

HCA / McKinsey Project: Re-inventing the alumni communities operating model



Presentation
March 2018

Private and confidential

KEY MESSAGES

Context

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

HCA HAS A SUCCESSFUL HISTORY

Fellowship

Membership

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

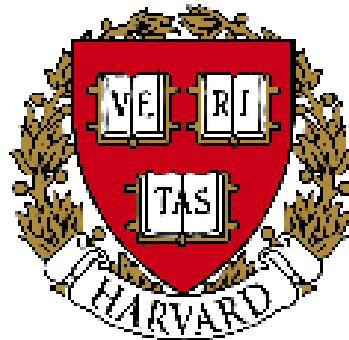
Range of events

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

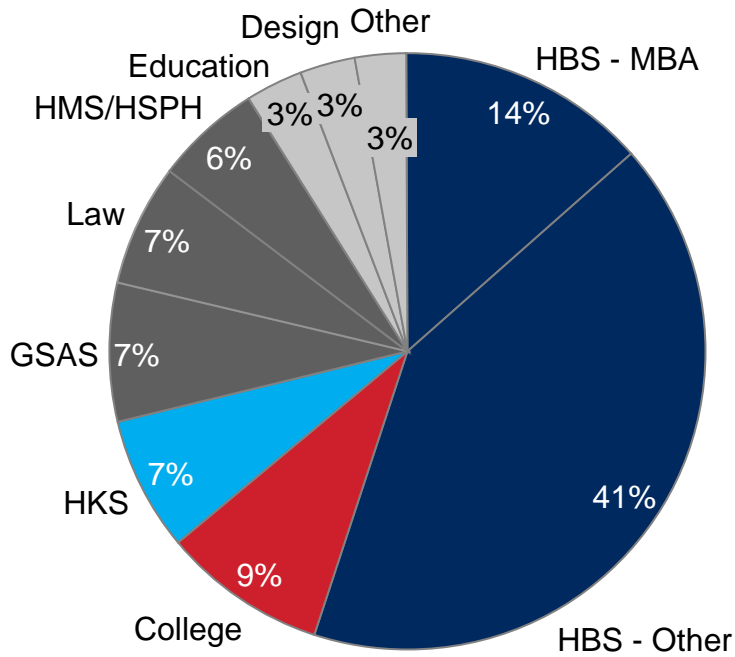
Local courses

- Non-profit workshop
- Negotiation skills

HCA HIGHLY REPRESENTATIVE

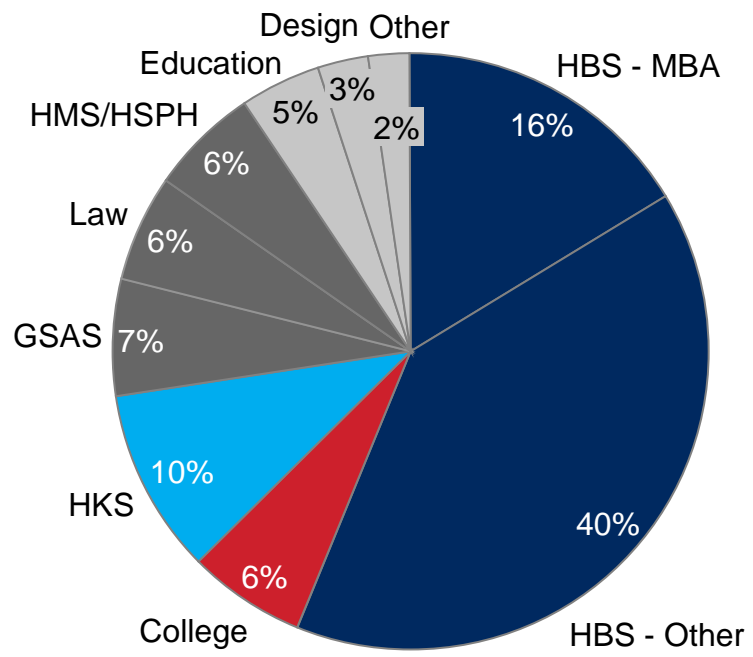
Proportion of All Harvard alumni by school

