



HOBY Strategic Plan

2016-2020

7.21.16

Table of Contents

Letter from Javier and Steven	3
WHERE WE ARE: Reflections on 2012-2016 Strategic Plan	4
Progress Towards Goals	4
Lessons	5
What's Changed Since 2012?	5
WHERE WE WANT TO GO: 2016-2020 Plan	6
Bold Goal: 2030	6
2020 Organizational Goals	6
Strategies, Outcomes and Milestones	8
Strategic Planning Process	16
Strategic Planning Committee Members	16
Board of Trustees Members	16
Staff Members	17
Appendices	18
Appendix A: Board Resolution – 2015 to adopt Advancement Team	18
Appendix C: Implementation Plan Timeline	22

Letter from Javier and Steven

We are thrilled to present the 2016-2020 HOBY Strategic Plan. This plan builds on our nearly 60-year legacy and maximizes the strength of our volunteers and alumni to achieve a bold and ambitious goal: *By 2030, create the most civically-prepared and entrepreneurial global generation of youth leaders.*

The committee had to balance tensions such as the desire to perfect existing programs with the need to grow; providing adequate resources for our current volunteers with fulfilling global growth potential; emphasizing our state seminars by building a continuum of programs; and prioritizing clarity around what HOBY is now with what we might become in the future. While some in the HOBY family may advocate more strongly for one side of those tensions, we believe this plan achieves the right balance for success.

The goals and targets you see outlined in this plan will push us to do more than some believe we can achieve. The need for what HOBY offers is more important now than ever. We boldly accept the challenge to exceed those expectations. To meet this challenge we must do some things differently. The same approaches that have gotten us here will not necessarily be the same ones that will take us where we need and want to go.

Thankfully, HOBY is blessed with visionary and flexible leaders and volunteers. As an example, the BOT recently passed a resolution to create a HOBY Advancement Department. That strategic decision – and the progress we've already made around implementation of that decision – give us confidence that we have a solid foundation from which to realize our goals. This strategic plan builds upon the growth of our Advancement Department team with many of the goals focused on fiscal development, alumni and volunteers, and communications.

HOBY's mission is as relevant and important as ever. We hope you will join us to make the vision laid out in this plan a reality.

Javier LaFianza, CEO and President
Steven Hall, Board of Trustees Chair

WHERE WE ARE: Reflections on 2012-2016 Strategic Plan

Progress Towards Goals

In 2012, we set the following goals for the organization to achieve by 2015:

1. GROW our organization to 15,000 “Ambassadors” on an annual basis through increased local seminar site participation as well as new HOBY programs.
2. IMPACT our communities as well as our alumni and volunteers, leading with the goal of becoming the foremost youth service organization, logging 5 million Leadership for Service (L4S) hours.
3. Dramatically improve our DIVERSITY in the following two areas:
 - LEADERSHIP: Find new ways to bring leadership and service opportunities to those young men and women who are often ignored but deserving of the opportunity. In doing so we will seek to increase our overall school saturation to 50%.
 - FINANCIAL: Create new revenue streams that reduce our dependence on local seminar fee revenue to 50% of the total operating budget.

As of December 2015, progress toward achieving those goals is reflected in the chart below:

Goal	Notes
<p>Growth:</p> <p>Grow our organization to 15,000 Ambassadors.</p>	<p>An estimated 12,500 students are currently participating in all HOBY programs each year. This is a 25% increase from the estimated 10,000 students in 2012.</p> <p>The Advanced Leadership Academy was added to our program list to ensure that a HOBY program is available to students from their freshman through senior high school years.</p>
<p>Impact:</p> <p>Impact our communities as well as our alumni and volunteers by logging 5 million L4S hours.</p>	<p>As of July 21st, 2016, our alumni have logged 3,789,797 Leadership for Service hours. Approximately 200,000 hours are added each year.</p>
<p>Diversity: Leadership</p> <p>Find new ways to bring leadership and service opportunities to underserved youth and increase our school saturation to 50%.</p>	<p>Relationships with other youth focused non-profit organizations have not closed the gap, largely due to funding constraints. School saturation generally decreases slightly from year to year. Current school saturation rate is at 28%.</p>

