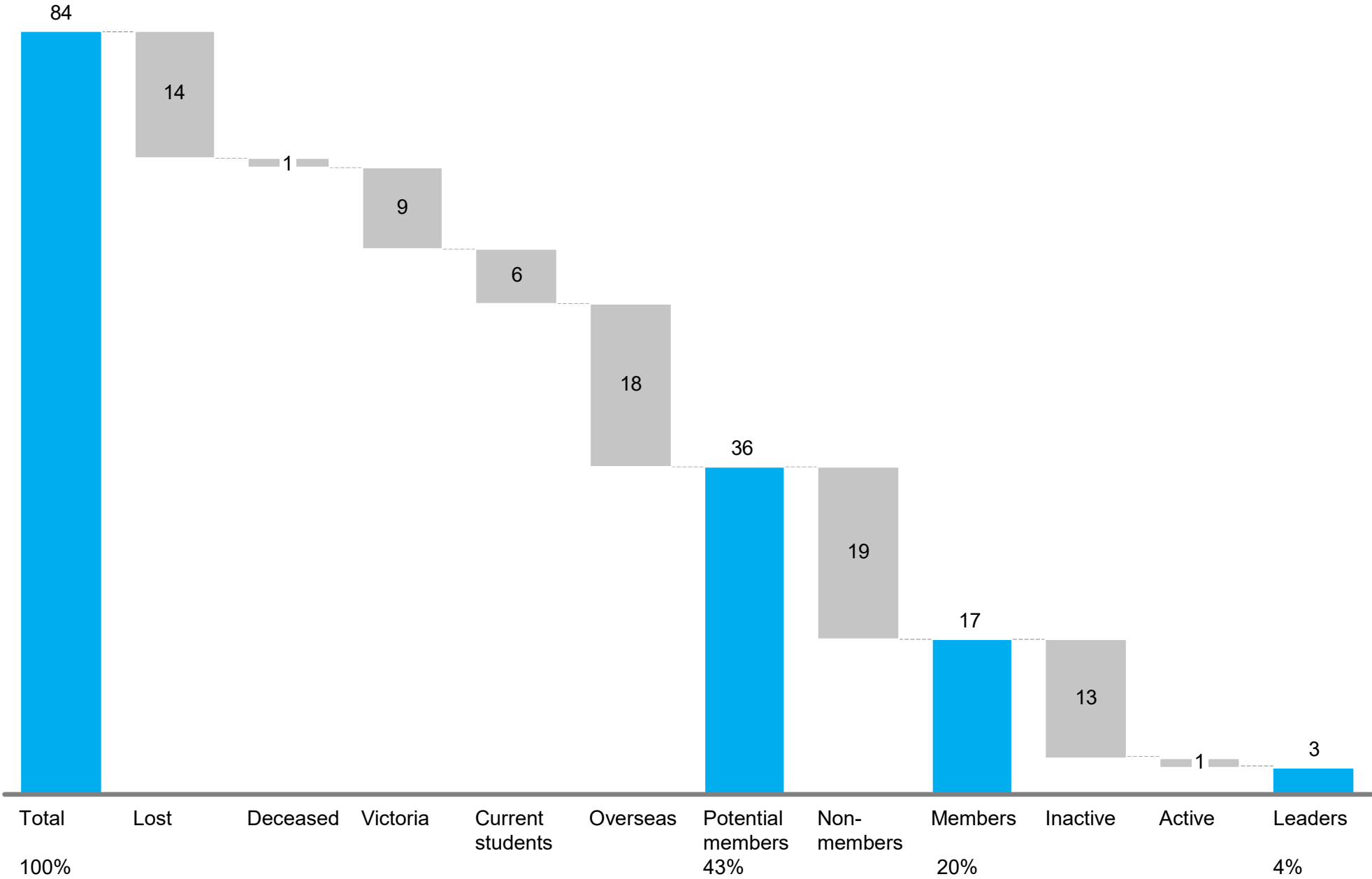
MENZIES PROFILE FAIRLY REPRESENTATIVE



SOURCE: HCA team analysis

MENZIES SCHOLAR POOR ACQUITTAL

Activity level of all Menzies scholars

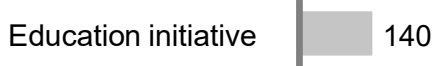


SOURCE: HCA team analysis

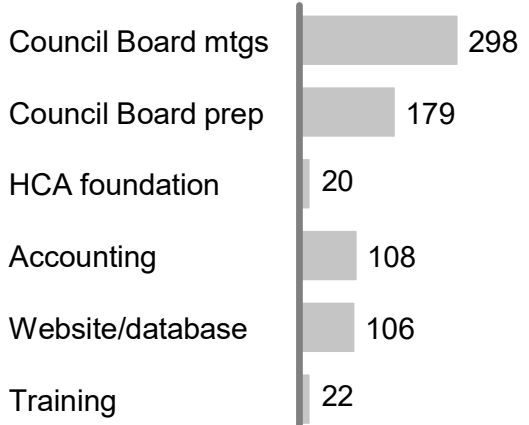
CONTRIBUTORS TIME COMMITMENT

(S=Suzie)