Sample size = 2178



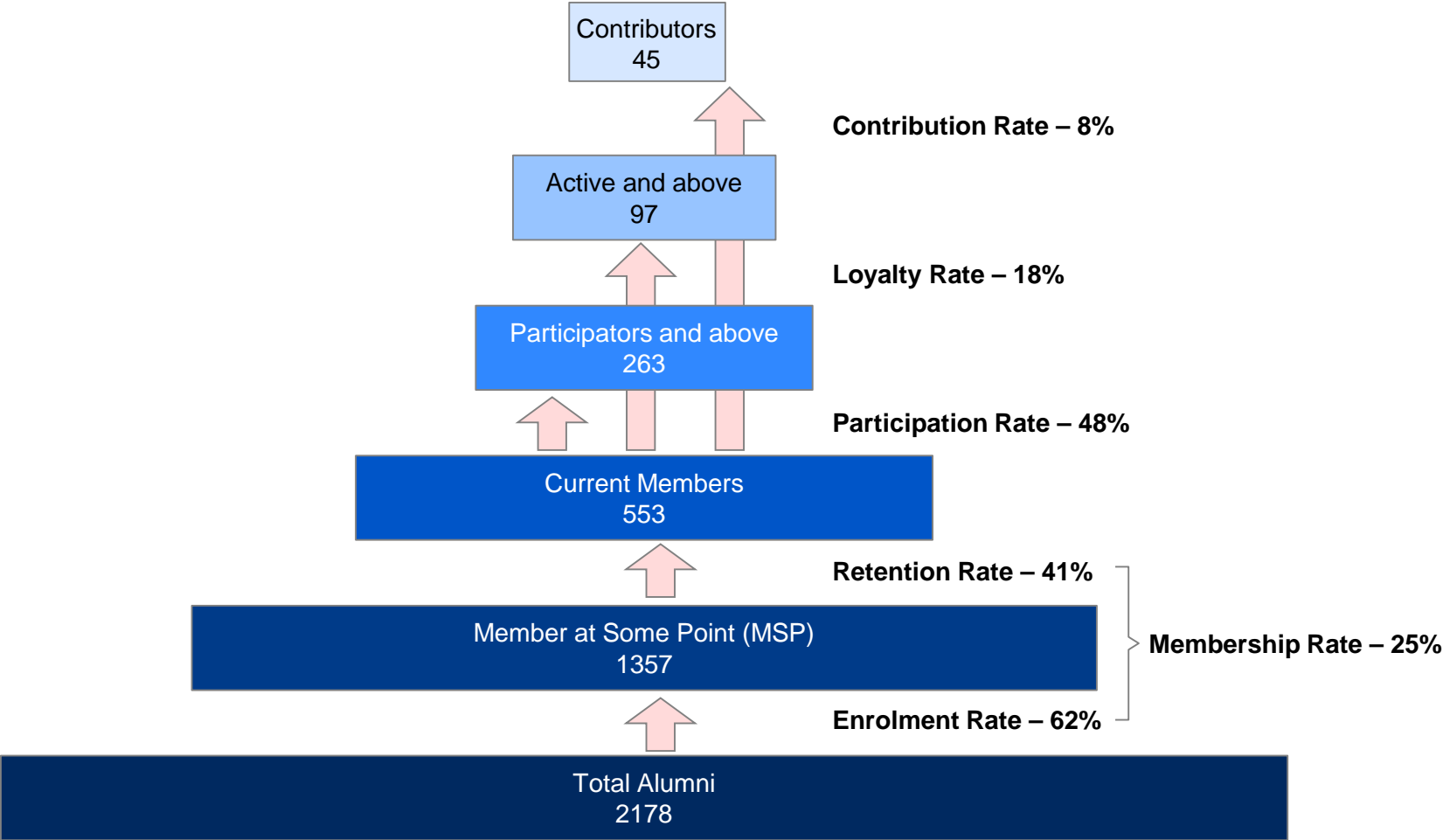
Proportion of current members by school

Sample size = 553



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

BUT MEMBERSHIP AND PARTICIPATION BELOW FULL POTENTIAL



SOURCE: HCA data (excl. HCAV)

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

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

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, management practices
- Capabilities, support, tools
- Values, behaviors
- Economics