<p>Diversity: Financial</p> <p>Reduce our dependence on local seminar fee revenue to 50% of operating budget.</p>	<p>Non-registration fee revenue makes up 30% of the 2016 budget. The recently created Advancement Department Team will increase Development outcomes as well.</p>
--	---

Lessons

- Implementation of issues campaigns muddled HOBY’s focus on leadership. Additionally, embarking on an issue campaign focused on a social cause required significant resources to implement. Focusing on a leadership-related issue such as entrepreneurship may be a better fit for HOBY.
- New revenue share (with fee increase), while difficult to get to final policy, proved doable. None of the worst-case scenario predictions materialized.
- Assumptions around ALA (i.e., “if we build it, they will come”) have not proven true.
- In response to the enforcement of the Boards “give or get” targets, BOT members responded by providing their skill sets in lieu of financial contributions which proved invaluable to the organization in the areas of marketing, information technology, and legal advice. Are there other skills/task gaps that board members can help fill?

What’s Changed Since 2012?

- The U.S. economy is stronger
- The World is a scarier place – literally and in perception
- We have increased our staff capacity
- We have improved the relationships between HQ and the field
- The membership of cooperating sponsor organizations has aged
- The expectations of volunteer experiences have changed
- There are more technology resources able to engage people immediately
- The number of diverse social media outlets has increased

WHERE WE WANT TO GO: 2016-2020 Plan

Bold Goal: 2030

Using the concept of a “moon shot” or an ambitious rallying cry, the Strategic Planning Committee developed the following bold goal:

By 2030, create the most civically-prepared and entrepreneurial global generation of youth leaders.

We see this bold goal as guiding our work and strategic choices for the next 15 years. This challenge will enable us to attract new supporters and donors, reengage alumni and volunteers no longer connected to HOBY, reinforce unity across HOBY, instill new meaning into our work, and refocus our attention and commitment to HOBY’s mission.

2020 Organizational Goals

To be on the path to realizing our bold goal of the most civically-prepared and entrepreneurial global generation of youth leaders, we must achieve the following through this new strategic plan:

A. Engage 20,000 program participants annually

- Strengthen and expand HOBY programs in the U.S.
- Develop and execute a State Seminar expansion strategy built on consistent and intentional growth across the country
- Proactively and strategically grow HOBY international programs around the globe
- Engage new and diverse groups of students in HOBY programs through greater outreach, fundraising, and partnerships
- Develop and implement curriculum and opportunities focused on civic engagement and entrepreneurship

B. Raise at least \$7M in annual revenue (including additional resources for program expansion, scholarship growth, endowment, and reserves)

- Strengthen HOBY’s “case” for fundraising
- Increase donor retention and cultivation for increased gifts
- Identify and pursue new sources of support and revenue (corporate sponsorships, major gifts, “buy one-give one”, etc.), with a particular focus on those avenues that have a specific interest in civic engagement and entrepreneurship
- Expand fee-generated revenue as appropriate (vis-à-vis competition and what market will support)
- Engage all board members as donors, champions, and fundraisers

C. Grow total number of volunteers by 10% and retain 75% of existing volunteers annually

- Establish progression pathway for volunteers (continuous engagement, not just seminar season)
- Identify and implement new roles and entry points for volunteers as appropriate (aligned with new strategic plan goals and strategies)
- Leverage partnerships for recruitment

D. Engage 10% of HOBY alumni in HOBY annually

- Develop and publicize new engagement opportunities (aligned with goals/strategies in new plan; e.g., donate, volunteer, recruit students, scholarships, promote HOBY)
- Improve data collection, tracking, communication
- Establish an active HOBY Alumni Association
- Establish a continuum of HOBY programs through college and mid-career opportunities

Strategies, Outcomes and Milestones

Engage 20,000 program participants annually

We believe the quality leadership experience HOBY offers young people is “life-changing” and, as a result, potentially world-changing. To realize a generation of the most civically-prepared and entrepreneurial global youth leaders, we must reach more young people with the HOBY experience. Achieving this stretch goal likely will mean expanding how we think about HOBY programs, what it means to “experience HOBY” and the ways in which we engage young people with the HOBY leadership curriculum.

