



2017

ANNUAL REPORT



## LETTER FROM THE PRESIDENT

“Surge is more than a program.  
Surge is a sprawling movement.”

We are young. Having launched in 2014, many would say the Surge Institute has graduated from the “start-up” descriptor. However, our work in elevating and strengthening diversity in the education leadership pipeline has truly just begun.

But what a beginning it has been.

Fresh off the heels of graduating our third class of emerging Chicago education leaders of color, we have now launched our largest and most diverse cohort yet. We are thrilled that 60 percent of our 2017 Surge Fellows stepped into new leadership roles and alumni from all cohorts are successfully scaling the ladders of leadership—and crediting Surge for catalyzing or aiding them in their journey. It is indescribable to begin to realize the vision of impact that brought Surge to fruition.

Surge is more than a program. Surge is a sprawling movement. This movement is not isolated to any one space. Not just non-profit organizations. Not just charter or traditional schools. This work transcends those categories. We are everywhere, forming a collective bond with the singular mission of transforming the service to students and communities who deserve nothing but the best and have been too long underserved.

As you navigate this narrative of fiscal year 2017 and absorb the stories of our fellows and alumni, we invite you to see the connective tissue. See the thread and shared mission. We avoid silos. We are many, yet we are one. And this is only the beginning.



A handwritten signature in black ink, reading "Carmita Semaan".

CARMITA SEMAAN  
FOUNDER & PRESIDENT



## FELLOWSHIP SUCCESSES

Surge has graduated **47** fellows  
across **3** cohorts  
since launching the fellowship in 2015.

The fellowship size increased by **70%**  
between **2016** and **2017**.

**64%**

of **2015** and **2016 alumni** reported  
new promotions, professional  
awards and board memberships in  
fiscal year 2017.

**60%**

of **2017 fellows** received  
promotions or stepped  
into new leadership roles  
**during** the fellowship.

**87%**

of **2015** and **2016 alumni** report  
because of their experience with  
Surge, they have changed policies and  
practices, created system-level change,  
or started a new organization to create  
change.



# 2017 COHORT SUCCESSES

## Black and Brown Leaders on the Rise

For Surge to be a movement there must be movers!  
The 2017 Surge Fellowship introduced a large and diverse  
collective of dreamers and doers.

Natalie Neris and William Collins are two powerful  
examples of this sprawling movement in action.



During his Surge journey  
**William Collins** developed  
**connections to education**  
**leaders** and discovered  
the **power of his story**.  
He has since stepped up  
in leadership at **OneGoal**  
**Chicago**, having been  
promoted to **Senior**  
**Director of Partnerships**.



**Natalie Neris** credits  
Surge with strengthening  
her **executive skills**  
and empowering her to  
**lead with authenticity**.  
These tools have been  
invaluable in her new role  
as **Executive Director** of  
**Namaste Charter School**.



# FELLOW SPOTLIGHT

## HAVING A VOICE



“As a 2016 Surge Fellow, I learned to use my seat at the table to move the room. Every encounter is as an opportunity to influence outcomes for black and brown children.”

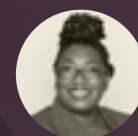
– **Ariel Johnson, 2016 Surge Fellow**

Director of Government Affairs, Illinois Network of Charter Schools



# FELLOW SPOTLIGHT

## A CLOSER LOOK



**Ariel Johnson**

Since graduating the Surge Fellowship in 2016, Ariel Johnson has seen her work with the Illinois Network of Charter Schools (INCS) evolve remarkably. She has been promoted multiple times and now serves as Director of Government Affairs to INCS and its affiliated political organizations.

Her leadership role allows her to impact children every day, crafting high-quality legislation that reaches 63,000 students across the state.

Serving as a political director, Johnson creates strategy around legislative and municipal elections through targeted campaign support. She also works to build coalitions among parents, community members, school leaders, and allied organizations to help create and maintain high quality education in our most underserved communities.

