

Executive Summary

Background and Overview of Methodology

Since its launch in 2014, the Surge Institute has been dedicated to “broadly addressing issues of race and class in urban education through leadership development, technical assistance, and advocacy.” It has served three cohorts of leaders of color through its signature program, the Surge Fellowship. In October of 2016, the Surge Institute (“the Institute” or “Surge”) engaged Mission Measurement (“MM”), a leader in the field of social impact measurement with over 10 years of expertise in monitoring and evaluation, to facilitate a learning evaluation to (1) assess the impact of the Surge Fellowship on Fellows and the landscape at-large, and (2) explore the factors that contribute to impact and surface opportunities to increase impact.

To assess impact on Surge Fellows and Alumni, MM first worked collaboratively with the Institute to identify and define the core outcomes the Fellowship is designed to produce. MM subsequently:

- Conducted interviews with Surge leaders and other education leaders who worked with Surge Fellows/Alumni or who were familiar with the organization;
- Facilitated focus groups with Surge Fellows and Alumni; and
- Fielded a retrospective, point-in-time survey to Surge Institute Fellows and Alumni to assess their statuses, attitudes, and behaviors at the start of and after the Fellowship.¹

MM synthesized findings from these data sources to determine the extent to which the Institute has produced priority outcomes and to surface opportunities for the organization to improve impact as it expands and grows.

Summary of Findings

- **The Fellowship has produced measurable outcomes;** it accelerates leadership growth and has facilitated the development of a dense, interconnected network of diverse leaders.

Leadership Acceleration

- Nearly a third (30%) of surveyed Alumni who completed the program in 2015 or 2016 have been promoted since completing the Fellowship. 43% reported assuming at least one new responsibility within their organization (e.g., responsibility for engaging funders) after completing the Fellowship.²
- A notable number of Alumni (39%) also report playing a larger thought leadership role in the education landscape after their Surge experience (e.g., wrote or published pieces about education reform or spoke to professional audiences outside of job obligations more frequently after their Surge experience).
- Alumni also gained key executive skills and abilities (e.g., change management, negotiation, or networking skills). 100% of Alumni reported that Surge significantly improved at least one of their skills or abilities, and most commonly reported that Surge improved their change management abilities.
- Surge’s greatest impact to-date is on Alumni presence. 83% of Alumni confirmed their Fellowship experience increased their confidence and ability to articulate and advocate for their point of view. In focus groups, all Alumni and Fellows shared that Surge empowered them by allowing them to “bring all of themselves to the table”, and inspired them to take concrete steps to improve education outcomes for low income students.

Network Strength

- Nearly three quarters (74%) of Alumni confirm their professional network has substantially increased because of their involvement with Surge. Alumni most commonly report having substantially increased access to leaders in education-related nonprofits or advocacy organizations.
- 100% of Alumni report that, because of their experience with Surge, they collaborate more across the education landscape. 65% indicate they currently serve as a mentor and model to more professionals because of Surge.
- In both focus groups and the survey, Alumni and Fellows shared that the Surge network is a “real network” and all Fellows/Alumni spoke to being part of a Surge family that provides comparatively more meaningful supports than other networks. For example, nearly all (91%) of Alumni indicated they consider the majority of their Surge cohort to be “lifelong friends.”

¹ 2017 Fellows reported their attitudes and behavior as of the survey field date in February 2017.

² Source: Surge Learning Evaluation Survey, February 2017. n=23.

- **Surge creates significant, differentiated value for Fellows and Alumni compared to other leadership development or educational programs.**
 - Multiple stakeholders (education leaders, Fellows, and Alumni) shared that Surge plays an important role in addressing gaps in the leadership development pipeline for leaders of color. They were able to describe the defining characteristics of a Surge Fellow and confirmed that they would consider completion of the Surge Fellowship to be a distinguishing characteristic.
 - Fellows and Alumni highlighted the value of Surge's unique race and equity lens and focus on authentic leadership. Several Fellows and Alumni indicated that the Fellowship was more valuable than other leadership or educational experiences (e.g., more valuable than their master's or law degree). Additionally, in focus groups, when asked to provide a 1-10 rating of the value of the Fellowship, where 1 indicated "Not valuable at all, a waste of time," and 10 indicated "Transformational, one of the most valuable investments you have ever made in your life," the average rating provided by Fellows and Alumni was 9. Fellows and Alumni most commonly shared that they valued their experience because it transformed their leadership outlook and provided them with access to a network of peers and leaders with shared backgrounds who affirm and inspire them.
- **Surge Alumni are beginning to change education policies and practices. However, preliminary data suggests host organizations and other educational leaders have not yet registered the impact and value of these changes.**
 - Nearly all (87%) of Alumni indicate they have started a new organization to create change or have changed policies and practices in their organization (e.g., changed student discipline policies).
 - However, education leaders who hosted Surge Fellows (n=3) were not consistently able to speak to the specific changes made by Fellows after they participated in the Fellowship or did not consistently indicate that Fellows had made system-wide changes in their organization. Leaders noted some Fellows left their host organizations soon after the Fellowship, so they were not able to affect significant change. In other cases, they indicated it would take more time to assess how new policies/practices affect students.
 - Other education leaders and Surge board members (n=5) did not speak to specific Fellow or Alumni impact, but expressed confidence that Alumni will positively impact students, schools, and systems in the next 5-10 years and encouraged Surge to measure its longitudinal impact on student outcomes.
- **Stakeholder feedback surfaced five short and long term recommendations to increase impact.**
 - *Short Term*– In order to preserve and deepen impact through Surge's expansion:
 1. Preserve key values and the core program model for Fellows, but where necessary, evolve specific aspects of the program and network supports (e.g., the Fellowship capstone and cross-cohort interaction)
 2. Provide avenues for deeper Alumni engagement, including access to critical resources and support and further skill development
 3. Develop a clear value proposition for all stakeholders and intentionally guide the development of Surge, host organizations', and Fellows' relationships
 - *Long Term*– In order to realize the Fellowship's ultimate vision and mission:
 4. Develop strategies to increase demand for Fellows and other leaders of color
 5. Establish a high-level strategy for measuring and improving education options and outcomes for low income students