

MF Strategic Implementation Plan 2020 - 2025

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EXECUTIVE SUMMARY

Purpose of the Strategic Implementation Plan

This Strategic Implementation Plan proposes an iterative, 5-year strategy to transform the Melton Foundation into an impact-oriented, dynamic organization that is positioned to thrive in programs as well as partnerships and become sustainable in resource development by 2025. Upon the approval of this document, the Executive Team will start an iterative implementation process based on 4 major goals:

1) Amplify & document Impact

We strive to amplify the impact of the Melton Foundation by developing a clear and compelling value proposition as leader in global citizenship education. The key aspects include social innovation, experiential learning and intercultural curiosity. We follow an evidence based approach through developmental evaluation of our programs and strategy.

2) Increase accessibility and visibility

We strive to increase the accessibility to our programs. We therefore open our programs to additional partners outside the universities to create local hubs. The Junior Fellow program will be modularized into a Learning and Leadership Track to allow more flexibility and transition points. We aim to create a repository of learning materials and position us as educational leaders. We market our programs more strongly to increase collaboration and strive to build a community of practice.

3) Work towards positive budget

We strive to work towards a positive budget by diversifying our revenue streams. However, we also will continue to moderately overspend to invest in the proposed changes. We follow the assumption that with increased accessibility and visibility we will be able to generate additional income to leverage the endowment distributions.

4) Align organizational structures with strategy

We will adopt our governance structure to ensure it best supports reaching above aims. This means that we will adopt our articles of incorporation and bylaws. We also adopt staff structure and responsibilities according to the strategy.

Timeline

The plan foresees an iterative change process:

Stage 1: 2019 - 2020 Strategy Launch and grandfathering current JF Program

Consolidating work of current Design Teams, formulation of value proposition, adaption of JF Curriculum, developing metrics system, developing hub structures (incl. pilot of a MF hub in Bangalore)

Stage 2: 2021-2022 Implementation of core aspect of the plan

Modularized Learning & Leadership Track, implement hub structure, implement impact evaluation, increase partnerships, and diversify income

Stage 3: 2023 - 2024 Expansion phase

If the strategy shows success based on our monitoring and evaluation framework and external response we increase efforts to build local hubs, expand the community of practice and evaluate possibilities for growth. We build on what works, consolidate partnerships & invest in resource development. A fall back scenario ensures that the MF would be capable of continuing a lean JF program with minimum staff, if all efforts fail.

Stage 4: 2025 Consolidation and begin of new strategy cycle

Assessment of situation and begin of strategy planning for next 5 years

Budget projection

The plan foresees strategic investments going forward. This means staying at spending levels around 700 to 800k in the next two years against an anticipated income from the endowment of around 500k. Going forward the board will have to decide which degree of overspending is acceptable. If no further revenue is generated the Foundations has a lifetime of approx. 13 years. Alternatively, in five years a fallback scenario can be executed that would mean a very lean program with 2,5 FTE. However, we strive to diversify our income to be able to increase our reach and impact. Growth will ultimately depend on the success we have to mobilize external funds. We do not suggest to increase the budget substantially without securing new sources of income.

This proposal does not include making any decision on next years or any following budgets. Numbers in the Annex are illustrative. Budgets are developed annually based on propositions of the Executive Office.

Recommendation from the (Interim) Executive Director

My recommendation is to approve the Strategic Plan. The plan builds on our legacy while opening up to the outside world. The implementation will be iterative, giving room for adjustments along the way, or as Henry Mintzberg would say we follow an emergent strategy. The approval by the BOD would give staff and the MF community a clear sign to move forward, making immediate changes where possible and concentrating on developing the core aspects of the plan further.

FULL STRATEGIC PLAN

Developed by the Fellowship Model Design Team

(with special thanks to key-contributors and co-authors Ashley Wilson, Beryl Nana Ama, Falk von Möllendorff, Neli Blum, Pedro Poblete, Steffen Bethmann, Tejaswini Ravindra and Victor Valenzuela).

Leadership & Overall Coordination: Lars Dietzel

VISION FOR SUCCESS

Since its founding in 1991, the Melton Foundation has brought together talented, emerging leaders from diverse geographies to develop their competencies to thrive in a globalized world. Based on collective experiences made especially through the initial years of the Fellowship, the majority of the 550+ Fellows have been able to develop deep personal relationship based on trust and mutual respect. Thus, many Fellows have stayed engaged with the foundation throughout their lives, which has resulted in the unique, close-knit Fellows community we observe at present. The ‘secret sauce’ of how the Melton Foundation curates and cultivates relationships has been an asset when developing meaningful learning experiences and leadership capacity in emerging change agents to date.

While the foundation has been successful in developing strategic partnerships with programmatic benefits beyond its partner universities (e.g. HPI School of Design Thinking), there is room to leverage and better capitalize on our strongest assets - our unique approach to developing global problem solvers by fostering deep intercultural collaborations that yield powerful actions. Part of our vision for success is to build on this ‘secret sauce’ and explore novel ways to communicate this unique value to existing and new audiences in order to better position, connect, and (financially) sustain the Foundation in the future.

To steer the Melton Foundation towards that vision, four top-level Goals underpin all aspects of this plan.

TOP-LEVEL GOALS

Goal 1 Document and amplify the mission impact of the MF

Assessment and evaluation is not new to day-to-day operations. Most of the programs in the MF have been developed through iterative processes, where evaluation of previous

experiences has informed improvements and innovations going forward. However, the attempts to develop coherent indicators for impact measurement have been few and little successful. Based on the research conducted by this Design Team, this is primarily for the following reasons:

- While the current mission & vision is relevant, it is ambiguous with regard to the primary purpose of the organization. Considering our finite budget, it is imperative to develop a focused value proposition for the foundation, which shall serve as baseline to develop coherent and clear indicators to measure the organization's mission impact short-, mid- and long-term.
- Traditionally, fellows have been the primary beneficiaries of the Melton Foundation. This is not an issue per se. However, the exclusive focus on fellows as the MF's 'core contribution to the world', coupled with an ambiguous mission & vision statement along with a vague Return on Investment strategy (outlined in the Theory of Change), makes a systematic tracking of fellows' lives and career choices - and thus the direct or indirect impact of the MF - very difficult.

As an organization that (a) promotes and enables collaborations across boundaries, and (b) sustains its programs through strategic collaborations and partnerships, this plan foresees to develop the following by the end of 2019:

- a focused organizational **value proposition** that is compelling, competitive and deliberate about the MF's "core product" and "core activities". To remain unique and carry forward the founding idea of convening young talent and enabling them to be global problem solvers, this proposal entails a re-framing of how we "promote and enable global citizenship", namely by engaging change agents with track record of civic engagement and/or leadership in their community in a global learning lab to connect, explore, develop and share innovative solutions to global and local issues with 'social innovators' from across the. An initial Social Business Canvas developed by this Design Team was shared in December 2018 and shall be refined in the upcoming months.
- a comprehensive **Monitoring and Evaluation (M&E) framework** with clear and coherent indicators that allow for rigorous tracking and assessment of the effectiveness across all aspects of the MF's work (for details, see Annex 3: M&E)

While the value proposition can be expected to result in more targeted, purposeful programming, partnerships as well as new avenues for revenue generation, the M&E framework would become our primary tool to track and measure impact, and serve as Proof of Concept. Although the elaboration of both is primarily an internal process, consultants

and expert advice may be considered. This will have budget implications, unless we can access the required subject matter expertise pro-bono within our own community or through our network-of-networks.

This process shall be highly participatory to allow members of our community as well as interested institutional and organizational partners to contribute with insights, perspective, vision and expertise. Effective change management (not only in 2019 but also during the months and years to follow) will be the key to success and shall primarily be led by the Director of Strategy and the (Interim) ED.

Goal 2 Increase accessibility and diversity of the MF

The Melton Foundation has been very narrow when recruiting fellows into its program. As a consequence of our legal status with the IRS until recently, only students from to-date six partner universities across the globe could access the fellowship. While there have been no limitations regarding applicants' academic background, the limited access to the MF has proven to be one of the biggest challenge for fundraising efforts in the past. The successful efforts to change the MF's legal status from initially 'support organization' to now 'private operating foundation' in 2017/18 offer greater flexibility in how the foundation operates, partners and recruits fellows. While we envision to build on our unique legacy, we see the need to increase access to the opportunities provided by the MF in order to become more relevant to collaborators, potential funders and to society as a whole.

In particular, we expect to (a) make the Melton Fellowship more appealing, (b) capture and retain talent more effectively, (c) diversify avenues for organizational and institutional partnership, (d) increase cultural and socio-economic diversity of our network, (e) amplify fundraising opportunities, and (f) leverage limited resources for tangible mission impact. To achieve this, the following measures shall be taken:

- Transform the current university-model into a **hub-model** to increase access, visibility and relevance in specific locations. Our existing partner universities would be key-partners in the endeavor to develop and gradually implement strategies that are pertinent to each location (for details, see Annex 5: HUBS). While each hub would have a unique 'DNA', MF hubs in general shall (a) be geographically defined, (b) engage multiple organizational and institutional partners in that territory, (c) connect to the MF's value proposition and mission, and (d) have structures in place to be self-sustained once established. If our initial attempts are successful, Fellows or partners could initiate MF hubs anywhere in the world.