Johnson attributes her ability to navigate political environments to lessons she learned at Surge. “I learned to use my seat at the table to move the room,” Johnson said. “Every encounter is as an opportunity to influence outcomes for black and brown children. Prior to my time in Surge, I would never have had the confidence to walk into a room of funders and explain my work and results with accuracy and certainty.”





# SUPPORTERS

## INSTITUTIONAL DONORS



BILL & MELINDA  
GATES *foundation*



The Crown Family



Bloomberg  
Philanthropies



LLOYD A. FRY  
FOUNDATION

TheJoyceFoundation

# SUPPORTERS

## INDIVIDUAL DONORS

### SURGE PRINCIPALS

**\$5,000 and above**

*Supports tuition for a fellow*

Greg Gunn & Lisette Nieves

### SURGE SCHOLARS

**\$3,000 – \$4,999**

*Supports one year of executive coaching for a fellow*

Jonathan & Michelle Russell

### SURGE SHARKS

**\$1,000 – \$2,999**

*Supports key fellowship activities (such as Shark Tank)*

Connie Casson

Darryl & Angela Cobb

Jackie Hanselmann Sergi

Doyoung Yong

### SURGE ADVOCATES

**\$500 – \$999**

*Supports monthly session for a fellow*

Lawrence P. Bass & Paula A. Sneed

Thomas Burnette

Antonia Contro

Kendra Ferguson

Kevin Hall

Anita Houser

Kaya Henderson

Heidi Rudolph

Alexander & Judith Toland

Varsha Vig

### SURGE COLLABORATORS

**Up to \$499**

*Supports 360 assessment for a fellow*

Jacqueline Statum Allen

Stephanie Arias

Andres Avila

Tracy Dell'Angela Barber

Marche Barney

Nicole Beechum

Bradley Bernatek

Michelle Bess

Swati Bharteey-Buck

Jaclyn Bivins

Joy Bivins

Andrea Black

Elisa Botello

Vaughn Bryant

Sarah Butterfass

Jonathan Chaparro

Joseph Chiczewski

Carmen Chubb

Dolly Chugh

Melissa Connelly

William Collins

Anthony Correll

Florence Culpepper

Danielle Davis

Dominique Davis

AJ DeLeon

Aarti Dhupelia

Cesar Dominguez

Tosha Downey

KerryAnn Dyce

Sasha Dzubay

Mario Estrada Earnest

Susanna Ver Eecke

Tom & Sue Fangmann

Sylvia Flowers

Doresah Ford-Bey

Wendell Fortson

Lauren Garcia

Stacy Gibbons

Christopher Goins

D. Nigel Green

Mark Haggarty

Akilah Halley

Vincent Harris

Yolanda Harris

Tomeka Hart

Dawn Hicks

Erica Hines

Tamara Hoff

Jeff & Akeshia Howell

Ceddrick Hunter, Jr.

Adria Husband

Jennifer Husbands

Bryan Jackson

Marcia Jeffries

Michelle Johann

Michael Johns

Ariel Johnson

Shenita Johnson

Carolyn Kaneda

Steve King

Becca Bracy Knight

Khadeejah Lasuc-Lewis

Angela Brizant Layne

Gloria Lee



# SUPPORTERS

## INDIVIDUAL DONORS

### SURGE COLLABORATORS

Up to \$499

*Supports 360 assessment for a fellow*

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Amy Liu  
Brian Madine  
Grisel Maldonado  
Tyra Mariani  
Ana Martinez  
Rito Martinez  
Stacy McAuliffe  
Maurae Gilbert McCants  
Julie Milder  
Stacey D. Mitchell  
Candace Moore  
Forrest Moore  
Daphne Morgan  
Michael Morgan  
Stephanie Morimoto  
Mark Morris  
Donald Moses  
Vivek Murali  
Halleemah Nash  
Natalie Neris  
Alejandro Espinoza Olazaba  
Nche Onyema  
Bianca Paiz

