



# 10-YEAR Impact Assessment

*Evaluation Report*

Prepared by

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## Table of Contents

<b>Executive Summary</b>	<b>3</b>
<b>Background</b>	<b>7</b>
<b>Participant and Alumni Representation</b>	<b>12</b>
<b>Internal Staff Representation</b>	<b>15</b>
<b>Surge’s Core Program Objectives</b>	<b>16</b>
Focus Inward	16
Imposter Syndrome	17
Dream Big	19
Know the Landscape	20
Make an Impact	21
<b>Program Specific Findings</b>	<b>22</b>
Surge Fellowship/Academy	22
The Black Principals Network and The Leadership Collaborative	23
Alumni Programs	24
Power Surge	26
<b>Overall Program Reflection</b>	<b>27</b>
Met Expectations	27
Building a community of BIPOC Leaders	27
Providing a safe space	28
Creating a pipeline of leaders	28
<b>System Level Change</b>	<b>29</b>
Increased presence of transformative leaders of color at the local and national level	29
An increased number of young people of color impacted	31
Improved quality programming	32
Improved institutional structures that support young people of color	32
Improved cross-system coordination focused on the needs of young people of color	33
<b>Programmatic Challenges</b>	<b>35</b>
Racial and Ethnic Differences	35
COVID-19 Related Challenges	39
Understanding Local Context	40
Communication Challenges	41
<b>Internal Staff Survey Findings</b>	<b>42</b>
Mission, Vision, and Values of Surge	42
Experience at Surge	42
Planning for the Next 10 Years	44
<b>Key Takeaways</b>	<b>45</b>

## Executive Summary

### Overview

The Surge Institute, a national nonprofit committed to driving transformative change in communities of color, empowers leaders of color working in youth-serving organizations. In the past 10 years, Surge has launched five key programs, supported over 500 leaders, and positively impacted more than 3 million scholars nationwide.

To mark its 10th anniversary, Surge collaborated with JMC Consulting Firm to evaluate its impact. This formative evaluation involved co-developing an Impact Model to define and track long-term outcomes. The outcomes evaluation incorporated insights from over 50% of participants across all programs and years, as well as feedback from 90% of Surge's internal staff. The review sought to assess Surge's expected impact on participants, determine how much of this was achieved, and identify opportunities for growth and improvement.

### Reflecting on the Core Program Objectives

**Focus Inwards.** Almost all Surge participants (97%) reported strong confidence in their leadership abilities, with 90% adopting a bold, transformative leadership approach. The majority (98%) regularly engage in professional reflection, while 95% actively pursue resources to support their development. However, more than half (59%) reported experiencing imposter syndrome, indicating a potential area for targeted support.<sup>1</sup> *Refer to Graphs 9 and 10 to provide further details.*

**Know the Landscape.** The majority of Surge participants continue to apply practices learned during the program to dismantle institutionalized racism and inequitable systems. They engage confidently in key activities such as analyzing historical data (61%), using data to inform decisions (69%), exploring diverse perspectives on inequity (65%), and identifying solutions by examining inequities (64%). These practices remain central to their ongoing efforts for systemic change. *Refer to Graph 11 for further details.*

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<sup>1</sup> While there isn't a definitive statistic on the exact percentage of leaders of color experiencing imposter syndrome to provide context for a comparison, research indicates that people of color, particularly women of color, are significantly more likely to experience imposter syndrome compared to their white counterparts. Some studies suggest as many as 75% of women executives of color report these feelings in their careers; this is largely due to underrepresentation in leadership roles and the pressure to represent their race and ethnicity in predominantly white spaces.

**Dream Big.** Participants and alumni shared that Surge expanded or refined their vision, enhancing their confidence and knowledge to pursue their goals. They valued access to—Surge’s network, mental health support, tangible resources, and the opportunity to conduct root cause analyses to better understand the underlying causes of inequities.