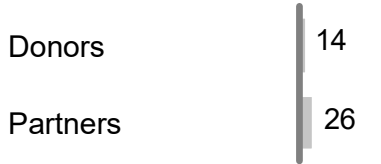
Strategic projects (S=0 of 140)



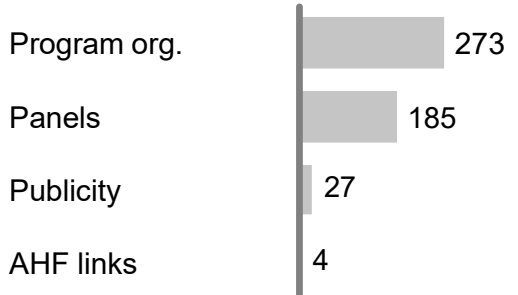
Governance (S=168 of 733)



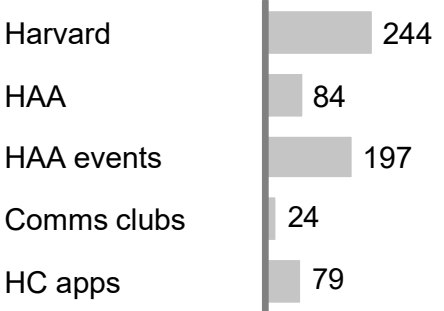
Giving back (S=0 of 40)



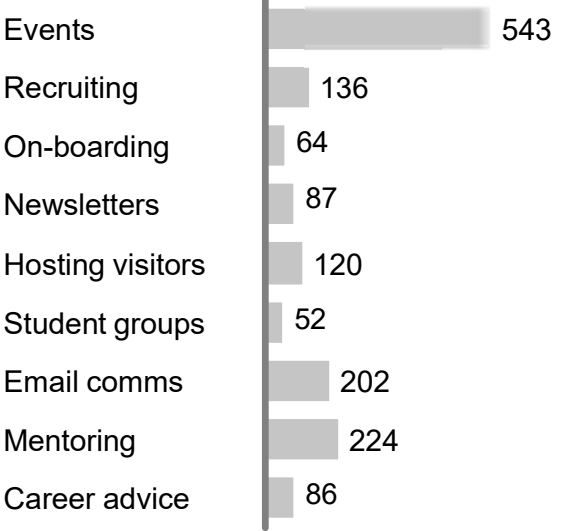
Contributing to Australia (S=40 of 489)



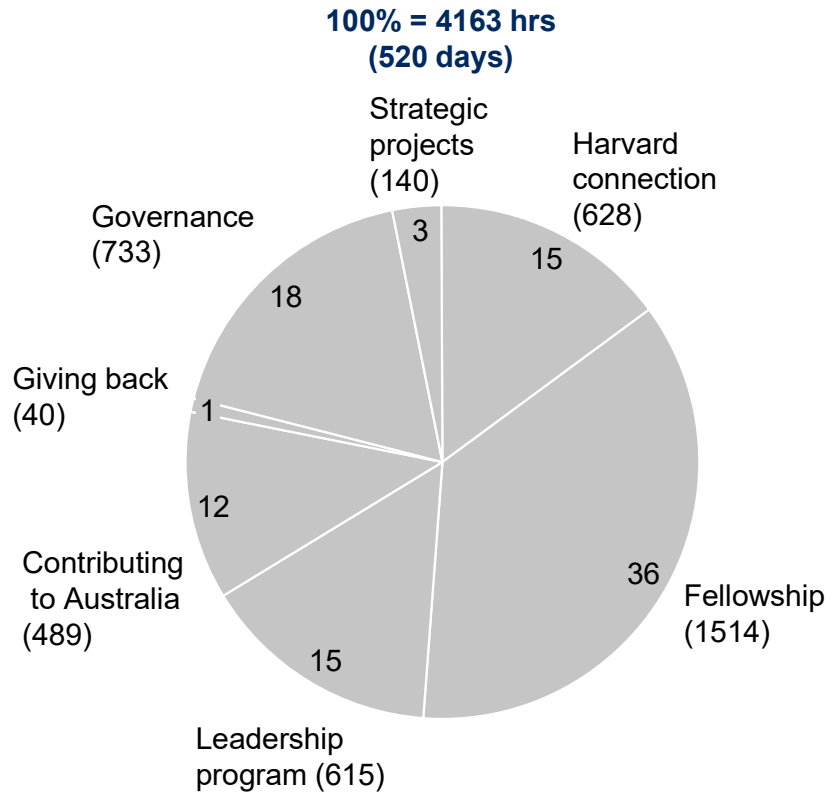
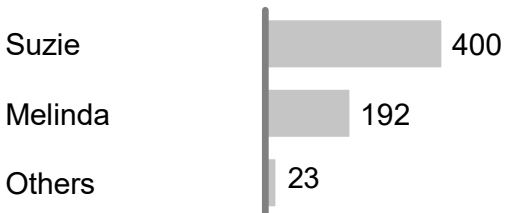
Harvard connection (S=26 of 628)