- Transition to a modularized approach to the Melton Fellowship. At present, the Melton Foundation offers a fellowship for life; the core learning however, happens during the initial years, i.e. the Junior Fellowship. In order to be more dynamic with our programs, better aligned with our target audience, and diversify access opportunities to the Fellowship, this plan entails the development of **two tracks** - a Learning (approx. 1.5 yrs) and Leadership Track (approx. 1 yr), a **Community of Practice** (COP, annual renewal) for active and engaged members of our growing community, as well as an alumni-type **network** for those graduates who are not in the position to be more actively engaged. Thus, we keep the aspect of life-long commitment, while being more purposeful on where and how to invest resources. Furthermore, having well defined transition points between tracks as well as the COP and the alumni-type network will allow us to collect and use data more systematically in order to improve programs and measure our impact. As a result, the Melton Fellowship as such would be limited to the duration of a track. Following graduation, Fellows can join the Community of Practice or become a part of the alumni-type network, based on their availability and interest. The same options will be available to current Senior Fellows. (for details, see Annex 6: TRACKS and Annex 7: COP)
- **Candidates' profiles** shall be refined in order to attract best suited individuals to join the Melton Foundation, whether it is for the Learning Track, the Leadership Track or the Community of Practice. Aligned to the MF's unique approach to developing global citizenship through project based collaboration across boundaries, future Fellows shall have track record of innovative civic engagement in addition to curiosity to learn about the world, global issues, different cultures, etc. By introducing a more focused candidate profile, we expect to curate relationships for impact and deliberately build a community of global problem solvers, while building win-win oriented organizational partnerships as well as developing fundraising potential.
- Transcend know-how and approaches developed by SF trainers and staff by better documenting activities, workshop approaches, tools, etc. from our online program(s) and events. Those shall be compiled and organized in a resource center for tested and recommended activities, methodologies, etc. to help facilitate a rich learning environment in tracks. Depending on funding availability and relevance, this resource center could be developed further into a '**Toolkit** for Global Problem Solvers' and be marketed to partners and audiences outside the Foundation.
- If successful with the above measures, the modularized approach bears opportunity to easily widen the scope and open up the track-fellowship to applicants beyond MF hubs in the future. Global partners could be approached to cross-promote the Fellowship and/or our Community of Practice, or even endorse suited candidates

from their network for the opportunity. This would increase the diversity within our community, create additional avenues for partnerships and resource development, and become a stepping stone towards building MF hubs in new geographic locations in the future.

Because this goal is many-fold and entails a number of variables that are (a) currently unknown in its full extent and (b) interconnected and dependent on resource activation, this plan foresees an iterative/emergent implementation process. Specifics are yet to be developed- especially for the development of MF hubs as well as curricula for the tracks - and should consider consultants and expert advice at crucial points. This will have budget implications, unless we can access the required subject matter expertise pro-bono within our own community or through our network-of-networks.

The development of detailed strategies especially for hubs, the Community of Practice and the alumni-type network shall be highly participatory in order to consider insights, perspective, vision and expertise of members of our community as well as interested institutional and organizational partners. Effective change management throughout will be key to success, and shall primarily be led by the Director of Strategy and the (Interim) ED. Risks can be mitigated through diligent monitoring and evaluation (M&E), iteration and (necessary) strategy adjustments along the way.

Goal 3 Work towards a positive budget

At present, the primary revenue of the Melton Foundation comes from the endowment donated by Bill Melton when founding this organization. Over the years and especially as a result of the recent financial crisis, the annual revenue from the endowment has decreased to currently approximately 450-500k USD per year. The endowment is valued around USD 9 million at the moment which means a remaining lifetime of around 13-14 years considering current annual expenses of approx. 700k USD per year. There are two contrasting approaches to sustaining the Melton Foundation: (1) significantly scale back programmatic activities to stay under the revenue produced by the endowment, (2) make strategic investments to diversify revenue streams and increase fundraising success of the MF. With a focus on yielding more tangible mission impact, this plan foresees a moderate investment strategy at first, in order to position the MF for financial sustainability in the future. Concrete examples for how we envision to work towards a positive budget 2020-2025 are:

- Promote impact investment, monitor cost-drivers, reduce overhead when possible, and publish annual reports to **position the MF as 'trustworthy' organization** with

potential donors and funders. This includes increased activity on global donor platforms such as GuideStar.

- Diversify revenue streams to **overcome endowment dependency**. With a focused value proposition in place, we expect to engage in more impact oriented partnerships, including with funding partners from business and industry. Connecting e.g. the leadership track or the Community of Practice to existing CSR initiatives, co-sponsoring events, developing MF hub strategies that include fundraising at local level to become self-sustained, etc.
- **Project-oriented fundraisers** within and beyond the MF community to pool resources that can be given as grants to support pilot innovations developed by members of our community or to take existing projects to scale - whether these emerge in MF hubs, tracks or the Community of Practice.
- Introduce **fees** to eventually self-sustain our Community of Practice, possibly also MF hubs. Inspired by membership organizations, annual fees would make resources available to develop, scale and increase reach and impact of programmatic activities beyond the Fellowship (Learning and Leadership Track).
- Pursue **events co-sponsorship**: With a compelling value proposition in place, the MF will be better positioned to market and co-finance events with external sources like foundations, industry, business, governments, etc. Also, MF organized events would be marketed to wider audiences with a registration fee. A case in point is the Global Solvers Co-Lab 2018, where the MF secured funding from a Jena-based foundation to cover 50% of the total event costs. Furthermore, participants paid a share of their cost, some up to 100% which reduced the event cost significantly while creating opportunity to engage wider audiences in our programs.
- Resume **fundraising** as core-activity of the MF starting 2021 (if not earlier). Considering lessons learned from previous fundraising efforts, the fundraising strategy should be agile in approach and global in scope to leverage the increased potential through hubs, national and regional funding opportunities (e.g. EU grants), as well as sponsorships from industry, business or 'big donors'. In addition, regular internal fundraisers will be part of the fundraising portfolio again. Ideally, senior staff members and BOD members support fundraising efforts, or even seek to secure funding for activities that fall under their purview.
- If successful in the pursuit of esp. goal 2, we see additional revenue potential e.g. by developing capacity in the area of **consultancy or developing certified courses** that can be offered to other organizations and businesses (source contents e.g. from the Learning Track curriculum). The **Toolkit** for Global Problem Solvers would be another

example of a marketable ‘product’ that the MF could provide to wider audiences (whether as open source or upon a fee).

- Last but not least, the **endowment** will remain an important revenue stream for the MF and would be used to co-finance the Fellowship tracks along with those staff and operating costs that cannot be otherwise secured.

While based on research and good practice examples, it is important to note that the accomplishment of this goal requires serious dedication by staff, BOD and our wider community. In order to develop and cultivate diverse revenue streams, the plan foresees an increase in annual expenses. Rather than austerity and strip-down programs, we propose a moderate spend-down of the endowment as initial investment in capacity and tools needed to position the MF for greater success in resource development in the years to come. An important next task will be to introduce refined measures and target budgets per year that allow to track and project the MF’s financial development more closely. The plan does not yet show which funds are expected to come from which sources. Projections are difficult to make. We propose a conservative approach, not increasing the budget substantially, but building on successful income generation.

Significant efforts in communications and marketing shall be made starting 2020, followed by initial fundraising activity in late 2020/early 2021. Options to be tested include hiring a person for fundraising, making fundraising a core task of key staff members, training staff on fundraising, further investments in Communication & Marketing, as well as including the community in fundraising effort. Risks shall be mitigated through diligent monitoring and evaluation (M&E), iteration and (necessary) strategy adjustments along the way. During a mid-term strategy assessment in 2022 (for details, see Annex 3: M&E), initial resource and development progress will be evaluated in order to readjust the MF investment strategy, which may including a fallback approach in absence of notable progress in that area.

Goal 4 Align organizational structures & processes with strategic goals and mission

The MF’s structure, governance and procedures have evolved over time. This is another crucial junction for a critical assessment of our organizational modus operandi in order to create favorable conditions that facilitate the implementation of this plan. This includes, but is not limited to, the revision of the MF’s

- Accountability and/or transparency commitment
- Staffing structure, geographical distribution, and performance indicators

- Governance structure, board composition, and by-laws
- Policies and procedures, including decision making processes
- IRS ruling
- Communication and collaboration platforms and ethics
- Organizational Core Values and their application across all areas

As this is closely connected to the work of the Policy & Governance Design Team, this plan foresees a close collaboration with that team, in order to incorporate their recommendations, complement this aspect, and eventually transform this Strategic Implementation Plan into a comprehensive Strategy 2020-2025 to be applied MF-wide and across all areas of activity. The Interim ED oversees the alignment and reformulation of core documents.

STAGES

This plan envisions four strategic stages for the implementation, which are summarized below. For further details, including milestones, indicators and accountability, please also refer to Annex 2: Consolidated Timeline.

Stage 1: *Strategy launch & grandfathering current model (2019 - 2020)*

The changes envisioned for 2025 require diligent preparation. Therefore, the initial two years, shall be used to put the pieces into place that are required for the vision to thrive. With the approval of this Strategic Implementation Plan, efforts shall be made to

- Consolidate both Design Teams' work into one overarching strategy that will govern all areas and aspects of the organization going forward - program, operations, governance, etc.
- Refine and test MF value proposition to ensure it's compelling, pertinent and realistic
- Develop coherent and effective Monitoring & Evaluation (M&E) indicators that allow for rigorous tracking and assessment of the effectiveness of MF programs, structures and procedures. This will be key in ensuring the iterative nature of the strategy, detect challenges of failures early and adjust accordingly.
- Design and test curricula for fellowship tracks, co-develop strategy proposals for local hubs, define and test approaches for the Community of Practice
- Develop a cogent communications and marketing platform

In parallel, the existing Junior Fellow program will also be implemented, including NFO and

GCC. While incremental changes to activities and curriculum may be introduced, we cherish the commitment made by the Fellows when joining the foundation. The last batch with the current 2.5 year Junior Fellowship will be recruited in 2019. The current model shall be grandfathered thereafter.

This initial stage requires effective change management within our community as well as with existing partners and collaborators. While an evolution of our organizational model is necessary, we want to provide ample opportunity for our Fellows and partners to engage in a constructive and forward-looking way.

During this first stage, capacity and/or expertise will be required in the following areas:

- Monitoring and Evaluation (M&E) expertise to develop indicators and measures, train senior staff and oversee rigorous application of the M&E standards
- Marketing & Communications to develop and implement a comprehensive communications & marketing platform and strategy
- Knowledge and networks to support the development of effective and efficient structures in local hubs
- Novel approaches, formats and tools to effectively engage practitioners in a Community of Practice
- Know-how in social innovation and/or entrepreneurship to help develop esp. the leadership track and/or Community of Practice.
- IT and/or programming expertise to systematically address the MF's technology needs

These capacities would be secured by onboarding (part time) staff members, hiring temporary consultancy, as well as pro-bono engagement from within our community and beyond. Ideally much of it can be covered through voluntary engagement by Senior and/or Junior Fellows.

