Program Previews for PresenTense 2011-2012

Introduction

This packet was created to provide you with a deeper look into PresenTense and particularly its core program, the Community Entrepreneur Partnership (CEP), mainly operating through partner-owned franchises in 12 communities in ten cities around the world. While PresenTense does run additional programs and includes additional facets to its operations, these project summaries were chosen because they will provide the most important highlights on our operations in this coming year. A table of contents is below.

The first three project summaries provide an increasing focus on the local. First reviewed is how we are preparing to oversee the global administration of the CEP, then the regional oversight of the CEP in North America, and finally a summary of work for a local CEP.

These CEP project summaries are followed by an introduction to our organizational professional education program, PTSchool, and the program we have created to supply trainers for all of our workshops, SocialStart (*SocialStarters* are individuals PresenTense trains and then contracts to run CEP and PTSchool seminars).

The final project summaries are all support oriented. It was important for us to include these because they make up the backbone of our organization, and yet would traditionally be called 'overhead' and frowned upon by rating agencies. PresenTense joins other social sector professionals in observing that the best businesses in the world invest deeply in their overhead to create the internal capacity to meet the needs of the public. Without overhead, there is no product improvement and can never be an investment in customer satisfaction. PresenTense believes that transparency can cure the social sector's fear of overhead.

As mentioned in the introduction to the Year in Preview, we decided to provide this limited collection of project summaries due to feedback from previous years that we were providing too much information for that information to be useful to the field. If you disagree with how we have acted upon those conclusions, and have other suggestions for what information you would like to see us share instead, please write us at yearinpreview@presentense.org.

General CEP Management

Mission: To support the three regional directors of the PresenTense Group with updated materials, templates and online tools for program management and assessment, as they provide on-going service to the 12 Community Entrepreneur Partnership program coordinators around the world in the coming program year 5772 (August 2011 through July 2012).

Context & Interdependence: The Community Entrepreneur Partnership (CEP) is a yearlong program for community development and start-up acceleration run in local communities by partner organizations (generally Federations or JCCs) who are paying customers of the PresenTense Group. To spread this mode of community development and exponential engagement through start-up acceleration, PresenTense has developed a franchise model that requires overall management, quality control and service provision. General CEP Management is the back-office component that provides support to local regional coordinators, so that they may better serve the local communities, and ties into PresenTense's general communications and operations backbone to ensure that the regional directors have the tools and resources they need to serve the local clients at the highest level.

Metrics: Since the General CEP Management is an internal office serving internal clients, it will measure itself based on a Satisfaction Score from quarterly surveys of CEP Coordinators. Such surveys will ask the following questions, anonymously graded on a 5-point scale, with a minimum goal of 4 average:

- Have you been provided with sufficient materials you need to successfully coordinate the fellowship?
- How would you assess the quality of the materials you have been provided?
- How responsive has PresenTense been to your additional material or support requests?
- Would you recommend another community partner with PresenTense?

In addition, the purpose of the CEP is to create an engine for Exponential Engagement in the local community, with the aim of directly engaging an average of 21 Steering Committee Members (including coaches), 18 mentors and 12 fellows per community as the catalyst for more robust community engagement. General CEP Management will measure the success of the program by measuring these distinctive elements, namely:

- How many Steering Committee members (including coaches) does your program have?
- How many Mentors are involved in your community?
- How many fellows are you engaging (going to engage)?
- How many Facebook fans does your program page have?

Workplan Summary: General CEP Management's work begins in the summer, with the Coordinator Training Course, where the local coordinators from around the world are trained on the elements of the CEP program and practice using the tools developed by PresenTense to simplify and standardize the program components. During the months of May to June, General CEP Management prepares the course, prepares course participants, assigns pre-work to ensure individuals come prepared for the course, and ensures the logistical elements are in place to host the participants in Jerusalem.

In August, when the local coordinators return to their home communities, the General CEP Management work switches to supporting the regional directors and their on-going work with the local coordinators. General CEP Management will review and update all templates, and provide them to the local coordinators through regional directors, so that local coordinators will have templates and forms for all recruiting, assessment and publicity activities during the community building stage of the fellowship. General Management will oversee distribution of the intake survey to new Steering Committee member, and feature new members on the PresenTense website and social media properties. When the call to applications goes out, General CEP Management will leverage PresenTense's own networks to spread the word across mailing lists and social networks.

When applications come in by early November, General CEP Management will hold a refresher workshop for local coordinators and admission team leads to review tools for first cut and final decisions, including online grading and speedinterviewing methodologies.

Once the fellowship class is determined in December, General CEP Management will oversee distribution of intake surveys to all fellows, and midterm surveys to all steering committee members. Mid-December, General Management will ensure finalization of the general fellowship workbook, and distribution to the local programs.

During the Fellowship program (January through May), General Management will hold monthly pedagogy review calls to discuss monthly goals, challenges that come up, and highlight innovations in the local communities. Regional directors will have a standing weekly meeting to update each other based on their weekly check-ins with local coordinators, and General CEP Management will provide trouble-shooting advice. General CEP Management will work through the Director of Training to adapt trainings for local needs in terms of schedule and content, and assess program impact through the midterm assessment and feed & feedback dinners.