Kara Palamountain  
David Park  
Kali Patrice  
Elizabeth Pattara  
Jawann Pollard  
Keyonn Pope  
Tamara Prather  
Marilyn Rhames  
Ashley Richardson  
Nneka Rimmer  
Evan Rudall  
Sandra Rush  
Khair Sadrud-Din  
Nina Sanchez  
LeShonne Segura  
George & Carmita Semaan  
Andrea Serrano  
Stacey Shells  
Marcy Shugert  
Veenay Singla  
DuJuan Smith  
Sherina Smith  
Tyler Snouffer  
Kellie Solliday  
Courtney Solomon  
Kerrien Rollins Suarez

Brianna Swartz  
TaMikka Sykes  
Amanda & Leticia Taft-Pearman  
Ashlie Tyler  
Vatika Vig  
Aaron Walker  
Carin Watson  
Cynthia Weiss  
Mark Welch  
Lakecia Whimper  
Kathy White  
Cassie Williams  
DeRonda Williams  
Nicole Wilson  
Julie Woolf  
Angel Zinger



# FELLOW SPOTLIGHT

## TRUTH THROUGH MENTORSHIP



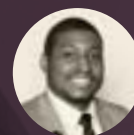
“Time is finite in my role and as a high school administrator, I can tell you exactly how much time I have to make an impact: 4 years. My work has shifted through my involvement in the Surge movement because I realize it’s more important now than ever, to tell my scholars the truth.”

—**D. Nigel Green, 2017 Surge Fellow**  
Assistant Principal, Muchin College Prep



# FELLOW SPOTLIGHT

## A CLOSER LOOK



**D. Nigel Green**

In thinking about his approach to his work, D. Nigel Green cites U.S. President Barack Obama's farewell speech, charging us all to "be those anxious, jealous guardians of our democracy."

As assistant principal of Muchin College Prep and a 2017 Surge Alumnus, Green takes this charge seriously. He has taken the skills, insights and connections he gained through the Surge Fellowship and poured them into the future leaders of this country... the students.

"Time is finite in my role and as a high school administrator, I can tell you exactly how much time I have to make an impact: four years," Green said. "My work has shifted through my involvement in the Surge movement because I realize it's more important now than ever, to tell my scholars the truth."