The following chart outlines the specific measures that will be used to indicate our success in reaching our goals.

<i>Measure(s)</i>	Baseline	Annual Change	2020 Goal
<i># of U.S. States operating HOBY programs</i>	49		50
<i># of U.S program participants annually</i>	10,663	8.9%	15,000
<i># of countries operating HOBY programs</i>	8	4	25
<i># of international participants annually</i>	1,275	40.7%	5,000

How we will achieve this goal:

Strategy	Proposed Key Tactics/Initiatives
Strengthen and expand HOBY programs in U.S.	<ul style="list-style-type: none"> ▪ Mini-grants for CLeWs ▪ Program development – with a specific focus on civic engagement and entrepreneurship ▪ Quality initiative ▪ Capacity study ▪ New partnerships/fully-leverage existing partners ▪ School saturation initiative(s) ▪ Incentives for alumni recruitment ▪ Create marketing campaign to provide greater awareness to our key audiences about our U.S. programs
Develop and execute a State Seminar expansion strategy built on consistent and intentional growth	<ul style="list-style-type: none"> ▪ Quality initiative ▪ Capacity study ▪ Marketing campaign(s) ▪ Splits for “at-capacity” sites ▪ Engage and strengthen corporate boards to assist in

Strategy	Proposed Key Tactics/Initiatives
	the state seminar expansion strategy
Proactively and strategically grow HOBY internationally	<ul style="list-style-type: none"> ▪ Create target country list and criteria for expansion ▪ Establish an international corporate sponsor fund for student participation ▪ New partnerships/fully-leverage existing partners ▪ Create marketing campaign to provide greater awareness to our key audiences about our U.S. programs ▪ Expand WLC country participation ▪ Replicate WLC globally (e.g., WLC Asia) ▪ Create international expansion committee ▪ Establish an international corporate sponsor fund for student participation ▪ Launch a “buy one-give one” program for wealthier donors/schools/countries ▪ Adapt programming for cultures outside US ▪ Hugh O’Brian Legacy Fund ▪ New/innovative ways to deliver HOBY content/experience
Engage new and diverse groups of students in HOBY programs	<ul style="list-style-type: none"> ▪ Hugh O’Brian Legacy Fund ▪ Launch a “buy one-give one” program for wealthier donors/schools/countries ▪ Establish new partnerships/fully-leverage existing partners ▪ Bring HOBY to students (urban CLeWs, school assemblies) ▪ New/innovative ways to deliver HOBY content/experience ▪ Marketing campaign(s) ▪ Incentives for alumni recruitment

Raise at least \$7M in annual revenue (including additional resources for program expansion, scholarship growth, endowment, and reserves)

One of the hardest things for an organization to do is grow and diversify revenue at the same time, given that most organizations grow revenue through doing more of what they do best (i.e., local seminar fees). For HOBY to realize the vision laid out in this plan, we must do both. We need to grow our revenue in order to engage more young people. We also must have a more stable and sustainable financial base, with different kinds of revenue, so that we can engage more diverse youth, expand strategically outside the U.S., and invest in ongoing program improvement and R&D.

The following chart outlines the specific measures that will be used to indicate our success in reaching our goals.