Stage 2: *Implement core aspects (2021 - 2022)*

In a second stage, the strategic implementation plan foresees to fully implement all aspects of this proposal. This is the stage when hubs, tracks and the Community of Practice would be in operation and, through rigorous application of the M&E standards, these proposal aspects shall be iterated to yield greater mission impact AND to broaden avenues for fundraising success.

Elements, such as implementing cutting edge technology for improved access and collaboration or developing the (internal) resource center of training approaches, exercise, methods etc. into a Toolkit for Global Problem Solvers, could also be introduced in a later stage if capacity and resources won't allow for immediate launch.

In alignment with the top-level goals, serious marketing and fundraising efforts shall be made at global and at hub-level in order to increase organizational reach and resources to carry the strategy forward.

Stage 2 will conclude with a comprehensive mid-term strategy assessment by the end of 2022. This instance shall serve as instrument to take stock on the progress so far AND analyze the investment strategy vs. revenue potential. In absence of notable progress towards Goal 3 "Work towards a positive budget", this will be an opportune moment to make necessary adjustments to the strategy, which may include scaling back to a low-cost, stripped-down program (fallback scenario).

In addition to the capacity and/or expertise requirements listed for stage 1, will foresee the following needs:

- Fundraising know-how in locations and/or world regions with MF presence
- Extended efforts to building, consolidating and expanding impact partnerships in local hubs
- Increased efforts to drive purpose and engagement in the Community of Practice and to consolidate a meaningful alumni-type network
- Materials development and marketing in preparation for the Toolkit, consolidating track contents and/or other ways to disseminate MF expertise and good practice to wider audiences (e.g. Open Source)

Stage 3: *Consolidation and possible growth (2023 - 2024)*

Under the assumption that the strategy evaluation at the end of stage two is affirmative and shows progress towards all top-level goals, this plan foresees the expansion of good practices - hubs, tracks, Community of Practice, etc. - to wider audiences. Communications and Marketing as well as Resource Development will continue to play a major role in this stage, so will investments in infrastructure, technology, staff and operations.

Aspects considered under this plan, that could previously not be introduced, would be tackled during this stage. This may include the development of an open-access 'Toolkit for Global Problem Solvers' or the implementation of a full-service online learning &

communications platform. Also additional revenue potential, such as offering consultancy services or certified courses (source contents e.g. from the Learning Track curriculum), could be sought after under Stage 3. We will strive to position us as leaders in global citizenship education.

Capacity and resource requirements envisioned for this stage in addition to what has been listed for previous stages, would include the followings:

- Social innovation and social entrepreneurship capacity to increase value and impact of the Leadership Track and the Community of Practice

FALLBACK SCENARIO: Initial resource and development progress will be evaluated during a mid-term strategy assessment at the end of 2022 (for details, see Annex 3: M&E). Should no notable progress in that area be made, this stage should undergo a complete overhaul, which might include a full retreat to the fallback scenario, i.e. a scale back to a stripped-down program in the interest of the longevity of the Fellowship Program (for details, see Annex 1: Cost-Revenue/Budget Projection).

Stage 4: Evaluation and new strategic planning (2025)

The final stage of this plan foresees a comprehensive evaluation of the progress, successes and failures coupled with the initiation of a new strategy planning process for the upcoming five years.

For a more detailed timeline, including milestones, measures and accountability, see Annex 2: Consolidated Timeline.

SUMMARY OF APPROACH & IMPLEMENTATION IMPERATIVE

This plan proposes a **moderate spend down approach** of the endowment fund in order to build capacity and put the necessary tools in place that allow us the MF to diversify its revenue streams and ensure financial stability for the future. We do not anticipate a positive budget by 2025, however it envisions a clear tendency of increased income and decrease in overspending by systematically working towards four top-level goals:

1. Document and amplify the mission impact of the MF
2. Increase accessibility and diversity of the MF
3. Work towards a positive budget
4. Align organizational structures & processes with strategic goals and mission

For almost three decades, the MF has operated on a traditional fellowship approach. With this strategy, we proposes a **more entrepreneurial approach** by modularizing MF programs and activities. By doing so, we envision to increase accessibility of the latter as well as opportunity for resource development on multiple levels. The different proposal aspects - Tracks, local Hubs, Community of Practice, or the 'Toolkit for Global Problem Solvers' (for details, see respective Annexes linked to in the text) - are inspired by good practice examples from thriving organizations across the globe; they also connect to earlier pilot-projects and approaches we explored in our own programs. While the different proposal aspects are interconnected, each one of them can be conceived as an independent unit, and shall be developed as such in an iterative manner going forward. This includes the possibility to discontinue any of those, should the anticipated impact and ROI (Return of Investment) stay away. Learning from both, earlier failures and current good practices in the field, puts the MF in a solid position to thrive in the future.

Because this plan approaches organizational development as an **iterative process**, systematic Monitoring & Evaluation (M&E) will play an important role across all aspects of the MF's activities - from programs, to operations and governance. Coherent and clear measures and indicators shall be developed at an early stage of the process in order to track and quantify progress and impact of MF's activities as well as of this plan (for details, see Annex 3: M&E). This is a significant paradigm shift in the MF and shall help BOD, staff and Fellows make more informed decisions, develop effective strategies for the longer-term, and promote institutional learning, while building the reputation of the MF as a trustworthy, impact-oriented and accountable organization.

Consequent and diligent M&E practice will also help mitigate risks through iteration and (necessary) strategy adjustments along the way.

While it is necessary for the MF Fellowship model to evolve, a programmatic overhaul alone will not suffice. In order for the MF to eventually take a prominent place among the many other similar organizations across the globe, all areas of the MF must evolve, including our approach to governance, board composition or accountability standards. This plan therefore foresees to adopt our internal structure to the strategy. This includes rewriting the articles of incorporation and bylaws. The board may be opened to donors, experts or other external people that can bring value to the foundation.

Because marketing and communication to all stakeholder audiences will be essential in this transition, this plan foresees a significant increase in communications and marketing efforts by 2020. Specific short and long term goals shall lead to a more visible foundation with a well-known mission, vision and means to achieve them. While details are to be developed, we envision an **overhaul of the MF's public profile** in order to reflect our programs, collaborations, mission and vision in a more focused, compelling and engaging way (for details, see Annex 4: Marketing / Communications).

The intensified communications & marketing efforts shall be complemented by fundraising activity towards the end of 2020/early 2021 in order to identify and **leverage diverse fundraising avenues** to enable the full implementation of this plan (for details, see Top-Level Goal 3 and Annex 1: Cost-Revenue/Budget Projection).

Having purposefully built a community around the MF's work since 1991, this plan expects to carry forward this legacy by taking **change management** seriously throughout all stages. Beyond keeping Junior and Senior Fellows abreast, we expect to increase opportunities for purposeful engagement in the future. The three premises of change management promoted by this plan are:

- Community Engagement
 - *All fellows are invited to participate in the implementation and iteration of this strategy. This include, but is not limited to*
 - *co-developing detailed strategies for different proposal aspects, such as hubs, tracks, and the Community of Practice*
 - *joining expert teams that work on developing a comprehensive M&E framework, among other opportunities to contribute with subject matter expertise.*
- Transparency & Accountability

- *Regular updates and annual reports shall be published to further increase commitment to the MF. In addition to promoting an 'open inbox' policy for BOD members and staff.*
- Iteration
 - *This plan proposes an iterative approach, which entails documentation, assessment and improvements to the work of the MF across all areas (for details, see Annex 3: M&E). To achieve this, regular feedback loops will be key and are another opportunity for members of our community to engage in shaping the future of this organization.*

ANNEXES

Annex 1: Cost-Revenue / Budget Projection

Cost-Revenue Projection

POSSIBLE GROWTH SCENARIO

The budget for 2019 reflects actual and approved numbers. Projections for 2020 and beyond take existing cost-drivers into account as well as projected expenses for staffing, capacity development, technology, events, etc.
As outlined in the Strategic Implementation Plan, we propose a moderate spend-down of the endowment initially as investment strategy to build the capacity and tools needed in order to position the MF for financial sustainability in the future.

Spending will depend on revenue generation success. This is a best case scenario for illustrative purposes. Budgets will continue to be determined annually.

OVERVIEW

	Year	2019	2020	2021	2022	2023	2024	2025
Endowment value (estimate)		\$9,292,900	\$9,172,295	\$8,875,410	\$8,486,680	\$8,011,014	\$7,576,565	\$7,215,393
REVENUE - endowment (estimate)		\$464,645	\$458,615	\$443,770	\$424,334	\$400,551	\$378,828	\$360,770
REVENUE - other (envisioned)		\$20,000	\$30,000	\$50,000	\$100,000	\$250,000	\$400,000	\$500,000
<i>TOTAL revenue (tendency rising)</i>		<i>\$484,645</i>	<i>\$488,615</i>	<i>\$493,770</i>	<i>\$524,334</i>	<i>\$650,551</i>	<i>\$778,828</i>	<i>\$860,770</i>
COST - expense (estimate)		\$605,250	\$785,500	\$882,500	\$1,000,000	\$1,085,000	\$1,140,000	\$1,165,000
<i>TOTAL overspent (tendency falling)</i>		<i>-\$120,605</i>	<i>-\$296,885</i>	<i>-\$388,730</i>	<i>-\$475,666</i>	<i>-\$434,449</i>	<i>-\$361,172</i>	<i>-\$304,230</i>
<i>Fallback (strip-down program)</i>								\$430,000

FALLBACK SCENARIO: In the absence of notable progress with initial resource and development efforts during the mid-term strategy evaluation in 2022, readjustments to this strategy should be made, which may include a complete fallback scenario to a basic learning program.

Annex 2: Consolidated Timeline

The following shows a consolidated timeline of all steps anticipated. It serves as guidance moving forward and will have to be adopted along the way.