Starting in March, General CEP Management will focus on Launch Night preparations, including preparations of the Launch Book magazine featuring activities across local communities, and leverage the PresenTense network to raise consciousness about Launch Nights across the world. General CEP Management will host an open call to Launch Night Task Forces to discuss Launch Night requirements and opportunities, and enable the sharing of innovations and tips between local teams.

Following Launch Night in June, General CEP Management will oversee the assessment process, and provide tools and opportunities for local coordinators through the regional directors for program continuation over the summer months. At the same time, General CEP Management will collect lessons learned from the program year and integrate these lessons into a curriculum update process during the month of June, so that a new, upgraded version of the curriculum will be ready for the Coordinator Training Course of 2012.

Budget Summary: The majority of the General CEP Management budget is focused on the summer Coordinator Training Course, when local coordinators and regional directors from around the world come to Jerusalem for an annual update of the curriculum and training of new coordinators. During that course, budget requirements include: flights, room and board for individuals coming from around the world, and conference facilities, food and special meals for all course participants. While the course remained under 18 individuals, the PresenTense Jerusalem hub was able to provide for the basic space requirements. The Coordinator Training Course of 2012 has a target of 26 participants (18 coordinators, 3 regional program directors, 2 regional directors of training, 3 staff observers), which may require larger facilities.

During the course of the year, the General CEP Management budget is focused on staff time, conference call technology, and information systems that will enable the effective distribution of materials to the local coordinators. Of these materials, the most expensive will be the Program Book, a magazine introducing the PresenTense program that will be distributed to all Steering Committee and Mentor Community members, to give them a fuller understanding of the program and its functions.

Finally, General CEP Management will reserve a travel stipend in case of trouble shooting needs for regional directors or local coordinator challenges, and an additional event reserve to hold one additional gathering of regional coordinators during the program year.

North American CEP

Mission: To provide support, training and guidance to the 7 North American Coordinators so they successfully implement their respective CEP programs for their local communities in the 2011-2012 program year, (where success equals 80% satisfaction by Coordinators and all community stakeholders).

Context & Interdependence: The Community Entrepreneur Partnership (CEP) is a yearlong program for community development and start-up acceleration run in local communities by partner organizations (generally Federations or JCCs) who are paying customers of the PresenTense Group. To spread this mode of community development and exponential engagement through start-up acceleration, PresenTense has developed a franchise model, which requires overall management, quality control and service provision. North American CEP Direction is the in-house PresenTense department that serves our current local North American community partners and ties into PresenTense's general communications and operations backbone to ensure that the local clients have the tools and resources they need to implement a successful program.

Metrics: Since the North American CEP Direction serves external clients, it will measure itself based on a Satisfaction Score from quarterly surveys of CEP Coordinators. Such surveys will ask the following questions, anonymously graded on a 5 point scale, with a minimum goal of 4 average:

- Have you been provided with sufficient materials you need to successfully coordinate the fellowship?
- How would you assess the quality of the materials you have been provided?
- How responsive has PresenTense been to your additional material or support requests?
- Would you recommend another community partner with PresenTense?

In addition, the purpose of the CEP is to create an engine for Exponential Engagement in the local community, with the aim of directly engaging an average of 12 Steering Committee Members, 12 Coaches, 18 mentors and 12 Fellows per community as the catalyst for more robust community engagement. North American CEP Direction will measure the success of the program by measuring these distinctive elements, namely:

- How many Steering Committee members does your program have?
- How many Coaches are coaching your Fellows?
- How many Mentors are involved in your community?
- How many fellows are you engaging (going to engage)?
- How many Facebook fans does your program page have?

The effectiveness of our program will be evaluated by the feedback from the aforementioned stakeholders involved, assessing their experience at the beginning and ending of each program – targeting an 80% satisfaction rate from all Steering Committee Members, Coaches, Mentors and Fellows.

Workplan Summary: North American CEP Direction's work begins in the summer, with the Coordinator Training Course, where the local coordinators from around the world are trained on the elements of the CEP program and practice using the tools developed by PresenTense to simplify and standardize the program components. During the months of May to June, North American CEP Direction helps to prepare the course presentations and materials, prepares participants with agendas and pre-work, and ensures the logistical elements are in place to host the participants in Jerusalem.

In August, when the local coordinators return to their home communities, the North American CEP Direction work switches to supporting the North American Coordinators and their program implementation. North American CEP will review and update all templates with General CEP Management, and provide these templates to the local coordinators to use for all recruiting, assessment and publicity activities during the community building stage of the fellowship. North American CEP Direction will oversee the distribution and completion of the Steering Committee intake surveys, and work with the North American Coordinators to feature these community members on their local websites and other social media properties. Weekly check-ins will reoccur throughout the entire program year.

Throughout September North American CEP Direction will work with the Local Coordinators with their Steering Committee recruitment efforts to secure a 3-6 person executive committee, and 12-16 other Steering Committee members, divided across 3 work streams. North American CEP Direction is available to meet or speak with the executive team but will attend and facilitate all introductory Steering Committee Meetings and assist the Coordinators to set the agendas for the initial work stream meetings.

