SURGE™
INSTITUTE

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.

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.

60%
of **2017 fellows** received promotions or stepped into new leadership roles **during** the fellowship.

64%
of **2015 and 2016 alumni** reported new promotions, professional awards and board memberships in fiscal year 2017.

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 to the confidence to walk into a room of funders and explain my work and results with accuracy and certainty.”

SUPPORTERS

INSTITUTIONAL DONORS

CHAN ZUCKERBERG INITIATIVE

BILL & MELINDA GATES foundation

WALTON FAMILY FOUNDATION

CHARLES AND LYNN SCHUSTERMAN FAMILY FOUNDATION

The Crown Family

NEWPROFIT

Bloomberg Philanthropies

newschools venture fund

LLOYD A. FRY FOUNDATION

The Joyce Foundation

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)

Anonymous
Connie Casson
Darryl & Angela Cobb
Jackie Hanselmann Sergi
Doyoung Yong

SURGE ADVOCATES

$500 – $999

Supports monthly session for a fellow

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

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."

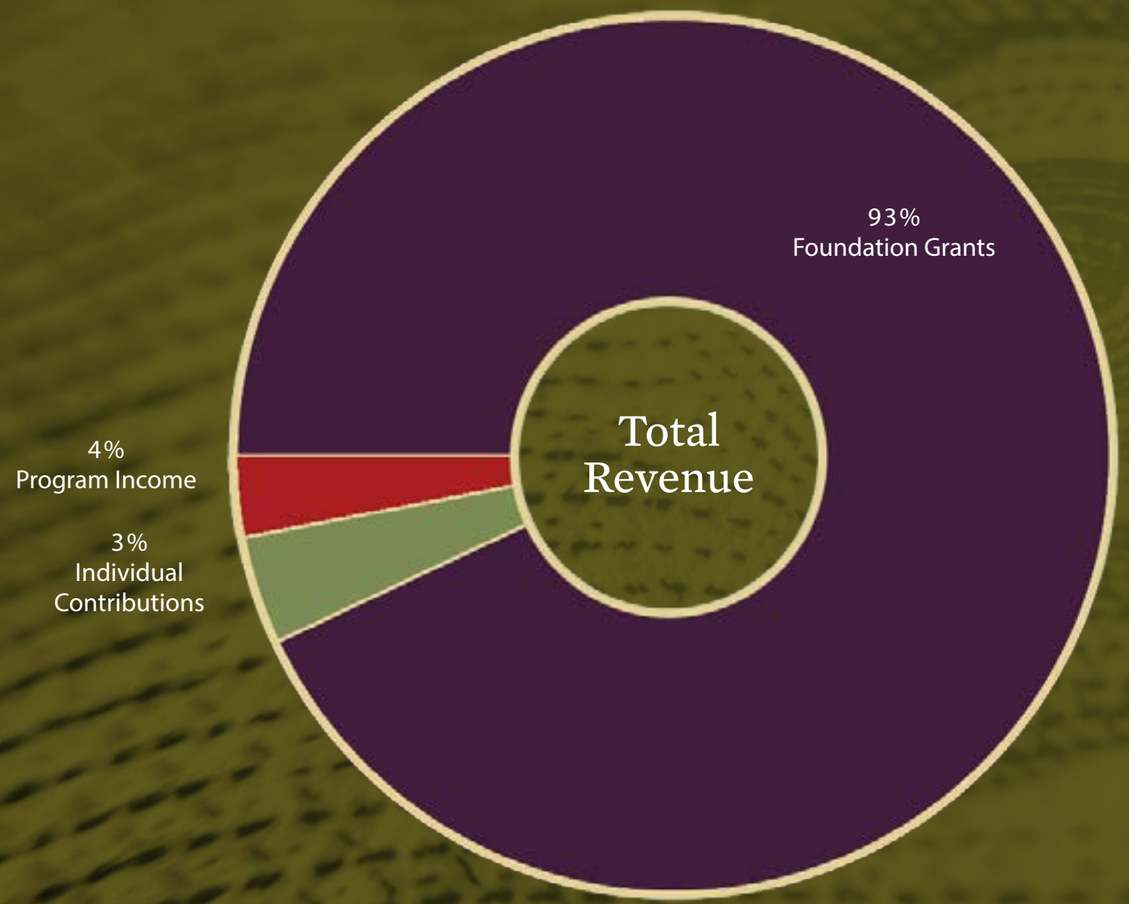
As assistant principal of Muchin College Prep and a 2017 Surge Alumnus, Green takes this charge seriously. He has taken the skills, insights and connections he gained through the Surge Fellowship and poured them into the future leaders of this country... the students.