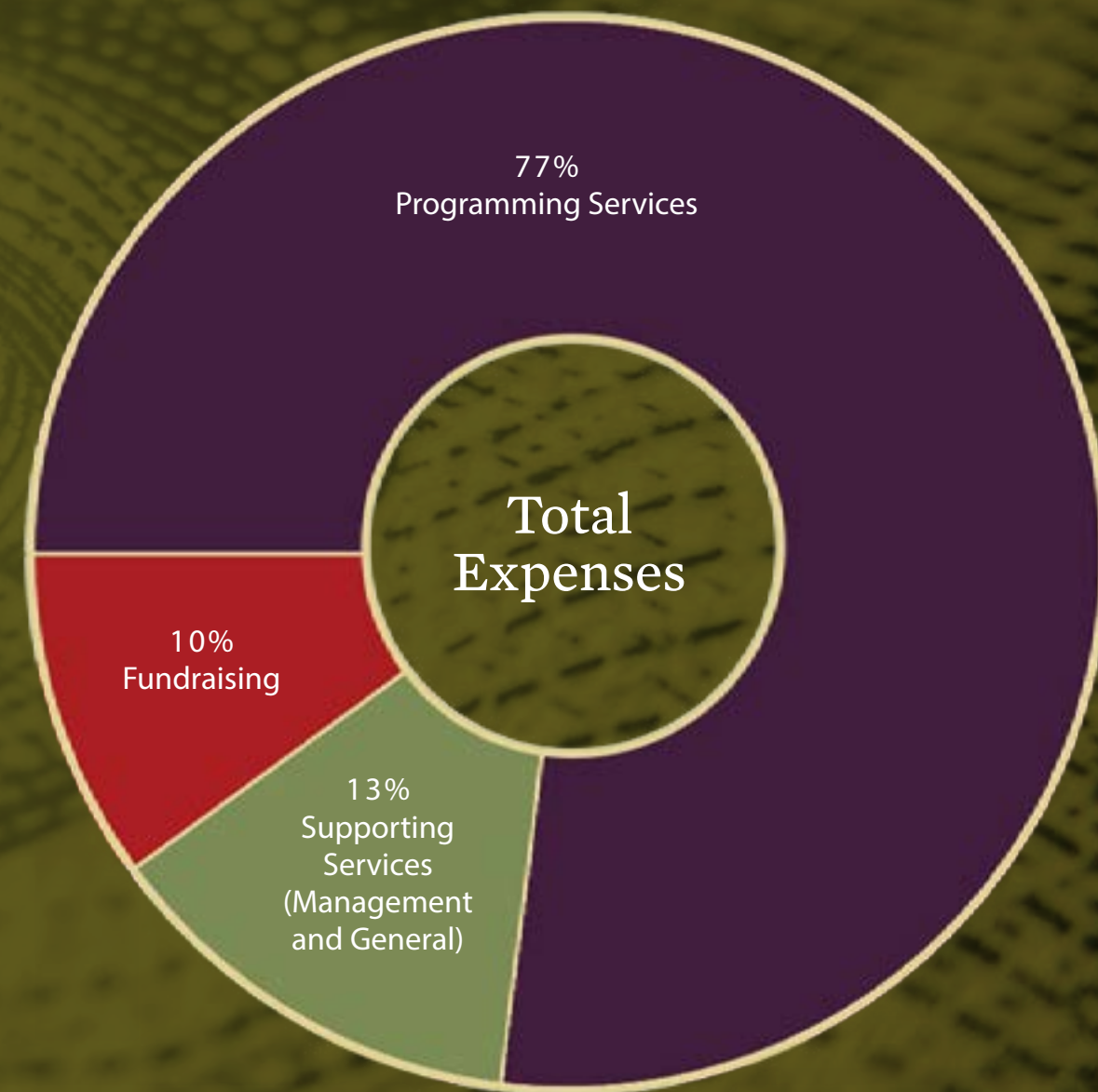
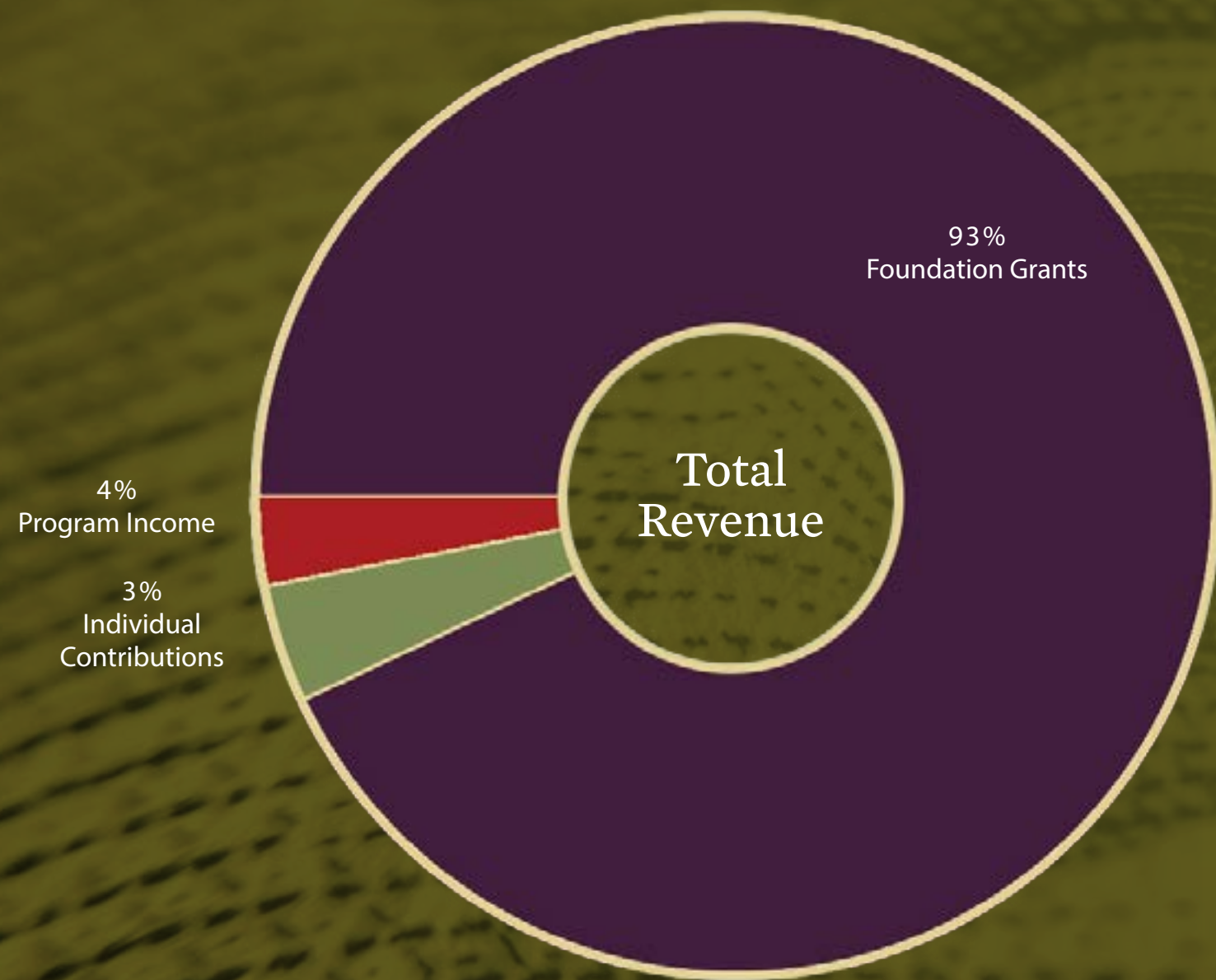
D. Nigel says Surge has inspired him to lead beyond his work at Muchin as well. He is now a volunteer mentor for iMentor Chicago and contributed to an op-ed voicing his support for DACA to Education Post.