Stage 1: Strategy Planning, Collective Transition

Timeframe	Milestone	Measure
2019	Implementation of (current) 2.5 year JF program	Description of current program (approach, performance, learning indicators & metrics)
2019 - 2020	Develop hub proposal(s) for each geography & in collaboration with (committed) partner universities	Hub strategies per location; identify & engage recruitment partners; participative process, collective decision making
2019 - 2020	Document approaches, materials, techniques, exercises used by SFs & staff during JF Program	A collection of at least 30 unique tools & approaches used to develop JFs
2019 - Q2	JF Recruitment with adapted Selection Criteria & focused candidate profile	Up to 20 New Fellows from partner universities selected
2019 - Q3	Curriculum development for Learning Track	Adapted curriculum, incl. timelines, events participation, performance & learning indicators, and measurements
2019 - Q3	Carry out hub-oriented GCC	Engage (a) strategic (hub) partners & (b) participants from outside MF university
2019 - Q4	Develop Monitoring and Evaluation (M&E) framework	M&E indicators & descriptions developed; data collection methods defined; train staff in M&E indicators & application
2019 - Q4	Finalize Strategy 2020-2025 paper	Publish comprehensive Strategic Plan (incl. Value Proposition, M&E framework, governance considerations, institutional development)
2019 - Q4	Develop recruitment strategy for Learning Track	Steps are taken to enable track recruitment for 2020
2020	Full implementation of Monitoring and Evaluation (M&E) framework	Train BOD & MF staff on M&E standards, Publication of Strategic Plan & Annual Reports (e.g. Guidestar, MF website etc.)
2020	Improve MF virtual infrastructure + identify web & technology needs for future	Up-to-date communications system; 3 quotes from CMS/CRM providers or developers
2020	Develop comprehensive communications & marketing platform & strategy to engage key-partners (existing & new)	Communications & marketing strategy (website overhaul, newsletter, social media, blog + print/A&V marketing); Compelling marketing materials along with clear and succinct elevator pitch

2020-2021	Launch local Hubs (grandfather university model - depending on interest at current partner universities)	Scope of initial hubs confirmed (incl. new MoUs); Promo materials for hub-marketing in place; Initial recruitment partners engaged (partner university + at least 1 additional local partner)
2020	Refine "Value Proposition" for COP proposal, candidate profile & clarify assumptions & Develop 'alumni network' proposal and transition points	Thought leaders & MF community members provide input & guidance, help clarify assumptions (incl. legal aspects, such as 'membership model' for COP); Compelling COP / alumni-type network proposal; Participative process, collective decision making;
2020 - Q2	Host Co-Sponsored event	High-quality, transformative & 50% co-sponsored activity to promote MF Strategy 2020-2025
2020 - Q2	Launch pilot of Learning Track	Up to 25 Fellows from universities + suited hub partners selected; Evaluate & measure performance & learning indicator
2020 - Q2	Curriculum development for Leadership Track	Pilot curriculum (incubator OR mentor), incl. timelines, events participation, performance & learning indicators, and measurements
2020 - Q4	Develop (initial) COP launch plan, incl. Engagement Mode, Strategy & Rules	Detailed proposal incl. timelines, impact indicators and measurements (connectivity / health / results); Participative process, collective decision making
2020 - Q4	Comprehensive annual review, evaluation & impact-based planning	Publish annual report based on M&E indicators for all areas

Stage 2: Implement core changes

Timeframe	Milestone	Measure
2021	Engage in global fundraising	Successful grant proposals / fundraising campaigns (internal & external)
2021	Develop & implement comprehensive platform for Fellows (Tracks), Members (COP) & Alumni management and tracking	Suitable CRM system is in place that allows relationship management & tracking
2021 - Q1	Recruitment for Learning Track & Leadership Track	Up to 25 Fellows for Learning & 5 Fellows for Leadership track from hub partners selected;
2021 - Q2	Launch COP pilot (with first followers/early adapters - possibly Fellows)	Impact report with areas of improvement, incl. adjust timeline - lean technology
2021 - Q3	Launch Leadership Track (pilot)	Evaluate & measure performance & learning indicator

2021-2022	Develop compelling Value Proposal for Tool Kit	Incl. meaningful taxonomy to categorize & organize resources (tools)
2021-2022	Identify & partner with like-minded organizations to explore collaboration (incl. Joint funding proposal) on Tool Kit	Clear Value Proposal for Tool Kit; At least 1 impact partner on board
2021-2022	Impact partnerships for Hubs	Identify & engage additional hub partners (technology, industry, research, funding, etc. partners)
2021 - Q4	Comprehensive annual review, evaluation & impact-based planning	Annual report based on M&E indicators & incl. areas of improvement published
2022-2023	<i>Secure funding to develop comprehensive 'Toolkit for Global Problem Solvers'</i>	<i>Fundraising strategy & goals</i> ; Clear Value Proposal for Tool Kit; At least 1 collaborator / impact partner on board;
2022	Host Co-Sponsored event (e.g. Co-Lab) at MF Hub	High-quality, transformative & 80% co-sponsored activity to promote COP, Leadership Track, and Tool Kit
2022	Recruitment for Learning & Leadership Track	Up to 30 Fellows for Learning & 10 Fellows for Leadership track from hub & global partners selected
2022	Prepare public launch of COP	Appealing web-presence & marketing strategy
2022	Impact partnerships for Learning Track	Clear map of impact track trajectory along with at least 2 impact partners engaged (curriculum, project, technology, etc.)
2022 - Q3	Strategic Plan mid-term evaluation	Annual report based on M&E indicators & incl. areas of improvement published

Stage 3: Expansion of what works, consolidate partnerships & resources

Timeframe	Milestone	Measure
2022-2023	Develop online platform for Tracks, COP and tool kit	Lean community platform with (open) access to materials used by us & defined metrics
2022-2023	Secure funding for hubs	At least 1 externally funded Fellowships per Hub
2023	Impact partnerships for COP	At least 1 impact partners engaged (resources, infrastructure, project, technology, etc.)
2023	Develop Impact partnerships for Leadership Track	Clear map of leadership track trajectory along with at least 2 impact partners engaged (mentor, internship, pipeline, etc)
2023	Prepare for open-access of Track & COP resources (toolkit)	Compile resources, methods, skill trainings, activities, how-to guides, case studies, etc. + identify suitable technology

2023	Secure funding for Leadership Track	At least 5 externally funded Fellowships available
2023	Secure funding for COP projects	At least 1 externally funded COP project
2023	Market COP with global partners (in addition to hub partners)	5% of COP members from non-hub partners + additional 'impact partnerships' confirmed
2023	Market tracks with global partners (in addition to hub partners)	At least 5 suited candidates from non-hub partners selected into track(s)
2023 - Q4	Comprehensive annual review, evaluation & impact-based planning	Annual report based on M&E indicators & incl. areas of improvement published (incl. 'talent retention' across tracks / COP trajectory (drop-outs, continued participation, felt benefit, impact, etc.)
2024	Full launch of Toolkit (open access resources from Tracks & COP + collection of exercises, techniques, etc.)	Lean platform with (open) access to materials used for tracks / /developed by COP & defined metrics & marketing strategy
2024	Co-Sponsored event (e.g. Co-Lab) at an existing or future MF Hub	High-quality, transformative & 100% co-sponsored activity to recruit for COP/Leadership Track & promote Tool Kit/Hub creation
2024	Brand & promote hub globally (replicable/scalable model)	"Build A MF Hub" kit (structure, leadership, financing, etc. guidance for developing new hubs)
2024	Use online tool kit with local, global partners & market globally	Appealing web-presence & marketing + collaboration strategy, incorporates launch of open-access Learning Track resources
2024	Position MF as thought leader / niche expert	Some successful cases of consultancy / training to other NPO, businesses, etc.; Publish 'thought pieces' in high-profile / cutting edge magazines / platforms (e.g. SSIR)
2024 - Q4	Comprehensive annual review, evaluation & impact-based planning	Annual report based on M&E indicators & incl. areas of improvement published

Stage 4: Evaluation, new Strategic Planning

Timeframe	Milestone	Measure
2025 - Q2	Impact evaluation of strategic plan 2020-2025 & Define strategic avenues for next strategic planning	Information sourced from thought leaders, hub & global partners, MF community (Fellows, alumni, COP members)
2025 - Q4	Annual review, evaluation & impact-based planning	Annual report based on M&E indicators & incl. areas of improvement published
2025 - Q4	Strategic Plan 2025-2030	Strategic Plan 2025-2030 endorsed by MF community & approved by BOD

Additional Action Items in Support of the Strategy 2020-2025

Timeframe	Milestone	Measure
	Identify & Pursue collaboration with good-practice organizations / accreditation by “accountability” monitors	- Subscribe to organizations / platforms who accredit “accountability” / participatory standards (e.g. Accountable Now, Guidestar etc.) - Make strategic plan, annual report / 990 available on relevant platforms (e.g. Guidestar) and the MF website
	Support development of new, non-historic MF hub	New Hub (outside existing MF geographies) is forming
	Seek accreditation for Track Curriculum(s) + Tool Kit	Curriculum recognized / accredited by relevant institutions

Annex 3: M&E (Monitoring & Evaluation)

Monitoring and Evaluation (M&E) is a key aspect of the Melton Foundation's Strategic Implementation Plan for three reasons: first, to increase donor support it is fundamental to have impact measures that easily show the effectiveness of the programs; second, the ability to course-correct in agile ways requires a good understanding of the consequences of introduced changes to the program; and third, an increased level of accountability and organizational learning are pivotal to good governance and community trust, both of which can be challenged by introducing a more open and diverse network of hubs and fellows.

M&E, then, should become core aspects of the work of the Melton Foundation, and should not be considered a separated topic managed by an exclusive department or entity, but rather built in to any initiative carried out by the organization. This implies a major shift in the approach of the Foundation, and the adoption of a M&E culture is a stepped and incremental process.

The M&E strategies of the Melton Foundation will be guided by three core principles:

1. Accountability - both internal and external
2. Evidence based practice, and
3. Feedback loops that promote institutional learning (developmental evaluation).