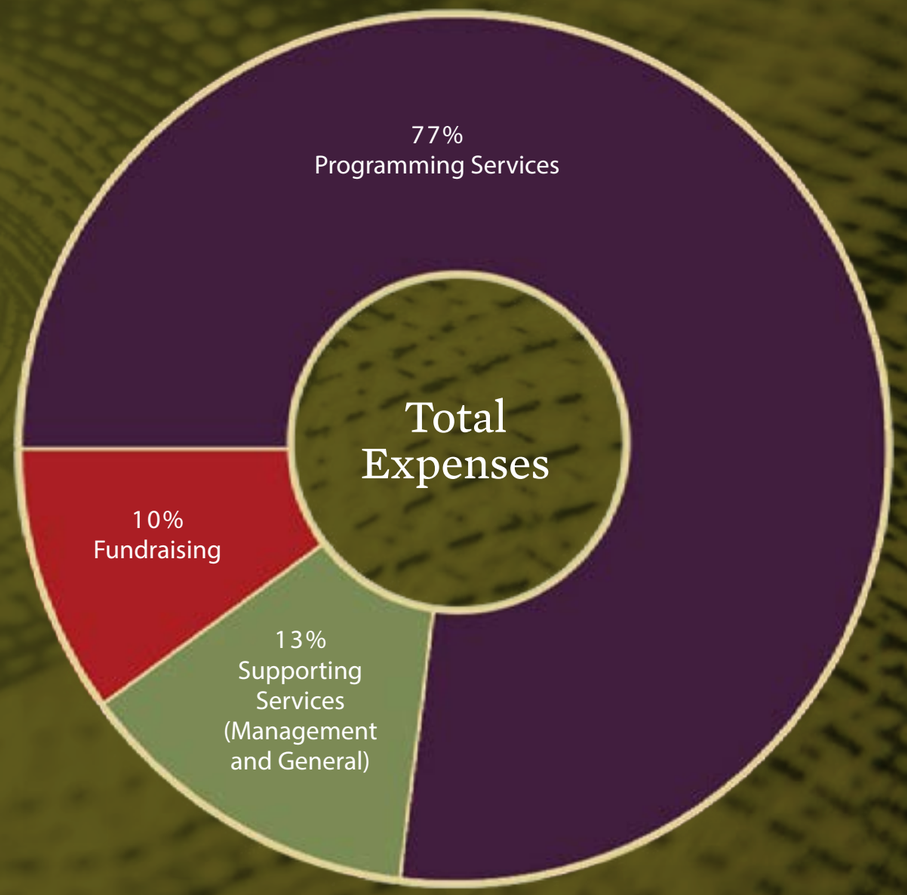
"Time is finite in my role and as a high school administrator, I can tell you exactly how much time I have to make an impact: four years," Green said. "My work has shifted through my involvement in the Surge movement because I realize it's more important now than ever, to tell my scholars the truth."

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
REVENUE & SUPPORT			
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)	-
Total Revenue and Support	1,904,013	(267,237)	1,636,776
EXPENSES			
Program services	$1,288,133	-	$1,288,133
Supporting services:			
Management and general	208,893	-	208,893
Fundraising	167,131	-	167,131
Total Expenses	1,664,157	-	1,664,157
CHANGE IN NET ASSETS	239,856	(267,237)	(27,381)
NET ASSETS, BEGINNING OF YEAR	152,008	1,857,852	2,009,860
NET ASSETS, END OF YEAR	$391,864	$1,590,615	$1,982,479

STATEMENT OF FINANCIAL POSITION

ASSETS	
Cash	$1,059,053
Pledges receivable, net	940,000
Deposits	9,414
Total assets	$2,008,467
LIABILITIES AND NET ASSETS	
Accrued expenses	$25,988
Total liabilities	$25,988
Net Assets:	
Unrestricted	391,864
Temporarily restricted	1,590,615
Total net assets	1,982,479
Total liabilities and net assets	$2,008,467

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 tranformative 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 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.**

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2017

ANNUAL REPORT

CONTACT

All inquiries can be sent to info@surgeinstitute.org

We look forward to hearing from you!