# FINANCIALS

## TOTAL REVENUE AND EXPENSES





# FINANCIALS

## FINANCIAL STATEMENTS

### STATEMENT OF ACTIVITIES

YEAR ENDED JUNE 30, 2017

	Unrestricted	Temporarily Restricted	Total
<b>REVENUE &amp; SUPPORT</b>			
Foundation grants	\$ 58,581	\$1,470,000	\$1,528,581
Individual contributions	39,313	-	39,313
Program income and other	68,364	-	68,364
Interest income	518	-	518
Net assets released from restrictions	1,737,237	(1,737,237)	-
<b>Total Revenue and Support</b>	<b>1,904,013</b>	<b>(267,237)</b>	<b>1,636,776</b>
<b>EXPENSES</b>			
Program services	\$1,288,133	-	\$1,288,133
Supporting services:			
Management and general	208,893	-	208,893
Fundraising	167,131	-	167,131
<b>Total Expenses</b>	<b>1,664,157</b>	<b>-</b>	<b>1,664,157</b>
<b>CHANGE IN NET ASSETS</b>	<b>239,856</b>	<b>(267,237)</b>	<b>(27,381)</b>
<b>NET ASSETS, BEGINNING OF YEAR</b>	<b>152,008</b>	<b>1,857,852</b>	<b>2,009,860</b>
<b>NET ASSETS, END OF YEAR</b>	<b>\$391,864</b>	<b>\$1,590,615</b>	<b>\$1,982,479</b>

### STATEMENT OF FINANCIAL POSITION

#### ASSETS

Cash	\$1,059,053
Pledges receivable, net	940,000
Deposits	9,414
<b>Total assets</b>	<b>\$2,008,467</b>

#### LIABILITIES AND NET ASSETS

Accrued expenses	\$25,988
<b>Total liabilities</b>	<b>\$25,988</b>
<b>Net Assets:</b>	
Unrestricted	391,864
Temporarily restricted	1,590,615
<b>Total net assets</b>	<b>1,982,479</b>
<b>Total liabilities and net assets</b>	<b>\$2,008,467</b>

These financial statements were abstracted from the Organization's June 30, 2017 financial statements, which were audited by ICL, LLC. Because the information does not include all the disclosures required by accounting principles generally accepted in the United States of America, it does not purport to present the Organization's financial conditions or results of operations. A copy of the audited financial statements will be provided upon request at the Organization's office.