In order to achieve all of this, the following things are proposed to be carried out:

- **Baseline definition:** In order to implement this iterative Strategic Implementation Plan, qualitative and quantitative baseline indicators shall be developed including, but not limited to the following aspects:
 - Status of Global Citizenship Program (quality of Junior Fellowship, experiential learning setting, development of global citizenship capacity, talent retention, impact on communities, etc.)
 - Status of current Senior Fellow network (geographical & professional distribution, continued engagement with MF/in global citizenship practices, connectivity parameters, interests, experience, knowledge, etc.)
 - Status of governance / accountability (BOD, reportings, etc.)
 - Status of institutional networks and collaborative organizations
 - Status of internal operations / HR (staff, processes, etc.)

While these measures can be expected to be refined over time, it is important to define a solid set of indicators and measures at an early stage to allow for coherent tracking, assessment and iterations of the progress in accomplishing the top-level goals as well as the impact of MF programs and activities.

Furthermore, this will allow us to research and present a more coherent MF Case for Impact to date which will be useful, if not necessary, for resource development and scaling efforts proposed in this plan.

- **Final Governance and Institutional Strategic Planning:** One of the key aspects required to improve our internal and external communications and better plan for impact is to develop a comprehensive Strategic Plan that considers measures to align governance structure, operations, HR management, etc. along with revising the MF's vision, mission, and theory of change. This shall be carried out in collaboration with the Policy & Governance Design Team and respective committee(s) of the BOD.
- **Institutional memory:** Before the end of 2025, a report on institutional memory should be written that communicates sensibly the evolution of the Melton Foundation, ideally setting the basis for comparisons between the different stages the organization has gone through.
- **Annual Reports:** Once a year, a comprehensive review should be published online. This review should be impact-focused, brief, and easy to communicate to our community, partners & collaborators as well as (potential) donors. The review could be developed and launched at the end of a calendar year, or at suitable times during the 'Melton year' (e.g. with the Melton Day Celebration, at the GCC, etc.)
- **Impact-based annual planning:** Annual planning and reporting shall be connected to the Strategic Plan and consider impact-based assessment of all programs and activities in addition to budget planning. Similar expectations shall be held for HR and Board as well as governance and policy development.
- **Measure for success in each activity:** Based on the baseline definition, each program activity should define specific indicators and measures for success that are impact-focused and promote institutional learning.
- **Strategic planning evaluation:** Twice during the 2020-2025 cycle, a comprehensive review of the process would be carried out in order to assess progress towards the top-level goals identified under this Strategic Implementation Plan. Regular review allow for iterations of the strategy, should the need to adapt or change direction arise. The last review should be connected to the initiation of a new Strategic Planning for the upcoming cycle 2025-2030.

In order to achieve these activities, the following strategies shall be established:

1. **M&E as part of BOD and Staff meetings:** Leverage annual planning meetings to discuss, analyze and iterate the MF's operations, governance and programs through diligent application of M&E practices in the pursuit of this strategy.

2. **Hire an M&E assistant:** In order to promote M&E as integral part of the foundations work going forward, we propose to hire a M&E assistant to support directors and senior staff in the day-to-day tasks related to institutional learning (data collection, data analysis, report writing, interviewing, etc.).
3. **Create/adopt a framework for M&E:** Methodologies like Logical-Framework, Result Based M&E, or PALS provide a set of tools and approaches to include M&E in all institutional planning. Adopting or adapting these tools can help to synergize efforts and reduce complexity in continuous planning.
4. **Set up a volunteer committees:** Certain activities proposed, especially the institutional memory report, are time intensive and could be carried out by a group of Fellows who volunteer to realize activities like surveys, interviews, etc.

How

The below table outlines a roll-out strategy of the M&E Framework between 2019/20 and 2025. The timeline for the envisioned development and implementation may change due based on process requirements.

Stage Name	Timeframe	Milestone	Measure
Stage 1: <i>Strategy planning, collective transition, Minimal Viable Product (MVP)</i>	2019-Q3	Baseline indicators defined, measures developed	Thought leaders & MF community members contribute to development of MF Impact Matrix; participative process, collective decision making
	2019-Q4	Comprehensive Strategic Plan (incl. Governance and Institutional development - in collaboration with Policy & Governance Design Team)	Publishable Strategic Plan (incl. Compelling Value Proposition + Impact standards) endorsed by MF community & approved by BOD
	2019-Q4	Annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
	2020	Full implementation of M&E as per strategic plan	Trained BOD & MF staff on M&E standards, Publication of Strategic Plan & annual report / 990 as appropriate (e.g. Guidestar, MF website etc.)
	2020	Institutional Memory	Case study published via online journal (e.g. SSIR) and/or other relevant spaces

	2020-Q4	Annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
Stage 2: <i>Implementation of core aspects</i>	2021	Develop partnerships with good-practice organizations / "accountability" monitors	Subscribe to organizations / platforms who accredit "accountability" / participatory standards (e.g. Accountable Now, Guidestar etc.)
	2021-Q4	Annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
	2022	Mid-Term Strategy Assessment (<i>FALLBACK APPROACH: if notable progress on goal accomplishment incl. for Goal 3 (Work towards a positive budget) stays out, this would be the opportunity to re-adjust the strategy and/or consider a fallback approach).</i>)	Comprehensive report about Strategy & top-level goal accomplishment
	2022-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
Stage 3: <i>Expansion of what works, consolidating partnerships & resource development</i>	2023	Iterate & improve baseline criteria across programs & MF activities	
	2023-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
	2024-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
Stage 4: <i>Evaluation, new Strategic Planning</i>	2025	Impact evaluation of & Define strategic avenues for next strategic planning	Comprehensive Impact report incl. Toolkit users, downloads/clicks, soc med distribution, ROI, etc.
	2025	New Strategic Planning	

Annex 4: Marketing / Communications

Marketing and communication to all stakeholder audiences will be essential in this transition. Throughout this process there will be short and long term goals that will hopefully lead to a more visible foundation with a well-known mission, vision and means to achieve them.

Needs

- Materials that outline the new vision/mission and program in extended and one pager formats.
- A clear and succinct elevator pitch that is memorable and is easy to share and understand.
- Targeted promotion & marketing via the external newsletter

Leverage the MF blog for fellows can share the fun experiences and the Melton Fellow difference (this will help us make the case for benefit for outsiders as we expand the foundation) that follows an editorial calendar. This blog can also be offered to partners for cross posts

- A staff member tasked to keep all external modes of communication (social media and website) up to date

The creation of all of these will be quick wins in the first stage of this transition.

Incremental Changes

Stage 1 (immediately)

- Buzz via Social Media & bi-monthly newsletter
Use Social Media Platforms and the newsletter for purposeful messaging, promotion of Fellows' project or partner news connected to future goals in order to generate excitement and grow our audience base.
- Launch blog
Identify partners and where they might fit in to the larger implementation do that new materials can be tailored to what they would need to hear to get on board (are they just going to help you build awareness of the change, will they be a target for new fellows, will they be a content partner in the new curriculum etc)

Stage 2 (as the proposal is adopted)

- Develop a comprehensive marketing & communications strategy
- Update website

- Create materials: brochure, one pager, quick social video/gif to relaunch the “new” foundation
- Get elevator speech and share with fellows. Especially those going to partner conferences should answer the question “what do you do” eg we equip youth and young professionals around the world with the skills to change their communities through innovation and social entrepreneurship (just an idea, I know we are defining words so these may not work once we finish)

Annex 5: HUBS

After 27 years of recruiting Fellows from our partner universities, the MF is looking forward to expand its programs, reach and impact. In order to work towards deeper, more tangible collaborations, this plan foresees the development of local 'hubs' to foster cross-sector collaboration for impact solutions at local level.

The currently bilateral partnerships between MF and Partner Universities shall be developed into multilateral collaborations with diverse local entities that form part of the 'hub'. In addition to interested partner universities, we envision 'hubs' to be made up of businesses, non-profit organizations, governments, funders, and social innovators (e.g. innovative environmental group, educational program for underprivileged students, CSR initiative of local companies). Hub partners would have different roles and responsibilities in order to contribute from their expertise and role in society - be it as partners for Fellow recruitment, social innovation, fundraising, know-how or marketing. By engaging different organizations locally, we expect

- to expand the currently small-scale MF presence into a thriving, impact-oriented 'hub' of global problem solvers who collaborate on pressing social and environmental issues
- increase accessibility to and diversity (including socio-economic) in our network (see also Top-Level Goal 2)
- identify novel opportunities for resource development and (joint) fundraising (see also Top-Level Goal 3)
- Increase the MF's visibility and mission impact in a tangible way
- Develop long-term, strategic partnerships to pool resources for mutual benefit and impact

Standing MF partner universities will continue to play an important role, also in the hub structure. The extent to which they will engage in the development of local hubs depends on the university's capacity and desired role and shall be determined upon approval of this plan. However, we aim to open up the selection of new fellows from non-university partners and to strengthen the collaboration with individuals and organizational partners who drive innovative solutions in local communities (and beyond).

At some MF partner universities there are already very strong outreach programs to the community or collaboration with other institutions. In Chile, e.g. a law was recently passed that commits universities to strengthen their ties with the surrounding communities adding

actively to their development. We want to harness on such opportunities, make our work more relevant in local communities, and give our fellows a chance to play a pivotal role in these.

The following example illustrates how a MF Hub could look like in Bangalore:

Bangalore is an ideal location for a city-based Hub: The city is highly diverse, geographically defined, and a thriving ecosystem that combines scale with demand and potential impact. Also, it is home to many Senior Fellows, whose presence we could leverage in the development of an impact-strategy for the hub. While deepening the relationship with BMSCE as recruitment and strategy partner, other organizations like Amani Institute, Ashoka Youth Venture India, Social Story, GrowFit, British Council, Commonwealth Youth, Infosys, and Women Making Films would form an active part of this hub. Some would be recruitment partners when selecting Fellows, others would contribute by offering projects, internships, and career opportunities to uniquely skilled change agents, and others would be potential funders sponsoring fellows and/or hub programs.

Hub governance could be organized through a “Leadership Board” comprised of stakeholder representatives from local collaborating businesses, NGOs and universities together with Bangalore-based Senior Fellows. This group would help develop the strategy for the City Hub, oversee the implementation of impact-oriented activities, cultivating local and international donors, identify and apply for grant opportunities, and more.