**Make an Impact.** The majority of participants reported that their organizations are making a positive impact on youth and communities of color. Three-quarters (75%) indicated that their organizations had reimagined their approaches, and 79% agreed or strongly agreed that their work has improved achievement outcomes for students of color. Additionally, 75% reported improved quality of life for students of color, and 70% agreed their organization had implemented changes that invested financial capital in communities of color. *Refer to Graph 12 for further details.*

### Program Specific Finding

**Surge Fellowship/Academy.** Respondents identified the three most beneficial program components as participating in cohort group activities (80%), access to executive coaching (80%), and engaging in leadership stories (79%). Even though the academy is an abbreviated version of the fellowship, there were no notable differences when responses were compared. *Refer to Graph 13 for further details.*

**The Black Principals Network and The Leadership Collaborative.** All respondents who received individual principal coaching (100%) rated it as “extremely beneficial.” The majority (93%) also found the self-care strategies and practices extremely beneficial, followed by professional development content (86%) and the problem of practice (79%). *Refer to Graph 14 for further details.*

**Alumni Programs.** Participants highly valued the Surge alumni network, citing numerous opportunities to maintain ongoing engagement with the organization. Specifically, the top three experiences for alumni are attending conferences, applying for and receiving Surge funding, and having access to Surge Institute. *Refer to Graph 15 for further details.*

**Power Surge.** Participants described their Power Surge experience as “personal, contextual, and emotional,” with many noting it as a “spiritual transformation,” distinguishing it from more traditional leadership programs. They felt sustained in their work, leaving the program feeling healed, more courageous, confident, and deeply connected to their mission.

### Overall Program Reflection

Reflections from participants indicate a strong alignment between Surge’s goals and their expectations, with 85% reporting that the program met their expectations. Participants and alumni reported significant personal and professional growth, particularly in expanding their networks, and 86% experienced a safe and healing environment. Nearly all (97%) felt driven to make meaningful changes in their communities due to their participation in Surge.

## Systems-level Impact

The **242 leaders who participated in the survey reported working towards systems-level change.** Most serve communities where 50% or more of the population are people of color. These leaders reported that they positively impact these communities according to the systems-level outcomes outlined in the Impact Model.

### **Increased presence of transformative leaders of color at the local and national level**

Surge participants and alumni are actively driving change within their organizations and communities. Most survey respondents hold middle management (39%) or top-level management positions (32%), giving them the authority to influence decisions at the local level. One-third (30%) received a promotion within their organization after completing Surge, with most occurring within a year. While 42% are focused on community-level work, fewer are engaged at the national (15%), county (14%), state (12%), or regional (9%) levels. *Page 29 provides more details.*

### **Increased number of young people of color impacted**

Surge participants and alumni reported that they are collectively serving individuals, from birth through 65 plus years old. Most (86%) are in organizations serving a population of 50% or more people of color. Almost all are working to ensure that more students of color are served and are working to ensure that there are a variety of programs, supports, and resources to meet the diverse needs of students of color (78%). *Refer to page 29 for more details.*

### **Improved quality programming**

Most (98%) are working to improve the quality of existing programs, supports, or resources. Participants described designing a leadership program for high school students and case management services for transgender youth of color. *Refer to page 31 for more details.*

### **Improved institutional structures that support young people of color**

Participants have implemented policies within their organization (84%) and community (76%) to support students of color. *Refer to page 32 for more details.*

### **Improved cross-system coordination focused on the needs of young people of color.**

Surge respondents also collaborate to improve cross-system coordination. Participants have collaborated with organizations outside of youth-serving (75%), community leaders (76%), state officials (29%), and national-level officials (17%). Collaboration more likely involves sharing resources and information. *Refer to page 32 for more details.*

### **Internal Staff Survey Findings**

In addition to the leaders of color served by Surge, the staff—across all roles—play a pivotal role in advancing the organization’s mission, vision, and values. The majority of staff respondents (79%) felt that Surge was doing “extremely well” with achieving its mission. By actively translating Surge’s mission, vision, and values into their work, staff contribute to the organization’s capacity to achieve meaningful impact. Their buy-in and alignment with the mission have the potential to significantly strengthen Surge’s ability to realize its goals.

#### **Key Takeaways**

- Surge programming is successful in its mission to develop transformative leaders.
- Surge participants and alumni are making changes at the organization and community levels such as implementing policies that support students of color.
- Some Surge participants and alumni are experiencing imposter syndrome as a result of being first-time entrepreneurs or not having entrepreneurial aspirations which impacts their ability to bring about system-level change.
- Even though Surge participants and alumni were satisfied with their Surge experience and felt the program met or exceeded their expectations, there were some slight differences in the experiences of participants based on race/ethnicity.
- Surge participants support the expansion of the program through Surge Academies but offer suggestions to incorporate more local context.

## Background

### Project Overview

The Surge Institute is a national nonprofit that demonstrates its commitment to transformative change in communities of color by elevating leaders of color working within the educational system. Since their launch in 2014, they have continued to expand in scope and reach. They offer 5 key programs, have served over 500 leaders of color, and impacted over 3 million scholars across the United States. As a testament to their desire to strengthen their impact, they have partnered with JMC Consulting Firm to conduct a comprehensive evaluation of their programs to understand the extent to which they have achieved their mission and are working towards their vision of community transformation. The evaluation aimed to understand Surge's impact, as illustrated in the Impact Model. Insights from participants, alumni, and staff were used to better understand the extent to which impact was realized and identify where there are opportunities for improvement. The evaluation focuses on assessing the impact of Surge's programs and networks over the past 10 years.