In October when the call to applications goes out, North American CEP Direction will assist the local Coordinators and the admissions team with their recruitment strategies, and work with General CEP Management and PresenTense Communications to spread the word across mailing lists and social networks. North American CEP Direction will also make sure that Venture Development and Networking work streams are executing their respective responsibilities.

When Fellowship applications come in by early November, North American CEP Direction will work with General CEP Management to hold a refresher workshop for Local coordinators and admission team captains to review tools for first cut and final decisions, including online grading and speed interviewing methodologies. North American CEP Direction will attend the first year CEP speed interviewing events, to ensure that the new Coordinators are familiar with the process.

Once the Fellowship classes are determined in December, North American CEP Direction will oversee distribution of intake surveys and waiver form to all Fellows, and work with Coordinators and networking teams to publicize the newly admitted classes. North American CEP Direction will also make sure that Coordinators are working with their Venture Development Teams to match and Coaches and Mentors. Mid-December, North American CEP Direction will ensure finalization of the general fellowship workbook, and distribution to the local programs.

During the Fellowship program (January through May), North American CEP Direction will hold monthly Coordinator calls to discuss monthly goals, challenges that come up, and highlight innovations in the local communities. North American CEP Direction will make sure that all PresenTense seminars are scheduled for the Fellows, clusters are meeting, Round Table sessions are on the calendar, and all other curricular elements are planned.

There is a potential Retreat on the books for February which will bring together the Local Coordinators and Executive Teams to share best practices, reflect on their communal work, and cultivate continued connection between the North American clients and community members.

Starting in March, North American CEP Direction will focus on North American Launch Night preparations, ensuring that Launch Night teams are securing venues, building invitation lists and assisting the PresenTense Managing Editor with the Launch Book magazine. North American CEP Direction will work with General CEP Management to host an open call to Launch Night Task Forces to discuss Launch Night requirements and opportunities, and enable the sharing of innovations and tips between local teams.

Following Launch Night in June, North American CEP Direction will start program assessment and provide tools and opportunities for local coordinators to offer continued programming during the summer months. At the same time, North American CEP Direction will collect lessons learned from the program year and work with General CEP Management to integrate these lessons into a curriculum update process during the month of June, so that a new, upgraded version of the curriculum will be ready for the Coordinator Training Course of 2012.

Budget Summary: The majority of the North American Program Direction budget is focused on the travel and in-person support for the 7 North American Coordinators, as well as staff time and effective technology and back-end information systems to distribute all relevant materials to the Local Coordinators.

During the year, budget requirements include: flights, room and board, on-ground transportation costs, and meeting expenses for the North American Program Director. Cell phone, laptop, conference call technology and other integrated communications systems are crucial expenses when Coordinator support is provided from a distance.

There is also a potential event on the books for February to bring together the local coordinators and executive teams. Local Partners will be required to pay transportation and board costs whereas PresenTense will cover venue and food expenses.

New York CEP

Mission: To recruit, manage and optimize the relationships between fellows, coaches, mentors and steering committee members such that 12 ventures are ready to launch on Launch Night in May/June and that upon conclusion the CEP will receive at least an 80% satisfaction rating from each of its participant groups.

Context & Interdependence: The Community Entrepreneur Partnership (CEP) is a yearlong program for community development and start-up acceleration. As opposed other CEP's run in local communities by partner organizations (generally Federations or JCCs) that are paying customers of the PresenTense Group, the New York CEP is an internal, PresenTense-staff run CEP. It therefore offers the opportunity to trial new ideas and practices, which can then be introduced to client sites.

Metrics:

- Strength and diversity of the fellowship pool. The NY CEP aims to have at least 50 fellowship applications, including at least 3 from Russian speaking communities, and submissions from the Brooklyn Sephardi and Israeli communities.
- Strength and diversity of the CEP network of steering committee members, coaches and mentors. The NY CEP aims to have at least 20 steering committee members, 12 coaches and 18 mentors, with representation from local Russian speaking, Sephardi and Israeli communities.

- Feedback surveys, held progressively throughout the fellowship, will express at least an 80% satisfaction with the participant's experience in their role as a fellow, coach, mentor or steering committee member.
- Increase brand awareness of the CEP by increasing the number of Facebook and Twitter followers by 20% each quarter.

Workplan Summary: Beginning in August, the CEP coordinator recruits members of the Executive Committee who will take leading roles in the Steering Committee and help decide the strategic priorities of the fellowship. Together with the Executive Committee, the coordinator then recruits members of the Steering Committee by mid-September. From mid-October to mid-November applications for the fellowship will be solicited by leveraging the Steering Committee's networks and utilizing PresenTense's media and communications assets.
When applications come in by early November, the CEP coordinator will direct the admissions process, involving rounds of online grading and speedinterviewing. Once the fellowship class is determined in December, the coordinator will oversee the forming of network relationships between fellows, their clusters, and coaches and mentors.

