



THE SURGE AHEAD
ignite • fuel • transform



3 YEAR PLAN

2021-2024



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IGNITE FUEL TRANSFORM

3

YEAR PLAN

2021–2024

OUR MISSION

To educate and develop leaders of color who create transformative change for young people, their families and our broader communities.

OUR VISION

We are the preeminent pipeline addressing the dearth of leadership of color at the decision-making tables. Surge educates, empowers and energizes leaders of color who will create transformative change in the communities they serve.

INTRODUCTION

Letter from the President

When Surge was founded in 2014, the mission was clear: we needed to ultimately increase representation in education leadership. Our end goal was to change the educational experience and open up the options for students and communities of color, who have been left on the margins for as long as the United States has existed. Serving that goal started with design and launching a signature program that brought together emerging leaders of color in education, providing a connective learning experience that instilled the necessary executive skills needed to take the reins and steering organizations and institutions toward freedom and equity.

The Surge Fellowship was that program. Since the launch of the fellowship six years ago, we have experienced incredible successes, growing our network of Surge Alumni to more than 200 leaders of color nationwide, all leading with authenticity and connection. Along with that growth of the movement, we've explored new ways to grow and elevate the experience, new ways to extend our reach, and new ways to directly disrupt and transform the deeply flawed American education system. From Surge Academy to Surge Angels, the way we serve our people has continually evolved and boldly risen.

The culture has shifted and now, more than ever, we have an opportunity.

Last year, 2020, was a reckoning. Layered upon a worldwide pandemic and a deeply divisive presidential election was a murder seen around the world. After all of the violence destroying our people and communities, all of the systemic racism raining down upon us for generations, George Floyd's death served as a wake up call to many who had previously ignored our cries. People, major institutions, and organizations began speaking openly against not just police violence but systemic racism as a whole. Support for our movement grew and we were able to secure funding that we could pass on to our communities through new initiatives and resources.

The culture has shifted and now, more than ever, we have an opportunity. Inclusive leadership and diversity (beyond the performative elevation of one or two black or brown people) is not just part of the conversation, it *is* the conversation. As much as Surge has been an inflection point for the leaders of color who have experienced our programs, this is an inflection point for the systems those leaders are fighting to change.

It's not just education. It's not just Chicago and Oakland. It's not just a fellowship. There is a national, multi-layered explosion of impact on the horizon for the Surge movement, and this strategic will pull back the curtain on the work happening to truly ignite the next generation of transformative leaders, fuel the agents of change currently wreaking havoc on the white supremacist super-structure, and transform the system that has too long oppressed this beautifully diverse country.

To summarize the state of this movement: The best is yet to come.

A handwritten signature in black ink, appearing to read 'Carrie', with a long, sweeping horizontal line extending to the right.



STRATEGIC PLAN RATIONALE

The Case for Change

The United States has been and continues to be built on the backs of strong and persevering people of color. Black people. Brown people. Asian American people. Pacific Islander people. Indigenous people. Yet this country has a major equity problem. A white supremacy problem. A horrifying and, at times, deadly racism problem.

It only changes when the face of leadership changes. Not just who the presidents and governors are, and not just who the school leaders are. This is about re-examining the place from which our business leaders, our non-profit leaders, and our major power players operate. Balance can only come if transformative voices are leading the charge.

This is Surge.

Why does Surge exist?

INTRINSIC IMPACTS

- Personal Liberation and Healing
- Activation / advance toward personal mission
- Increased awareness and skill with strategy, navigation, management, communication skills
- Family-like connection across identities and occupations
- Group identity of people aligned by mission and with deep knowledge of cohort-mates

EXTRINSIC IMPACTS

- High Satisfaction of Program Completers
- Freedom Dreams Presentations and/or Documented Projects
- Promotions/ Recognitions/Founding new organizations
- Alumni referrals for new program candidates
- Alumni with recurring donations to Surge

What have we done?

- Since 2015, we have prepared 231 leaders of color in education through the Surge Fellowship and the Surge Academy.
- In the 2020 alumni survey, 96% of alumni say Surge met or exceeded their expectations. They know themselves better.
 - 95% of alumni are aware of their strengths and development areas.
 - 90% agree that their Surge experience improved their ability to navigate complex organizations.
 - 89% agree that Surge significantly improved their critical thinking abilities.
 - 89% agree that Surge significantly improved their ability to build relationships with senior leaders.
- They understand the landscape and their role in the movement better.
 - 96% of alums feel able to articulate how their experiences connect to larger race and class equity issues.
 - 90% agree they have a strong understanding of historical policies related to the education landscape.
 - 84% agree it is their responsibility to facilitate transformative, systems-level improvements since completing their Surge experience.
- They are connected to one another.
 - 97% of alumni agree that they made genuine personal connections with people who they care about and whose success is important to them.
 - 92% of alumni say “I am able to lead by empowering and advocating for others.”
 - 74% say they serve as a mentor and model to more professionals because of their Surge experience.