The development to a hub structure follows an incremental path. The MF defines guidelines and supports implementation. We expect to collaborate with JFs, SF, TTs and the university leadership to develop a mutually beneficial strategy for each geography, research and connect with suitable partners. Because the circumstances at location are different, we will develop different approaches for different locations starting 2019. Ideally in the next round of recruitment in 2020 we would already amplify our search for new fellows in some (if not all) locations.

Given the importance of having a local person actively working on developing and establishing strong hubs, this plan foresees to include hub officers as MF staff by 2020/21. It is to be evaluated, whether such a position can be created in each location or whether it would be a global coordinator (at first). Also it is to be determined whether this should be a part-time or a full time engagement.

Competencies for (future) hub officers include: knowing the local social innovation landscape, strong networking skills, ability to mobilize funds, ability to work with people of different cultural, ethnic and economic backgrounds. Until we are able to hire new staff for that purpose, the hub development shall be coordinated by the executive staff, primarily by the Director of Strategy and/or the CEO, in collaboration and coordination with the help of people on the ground.

Following initial investment of finance and HR by the MF, local hubs should strive towards financial independence and sustainability. Fellows still receive support from MF.

How

The below table outlines a roll-out strategy for MF hub development, starting at current geographies between 2019/20 and 2025. The timeline for the envisioned development and implementation may change due based on process requirements.

Stage Name	Timeframe	Milestone	Measure
<i>Stage 1: Strategy planning, collective transition, Minimal Viable Product (MVP)</i>	2019-2020	develop hub proposal(s) for each geography & in collaboration with (interested) partner universities	hub strategy(ies) per location; identify & engage 1st followers (recruitment partners); participative process, collective decision making
	2019-Q4	Hub-oriented GCC	engage (a) strategic (hub) partners & (b) participants from outside MF university
	2020-2021	launch local Hubs (grandfather university model - depending on interest at current partner universities)	- scope of initial hubs confirmed (based on interest of partner universities, incl. new MoUs) - promo materials for hub-marketing in place - initial recruitment partners engaged (partner university + at least 1 additional local partner) - document experience with developing hubs
	2020-Q2	Hub-wide Recruitment for Learning Track	Up to 25 Fellows from universities + suited hub partners selected
	2020-Q4	Annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published

Stage 2: <i>Test & iterate MVP, Disruptive Changes</i>	2021-2022	Develop Impact partnerships for Hubs	in addition to "recruitment partners", identify & engage other hub partners (technology, industry, research, funding, etc. partners)
	2021-Q2	Hub-wide Recruitment for Learning Track & Leadership Track	Up to 25 Fellows for Learning & 5 Fellows for Leadership track from hub partners selected; Appealing web-presence & marketing strategy
	2021-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators & incl. areas of improvement published
	2022	Host Co-Sponsored event (e.g. Co-Lab) at MF Hub - promote Hub partners/COP/Leadership Track	High-quality, transformative & 80% co-sponsored activity
	2022-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
Stage 3: <i>Expansion of what works, consolidating partnerships & resource development</i>	2022-2023	Secure funding for hubs	At least 1 externally funded Fellowships per Hub
	2023-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
	2024	Co-Sponsored event (e.g. Co-Lab) at an existing or future MF Hub - promote Toolkit/Hub partners & recruit for COP/Leadership Track	High-quality, transformative & 100% co-sponsored activity
	2024	Brand & promote hub globally (replicable/scalable model)	Appealing web-presence & marketing + collaboration strategy
	2024-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
Stage 4: <i>Evaluation, new Strategic Planning</i>	2025	New, non-historic MF hub in development	a new Hub (outside existing MF geographies) is forming
	2025	Impact evaluation of & Define strategic avenues for next strategic planning	Comprehensive Impact report incl. Toolkit users, downloads/clicks, soc med distribution, ROI, etc.
	2025	New Strategic Planning	

Incremental Changes

In 2019, we do not strive for significant changes to the collaboration agreement as it currently stands. Along with the development of a global strategy 2020-2025 for the MF, however, we hope to engage partner universities in conversations about future role and possible leadership as we move towards building local hubs for global citizenship practices.

Starting in 2020, universities would become part of a network of institutions and organizations with shared access to the Fellowship and shared opportunity to leverage the MF's global network and its resources. The role of universities in the vision 2020-2025 will depend on the mutual agreement between MF and each partner university and may include the following:

- Allow for and facilitate the recruitment process on campus that is inclusive of the larger 'hub'.
- Provide free access to infrastructure for MF activities.
- Promote the partnership with the MF and other 'hub'-partners.
- Promote activities realized by the MF and/or its Fellows and network partners.
- Designate a faculty member and/or administrators to serve as contact for administrative or strategic purposes, depending on the university's capacity and desired role in the 'hub'.
- Provide resources and access to university networks and partners to facilitate the realization of MF projects.
- Collaborate in fundraising efforts for MF projects and activities.
- Support local Fellows.

As local 'hubs' grows and diversifies, the role of the university will evolve as well. Ideally, the growth of the ecosystem is accompanied by growth in access to opportunities and resources, including income from funders and investors. This in turn may allow for additional resources at the partner university for more fellowships, programs, staffing, etc.

Benefits for Partner Universities and new partners going forward

As an organization that promotes collaborative solutions, we believe in building partnerships that are mutually beneficial. While we propose to explore and refine opportunities that the MF will contribute to the local partners, specific benefits for partner universities will depend

on the mutual agreement between MF and each partner university and may include the following:

- Enrich the portfolio of opportunities for students by offering the access to an prestigious, global Fellowship Program for social innovators.
- Strengthen international connection in five major world regions.
- Be part of and help shape an emerging or growing 'hub' of innovators and globally responsible leaders.
- Connect academia with the local 'hub' for purposeful community engagement.
- Collaboration with university departments and institutes with interest in researching topics like e.g. intercultural communication, education, global learning, social innovation, cross-sector collaboration or regenerative economy.
- Access the MF's global community of Fellows, partner organizations, and collaborators.
- Contribute to or initiate global citizenship projects with the MF and/or its network partners - locally or globally.
- Shared fundraising proposals with the MF and/or its network partners.
- Brand-building through mutual promotion of partnership.
- Host MF annual conferences / gatherings on campus.
- Shape and promote a joint vision (partner universities that actively engage in the process would have agency in the MF decision making process).

Annex 6: Tracks

After almost three decades of existence, the Melton Foundation is seeking to build a strategic model to stand the test of time. A key resource of the foundation has been and will be the caliber of fellows it attracts and nurtures to push forth its agenda of global citizenship. It is thus imperative to develop and market purposeful programs AND ensure that individuals chosen are willing to align with the objectives of the fellowship.

For that purpose, the MF Global Citizenship Program shall be organized in two independent tracks: a *Learning Track* and a *Leadership Track*. Envisioned as sequential modules, graduates from the *Learning Track* can consolidate their learning journey in the *Leadership Track*. This kind of modularization allows us to

- Deliver more targeted, relevant and time-bound programs
- Amplify entry points for individuals to join the Fellowship as well as engage collaborators and partners in meaningful and mutually beneficial way
- Recruit and select candidates for each track and based on their capacity, while continuing to build a lifelong engagement trajectory for Fellows
- Be more dynamic in forging collaborations, partnerships and/or building development pipelines also with other organizations (incl. Funding opportunities)
- Design transition points for documenting important impact data while allowing those Fellows, who do not want to continue in the MF, to move on

With the ***Learning Track***, we target young change agents aged 18-25 years who are committed to (innovative) community engagement and demonstrate "hunger" for learning about the world beyond their reach. Recruitment would happen on an annual basis with up to 30 Fellowships available for applicants from established MF Hubs and/or endorsed by MF partner organizations. The selection process would be merit based and ought to be designed to identify those individuals, who have the potential to leverage their skills and engagement for greater impact through the MF's global programs and network.

The *Learning Track* would span approx. 1.5 years and include collaborative distance learning in global teams, guided work in social venture projects, combined with two in-person encounters. In an experiential learning environment, Fellows learn core competency for cross-boundary collaboration while developing (their own) projects through global know-how, skills development and mentoring. Thus, they get equipped to act and think as global citizens.

Credentials for Learning Track Candidates

- Individuals aged 18 – 25 years
- Track record of civic engagement or leadership at community level
- Enthusiasm for learning and exposure in a highly diverse environment
- Curiosity for different social contexts and cultures
- Demonstrable interest in global challenges and international issues
- Respect for diversity, whether across the street or across the globe
- Personal motivation, initiative, and ability to work in teams,
- Sufficient English language skills to understand and participate in all aspects of the program, and a
- Affiliation with a MF hub partner (may, but doesn't have to be an institution of higher learning - going forward, this would be increased to global MF partner)

In addition to an online application form, applicants would have to present at least one Letter of Recommendation

- From university or institution of higher learning
- From any community engagement program worked on in the last three years

Upon completion of the track, Fellows can apply to continue their experiential learning journey in the *Leadership Track* or transition out of the active Fellowship. In either case, data about the graduates' learning progress, satisfaction in the program, the reasons to transition out/stay on etc. shall be collected prior to launch and upon completion of the track. If transitioning out, successful graduates will become part of the 'alumni' network with continued access to our database and the opportunity to receive regular newsletters. 'Alumni' can re-activate their Fellowship at any time and apply to the *Leadership Track*, the *Community of Practice* engage in other ways.

The ***Leadership Track*** aims at emerging global problem solvers aged 20-30 years, who have a proven track-record of leadership in (innovative) social ventures and are somewhat versed in global affairs and/or intercultural settings. It builds on the the *Learning Track* and offers Fellows an in-depth learning experienced to either develop and/or incubate (their own) social ventures through the MF's applied Global Citizenship framework and global network, or to develop their leadership capacity as mentor to Fellows in the *Learning Track*. Recruitment would happen on an annual basis with up to 15 Fellowships available for applicants from established MF Hubs and/or endorsed by MF partner organizations - including exceptional fellows who have successfully completed the *Learning Track*. The selection process would be merit based and primarily project based to allow for a purposeful curation of each cohort.