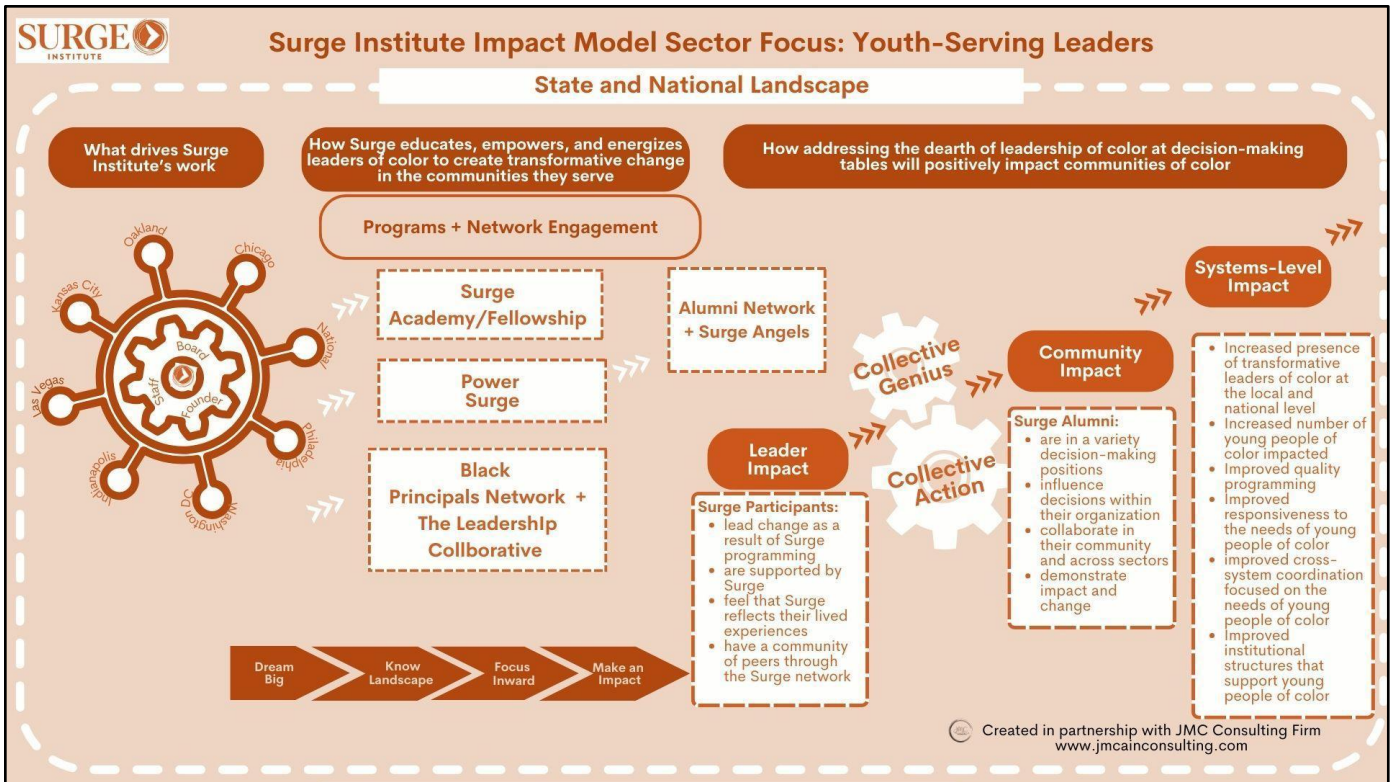
- **Surge Fellowship:** This is a 10-month cohort-based program launched in 2015 in Chicago. It connects, accelerates, and empowers emerging leaders of color in education.
- **Surge Academy:** This is a 6-7 month abbreviated version of the Fellowship which focuses on leaders of color in small and mid-sized cities such as Kansas City and Indianapolis.
- **Surge Angels:** This is an incubator program for Surge alumni which equips them with the resources and start-up support to build out their businesses.
- **Black Principals Network (BPN):** This program was originally launched in 2021 by the Schusterman Family Foundation and inherited by Surge in 2022. This program provides community and professional development for Black principals across the country.
- **The Leadership Collaborative (TLC):** This is a smaller cohort-based program for participants in BPN including principals, vice principals, directors, and school deans. The program offers 7 sessions which include 3 in person and 4 virtual sessions.
- **Power Surge:** This program is for top leaders who serve in senior leadership/cabinet roles in organizations that transform and power systems that improve student outcomes. It convenes 16 transformative black and brown executive leaders across the US addresses critical issues in the education and youth-serving systems, and drives innovation.