Our alumni are achieving amazing things

Promotions / Recognitions

- CHI15 alum Melissa Connelly is the CEO of OneGoal. OneGoal is powered by Surge alums Zuleica Lopez (CHI20), Danny Mason (CHI20), Dominique Myles (CHI17), Alejandro Espinoza Olazaba (CHI17), Susie Tovar (CHI18), and Ashli Watts (CHI20).
- CHI15 alum Ana Martinez Shropshire is a Partner at The Opportunity Trust
- CHI15 alum Candace Moore is the Chief Equity Officer for the City of Chicago.
- CHI15 alum Angela Brizant is the Assistant Dean for Pluralism and Leadership at Dartmouth College.
- CHI16 alum Christopher Goins is the Chief Equity Officer for Thrive Chicago.
- CHI16 alum Ariel Johnson is the Chief of Staff at the Illinois Network for Charter Schools.
- CHI17 alum Jonathan Chaparro is the founding Site Director for Braven.
- CHI17 alum Natalie Neris is the Chief Education Officer of Kids First Chicago.
- CHI17 alum Nina Sanchez is the Director of Enrich Chicago.
- CHI19 alum Janene Ingram is the Executive Director of the Pitch In program at the Wood Family Foundation
- OAK19 alum Adanta Ahanonu is the Chief Program Officer for COOP Careers, which introduces students of color to technology careers.
- OAK19 alum Jayo Miko Macasaquit is the Chief People Officer for The 19th, an independent newsroom focused on gender, politics, and policy.
- CHI20 alum Celia Gonzalez Lozano is the Chief Program Officer at Communities in Schools of Chicago.
- KC20 alum Garrett Webster is the Executive Director of Becoming a Man programming in Kansas City, joining CHI18 alum AJ Watson, who is National Director for Youth Guidance.

Founders

These alums have started their own schools, organizations, or companies:

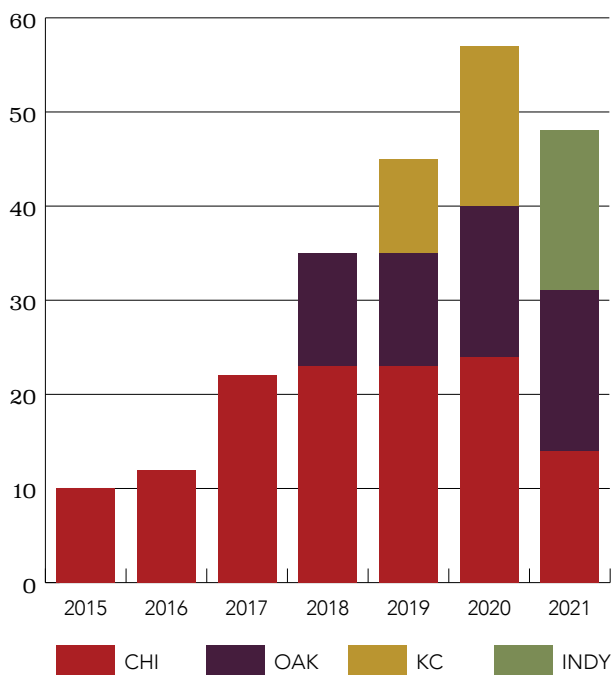
- Rick Anderson (IND21), Allegiant Prep Academy
- Charles Cole, III (OAK18), Energy Converters
- Emilia Chico (CHI20), Chico Consulting Group
- Robbie Curry (CHI20), The MARCUS Literacy Project
- Trinity Davis (KC19), Teachers Like Me
- AJ DeLeon (CHI15) and Nick Freeman (CHI18), Innovare
- Geoff Fenelus (IND21), PROMISE Prep
- Dawn Hicks Griffin (CHI17), DSH Consulting and Coaching
- Adria Husband (CHI15), Shifting Hearts & Minds
- Bryan Jackson (CHI17), Attach Consulting
- Michelle Kemp (CHI17), MK Consulting
- Ma'at Lands (IND21), Founding School Leader at Rooted School Indianapolis
- Grisel Maldonado (CHI15), Avanza Strategies
- Kyra Marcano (CHI18), Brilliant Light
- Lydia Mercer (CHI19), (Un)Learning Space
- Stacey Mitchell (CHI15), SAGEli Consulting
- Monique Moore (OAK18), Monique Moore Consulting
- Alberto Morales (CHI20), CEO of Morales Consulting
- Ajia Morris (KC20), Greenline Initiative
- Halleemah Nash (CHI17), Rosecrans Ventures
- Edgar Palacios (KC19), Latinx Education Collaborative
- Harold Pearson (OAK18), SPAAT
- Cescily Philips (KC20), Inspired Aesthetics
- Terrence Pruitt (CHI19), Project Restore Initiative
- Marilyn Rhames (CHI16), Teachers Who Pray
- Jahna Riley (KC20), Aya Coffee & Books
- Kim Riley (KC20), The Transition Academy
- Steven Rosado (CHI19), The Praxis Institute
- Maraliz Salgado (CHI18), Liberate Life Coaching
- Catina Taylor (KC20), Dreams Consulting
- Chrystal Westerhaus (IND21), Founding Principal of United Schools of Indianapolis