KEY MESSAGES

Context

Mission	Bolder ambitions for making a difference
----------------	--

Strategy

New ideas for Members, for Australia, for Harvard

Op model

A distributed leadership model

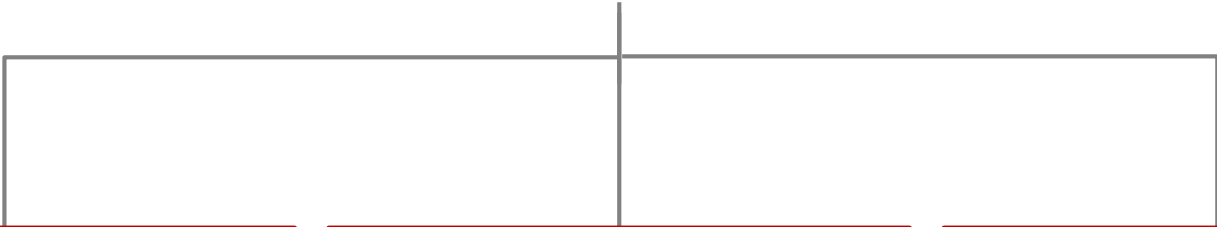
Implementation

Many ways to get involved

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

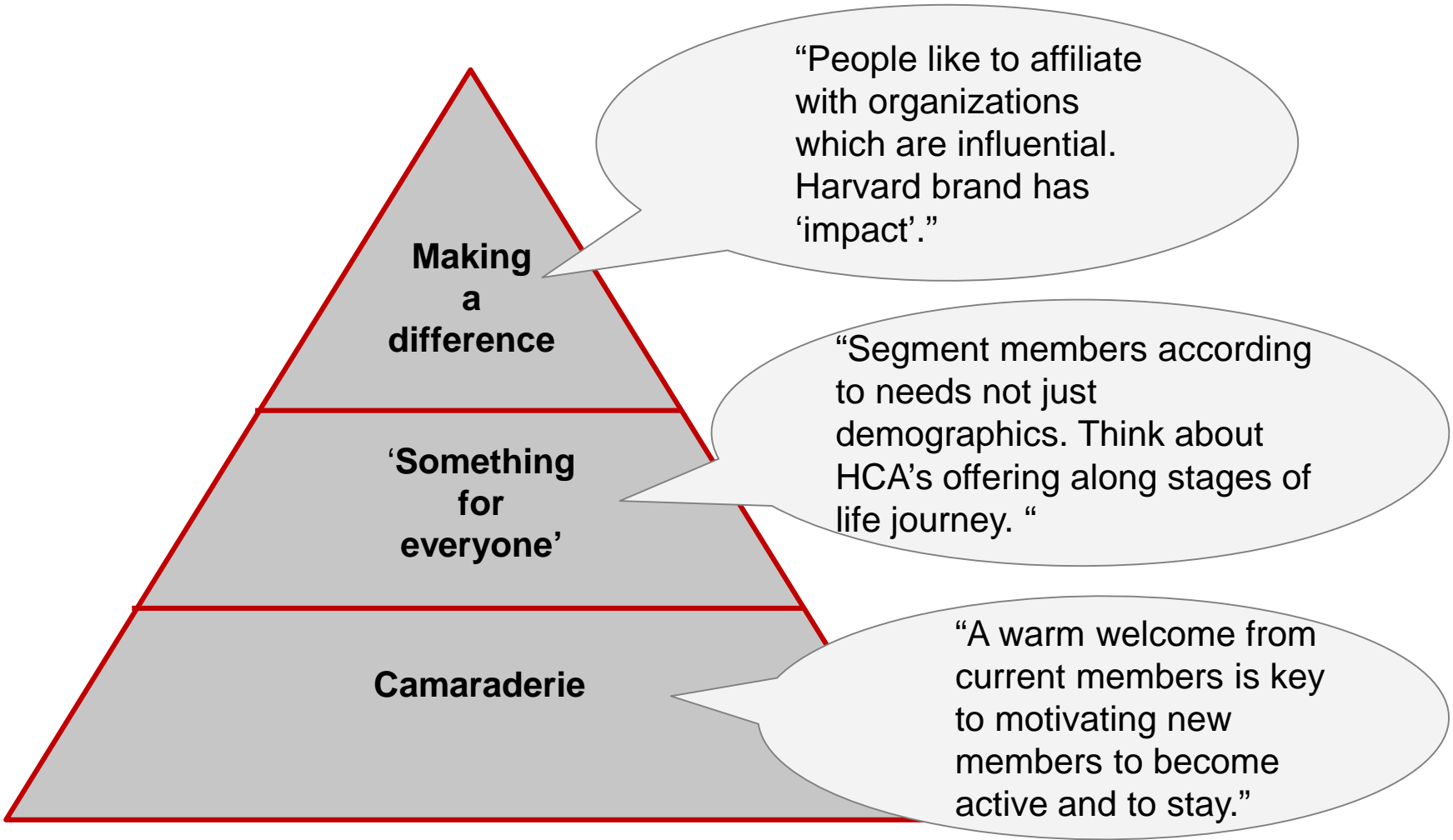