Fellowship (S=470 of 1514)

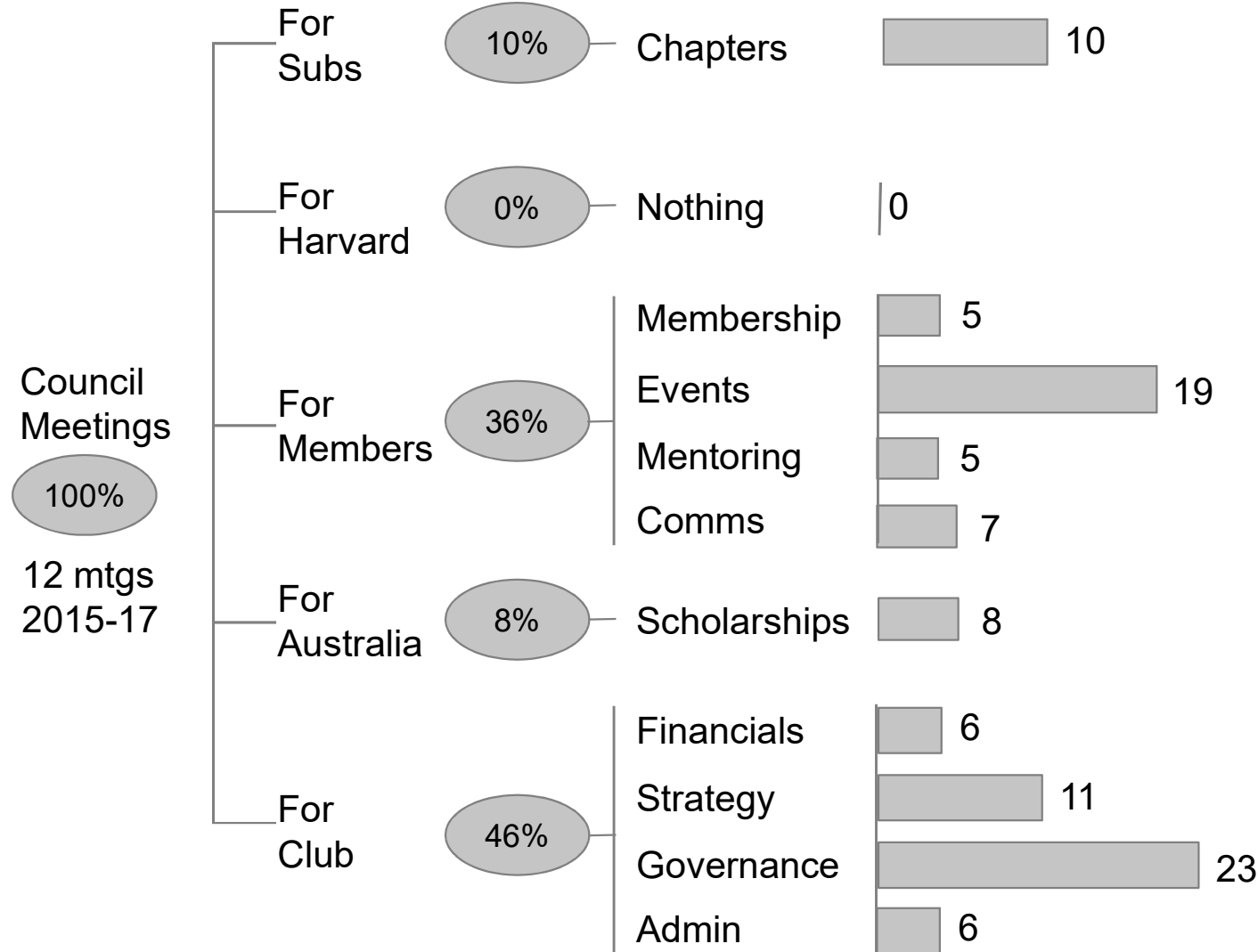


Leadership program (S=400 of 615)



COUNCIL MEETINGS TIME USAGE

Past Council meeting time allocation



Findings

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'