Academic and Programmatic Achievements

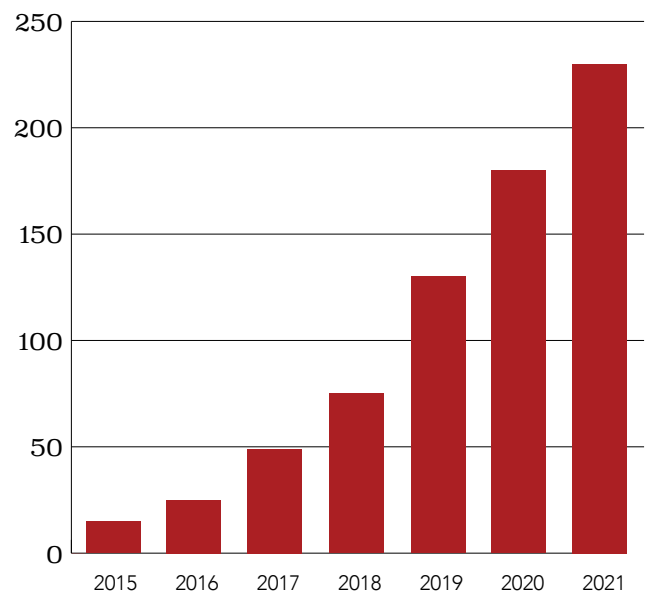
- Dr. Charles Cole III (OAK18), Dr. DuJuan Smith (CHI15) earned their Ph.D.s.
- Mario Estrada (CHI17) and Shenita Johnson (CHI17) have completed their MBAs at Kellogg School of Management, Jonathan Chaparro (CHI17) and Grisel Maldonado (CHI15) are nearly complete. Ashlie Tyler (CHI17) earned her MBA at Duke University.
- William J. Collins (CHI17) has completed the IMPACT Fellowship, the Black Bench Fellowship, and earned a certificate from Georgetown in Nonprofit Management, all while serving as the **Chief Advancement Officer** for Surge.
- Cesar Dominguez (CHI17) completed The Broad Residency. He serves as Director of Strategy Tulsa Public Schools.

Our Alumni Over Time

Fellowship and Academy Participants by Year



Cumulative Alumni



The FY19-21 strategic plan was built on expanding Surge through new Fellowship sites. We did research on how other nonprofits successfully scaled, and learned that we would need to secure at least half of the local budget from local sources each year, and we wanted to secure 2-3 years' funding before launching a new site, hiring an Executive Director, Program Director, and Operations Coordinator.

We were not successful in implementing that strategy. We reviewed our plans and our actuals, and we know the reasons why it didn't work.

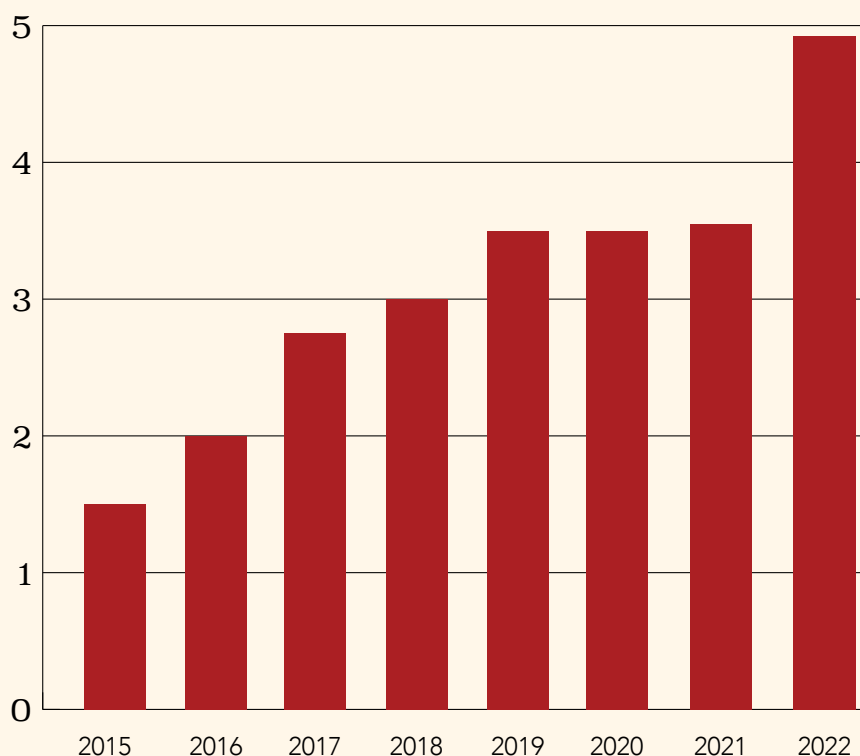
The market presented another opportunity.