Credentials for Leadership Track Candidates

- Individuals aged 20 – 30 years
- Track record and demonstrable commitment to leadership and social innovation
- Curated a novel project (developed or undeveloped) which will be nurtured throughout the fellowship period
- Abreast with global issues and multicultural engagement
- Enthusiasm for learning and exposure in a highly diverse environment
- Personal motivation, initiative, and ability to work in teams,
- Sufficient English language skills to understand and participate in all aspects of the program

In addition to an online application form, applicants would have to present at least two Letter of Recommendation

- From professional [full time, part-time, volunteering, internships] of a social venture or any related field
- From peer

The *Leadership Track* would span approx. 1 years and include individual and collective capacity development through distance learning, mentoring and subject matter expertise as well as access to seed funding to ignite or scale social venture projects, combined with (at least) one in-person encounter. Through an experiential learning environment, Fellows learn to harness the collective intelligence of highly diverse groups, deepen their cross-boundary collaboration skills while developing a prototype-solution into a workable project AND/OR develop their leadership capacity as mentor in global teams. Thus, they become more literate in the MF's global citizenship approach. Candidates who enter the Melton Fellowship through the learning track will receive an induction to ensure they are familiar with ethos, culture and community of the Melton Foundation.

Similar to the *Learning Track*, data about the graduates' learning progress shall be collected prior to launch and upon completion of the track. This being another transition point, successful graduates can either join the *Community of Practice* or - in the case of transitioning out - will become part of the 'alumni' network. (Similar conditions as for the *Learning Track* apply; perk options for talent retention purposes should be considered)

How

The below table outlines an implementation strategy of *Learning and Leadership Tracks* between 2019/20 and 2025. Because of strong dependencies to other proposal aspects - esp. “Hubs” and “Candidate Profiles” - the timeline for the envisioned roll-out may change.

Stage Name	Timeframe	Milestone	Measure
<i>Stage 1: Strategy planning, collective transition, Minimal Viable Product (MVP)</i>	2019-2021	Implementation of current 2.5 year program	
	2019-Q2	Fellows Selection for current 2.5 year program (revised criteria & candidate profile)	Up to 20 New Fellows from partner universities selected
	2019-Q3	Curriculum development for Learning Track	Documentation of (current) program, incl performance & learning indicators + measures Adapted curriculum, incl. timelines, events participation, performance & learning indicators, and measurements
	2019-Q4	Strategy development for track recruitment	Steps are taken to enable track recruitment for 2020
	2020-Q2	Fellows Selection for Learning Track	Up to 25 Fellows (TBD) from universities + suited hub partners selected
	2020-Q3	Launch pilot of Learning Track	Evaluate & measure performance & learning indicator
	2020-Q3	Curriculum development for Leadership Track	Pilot curriculum (incubator OR mentor), incl. timelines, events participation, performance & learning indicators, and measurements
	2020-Q4	M&E assessment of Learning Track	Impact report with areas of improvement, incl. adjust timeline
<i>Stage 2: Test & iterate MVP, Disruptive Changes</i>	2021	Evaluation of Learning Track	Impact report with areas of improvement, incl. adjust timeline
	2021	Prepare launch of Leadership Track	Appealing web-presence & marketing strategy

	2021	Implement technology for Fellowship management and tracking	Suitable CRM system is in place that allows relationship management & tracking
	2021-Q4	M&E assessment of Learning & Leadership Track	Impact report with areas of improvement, incl. 'talent retention' across tracks (drop-outs, continued participation, etc.)
	2021-Q2	Fellows Selection for Learning Track & Leadership Track	Up to 25 Fellows for Learning & 5 Fellows for Leadership track from hub partners selected
	2022	Impact partnerships for Learning Track	Clear map of learning track trajectory along with at least 2 impact partners engaged (curriculum, project, technology, etc.)
	2022	Recruitment for Learning & Leadership Track	Up to 30 Fellows for Learning & 10 Fellows for Leadership track from hub & global partners selected
	2022	Pilot 1yr Leadership Tracks	Evaluate & measure performance & learning indicator
	2022-Q4	M&E assessment of Learning & Leadership Track	Impact report with areas of improvement, incl. 'talent retention' across tracks (drop-outs, continued participation, etc.)
Stage 3: <i>Expansion of what works, consolidating partnerships & resource development</i>	2023	Develop Impact partnerships for Leadership Track	Clear map of leadership track trajectory along with at least 2 impact partners engaged (mentor, internship, pipeline, etc)
	2023	Secure funding for Leadership Track	At least 5 externally funded Fellowships available
	2023	Market tracks with global partners (in addition to hub partners) -- 2023	At least 5 suited candidates from non-hub partners selected into track(s)
	2023-2024	seek accreditation for Track Curriculum(s)	Endorsement (better accreditation) by trustworthy, global partner
	2022-Q4 & 2023-Q4	M&E assessment of Learning & Leadership Track	Impact report with areas of improvement, incl. 'talent retention' across tracks (drop-outs, continued

			participation, etc.)
	2023-2024	Prepare for open-access of Learning Track resources (see: Toolkit)	Compile resources, methods, skill trainings, activities, etc. + identify suitable technology
	2024	Launch open-access of Learning Track resources (see: Toolkit)	Lean platform with (open) access to materials used for the learning track & defined metrics & marketing strategy
Stage 4: <i>Evaluation, new Strategic Planning</i>	2025	Impact evaluation of tracks & Define strategic avenues for next strategic planning	Comprehensive Impact report for each track, incl. learning, performance, continuity, impact on Fellows & local community, etc.
		New Strategic Planning	

The track approach takes the current good practices in the Jf program further. In difference from the current approach, there will be multiple entry and exit points for suitable candidates to join the Fellowship throughout a life-time and across geographies. MF resources would primarily be directed at active participants - i.e. Fellows in any of the tracks OR members of the *Community of Practice*.

The philosophy of “lifelong commitment” shall be taken forward through the ‘alumni’ network, which connects graduates from any of the programs (past, present and future) by providing continued access to our global Fellows directory and a special edition of the MF newsletters with targeted information. ‘Alumni’ can re-activate their Fellowship at any time and apply to the *Leadership Track*, the *Community of Practice* or engage in other ways. As the Strategy will be implemented step-by-step, current Senior Fellows would be able to choose whether they want to be actively engaged as early adopters of the Community of Practice and/or the Leadership Track OR whether they prefer to remain part of the network as ‘alumni’ (specifics shall be developed in collaboration with the wider MF community).

Incremental Changes

After re-inviting FSU & DU, recruitment and selection in 2019 will be conducted at all (confirmed) partner universities. Process guidelines and selection criteria have been refined and will be implemented by local campus teams (incl. TTs and SFs, where possible) and the global selection team. Incremental changes in 2019 entail the following:

- (1) The candidate profile has been aligned to reflect the above outlined proposal, including a stronger focus on engagement or leadership at community level and the potential to collaborate on novel solutions
- (2) While the selection criteria continue to be centered around the MF's Global Citizenship approach awareness, responsibility and action, the focus is shifting from pre-existing knowledge about global issues and/or intercultural experience, towards engagement at local level as well as curiosity and eagerness to learn about problems and solutions around the world
- (3) Candidates are expected to provide at least one Letter of Recommendation as part of their application. The recommendation can come from (school) teachers, (university) faculty members, or a community leaders, project partner and/or organizational representatives the applicants has worked with in the recent past

2019 is the year to 'transform' the foundation into a hub-based organization. Beginning 2020, we envision to start recruiting fellows from partner universities and hub-partners. This may vary from location to location, based on the development of hub-strategies and the engagement of early hub-partners.

Annex 7: COP (Community of Practice)

In the pursuit of increasing the impact potential of the MF network while aiming for a positive budget, the Vision 2020-2025 proposes to facilitate a community of practice for interested and suited candidates. This approach to community engagement allows us to

- Diversify entry points for target audience(s) to collaborate in meaningful and mutually beneficial way
- Increase the net(work)-worth of the MF by building and cultivating purposeful relationships with established (social) innovators or entrepreneurs across the globe
- Add value of the MF's lifelong engagement trajectory by facilitating space for collaborative action(s)
- Allocate limited MF resources for ROI
- Be more purposeful in forging collaborations, partnerships and/or building pipelines to result in greater mission impact in local hubs and beyond (incl. Funding partners)
- Design transition points for documenting important impact data while allowing those Fellows, who do not want to continue in the MF, to move on
- Increase MF mission impact

A Community of Practice (COP) is defined as a “group of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly.” (Wenger-Trayner, [Introduction to Communities of Practice](#)). As lifelong learning lab for emerging to seasoned global problem solvers, the MF offers an ideal platform to facilitate a COP that connects experienced Melton Fellows, social innovators, as well as organizations across sectors in a purpose-driven “learning lab” to harness collective intelligence for wider impact.

While details related to the COP are yet to be developed, this Design Team considers the following aspects as starting point for a collaborative COP strategy-development in the near future:

- Interested and well-suited people could join the COP in different ways: through an open application process (once a year / rolling application), by recommendation from another COP members, by endorsement e.g. of local hub or global MF partner organizations
- Eligible candidates to apply would be accomplished Fellows (graduates of the Leadership Track or similar (live experience), individuals, partners & collaborators
- The COP could be a membership-model; financial contributions to the COP could be organized through an annual fee with different price-categories (based on self-

assessment); upon renewal a variety of reduced fees / perks could be made available to acknowledge high performance and/or contribution to the COP - an alternative could be to award 'merit' badges.

- The revenue generated by the COP could be used directly to initially co-finance and eventually fully finance needed technology, staff time, events travel, as well as grant money to spur impact projects
- Organizations from industry and businesses could become 'sponsors' of the COP in order to benefit either from that global platform (cross-promotion, know-how, prestige) AND/OR to leverage the collective COP intelligence to develop (business) solutions or directly recruit talent.
- CoP would be the key driver in multiplying MF mission impact AND/OR contribute with know-how, skills & expertise to the respective Fellowship tracks

There are many **open questions**, such as thematic focus, participation requirements, long-term ROI, expected outcomes - both for the MF as well as for the COP itself, etc. that still need to be addressed. We envision this process to happen in collaboration with Senior Fellows and (global) MF partners who are interested to develop this proposal further.