During the Fellowship program (January through May), the coordinator will schedule and oversee all program modules, including workshops, venture milestone distribution, cluster meetings, coaching, mentoring and round tables. The coordinator will hold monthly check-ins with fellows, coaches and mentors to ensure a positive volunteer experience, as well as deep impact on the fellows and their ventures. Starting in March, the CEP coordinator will focus on Launch Night preparations, including preparations of the Launch Book magazine, and leverage the PresenTense network to raise consciousness about Launch Night. The coordinator will ensure a successful Launch Night, as defined by audience satisfaction as well as fellow opportunities generated by the event.

Following Launch Night in June, the CEP coordinator will conduct 'feed and feedback' sessions with fellows, coaches, mentors and steering committee members, which will collect lessons learned from the program year so that these lessons can be integrated into a new, upgraded version of the curriculum for the Coordinator Training Course of 2012.

Budget Summary: Aside from staff time there are two major components of the New York CEP budget. The largest single expense relates to Launch Night, which involves renting a space and providing food and drink for the large audience in attendance. The other major budgetary requirement concerns food for meetings of various groups within the CEP network. Throughout the year, meetings are held with fellows, coaches, mentors and steering committee members for the purpose of orientation, group work, feedback or appreciation. There is also an allocation for printing needs, including recruitment brochures and the venture Launch Book.

SocialStart Training Program

Mission: To recruit, train and certify at least 10 U.S.-based SocialStart trainers in PresenTense curriculum and pedagogy, enabling them to deliver up to five distinct seminars to CEP Fellows in the seven PresenTense cities between January and May 2012. The SocialStart program will enable Trainers to provide Fellows with a systematic framework and assist Fellows in applying these tools to complete program milestones and create sustainable ventures.

Context & Interdependence: The SocialStart Trainers provide the content for the Community Entrepreneur Partnership fellowships in North America, kicking off monthly cycles of learning for the Fellows and assigning milestones to keep the Fellows on track, between January and May 2012. In order for the CEPs to succeed and for the model to scale, PresenTense must train a cohort of SocialStarters who feel comfortable delivering the content and following the pedagogy that PresenTense espouses. Without the content delivered by SocialStarters, Fellows lack the training necessary to launch successful ventures.

Metrics:
1. Evaluating satisfaction levels and progress from key stakeholder groups:
<u>Social Start Trainers:</u>

- Intake survey: Assess starting point with regards to teaching, venture development and Jewish communal involvement.
- Certification criteria for Trainers Course:
    - Attendance/participation at all training programs
    - Demonstrated competency and effective instruction during teachbacks (graded on a 5-point scale by PT staff)
    - Self-described confidence with facilitation skills and comfort with content
    - Completion of model milestones
    - Commitments to shadow one seminar, teach one seminar under observation and teach two seminars independently between January and May 2012.
- Seminar evaluations from Fellows - based on Fellows' feedback, Trainers will be rewarded, provided with additional training or pulled from program
- Midpoint evaluation during CEP cycle
    - Were SSTs provided with enough training and understanding of content?
    - Are they satisfied? (80% goal)
- Exit interviews, in-depth assessment of curriculum and training
    - Would they recommend experience to a friend?

<u>Fellows:</u>

- Intake survey: Assess starting point with regards to venture development skills and Jewish communal involvement
- Seminar evaluations: Relevance, clarity of content and facilitation
    - e.g. "Did this seminar on Environmental Scanning help me understand how to identify players in my industry? Do I have a clear understanding how to position my venture toward a unique customer and with a unique value proposition?") and effective facilitation skills ("Did the Trainer present the content in a clear, structured manner?")
- In-depth assessment of curriculum, content delivery and individual satisfaction

Coordinators:

- Seminar evaluations: Relevance of seminar to milestone, facilitation
- Midpoint evaluations: Quality and accuracy of milestones submitted to determine whether training adequately prepared them ("How many Fellows approached you with clarifying questions about the Workplan?").
- In-depth assessment of curriculum and content delivery

2. Assessing the impact of the training on Fellows' venture development.

- Examine intake intake evaluations as compared with the milestones to determine whether Fellows gained clarity on the purpose of their venture.
- Explore the final executive summaries to determine whether all the necessary elements are in place and whether the venture is market-ready, and whether the venture progressed after Launch Night in attracting community partners and potential investors.
- Longer term, surveying community stakeholders to determine impressions of venture and elements of business plans

Workplan Summary: The first step of developing the SocialStart program is to update the curriculum based on feedback from past fellows, Coordinators and SocialStart trainers. In September and October 2011, each module will be updated to clarify core concepts, strengthen applicability and achieve smoother flow.

The next step is to recruit SocialStart Trainers in October and November 2011, with the goal of achieving a 3:1 application to acceptance rate while maintaining a 60% concentration of New York-based trainers for the sake of accessibility and cost-conserving. Target populations will include MBA students, teachers (ideally graduates of Teach for America or other fellowship programs) and entrepreneurs (including past PT Fellows). Required skills include teaching experience and familiarity with business, entrepreneurship and/or nonprofit management; characteristics include flexible, personable and committed to impact and engagement in the Jewish community. Candidates will go through an application phase and an interview phase, during which they will present to their fellow applicants and PT staff.