In 2019, Surge launched the Surge Academy, a program similar to our pilot approach in Chicago and Oakland, with all the head & heart & soul of Surge, but staffed by the national team and supported locally. And it worked. The participants felt the Surge magic, made connections, began to lead differently, and joined our alumni network as equal members.

Our Fellowship programs have been wildly successful in their programming, in elevating the leaders of color in education that they serve. But they have never been fully funded locally. It is time for a new strategy.

In 2021, Surge was funded 91% by philanthropy and 9% from program revenue. That mix is not sustainable, as more established national nonprofits are closer to 50% philanthropy and 50% program revenue. With Surge wanting to bring programming to more people and wary of dependence on philanthropic investments, we set our sights on offering programming that makes our organization more sustainable.

Budget over Time (in \$M)



Environmental Scan: What does our Community require?

Surge's programming was ready to change, but the context in which we operate changed, too. The COVID-19 pandemic kept people at home starting in March 2020, and the summer of 2020 started with the murders of Ahmaud Arbery, George Floyd, and Breonna Taylor. The campaign for the 2020 election was long, loud, and contentious. These elements and more led to a racial reckoning, an awareness that America's original sin of slavery continues to have long-lasting impacts. Foundations and funders doubled down on investments in leaders of color, in representative leadership, and in elevating the profile of leaders from underinvested communities. Surge grew from this reckoning, raising an additional 50% over the FY21 budget, with commitments to fully fund FY22, and positioning the organization to dream big for expanded offerings and resulting impact again.

The landscape of leadership programs has changed, too. A high-level analysis of contemporary programs is as follows:

Organization	Mission / Vision	Goal	Size	Relevant Programs
Management Leadership for Tomorrow (MLT)	MLT equips and emboldens high-achieving women and men from underrepresented communities-- African American, Latinx, and Native American-- to bridge the college-to-career transition gap and ensures Fellows succeed in post-college careers	Transforming leadership pipelines by driving breakthrough results for individuals and institutions	8000 alumni since 2002	MLT Black Equity Work Certification, Future Housing Leaders Fellowship, Private Equity Accelerator, Senior Executive Leader Fellowship
Latinos for Education	Working to develop, place, and connect essential Latino leaders in the education sector	We support an ecosystem of Latino education leaders to access highly influential roles and opportunities	2,900 in network as of 2021	Latino Board Fellowship, Aspiring Latino Leaders Fellowship (Houston & New England) EdCentro platform
Education Pioneers	Program to transition into or within education. More than 50% of EP Alumni self-identify as leaders of color or multiethnic	EP recruits, connects, and advances professionals from diverse backgrounds to solve problems from outside of the classroom so students and teachers succeed inside of the classroom.	4500 alumni since 2003	COVID Response Fellowship; Summer Fellowship, Impact Fellowship
Camelback Ventures	Provide a rigorous accelerator for untapped entrepreneurs , focused on tackling these three impact areas first: 1) Education, 2) Conscious Tech, and 3) Local Economies. Six month program supports development of both founder and venture . Participants are 94% POC, 55% women.	Camelback has supported 9 schools, 18 for-profits, and 19 nonprofits, across 14 cities, creating 314 new jobs. \$1.7M direct investment has catalyzed Fellows raising an additional \$20M from follow on investors - a 10x ROI.	83 entrepreneurs of color and women - who have collectively raised over \$50 million. (830 have applied). 2015 start	Generational Inheritance Initiative Strategic Plan
EdLoC	Membership organization dedicated to elevating the leadership , voices, and influence of people of color in education	Leading more inclusive efforts to improve education . Boulder Fund supports the launch or expansion of creative solutions to pressing issues in the field		Boulder Fund is in 4th cohort. \$3.1M invested

Organizational Assessment

What are our Strengths?