<i>Measure(s)</i>	<i>Baseline</i>	<i>Annual Change</i>	<i>2020 Goal</i>
<i>Annual revenue</i>	\$3,000,000	16.4%	\$5,500,000
<i># of new donors annually</i>	180	20%	375
<i>State Seminar & Domestic Program Revenue</i>	\$1,866,063	17%	\$3,500,000
<i>ALA Revenue</i>	\$86,102	23.5%	\$200,000
<i>WLC & International Programs Revenue</i>	\$825,250	9.8%	\$1,200,000
<i>Total in Hugh O'Brian Legacy Fund</i>	\$123,876 (as of Apr 2016)	34%	\$400,000
<i>Total in Reserves</i>	\$1,354,182 (as of Apr 2016)	5.6%	\$1,700,000
<i>Donor retention rate</i>	22.54%	3.2%	25%
<i># of online donors</i>	50	50%	250
<i>% of board members meeting give/get goal</i>	41%	25.7%	100%
<i># major gifts</i>	2	2	10
<i>% annual revenue from corporate sponsorships and grants</i>	6.6%	25%	16%

How we will achieve this goal:

<i>Strategy</i>	<i>Proposed Key Tactics/Initiatives</i>
Raise HOBY's profile and brand recognition/strengthen "case" for fundraising	<ul style="list-style-type: none"> ▪ Brand survey ▪ Media outreach and monitoring ▪ Research to prove impact of HOBY model (especially with underserved populations and outside the U.S.) ▪ Establish HOBY as a thought leader by increasing speaking engagements ▪ Increase testimonial collection and use ▪ Volunteer-driven, geotargeted fundraising

Strategy	Proposed Key Tactics/Initiatives
<p>Increase donor retention and cultivation for increased gifts</p>	<ul style="list-style-type: none"> ▪ Strengthen development team ▪ Donor segmentation and customized cultivation strategies for priority prospects ▪ Wealth screening tools ▪ New stewardship campaign(s) ▪ Implement Donor Perfect database phase II and III Redesign donate page on website with a specific focus on user experience and conversion rate
<p>Identify and pursue new sources of support and revenue (corporate sponsorships, major gifts, “buy one-give one”, etc.)</p>	<ul style="list-style-type: none"> ▪ Expanded prospect lists ▪ Leverage alumni and volunteer connections/networks ▪ Implement Donor Perfect database phase II and III ▪ Volunteer-driven, geotargeted fundraising ▪ Alumni association ▪ Parent and alumni giving campaigns ▪ Establish giving goals for alumni and volunteers ▪ Developed countries/high-income areas support developing countries/lower-income areas ▪ Planned giving programs with alumni and volunteers ▪ New/innovative partnership packages (e.g., Big 4 Consulting Firms)
<p>Expand fee-generated revenue as appropriate (vis-à-vis competition and what market will support)</p>	<ul style="list-style-type: none"> ▪ Price study/comparisons – periodically revise pricing and revenue share as appropriate ▪ Pilot new pricing strategies ▪ Review growth strategies on a yearly basis to become more effective in challenging the organization to continue developing
<p>Engage all board members as donors, champions and fundraisers</p>	<ul style="list-style-type: none"> ▪ Leverage alumni and volunteer connections/networks ▪ Reassess current give/get policy and consider expanding this policy to include GIK services to ensure 100% of BOT and BOG participation ▪ Annual customized outreach strategies for all BOT and BOG members

Grow total number of volunteers by 10% and retain 75% of existing volunteers annually

Volunteers are the core of HOBY and we cannot achieve the goals of this plan without them. To engage more young people in HOBY programs, we need more volunteers. Key to this success is focusing on volunteer retention. Experienced, returning volunteers provide a stable base from which to grow and maintain a quality program experience at the same time.

The following chart outlines the specific measures that will be used to indicate our success in reaching our goals.