# THE SURGE AHEAD

As we look to the future, Surge continues expanding its impact and influence on education for our children and communities.

## 2017

### PROVEN IMPACT

A third-party research firm performed an empirical evaluation of the fellowship. The results will be released in November 2017. They reveal a **transformative impact** on our fellows and their communities.

### CONTINUED GROWTH

In October, the Chicago Surge Fellowship successfully launched its largest and most diverse cohort of **25 fellows**.



The background of the slide is a photograph of a large suspension bridge, likely the San Francisco Bay Bridge, spanning a body of water. In the distance, a city skyline is visible under a hazy sky. The image has a warm, golden-brown color cast.

THE SURGE AHEAD

2018

## NEW COMMUNITIES

Surge is excited to announce we will soon **launch a new Fellowship**, unifying and empowering education leaders of color in **Oakland, California.**

## PROGRAM EXPANSION

How do we best serve our communities? By evolving to fit the need. Stay tuned! Surge's next steps include new extensions of our programming, such as **expanded alumni services** and **professional development, pilot opportunities** in smaller markets, and **support for prospective entrepreneurs.**



# FELLOW SPOTLIGHT

## BEYOND THE FELLOWSHIP



“The relationships formed, lessons learned and insights gained through the Surge Fellowship have provided me with a solid foundation to continue my leadership journey at Chicago Public Schools.”

— **Elisa Botello, 2016 Surge Fellow**

Director of New School Development, Office of Innovation and Incubation, Chicago Public Schools



# FELLOW SPOTLIGHT

## A CLOSER LOOK



**Elisa Botello**



The Surge journey begins the moment an emerging leader of color learns about our fellowship. Then comes the rigorous application process, packed with essays, interviews, case studies and connection building. Finally, there is the year-long Fellowship journey, the transformative experience that marries executive skill-building with a deep dive into who each fellow is as an authentic education leader.

But, as Elisa Botello notes, the journey does not end when the fellowship does. “Although I completed the program in October 2016, the Surge experience for me is one that has just begun,” Botello said. Alumni continue to receive executive coaching and developmental support from the Surge family after graduating. In 2017, Surge alumni participated in several Surge community events, including a fireside chat with former U.S. Secretary of Education Arne Duncan.

“Authenticity, excellence, and humility are front and center in my leadership growth,” Botello added, relating the movement to her work at Chicago Public Schools. “It is because of the Surge Fellowship that I continue to draw from these anchors, my fellows and the Surge network for support, consultation and community as I do my part to ensure that high quality educational options exist in Chicago.”



# LEADERSHIP

## NATIONAL



**SASHA DZUBAY**  
Manager, Operations  
and Development



**RITO MARTINEZ**  
Vice President,  
National Programs



**CHRISTOPHER PAICELY**  
Manager, Marketing  
and Communications



**CARMITA SEMAAN**  
Founder  
and President

## CHICAGO



**CECILY RELUCIO HENSLER**  
Program Manager



**TAMARA PRATHER**  
Executive  
Director



**SANDRA RUSH**  
Program and Development  
Coordinator



# LEADERSHIP

## BOARD MEMBERS



JEAN-CLAUDE BRIZARD



DARRYL COBB



NNEKA RIMMER



PAULA SNEED

## SPECIAL MESSAGE

We would like to give special thanks to all who donated their time and energy toward supporting our efforts this year.

This movement is powered by passion for the work. If you feel strongly about bringing more diversity to education leadership, please **volunteer**. If you've achieved great success, made it to the mountaintop, and are looking to support an effort that lifts up others, please **donate**. We appreciate your support.

To learn more about how you can join this movement  
visit **[surgeinstitute.org](https://surgeinstitute.org)**.





# 2017

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### CONTACT

All inquiries can be sent to [info@surgeinstitute.org](mailto:info@surgeinstitute.org)

We look forward to hearing from you!