Transformative programming is our top strength. Our program objectives are Dream Big, Know the Landscape, Focus Inward, and Make an Impact. With this balance of goals, our programming engages emerging leaders and helps them build their vision for their communities.

The Surge team. Surge is not your average workplace; we have ambitious goals to improve our programming and deliver excellent content to our fellows and alums. Our workplace is people-centered, with meeting structures, decision-making methods, and work planning that adapts with new learning and leaves oppression of corporate cultures behind. We invest in individuals to meaningfully grow within their roles. Our people are celebrated for their many identities, valuing differences in race, gender identity, sexual orientation, religion, family structure, age, and the countless intersectionalities therein. We value wellness, providing competitive salaries, supportive benefits and flexible time off to enable people to take care holistically. We have fun together, investing in staff retreats, care packages, and social connection, before, during, and after the COVID pandemic.

Our allies make us better. Surge builds deep relationships with presenters, coaches, facilitators, caterers, and other partners who represent our values and our identities, and we help them build thriving businesses with authenticity.

Our alumni have only begun to shine. We have 231 program alumni, nearly all of whom give their time, talent, and treasure to Surge each year. Some are climbing the ladders of authority and influence in our cities, districts, and nonprofits. Others are finding a new way for themselves to create their own consultancies, nonprofits, or companies to make a difference in the world. Many of them see Surge as the most important alumni network to which they belong, meaning more than their undergraduate experience or other fellowship programs. As we curate experiences and facilitate convening, we will see even more connection, innovation, creativity, and impact from this nationwide group.

Our board is visionary, connected, and devoted to helping our organization achieve greater levels of impact with individuals, communities, and cities. Their perspectives, with a balance of experience in foundations, charter school leadership, nonprofit leadership, impact investing and corporate chops, support our growth, dare us to dream bigger, and keep us grounded in supporting our people to make sustainable impact.

Our financial status is better than ever. Our team is well positioned to expand to new communities through the Surge Academy, and our deep partnerships with local and national foundations have put us in a strong financial position. We have an operating reserve and can begin to think about building a strategic opportunities fund to expand our impact in new industries and program styles.

What are our Opportunities?

Our programming has measurable and immeasurable impact on the individuals who engage. Our top opportunity is to continue to **bring that programming to people in education and beyond**, in Chicago, Oakland, and across the nation, and with senior and junior leaders as well. This can all be done to build financial sustainability.

Sharing the Surge way of doing business will **make an impact in talent and diversity consulting**. By exploring the ways in which schools, nonprofits, and companies recruit, select, develop, and reward talent, Surge can influence performance management systems to recognize the assets of people of color and build the leadership and collective culture of various types of organizations.

Elevating the voices of those with lived experiences will change the narrative in cities and communities, and enable leaders to see the assets and opportunities in immigrant and working-class communities, not just the needs.

One of the most transformational aspects of our existing programming is **executive coaching**. More than anything else, our alumni identify the relationship with their coaches of color as a real difference-maker, building their confidence and resolve to pursue their vision for themselves, understanding and aiming their strengths, and acknowledging successful and unsuccessful patterns. Building a brand to bring this opportunity beyond just our fellows and community can help elevate the Surge brand, build the practices of coaches of color, and accelerate the healing and impact of countless leaders of color.

Our loyal alumni value their relationship with Surge, and look to the program team and alumni team to help them with career transitions, entrepreneurial ideas, healing and wellness, and collaboration opportunities across sites and classes. With sustained financial health and a growing alumni base enable us to think creatively about how to support our alumni and continue to accelerate their impact on children, communities, and cities. Their impacts can take them to elected office, governing boards, start-ups, school and district leadership, personal development, and more that we never dreamed of. Alumni supports will scale to connect, support, and inspire our alums.

COVID led us to find new ways of working, and our two latest hires live in Florida and Pennsylvania, respectively. Carmita is headed to California. Our current staff has successfully nestled work spaces into their homes, supported with standing desks, big monitors, and ergonomic chairs. We can save money and invest our funds differently to **become a virtual organization**, limited not by cities but opened to national opportunity.



IGNITE

Developing, Elevating, and Uniting



FUEL

Providing the Support
It Takes to Move Mountains



TRANSFORM

Creating Equitable Spaces for All

A spark of brilliance exists throughout this beautifully colorful country. A vibrant array of Black, Latino/Latinx, Asian American, and Pacific Islander agents of change surging in the wings. We are ready for not just a seat at the table, but for an opportunity to tear down that table and build a bigger and better one, with more seats and a more culturally inclusive design at its center.