<i>Measure(s)</i>	Baseline	Annual Change	2020 Goal
<i>New aggregate volunteer growth annually</i>	6.5%	11.4%	10%
<i>Annual volunteer retention rate</i>	51%	10%	75%

How we will achieve this goal:

Strategy	Proposed Key Tactics/Initiatives
Establish progression pathway for volunteers (continuous engagement, not just seminar season)	<ul style="list-style-type: none"> ▪ Create volunteer Advisory Council to provide ongoing feedback and input ▪ Mentor program (seasoned volunteers paired with new volunteers) ▪ CLeW registration and management system ▪ Continuing leadership development ▪ Regional training participation supported by HOBY ▪ Create new volunteer roles for emerging HOBY programs
Strengthen systems for volunteer management	<ul style="list-style-type: none"> ▪ Expanded/enhanced recognition program ▪ International training events ▪ L4S volunteer logging ▪ IT infrastructure ▪ Online learning/training platform ▪ Tools/technology to make volunteering easier ▪ Volunteer Year-End Survey; feedback tools ▪ Mentor program (seasoned volunteers paired with new volunteers)

Strategy	Proposed Key Tactics/Initiatives
Identify and implement new roles and entry points for volunteers as appropriate (aligned with new strategic plan goals and strategies)	<ul style="list-style-type: none"> ▪ Create new volunteer roles for emerging HOBY programs ▪ Mentor program (seasoned volunteers paired with new volunteers) ▪ CLeW registration and management system ▪ Continuing leadership development ▪ Regional training participation supported by HOBY
Leverage partnerships for recruitment	<ul style="list-style-type: none"> ▪ Phi Sigma Pi, corporate volunteer programs, young professional organizations
Engage volunteers in targeted outreach and promotion	<ul style="list-style-type: none"> ▪ Identify outreach and promotion roles appropriate for volunteers to increase HOBY's reach and brand awareness

Engage 10% of recent HOBY alumni in HOBY annually*

HOBY alumni are our best advertisement, strongest advocates, and an under-utilized asset. HOBY must build on the “life-changing” HOBY experience of alumni by engaging them in strengthening and growing the organization. While limited alumni data exists today, over the next four years, we seek to obtain better data to identify trends and better engage our broad alumni network.

<i>The following chart outlines the specific measures that will be used to indicate our success in reaching our goals.Measure(s)</i>	Baseline	Annual Change	2020 Goal
<i># of different programs/opportunities for alumni engagement</i>	4	2	12
<i># of alumni who donate to HOBY Int'l</i>	Data not collected		100
<i>% of HOBY volunteers who are alumni</i>	73.08%	.65%	75%
<i>% of alumni engaged with HOBY's Alumni Association</i>	N/A		1.5%
<i>Total alumni engagement</i>	Data not collected		10%

*Recent is defined by alumni that have participated in HOBY programs within the past 10 years

How we will achieve this goal:

Strategy	Proposed Key Tactics/Initiatives
Develop and publicize new engagement opportunities (aligned with goals/strategies in new plan; e.g., donate, volunteer, recruit students, scholarships, promote HOBY)	<ul style="list-style-type: none"> ▪ Identify outreach and promotion roles appropriate for alumni ▪ HOBY blog growth; newsletter ▪ In-person experiences ▪ Speakers bureau ▪ Create new volunteer roles in new and emerging HOBY programs
Improve data collection, tracking, communication	<ul style="list-style-type: none"> ▪ Data cleanse ▪ Develop mobile engagement platform ▪ Track alumni college, professional life ▪ Enhance L4S tracking
Establish an active HOBY Alumni Association	<ul style="list-style-type: none"> ▪ Evaluate how other alumni associations acquire and retain members ▪ HOBY blog growth; newsletter ▪ Tiered-membership with increased access to member benefits ▪ Speakers Bureau

Strategy	Proposed Key Tactics/Initiatives
<p>Establish a continuum of HOBY programs through college and mid-career opportunities</p>	<ul style="list-style-type: none"> ▪ Internship program with government and companies ▪ College readiness grants ▪ Every site has a seasoned alumni chair on corporate board ▪ Expand HOBY day of service (service corps) ▪ Adult seminars ▪ Alumni groups on college campuses ▪ Ongoing professional development
<p>Engage alumni in targeted outreach and promotion</p>	<ul style="list-style-type: none"> ▪ Identify outreach and promotion roles appropriate for alumni to increase HOBY's reach and brand awareness