For Members

To extend the unique Harvard
experience through life's
journey

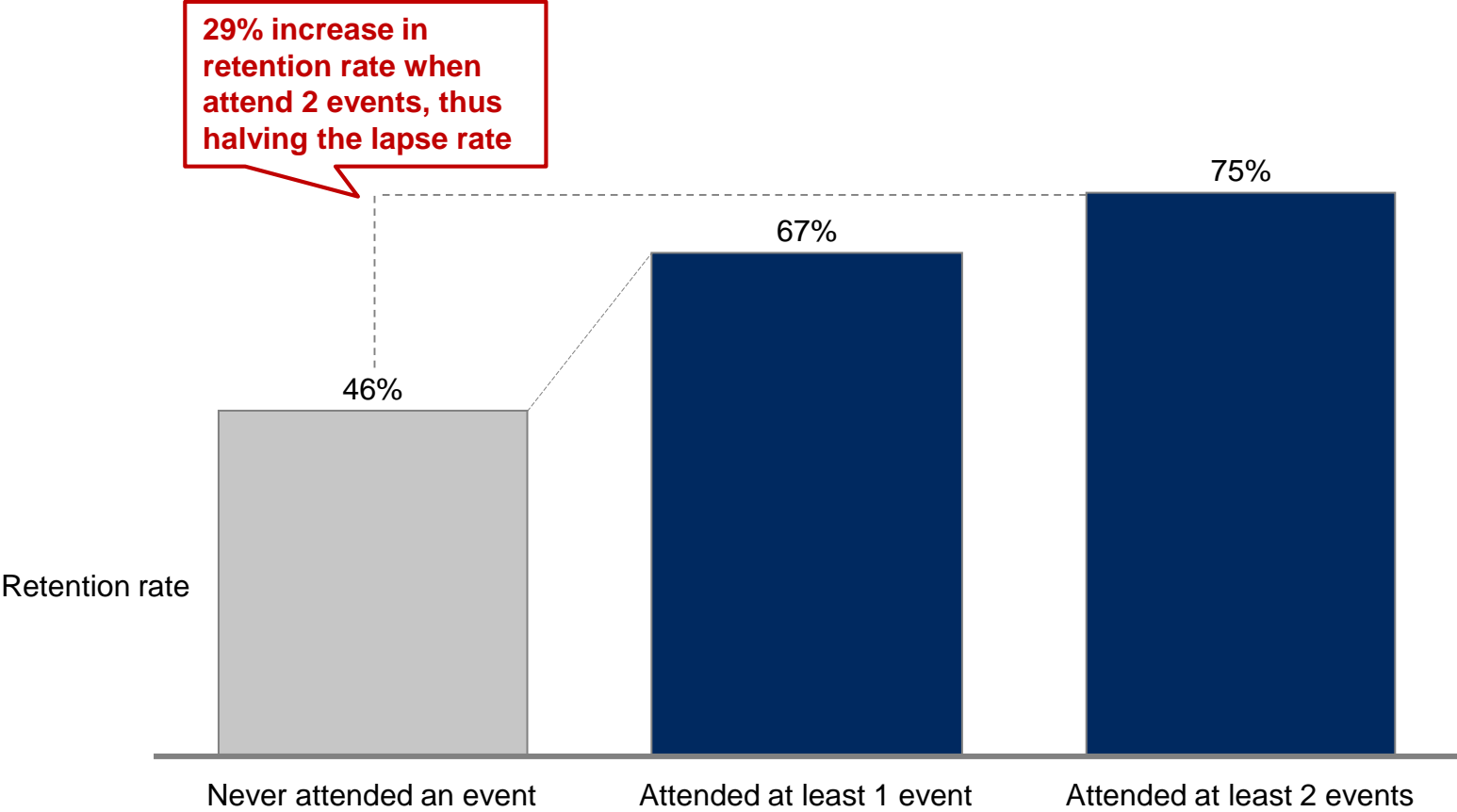
For Australia

To make a worthwhile
contribution to Australian society

MEMBER VALUE PROPOSITION



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

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 participation, more satisfaction