The Surge ahead includes developing, elevating, and uniting more than 5,000 of these leaders by 2030, catalyzing their growth and providing the tools and connection necessary for us to wreck the nonsense we see and create the space we need.

This isn't the beginning of a movement. It's the expansion of one that has already been burning brightly for more than five years. Leaders of color in Illinois, California, Indiana, Kansas, Texas, Missouri, Washington D.C., and many more places are connected to one another through this movement. They are education leaders, lawyers, executives, government workers, artists, non-profit leaders, data minds, tech developers, and entrepreneurs. They are all Surge.

The Surge ahead will fuel the expanding vision and efforts of those leaders, binding them tighter as a collective of changemakers, growing their knowledge of what it takes to influence change, and providing the ongoing support it takes to move mountains.

Our systems are not broken. Our education systems, our policing systems, our economic systems, our social structures... they are not broken. They just aren't actually ours. Upon close examination, one can see that these systems were designed to benefit specific groups of specific socio-economic classes and of specific races. And, by and large, that shows up when we simply look at the wealth, power, and education gaps. Our eyes tell the story. But change is gonna come.

The Surge ahead will influence systemic change, connecting with forward-thinking leaders and allies to build collective efforts that shift policies and practices in institutions and organizations to create equitable spaces for all.

IGNITE

Ignite brings more people into the movement. Though we have 231 alumni in the summer of 2021, we envision looking back from 2030 with Surge alumni that number 5,000 are more. This seismic change is based on steadily expanding our programming, bringing Academies to new cities, engaging more senior leaders in the Surge magic, and designing experiences for new groups of leaders to dream big to impact themselves, their families, their organizations, and our communities.

Based on our core strength of leadership acceleration programming for education leaders of color, we will serve emerging leaders of color, wherever they are.

We will develop programming very similar to our existing programming, but acknowledge the interdependencies of social change, and expand our reach beyond education. City-wide, leaders of color would have a Surge experience to increase their vision and impact for themselves and their community. We will not just expand are view of what areas we serve but also what kinds of leaders we serve. Our upcoming pilot, Power Surge, will introduce a new suite of national program geared toward developing, elevating and uniting senior leaders in the C-suite.

In addition, we would support the development of communities of color in larger organizations. Typically folks are organized into Employee Resource Groups, with a sponsor and goals to increase retention and role satisfaction, typically through mentoring, sponsorship, and professional development. The Surge-style programming would leverage the strengths of the individual and help them to navigate within their setting, and to lead and influence shifts in the way their organizations conduct business. This nonprofit or for-profit program leverages keystones of the Surge Fellowship or Academy, leading to authentic and organic shifts in organizations.

Fellowship-style
programming for
Education Leaders
of Color

City-wide
Fellowship-style
programming for
Leaders of Color

Power Surge for
senior education
Leaders of Color

Employee
Resource Group
programming for
Leaders of Color

RISING

The IGNITE tenet of this strategy centers around the leaders who come into the Surge space seeking connection and growth.

\$20 million over three years will get us to our goal of 5,000 alumni by 2030.

OVERVIEW	IGNITE brings more people into the movement. <ul style="list-style-type: none"> Our goal is to steadily expand programming, bring Academies to new cities, engage more senior leaders, and design experiences for new groups of leaders, their families, their organizations, and our communities. 		
STRATEGIES	Core Programming Expand fellowship-style programming for leaders of color (via fee-for-service models) <u>beyond the education sector, in new cities</u>	Power Surge Engage <u>senior leaders</u> of color in fellowship-style programming to support their sustainability, satisfaction, and impact	Employee Resource Group Engaging for-profit leaders of color in fellowship-style programming to support their sustainability, satisfaction, and impact
FY22 Activities & Key Results	<ul style="list-style-type: none"> Expand programming to new cities and industries Key Result: High satisfaction scores <ul style="list-style-type: none"> CHI & OAK Fellowships 2+ Academy programs 	<ul style="list-style-type: none"> Contract w/ a program designer who understands senior leader needs Key Results: Program design and funding secured for pilot cohort 	<ul style="list-style-type: none"> Research ERG program design Key Results: Partner Identified and content collaboratively drafted
FY23 Activities & Key Results	<ul style="list-style-type: none"> Learn from program evaluation and unify program structure Key Result: 8+ programs throughout the year 	<ul style="list-style-type: none"> Pilot and monitor cohort for senior leaders of color in education Key Result: Program revisions adapted per feedback/evaluation insights 	<ul style="list-style-type: none"> Pilot ERG program Key Result: Implementation of continuous improvement strategies to measure impact and update content
FY24 Activities & Key Results	<ul style="list-style-type: none"> Adapt content for new settings (i.e., cross-industry in a city) Key Result: 12+ programs throughout the year 	<ul style="list-style-type: none"> Repeat/scale to meet demand Key Result: 2+ programs delivered 	<ul style="list-style-type: none"> Scale program Key Result: Expansion of ERG facilitation with measured impact



FUEL

Fuel is how we sustain and support our alumni after they have joined the movement. We will support leaders to maximize positive impact with their communities. Our lever of change is truly what happens when alumni leave our programing. As we ignite and bring them into the movement we want to ensure we can sustain the work they do after graduation.