After accepting at least 10 qualified Trainers, PresenTense will build and execute the Trainers Course in the Winter of 2011, which will include two two-day seminars with instruction and teachbacks, assignments in advance of the seminars and throughout the Training Course, reviews of online presentations and access to readings and resources to build expertise for Trainers. It will then certify all Trainers who have met the set requirements as designated above.

Next, PresenTense will designate Trainers to shadow and teach seminars, managing all logistics for the process. PT staff and Trainers will teach 5 seminars in each of the 7 cities through January and May 2012 and will engage in monthly calls to discuss pedagogy, challenges and success stories. In May PresenTense will wrap up by the program by encouraging SocialStart trainers to attend Launch Nights in their respective cities and will conduct final evaluations on the program. The summer will then be dedicated to implementing feedback and improving the program for 2012-2013.

Budget Summary: The budget for the SocialStart program includes only expenses and no direct revenue. It is focused on administrative costs for the Trainers Course, training and travel costs for CEP seminars and Trainer stipends. The Trainers Course costs include room rental (likely free if NY hub is chosen) and food, travel and lodging for Trainers and PT staff. The majority of Trainers will be based in New York, limiting the travel expenses, and those traveling in from other cities will be given a spending cap to contain costs for travel and lodging. There will be minimal costs for printing of program materials.

During the course of the CEP fellowship, PresenTense will cover the costs of travel for PT staff and Trainers to reach the host communities for each seminar each month. When possible, PresenTense will assign local Trainers to teach local CEPs to minimize costs. Trainers will be provided with a stipend of $100/seminar for every class they teach (either independently or observed), and their travel will be covered (with a cap) for both those they teach and those they shadow. The SocialStart program will build in a buffer of 15% to cover miscellaneous and unforeseen expenses.

PTSchool

Mission: To enable a subset of Jewish organizational professionals to innovate within their organizations by training them and providing them with customized modules, tools and frameworks. To execute PTSchool seminars for PresenTense's existing contracts and to sell and execute $35,000 worth of additional seminars to organizations around the country in program year 5772 (2011-2012).

Context & Interdependence: PresenTense's PTSchool product delivers PresenTense-certified content to the broader community, outside of its CEP fellowships, by targeting Jewish organizations and their professionals. The product line, which includes full-day and half-day seminars, six-module series and weekend organizational retreats, offers professionals workshops in digital and social media tools, visioning, and building social business models, among others, to enable participants to effect change within their organizations. PTSchool, along with the CEPs, strives to meet PresenTense's broader mission of fostering innovation within the Jewish community. In order to support and scale PTSchool, PresenTense trains a cohort of SocialStart trainers through its Winter 2011 Trains Course to deliver the content for PTSchool seminars. PTSchool seminars will run throughout the year beginning in October 2011.

Metrics:

1. Assessing satisfaction of PTSchool's clients and Trainers
   - Intake interviews with professionals to understand the current state of the organization and the capacity and influence of the professionals
   - Seminar evaluations about clarity of content, effectiveness of facilitation

- Surveys with attendees 6-9 months after seminar to determine whether the tools presented helped them to effect change internally. ("Which digital tools that you learned in PTSchool did you then employ within your organization and what was the effect?" "Which activities and outputs that you listed in your social business model did you then alter and innovate following the seminar?")

2. Evaluating Trainers to measure facilitation effectiveness
   - Fellow assessments of Trainers after each seminar
   - Self-evaluation of Trainers after each seminar

3. Longer term, determining whether organizational cultures have changed positively after professionals enrolled in PTSchool.
   - Survey organizational leaders and other stakeholders

Workplan Summary: The first step of developing PTSchool is to update the curriculum based on feedback from past clients and Trainers. In September and October 2011, each module will be updated to clarify core concepts, strengthen applicability and achieve smoother flow. Before each seminar, the modules will be customized according to organizational needs and capabilities.

The next step is to recruit and train SocialStart trainers within the same process as recruiting for the CEP. (Ideally, the same individuals will teach CEP seminars and PTSchool seminars). With 10 trainers, PresenTense can assign different trainers to different seminars around the country and generate positive margins. PresenTense staff will provide all training and ongoing support to Trainers, in addition to handling logistics. PresenTense will also facilitate interaction between the Trainers in order to build community and increase productivity.

Concurrently, throughout the year, PresenTense will be identifying organizations as sales targets and presenting to them in order to secure sales. It will market to organizations at a 4:1 ratio in order to meet its goal of selling $35,000 of additional contracts for this year. PresenTense will offer multiple options for products/packages and will tailor them according to the organizations' needs.

Budget Summary: The revenue side of the PTSchool budget focuses on sales to organizations and the expense side focuses on trainer stipends and travel, marketing and advertising, and materials printing.