Strategic Planning Process

An eight-month strategic planning process was led by Nancy Murphy, Founder and President of CSR Communications, with a committee of board, volunteers, alumni and staff. To complete this plan, the committee undertook the following:

- SWOT analysis
- Competitor scan
- Executive interviews with internal and external stakeholders
- Survey of volunteers, alumni and parents
- Program assessment
- Visioning exercise
- Goal and strategy work sessions

Background materials and research available upon request.

Strategic Planning Committee Members

Facilitator: Nancy Murphy

Cheryl Brenn, Staff

Sonya Gavankar, Field Volunteer (IL-N, 1993)

Megan Glynn, Staff

Steven Hall, BOT (FL-N, 1997)

Krista Kobeski, Field Volunteer (PA-C, 2001)

Javier LaFianza, CEO

Barry Meneghelli, Field Volunteer

Ametisha Morey, BOT (CA-C, 1986)

Erin Muckey, BOT (SD, 2004)

Vicki Ferrence Ray, Staff (PA-C, 1989)

Tami Seeger, Staff

Bryan Tate, Field Volunteer

Board of Trustees Members

Chair: Steven Hall (FL-N, 1997)

Mark LaRosa (Past Chair) (NJ, 1987)

Sanoj Stephen (President) (NY, 1991)

Stephanie Jackson (President-elect) (FL-S, 1995)

Kristin Winford (Treasurer)

Jason Lewis (General Counsel, Secretary) (OK, 1989)

Javier La Fianza

Monika Bach Schroeder (NY-W, 2003)

Jack Butler
David Fergusson
Joshua Ford (NY-W, 2005)
Jeff Kohn
Ametisha Nator Morey (CA-C, 1986)
Erin Muckey (SD, 2004)
Chris Swonger
Russell Tanguay (CT, 2000)
Rhett Wilson (AZ, 1995)

Staff Members

Chief Executive Officer: Javier La Fianza
Evan Akers, Program Associate
Cheryl Brenn, Chief International Programs Officer
Crystal Boutiette, HR, and Communications Manager
Noel Elgraby, WLC Assistant
Vicki Ferrence Ray, Chief Programs Officer (PA-C, 1989)
Megan Glynn, Director of Alumni and Volunteer Relations
Kevin Grace, Director of National Programs, B Region
Laurie Hayes, Bookkeeper
Danyll Lockhart, Director of National Programs
Sunshine Navarro Shivel, Registration and Outreach Manager
Rose Santini, Director of National Program, Y Region
Tami Seeger, Executive Assistant
Jess Sherwyn, Program Associate
Deirdre Shipstead, Director of Development

Appendices

Appendix A: Board Resolution – 2015 to adopt Advancement Team

At the conclusion of the annual two-day Board of Trustees retreat held on January 22-23, 2015, in New York City, the consensus of the retreat participants was that the Executive Committee should meet and put forward its recommendations regarding 2015 strategic initiatives based on the discussions held at the Retreat. Following a meeting of the Executive Committee held on January 28, 2015, the Executive Committee prepared a draft recommendation that was reviewed and discussed by the Board of Trustees at a special informational meeting held on February 5, 2015 and to be acted upon at a subsequent meeting. The purpose of the bifurcated approach to consideration of the recommendations was to give everyone an opportunity to reflect upon the work product produced at the Retreat and the proposed follow-on recommendations. After soliciting and receiving additional input from members of the Board of Trustees following the February 5, 2015 special meeting, the Executive Committee met again on February 12, 2015 and February 25, 2015 to finalize these recommendations based upon the discussions at the February 5, 2015 special meeting and other suggestions received from the Board of Trustees.