For Australia

To make a worthwhile contribution to Australian society

by

- Introduce more scholarships
- Focus on better acquittal
- 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

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
MAKING A DIFF FOR MEMBERS FOR HARVARD FOR AUSTRALIA FOR CLUB
APPS SEMINARS
NEW IT SYSTEM
ACQUITTAL
BOOK PRIZE
TIERED OFFER
MEMBERSHIP CARD
PUBLICITY
SIGs NOMS COM AWARD
CORROBOREE
BOARD, VPs, MISSION TEAMS, COUNCIL OF PLs
ANZ CLUB
COMMUNITY PARTNERS
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

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

KEY MESSAGES

Context

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

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

NEW 6-PERSON BOARD TO GOVERN THE CLUB

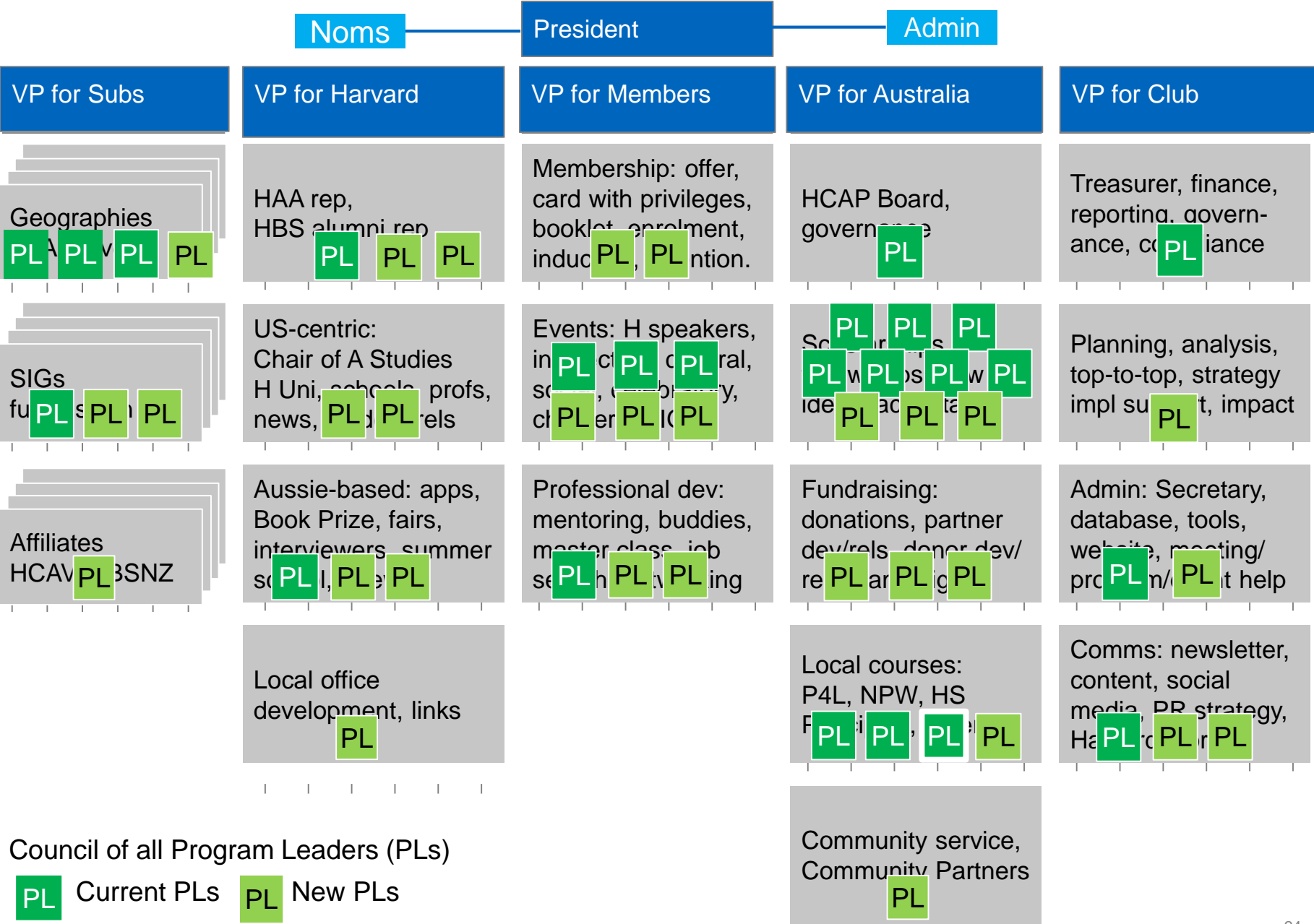
Noms

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, govern- ance, 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	