Sales revenue flows in according to when contracts are signed and services provided, generally broken up into several payments per sale. Expenses are incurred largely in line with each seminar, when trainers are paid, travel is reimbursed and materials are printed. Twice a year PresenTense prints marketing collateral for PTSchool and incurs costs for the designer, printing and mailings.

The goal of PTSchool is to generate net profits of over $30,000 this year to compensate for expenses for PTSchool and for running the SocialStart program (currently budgeted at under $10,000).

CEP Sales

Mission: To expand the Community Entrepreneur Partnership to a maximum of six new sites around the world for the 5773 (2012/2013) program year, and a minimum of three North American CEPs, bringing into the organization a target of $450,000 of new income for 5773.

Context & Interdependence: The Community Entrepreneur Partnership (CEP) is a yearlong program for community development and start-up acceleration run in local communities by partner organizations (generally Federations or JCCs) who are paying customers of the PresenTense Group. In order to spread this model, and build a sustainable base of income for the PresenTense Group, the CEP Sales team is responsible for acquiring six new expansion clients on an annual basis, until the organization can base itself on the on-going fees of 18 cities (and at that point develop new products for expansion). CEP Sales will work closely with the three Regional Directors, and General CEP Management, to ensure customer service with existing clients is satisfactory, and focus the majority of its energies on building a pipeline for, and closing on, new local sponsors for CEPs.

Metrics: CEP Sales will take a pipeline approach to sales, aiming to always have in process three times the cities that it aims to close on for any given year. Of those, one-third should be prospects for the year after, one-third prospects for the coming year, and one-third long shots for future cities. By January 2012, CEP Sales should have six CEPs in final negotiations, six CEPs with an option on the 5773 program year, and six CEPs ruled out for 5773, with an interest in 5774.

Workplan Summary: CEP Sales' work begins in the Fall, with a full review of contacts in potential expansion sites and a ranking of sales targets according to three levels of probability (High/Medium/Low). During that period of time, the Sales team will conduct environmental scans for each community, identifying influencers and potential allies who could help enable a local deal. In parallel, the Sales team will do a full materials audit to ensure adequate marketing materials exist for sales efforts. Following the materials audit, a marketing material workplan will be constructed to strengthen weak links in the sales chain, with drafts being sent for feedback for existing partners before print.

In November, Sales will send a small PresenTense staff contingent to the Jewish Federations of North America General Assembly, in the hope of prospecting additional communities. Sales will try and organize a special session at the GA for interested Federation executives, to discuss the CEP and the benefits it has for the community.

In December, CEP Sales will step up grassroots advocacy efforts, addressing local volunteers in target cities in the hope that they will advocate for bringing the CEP to their location. The IdeaSlam program will be offered to potential partners who might fear they are missing the critical mass locally, to test the water and give a taste of PresenTense's capabilities. Sales will also communicate with target site's Israel Mission departments to make sure PresenTense in Jerusalem is a stop on their trip. This phase of grassroots advocacy and Israel-connections will run in parallel with the closing process, from February to May, whereby Sales will work with the most likely candidates for CEPs to close on contracts and begin the on-boarding process for local partner staff.

Budget Summary: The CEP Sales budget is majority focused on marketing material development, and travel to and from target cities. Seeing as how the co-directors are the primary sales staff, costs will be unnaturally high for sales when taking into account international flights, which will be monthly from September through January, and bi-monthly after that. For that reason, sales trips will include multiple targets, and the Sales team will have to add local team members to the strategy.

Online Communications Program Preview

Mission: To facilitate conversations around PT's activities, initiatives, and programs within the PT community, and the broader Jewish community, and the world.

Context & Interdependence: PresenTense is growing at a fast rate, nearly doubling our number of fellowships this year, and expanding our programs offered through PTSchool and several new projects under development. This creates a number of requirements in terms of knowledge transfer and sharing of news and events to the general stakeholder public. Additionally, as our fellows continue to grow their ventures and get involved in the Jewish community in new ways, we have a greater obligation to showcase their efforts and share their news through our services and networks. Through upgrades to our website and communication channels, we will better facilitate our fellows' success and growth, and provide a reliable network and platform for their use.

Metrics

- Number of visits, visitors, and pageviews on the PT site
- Number of conversations, shares, likes, tweets, etc. of PT content on social media
- Number of subscribers to our newsletters
- Open rates and click-throughs for our newsletters
- Number of major news stories about PT and PT programs
- Number of quality blog posts on PT.org

Workplan Summary: Over August and September, we will meet with PT staff to discuss what content they are looking for on the PT site, and then create a written document to detail what content will go on what site(s), how it will be organized and managed, and how we envision the site in the next 3 years. In October, we will recruit community members to commit to blogging on a schedule, and create a plan for managing their submissions. Then, we will review the English, Hebrew, and Russian site content in October and November, in order to write, rewrite, edit, and reorganize as necessary, with help from interns in the appropriate languages. In January we will re-review the content as necessary, to make sure it is up to date as the fellowships start, especially regarding fellows, ventures, and profiles.