The Executive Committee recommends that the Board of Trustees adopt the following strategic goals and objectives to be implemented during 2015 and 2016:

1. HOBY will establish a professional advancement department consisting of a vice president of advancement, a director of alumni and volunteer relations, a director of communication and marketing, a director of development, and one or two administrative support staff to develop and implement a sustainable, professionally supported advancement program that will provide necessary financial and other resources to ensure HOBY's continued existence and growth.
 - a. HOBY will recruit and hire the new director of alumni and volunteer relations, the new director of development and one administrative support staff member as soon as practicable during the 2015 calendar year. HOBY will continue to utilize the services of an outside advancement consultant until a full-time vice president of advancement is hired. It is intended that the advancement department will be fully staffed no later than September 30, 2016.
 - b. In order to benchmark appropriate threshold financial progress for the advancement department, the fiscal year 2017 budget shall provide that budgeted 2017 development revenues will fund:
 - (i) professional compensation, benefits and direct expenses for the advancement team's activities and events during 2017; and
 - (ii) net development contributions to the remainder of the 2017 budget shall be no less than the net development contributions originally budgeted for the 2015 fiscal year (approximately \$134,000).
 - c. HOBY's CEO and the advancement team will work with the Development Committee and Finance Committee to create a plan for establishing a reserve fund equivalent to HOBY's gross annual expenses (in addition to the recently established endowment fund in honor of Hugh O'Brian). This plan will be incorporated into the budgeting process beginning with the 2016 budget.

- d. HOBY's CEO and the advancement team will work with the Development Committee to organize and execute two annual Albert Schweitzer Awards dinners in New York City each spring and in Los Angeles each fall beginning in 2015.
- e. HOBY's CEO and the advancement team will work with the Development Committee and WLC chairs to develop and execute an annual fundraising event in conjunction with the WLC closing dinner for high potential HOBY supporters beginning in 2016.
- f. HOBY's CEO and the advancement team will work with the Development Committee to develop a targeted engagement plan to identify and engage HOBY alumni in positions of influence in support of HOBY's mission. In support of this activity, HOBY's CEO and professional staff have evaluated and will implement a wealth screening database to complement HOBY's new DonorPerfect donor database system.

2. In addition to creating a director of alumni and volunteer relations within the advancement department, HOBY's CEO and professional staff will work with the Strategic Planning Committee and FOP to develop a plan to change the narrative with alumni and volunteers so as to maximize future engagement with and support of HOBY and its mission.

- a. HOBY's CEO and professional staff will work with a task force appointed by the Board of Trustees to develop and release a HOBY APP at the 2015 WLC with additional refinements to be developed and rolled out during the 12 month period leading up to the 2016 WLC.

- i. The initial beta release will be designed with limited scope and functionality but with sufficient appeal to "capture" 2015 WLC participants as the first active group using the APP for engagement and connectivity to HOBY following their WLC experience.

- ii. The goal for the APP is to include both "push" and "pull" features including database updating, fundraising, service hour reporting, communications and postings among users, communications from HOBY and other features determined by the task force (with input from WLC participants gathered during the 2015 WLC).

- iii. The task force will also evaluate HOBY's current proprietary contact management database (both software and data maintained in the database) and will report its assessment and any recommendations to the Executive Committee and the Board of Trustees.

- b. HOBY's CEO and professional staff will work with the Strategic Planning Committee to:
 - i. Develop an engagement strategy for post-high school participants generally in support of HOBY's mission; and
 - ii. Develop a plan to organize and execute homecoming events for alumni and volunteers in 2018 as part of the celebration of HOBY's 60th Anniversary as well as the 50th Anniversary of the WLC.