We will build the capacity of our alumni through tailored programmatic offerings, executive coaching, and access to capital. We have heard from our alumni. Post-program they are experiencing job promotions, a higher level of budgetary responsibilities, and in some cases, transitions into new organizations. It is at that time that they realize they need an additional level of support to build capacity as well as continued executive coaching support.

LEADERS

The FUEL tenet centers around the agents of change already serving the Surge movement and seeking to grow in their influence while remaining deeply connected to the mission to build a better system for our youth and communities.

Providing the Support it Takes to Move Mountains



OVERVIEW

FUEL is how we sustain and support our alumni after getting them into the movement.

- The goal is to support leaders to maximize positive impact with their communities after alumni leave our programs.
- As we ignite and bring alumni into the movement we want to ensure we can sustain the work they do after graduation.

STRATEGIES

Capacity Building

Ongoing capacity building support for Surge alumni beyond graduation to support job and role transitions.

- Content, cost structure & program developed
- **Key Result:** Pilot programming

- Incremental rollout and continuous improvement
- **Key Result:** Additional and/or revised programming

Networking

Co-lead networking opportunities with Surge alumni base to keep our people connected.

- Optimize alumni virtual space, plan FY23 Alumni Convening
- **Key Results:** New connective platforms

- Pilot and support alums to attend convenings
- **Key Result:** 2 topic-specific alumni forums

- Offer additional events
- **Key Result:** Regional & local alumni convenings

Incubation

Support alumni with nonprofit and for-profit endeavors with angel investing / fiscal agency / entrepreneur boot camp.

- Partner with external orgs to build Surge Angels 2.0
- **Key Result:** Participants recruited

- Assess 2.0 program content and costs
- **Key Result:** 1st Cohort launched

- Improve program, secure add'l funding
- **Key Result:** 2nd Cohort launched

Continuing Education

Support alumni through advanced content in executive skills and healing-centered engagement.

- Build online continuing education content
- **Key Result:** Programming delivered

- Continuous incremental rollout and scaling of continuing education program
- **Key Result:** Additional and/or revised continuing education programming

FY22

Activities & Key Results

FY23

Activities & Key Results

FY24

Activities & Key Results

TRANSFORM

Transform is how we shift the system for the folks we are igniting to center on equity. We realize that even the best equipped leaders have to have a level of support from the systems they work in to see true sustained impact.

Through the Transform tenet we can answer the question: After everything that happened in 2020, what is Surge's response and what will we do differently? We will expand our focus from just focusing on leaders to providing services to organizations as well.

We will focus on elevating the voices of leaders of color. We will leverage the platform that Surge has built and roll out more Masterclasses, publish books, release podcasts and continue to explore ways to drive transformative change through our collective voices. We will expand our consulting services to more organizations that center on equity for their employees. We also recognize the value in having executive Coaches of Color and will continue to expand a pool of coaches for our alumni, as well as expanding the offering to non-alumni.

THE SYSTEM

The TRANSFORM tenet is all about the system. How can we create tangible positive change for the better? This tenet is truly what makes Surge a movement.

Creating Equitable Spaces for All

OVERVIEW	TRANSFORM is how we shift the system for the folks we are igniting to center on equity. <ul style="list-style-type: none"> We will focus on elevating the voices of leaders of color. We will also expand our focus from just focusing on leaders to providing services to organizations 		
STRATEGIES	Elevating Voices Elevating voices of leaders of color internal to Surge for external audiences.	Consulting Consulting Services to include but not limited to Talent Strategy, Diversity, Equity & Inclusion, Progressive Story Telling and Start Up Consulting.	Coaching Curate and promote a pool of coaches for both Surge alumni and Non-alumni / Develop a coaching certification process to authorize Surge Coaches of Color
FY22 Activities & Key Results	<ul style="list-style-type: none"> Expand Surge Masterclass Research and benchmark a variety of communication platforms/media 	<ul style="list-style-type: none"> Develop framework for consulting model & cost structure Key Result: Pilot of consulting expansion delivered 	<ul style="list-style-type: none"> Develop coaching framework Key Result: Pilot of coaching delivered
FY23 Activities & Key Results	<ul style="list-style-type: none"> Ongoing development and production of content Key Result: Increased Surge marketing/communication/narrative footprint (Surge brand itself and alumni voices) 	<ul style="list-style-type: none"> Continuously assess, document, market and scale consulting services Key Result: Increased engagement with Surge consulting services (including fee-based services) 	<ul style="list-style-type: none"> Actively market and scale coaching Research certification process Key Result: Increased engagement with coaching services
FY24 Activities & Key Results			<ul style="list-style-type: none"> Operate and pursue certification Key Result: Certification process/program delivered