As for ongoing PresenTense communications, the first step will be to create a final version of the Storyboarding document, to chart out major stories over the next year. In addition, we will lead an email address drive in September and October to net more subscribers for our newsletter and more contacts for our organization overall. In addition we have goals for updating our Facebook page (September), Creating a list of best social media tools (October), and general social media practice review (December). Otherwise, a lot of the tools and work of communications are ongoing, and dependent on news and updates from fellowships, fellows, community members, and other PT programs.

Budget Summary: The main web and tech costs are highlighted in the data and tech project plan, and many of the tools used for online communications are free. As our fellowships and projects grow, it is important that we ensure that they are appropriately highlighted, and the work of establishing relationships with journalists and press liaisons is proving to be too time intensive for PT staff. Therefore, when we have budget available we will hire someone or a firm that already has those connections and relationships to do PR, thus maximizing our impact.

Information and Technology

Mission: To facilitate and organize the flow of information and data within the organization and for our client partners, reducing the time spent on it and increasing the relevance and usefulness of the data collected.

Context & Interdependence: PresenTense is growing at a fast rate, nearly doubling our number of fellowships this year, and expanding our programs offered through PTSchool and several new projects under development. At the same time, the amount of data available and needed for collection is growing as well, due to this expansion. The data needs to be easily accessible when required, yet the time spent on collecting, analyzing, publishing, and sharing data must stay the same - and ideally decrease - as staff energies are devoted towards our programming needs. These data management tools need to be made available to our fellowship clients as well, and extend across all PresenTense programs internationally.

Metrics

- Time spent by program staff on data collection and analysis
- Percentage of data collected as compared with amount desired (i.e. fellowship surveys, fellow tracking)
- Staff and client satisfaction with data quality, accessibility, and ease of collection at least 4 out of 5 on quarterly survey

Workplan Summary: Over the course of the coming year, we anticipate implementing a number of new systems and tools to significantly streamline data collection, information flow, and website management, and reduce staff time spent on information collection so more time can be spent on analysis and program management. This program area includes a number of discrete, yet overlapping, projects and initiatives, designed to impact staff across all departments of PresenTense.

The first project, which has already been started, is to implement an **application processing system** for all fellowships - US, Israel, and Russia - so that coordinators can easily collect applications, assign them to Steering Committee members for online review and evaluation, collect all grades and decisions in one central location, and track data across all applications. Currently we are developing this process in-house, and we plan to test it in October for the fall application season. We will make sure to manage any tech difficulties and take notes for how to improve the process. In December we will make any updates, post-fellowship application season, and then upgrade it for the global application in January. The same process of review and upgrading will take place in April, after the Global application season, and a 2.0 version will be released in July for the 2012-13 application season.

The next two projects, to improve **data collection** and to implement a metrics tracking system for PT fellowships and programs, may merge into one over the course of research and implementation. The project to improve data collection and flow will first involve meeting with staff in September to determine what are the biggest pain points and hurdles in data collection, and to brainstorm any ideas for improving the process. Then in September and October, this information will be used to build out and test potential solutions using current tools, such as Salesforce, and to create staff practices and guides on how, when, why, and what data to collect, from who it should be collected, and how this data will be analyzed and used to further our work at PT.

The **metrics tracking system** is a complete system for measuring our fellowships and the people involved in them. Over the summer, a number of template surveys were developed. In September, a metrics-tracking program will be selected and built out, possibly adapted with Salesforce. It will be tested in October and November, and report templates and data feeds will be created in November and December, in time for the late December launch with the 5-month fellowships.

The **PresenTense websites** must continuously be updated and upgraded - and so are a year round project. In September and October, we will meet with PT staff members individually to discuss what they envision in both a main PT site as well as program sub-sites. Notes will be written up into a workplan, and then a written document which details a 3-year plan for the website. Next we'll contact web shops in October and also research the options of doing it with our current tools. A decision will be made in November, and a new/seriously upgraded website(s) will be created in December-January, with a goal of finishing them mid-February.

Lastly, we will facilitate creation of a **kickstarter-like platform** for fellows to market their ventures, raise money, and recruit volunteers. In September we'll work with Aryeh Goldsmith to talk more about Mitzfunder and draw up a contract. From October-November the site will be developed, with a goal of launching in December before the fellowships begin.

Budget Summary: The data and tech budget mostly focuses on monthly program needs, as most of the costs are from web services and Internet servers that are well-tested and necessary for program function across all departments. The most variable item from these is GoDaddy, as we renew domain names on an irregular schedule depending on when they were first purchased, as well as plan to buy new domains for upcoming fellowships and programs. Some of the new items in the budget include programming help with the application system, for the months of October, January, and June-July, in case we will need to hire an outside programmer to help or finish up the fellowship applications before the application seasons. Additionally, as we envision ramping up the PT website, we'll need to spend on website development for the initial build, as well as ongoing tech support.

E-Fellowship

Mission: To create an online training program for applicants to our fellowships who are not accepted or unable to attend, so we can help support innovation through as many channels as possible.

Context & Interdependence: PresenTense is currently running 13 fellowships in a dozen cities, but even so we are unable to reach all of the innovators who would like to attend our programs. Some applicants we deem unsuitable for our in person fellowships, even though they would likely benefit from the curriculum. Others are accepted but unable to attend for various reasons. We are losing passionate, innovative entrepreneurs - and an eFellowship will enable us to reach them, and help them launch their own ventures through this online platform.