Appendix B: HOBY's Financial History

- **Early HOBY:** From 1958 until 1968, HOBY programs consisted of one seminar, held in Los Angeles each year. Between about 20 – 40 students, primarily boys participated in HOBY. Hugh's brother Don, who was involved with the CA YMCA, arranged location and speakers. Expenses were minimal and Hugh successfully covered it through his individual fundraising efforts.
- **Early Growth:** In 1968, the LA Seminar began to include International and National participants and became the International Leadership Seminar (ILS), the precursor to the World Leadership Congress (WLC). Less than 100 students attended the ILS. Hugh's individual fundraising efforts continued to fund the single seminar. Girls began participating in 1972.
- **Mid- 70's – late '80s: National Expansion:** As more students and cooperating organizations became introduced to the HOBY experience via the ILS, volunteers began replicating the model across the country. Programs were offered at non-cost to students and schools. Hugh's fundraising successfully covered costs for a small HOBY office and the ILS/WLC. The Board of Trustees was incorporated in the mid- '70s, which helped with the fundraising as well. Local sites were responsible for their own fundraising. Hugh also developed relationships with Cooperating Organizations such as Jaycees, Lion's Clubs, Women's Clubs, Kiwanis, Optimists etc. who provided volunteers and funding for local seminars.
- **'90s – 2002:** While still free to students, parents and schools, growth of all programs and HOBY strained Hugh's ability to effectively fundraise to fully cover costs. Local sites still relied on local fundraising, especially from Cooperating Organizations. Schweitzer Dinners were critical to fundraising efforts, supplemented by Hugh's personal relationships and some grants. Sites were also required to provide \$50 per student payments to HOBY International for services in support of the seminars. These payments did not always occur and there were no consequences for failing to do so. In 2002, Hugh received an award from the Lions Club International for \$200,000 of which \$65,000 was used to create an endowment to send students to WLC. That endowment grew to \$114,000 and was transferred to the Hugh O'Brian Legacy Fund in 2015.
- **2002:** Due to continued challenges in fundraising and payment from the sites, the National Registration fee was announced in September of 2002 to be in effect immediately for the 2002-2003 program year. The fee was \$150 per student, with sites earning a base revenue share of \$25 per student. Because of the poor implementation and communication of the registration fee, student registrations dropped from a high of over 13,000 students in 2002 to less than 6,609 in 2003. A registration fee for WLC was implemented in 2001, with sites required to pay for two students to attend. In 2003,

WLC was opened up to self-selected/funded students. HOBY International fundraising efforts, including dinners continued. The 2001 Schweitzer Dinner was rescheduled due to 9/11 to March of 2002 but with greatly declined revenues.

- 2003 – 2009: HOBY came to rely nearly entirely on the registration fees from State Seminars and WLC for organizational funding. Hugh and the organization's fundraising efforts were sporadic and had limited success. Schweitzer Dinners in NY were discontinued after 2006 and in LA after 2008. From 2003 – 2007, the Board continued to authorize additional expenditures from the reserve fund to cover organizational shortfalls. Since 2007, no funds have been withdrawn from reserves. State seminar and WLC registrations and revenue grew incrementally during this time.
- 2010 – Present: HOBY relaunched the Schweitzer Dinners in NY starting in 2011. The first NY dinner had a slight net loss. Since 2012, each NY dinner has generated revenue, with a high of \$463,000 in 2013. In 2015, HOBY relaunched the LA Schweitzer dinners as well. In 2015, plans for a comprehensive Advancement Department were developed with phased implementation beginning in 2016.

Appendix C: Implementation Plan Timeline

Once HOBY's Strategic Plan is approved, the Implementation Team will work with Senior Leadership to prioritize the strategies and develop a 12-18 month Implementation Plan. As part of this plan, the team will identify the tactics that HOBY will utilize to reach our strategic objectives. In addition, a dashboard will be developed and maintained for the Board to have regular updates as to the progress of this strategic plan.

Timeline	Action	Output	Key Participants
July 2016	Final Approval by Board of Trustees		BOT
September 21-22, 2016	Collaboration Work Session #1	12-18 Month Implementation Plan	Senior Leadership
September-November 2016	Build out Implementation Plan	Identify Functional Leaders for each strategy	Implementation Team & Senior Leaders
October 2016	Collaboration Work Session #2	Organizational Timeline	Senior Leadership