Enabling Mechanisms

Adapting the Organization

Surge needs to maintain many things that make working here attractive - competitive salary, generous and clear benefits, collaborative culture, and meaningful feedback.

The Surge of today is not structured in people or organization to meet the commitments of this strategic plan. Revisiting job structures, job families, training & upskilling support, supplementing capacity with contractors, and aligning with employee strengths are key components of adapting the organization to execute the strategy.

Great place to work

Surge is nothing without a solid team. Maintaining focus on recruiting, hiring, developing, retaining, and rewarding great people is critical to our success. This initiative includes the following:

- Recruiting and retaining great talent
- Developing and training existing staff members to support growth
- Offering competitive salaries and bonus structures, informed by annual benchmarking every other year
- Supporting employee wellness with physical and mental health



Continuously improving

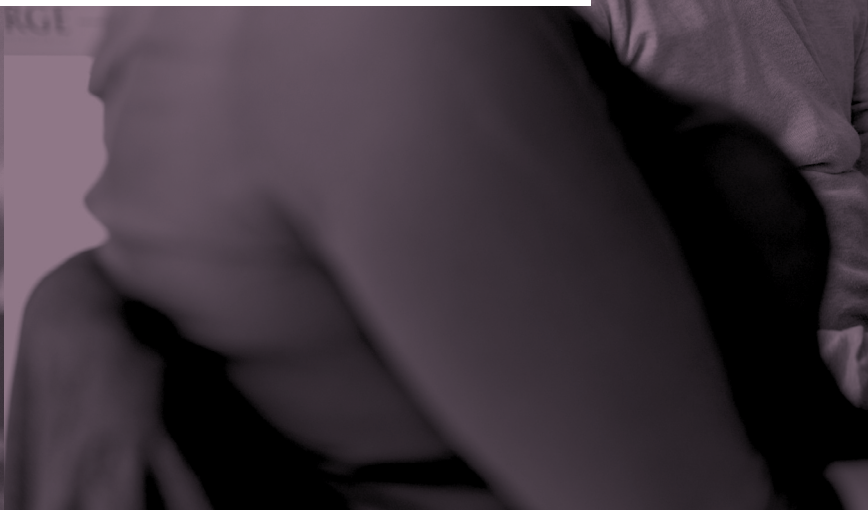
Surge is conducting a program evaluation in the summer of 2021. With the last program evaluation in 2017, the team was diligent in reflecting, applying the lessons, and adapting the organization to embrace the findings. In 2021, we will have another set of findings that will impact our organizational structures, our program structures, and our annual planning & reflection processes.

Evolving for efficiency

As we prepare for more in-person programming, we recognize the opportunities of becoming a virtual organization -- a broader pool for hiring, lower administrative costs, more flexible culture-building. We are exploring how to hold on to the best of what Surge does as we change how Surge does it.

Financial Stability

Surge will shift from operating from 10 percent program revenue to generating 50 percent of our revenue from programming over the next three years. We will need to raise \$20 million in the next three years to reach our goal of 5,000 alums by 2030.



Out of Scope

We are accustomed to saying “We can do anything, but we cannot do everything,” so acknowledging what we are saying no to is helpful to make explicit.

Initiative	Description
Junior Surge	Programming for high school- and college-age people
Strategy Consulting	Advanced consulting that “starts with a blank piece of paper,” explores a new market, or has a heavy quantitative element
Employee Search	Executive search capacity to source candidates and facilitate processes, resulting in successful hires
Research / Thought Leadership	Producing original research, white papers, and other content with information from the Surge perspective

How we got here

Through scores of interviews with staff, board members, alumni, and friends of Surge, we came to understand the strengths & opportunities for Surge from 2022-2024.



A strategic planning committee met monthly to provide vision, feedback, and advice to the project team. Members included the following:

Soledad Alfaro Connie Casson Darryl Cobb Will Collins
Sasha Dzubay Angel Martinez Tamara Prather
Aeriell Robinson Yvonne Rodriguez
Rodney Thomas A.J. Watson