The eFellowship will be a year-round program, modeled after the in-person fellowships. The curriculum and educational tools will be the same, and we will work with the US fellowships to further adapt them for online use. In addition, since the eFellowship will contain the same tools we share with our in-person fellows, we will be able to use it as an intranet for our local fellowships, to store lessons, powerpoints, videos, and online tools, and to enable them to share their materials with mentors and with one another.

Metrics

- Number of people who sign up for the eFellowship
- Number of people who complete the eFellowship
- Number of online mentors
- Satisfaction rates of eFellows greater than □ (online survey measurement)
- Satisfaction rates of online mentors greater than □ (online survey measurement)

Workplan Summary: The development of the eFellowship begins with the creation of a request for proposal and program specifications, which has already been completed. Following this, the proposal will be sent around to different web development shops, as both out-of-the-box and custom-built solutions are investigated in September. Once a decision is made in October, we'll work closely with the creators to ensure it is developed well, and to test it with 2-3 coordinators in November and December. We will also recruit an eCoordinator - either internal or external staff member, who will be able to give about 20 hours per week to this program. We plan to launch an alpha of the program in mid-December, in time for people who aren't accepted to the 2012 fellowships to try this out.

After it is launched, an eCoordinator will keep track of how fellows are doing, how the system is running, and work with developers and PT staff to make any changes as necessary. If the system works well, over June and July it will be further developed for use in the global institute and then local fellowships as an intranet. Additionally, in August and September 2012 we will prepare for a beta launch of the product to the public, both for fellowship applicants as well as anyone else that is looking for an eLearning platform to advance his or her venture.

Budget Summary: Due to the uncertainty regarding funding of this project, we have created two separate budgets - one if we receive grants, and one if we do not. If we receive grants, we will be able to build a custom eLearning platform from scratch or heavily customize an out of the box solution. We also will be able to hire a part time coordinator to manage the fellowship, as well as the adaption of curricular materials and troubleshooting tech issues. If we do not receive any grants, we will have to use an "out of the box" system current staff will have to adapt to our needs. Due to the special requirements of the CEP, an out of the box system is only temporary.

Regarding other income - while we anticipate receiving licensing fees from other organizations in the future that would like to use our platform for their needs, over the first year, as we test and troubleshoot the system, we cannot project any income for an alpha-level product. The same goes for income from eFellows - while we plan to charge a registration fee for anyone who would like to advance beyond the first module of the eFellowship, we cannot do so for such an entry level product that is yet untested.

Financial Resource Development

Mission: The FRD's mission is to raise $240K in chair funding and approximately $400K in restricted and unrestricted grants, enabling PresenTense to fulfill its 2011-12 goals of implementing CEP's and expanding to six new cities in the 2012-13 program.

Context & Interdependence: FRD provides the resources required to bring PresenTense to a position of core program sustainability for core program funding, after which it will serve to support expanded programs, talent acquisition, and staff development. Quality programs—*especially great fellowship experiences and successful fellows*—make FRD possible.

Metrics:

- $400K Restricted/Unrestricted
- $240K Chairs in New York and for the Global Fellowship
- Board of Directors engaged financially (giving or getting personally significant contribution at 90%) and governance
- Achieve fundraising goal for PT – TJC partnership

Workplan Summary: FRD will raise the funds planned from a number of different streams: The greatest challenge will be the approximately 400K in unrestricted grants from several streams.

1. *Existing Funders:*
    a. Existing funders will provide a strong cornerstone of the funds, estimated to be 250K. Existing funders will be approached for re-ups and where possible increases.
    b. Individual engagement will be upped through on-going conversations and communications.
    c. Existing members will be engaged by ongoing emails, investor portal, and 3-4 investor calls during the programming year.
2. *New Funders*
   . New funders will be approached according to their expression of interest over the course of this coming year.
3. Chair Funding
   . Existing Funders: All existing funders will be re-approached though. Risk: In cases where fellows did not perform, re-ups will be challenged by risk averse funders.
    a. New Funders: A list of fifty targets will be pursued. A retooled funding structure will ease sales. The approach will include an email-marketing blitz through SalesForce and follow-up in person's and phone conversations.
4. Board of Directors Engagement: This will take place through the board manual, ongoing meetings of committees, conversations, and goal setting. 1-2 committees will be established that also include staff and volunteers from the community.

Budget Summary: The primary need of FRD is to build strong relationships, facilitate face-to-face solicitations, ongoing communication, and excellent brand building and engagement through materials. The FRD budget reflects this in

- Regular trips for co-directors to do direct solicitation and relationship building, as well as funding for NA local team members to facilitate relationship building and solicitation.
- Material creation costs for several brochures and flyers that will be used during key reporting and selling seasons
- Special events costs, especially a whistle stop tour in May to bring board members and investors to the various launch nights around the world

=END OF YEAR IN PREVIEW DOCUMENT=