*In an **alternative scenario**, the MF would identify and build relationships to existing Communities of Practice that are aligned with the MF values and work in strategic fields and/or locations in order to promote those among graduates from the Leadership Track as well as in the alumni-type network. This would allow us to promote meaningful and continue engagement around global practices and collaboration, while being mindful about our finite budget. With this plan, however, we foresee to carry forward the good practice of building lifelong collaboration and learning opportunities through the development of a purpose-driven Community of Practice.*

How

The below table outlines an implementation strategy for the *Community of Practice* between 2019/20 and 2025. Because of strong dependencies to other proposal aspects - esp. "Hubs" and "Tracks" - the timeline for the envisioned roll-out may change.

Stage Name	Timeframe	Milestone	Measure
Stage 1: <i>Strategy planning, collective transition,</i>	2019-2020	Refine "Value Proposition" for COP proposal, candidate profile (as well as selection mechanism) & clarify assumptions	Thought leaders & MF community members provide input & guidance, help clarify assumptions (incl. legal aspects, such as 'membership model' for COP);

<i>Minimal Viable Product (MVP)</i>			Compelling COP proposal; participative process, collective decision making;
	2019-2020	Develop 'alumni network' proposal and transition points (network - COP) -- by mid 2020	Compelling alumni-network proposal; Participative process, collective decision making
	2020	Research & identify suitable COP technologies	Quotes from 3 different platform providers for budget approval
	2020-Q4	Develop (initial) COP launch plan, incl. Engagement Mode, Strategy & Rules	Detailed proposal incl. timelines, impact indicators and measurements (connectivity / health / results) Participative process, collective decision making
<i>Stage 2: Test & iterate MVP, Disruptive Changes</i>	2021-Q2	Launch COP pilot (with first followers/early adapters - possibly Fellows) -- mid 2021	Impact report with areas of improvement, incl. adjust timeline - lean technology
	2021	Develop & implement comprehensive platform for Fellows (Tracks), Members (COP) & Alumni management and tracking	Suitable CRM system is in place that allows relationship management & tracking
	2021-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators & incl. areas of improvement published
	2022	Prepare public launch of COP -- 2022	Appealing web-presence & marketing strategy
	2022	Host Co-Sponsored event at MF Hub (e.g. Co-Lab) to promote COP	
	2022-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators & incl. areas of improvement published
<i>Stage 3: Expansion of what works,</i>	2023	Develop impact partnerships for COP	At least 1 impact partners engaged (resources, infrastructure, project, technology, etc.)
		Secure funding for COP projects	At least 1 externally funded COP

<i>consolidating partnerships & resource development</i>	2023		project
	2023	Market COP with global partners (in addition to hub partners)	5% of COP members from non-hub partners + additional 'impact partnerships' confirmed
	2023	Implement technology for COP	Suitable CRM system is in place that allows relationship management & tracking
	2023-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published (incl. 'talent retention' across tracks-COP trajectory (drop-outs, continued participation, satisfaction, felt benefit, impact, etc.))
	2024	Prep open-access of COP resources (toolkit)	Compile resources, methods, skill trainings, activities, how-to guides, case studies, etc. + identify suitable technology
	2024	Co-Sponsored event at an existing or future MF Hub (e.g. Co-Lab)	High-quality, transformative & 100% co-sponsored activity to recruit for COP/Leadership Track & promote Tool Kit/Hub creation
	2024	Launch open-access COP resources	Lean platform with (open) access to materials used for the learning track & defined metrics & marketing strategy
	2024-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
<i>Stage 4: Evaluation, new Strategic Planning</i>	2025	Impact evaluation of tracks & Define strategic avenues for next strategic planning	Comprehensive Impact report incl. COP growth, engagement behavior & continuity, learning/ performance/ impact measures, correlation COP-local Hub, etc.
	2025	New Strategic Planning	

Incremental Changes

With the envisioned fellowship model being more time-bound, and the COP being built around a membership model, the current Senior Fellowship would become obsolete. We therefore envision to take the philosophy of “lifelong connections” forward through a two-fold approach:

- an ‘alumni’-type network, which connects graduates from any of the programs (past, present and future) by providing continued access to our global Fellows directory and a special edition of the MF newsletters with targeted information. Other than offering basic connectivity, that network would not incur costs to the MF
- the COP which would become the key driver in multiplying MF mission impact AND/OR contribute with know-how, skills & expertise to the respective Fellowship tracks

While the long-term vision is to become self-sustained, the MF would fund for the initial phase of the COP..

Existing (and future) Senior Fellows who are not available to engage actively, would transition into the ‘alumni’-type network, which include basic connectivity with the MF (directory, newsletter) and a platform to self-organize across ‘alumni’. ‘Alumni’ have the possibility to re-activate their ‘status’ by subscribing to the COP and/or apply to the Leadership Track (as applies) at any given point in time.

As the Strategy will be implemented step-by-step, current Senior Fellows would be able to choose whether they want to be actively engaged as early adopters of the Community of Practice and/or the Leadership Track OR whether they prefer to remain part of the network as ‘alumni’ (specifics shall be developed in collaboration with the wider MF community).

We aspire to actively engage interested Senior Fellows to help develop a detailed value proposition and kick-start the COP. During the pilot phase, those candidates could simply opt in. An initial membership fee waiver could be considered to spark and - as first followers - could be considered for to help bring the COP - and the parallel ‘alumni’-type network for that matter - to life.

Annex 8: TOOLKIT

The diversity of know-how and experience within the MF community has been a key-driver of success to offer relevant trainings, webinars, workshops, etc. to Junior Fellows at events like the GCC or the NFO, as well as online throughout the New Fellow Training, Project Team phase, etc. The activities, exercises, tools, approaches, etc. made available to the JFs have not been collected for future use until now. As part of the Strategy 2020-2025, we envision to change that and develop a collection of ‘tools’ used and promoted by the Melton Foundation for the purpose of developing global problem solvers. Initially, that collection would developed to be an (internal) resource and database for the Learning & Leadership Track. Depending on funding availabilities and general interest, this could be developed into a collaborative online platform that makes part of the MF know-how available to other audiences (e.g. Hubs, global partners, etc.) to use and help develop further.

Initially, we foresee to (a) document tools, techniques, strategies, approaches, etc. used in the JF program online and during MF events, and (b) develop a meaningful taxonomy to categorize activities based on their purpose of use etc. - a task that could be handled e.g. by the Program Assistant. Based on initial compilation, research, taxonomy and (internal) value add, this “toolkit” could become part of collaboration and fundraising proposals to develop a web-application that can be used and complemented by other leadership development organizations or organizations working on social innovation around the world. The Melton Foundation would thus contribute to actively promoting its mission by engaging global audiences around novel tools and approaches to foster cross-boundary collaboration to tackle global challenges - which would be an additional value add to the Learning & Leadership Track Fellowship as well as the emerging Community of Practice and local Hubs. In addition, the ‘Toolkit for Global Problem Solvers’ could become another flagship of mission engagement by actively collaborating & contributing to other, already existing resources of that kind as well as organizations active in our field.

How

The below table outlines an implementation strategy of toolkit between 2019/20 and 2025. Because of strong dependencies on funding and collaborations the timeline for the envisioned roll-out may change significantly.

Stage Name	Timeframe	Milestone	Measure
Stage 1: <i>Strategy planning,</i>	2019-2020	Document approaches, materials, techniques used during the JF	A collection of 20+ unique tools and approaches used to develop JFs

<i>collective transition, Minimal Viable Product (MVP)</i>		Program (possibly starting at the NFO)	
	2020-Q4	Evaluation of initial collection of resources & tools	Consider usability of materials, value add, comprehensiveness of documentation etc.
<i>Stage 2: Test & iterate MVP, Disruptive Changes</i>	2021	Develop taxonomy to categorize & organize the different approaches	An initial collection of 'tools' connected to the MF's global citizenship approach Awareness > Responsibility > Action
	2021-2022	Develop compelling Value Proposal for Tool Kit	Based on evaluation of initial resource collection (assess relevance & usability of materials, comprehensiveness of documentation, usability of taxonomy. etc.)
	2021-2022	Identify & partner with like-minded organizations to explore collaboration (incl. Joint funding proposal) on Tool Kit	Clear Value Proposal for Tool Kit along with at least 1 impact partner on board
	2022-2023	Secure funding to develop comprehensive 'Toolkit for Global Problem Solvers'	fundraising strategy & goals
	2022-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
	<i>Stage 3: Expansion of what works, consolidating partnerships & resource development</i>	2022-2023	Develop online platform for tool kit / 'open access' track resources
2022-2023		Pilot online toolkit with COP, hub & global partners	Lean platform with (open) access to materials used by us & defined metrics
2023		Prepare for toolkit launch (incorporate resources from tracks & COP)	Compilation of resources, methods, skill trainings, activities, how-to guides, case studies, etc. well presented and accessible via suitable technology
2023-Q4		Comprehensive annual review, evaluation & impact-based	annual report based on M&E indicators + areas of improvement

		planning	published
	2024	Full launch of Toolkit (open access resources from Tracks & COP + collection of exercises, techniques, etc.)	Appealing web-presence; marketing & collaboration strategy; Well defined usability metrics in place;
	2024	Co-Sponsored event (e.g. Co-Lab) at an existing or future MF Hub (to launch/promote toolkit)	
	2024-Q4	Comprehensive annual review, evaluation & impact-based planning	annual report based on M&E indicators + areas of improvement published
Stage 4: <i>Evaluation, new Strategic Planning</i>	2025	Impact evaluation of tracks & Define strategic avenues for next strategic planning	Comprehensive Impact report incl. Toolkit users, downloads/clicks, soc med distribution, ROI, etc.
	2025	New Strategic Planning	

Incremental Changes

There are no envisioned changes, other than a purposeful documentation of materials, approaches, etc. that SFs & staff offer to Junior Fellows, along with the permission of SF that these can be used further. Creative Common Licenses or - in some cases - copyright / creative commons attributions will have to be explored in order to ensure author and distribution rights.