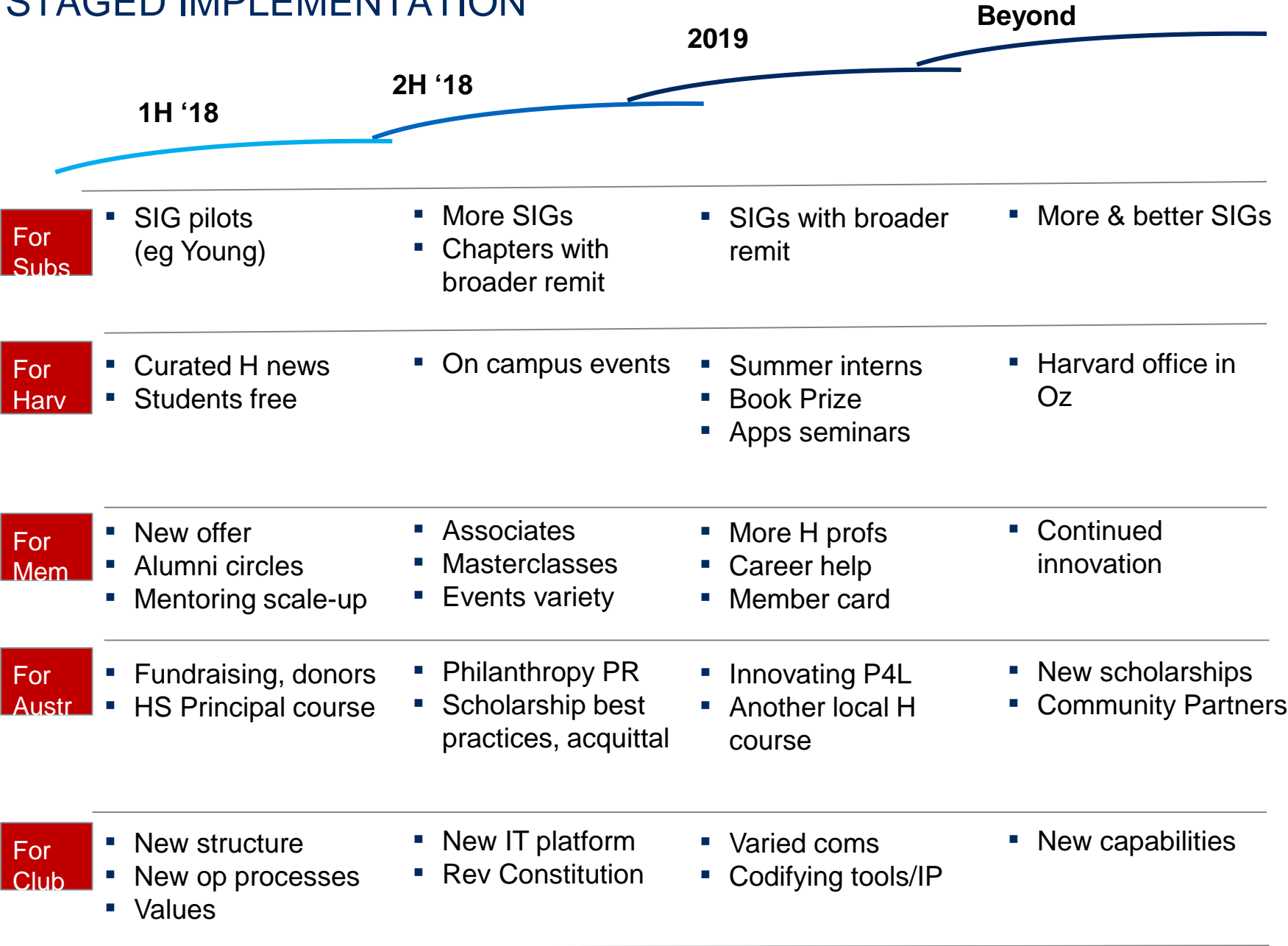
NEW DISTRIBUTED PROGRAM LEADER (PL) MODEL WILL BE KEY



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

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