### Evaluation Process

In January 2024, the JMC evaluation team hosted a kick-off meeting with Carmita Semaan, Founder and CEO, and Surge staff members to learn more about Surge, its programs, and its evaluation needs and to collect some initial data about the program's strengths and areas for improvement. Based on the information shared at the kickoff meeting and a thorough review of Surge materials, the JMC team drafted the first version of the Impact Model. The JMC team later met with a variety of Surge staff between January and March to review and provide feedback on multiple iterations of the Impact Model. Additionally, the JMC team met weekly with Dr. Yvonne Rodriguez between April 2024 to September 2024 to provide updates, review and approve data collection materials, and ensure that the evaluation was on track. The Chief Program Officer and Program Lead continued to receive updates and opportunities to review and provide feedback for all materials during this period. In August, after the completion of the data collection and gaining a deeper understanding of the Surge program and networks, the evaluation team met with Dr. Yvonne Rodriguez to finalize the Impact Model. The JMC team also developed an Impact Statement based on feedback received by the board.

JMC developed the Impact Model to visually represent how programs and networks lead to changes at the Individual, Community, and Systems levels. This Impact Model served as a guide for the structure of the program evaluation, including the development of data collection tools and analysis. Appendix B summarizes the collaborative process employed between JMC and Surge throughout the evaluation process. The finalized version of the Impact Model and Impact Statement are displayed below:





**Surge Institute Impact Statement**

BIPOC leaders are significantly underrepresented in leadership roles in organizations that predominantly serve students of color. As such, these organizations are not equipped to effectively connect with and address the needs of the students and communities they serve. There is an urgent need to address this disparity to ensure that leadership reflects and responds to the diverse population of Black/Latine youths it serves.

The Surge Institute seeks to address this issue by identifying and empowering leaders of color through its unique leadership development programs. By equipping leaders with the necessary skills and networks, Surge aims to create a pipeline of transformative leaders capable of driving systemic change and creating equitable spaces in education and beyond. Surge's goal is to educate and elevate 5,000 leaders of color by 2030, foster systems transformation nationally, and positively impact young people of color, their families, and their communities.

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After the development of the Impact Model in March 2024, the evaluation team shifted its focus to data collection. The team employed an **explanatory mixed-method approach** which began with a two-phase data collection process. In phase one, the team collected quantitative data which was later followed by a qualitative data collection phase to further explore the findings from the quantitative data. Data collection included the following activities:

**Alumni/Participant Survey:** In May 2024, the JMC team surveyed current Surge participants and alumni of the following programs: Surge Fellowship, Surge Academy, and The Leadership Collaborative (TLC). A total of 440 participants were invited to complete the survey. Of those, 241 responded for a 55% response rate. Survey respondents were asked about their motivations for participating, their experiences during and after the program, their vision for transformative change, and areas of success and recommendations for program improvement. An overview of the survey results is available [here](#).

**Internal Staff Survey:** In June 2024, the JMC team also administered a survey to the internal staff at Surge. A total of 29 staff members were invited to complete the survey; of those 26 responded for a 90% response rate. Surge staff was asked about their experiences as an employee at Surge, their reflections on each of the Surge programs and the application process, and their reflections on the mission and vision of Surge. An overview of the internal staff survey results is available [here](#).

**Focus Groups:** In July 2024, the JMC team conducted a total of 6 focus groups with subgroups of participants/alumni to further explore survey findings. Participants were invited to sign up for a focus group via Zoom. Of the 52 participants who signed up for the focus groups, 29 participated. Program participants and alumni were asked about their experiences in the different Surge programs and networks, motivation for participating, imposter syndrome, racial/ethnic experience, program impact, and suggestions for program improvement. Participants from the following groups were invited to participate based on the following rationale:

- **Black Principals Network** (1 focus group; n = 2): BPN is a network and not a cohort-based program, participants have different levels of interaction with Surge thus participants in BPN were not invited to participate in the participant/alumni survey. As BPN is an important part of the Surge network, the team wanted to ensure that BPN participants had an opportunity to provide feedback on the program as well.

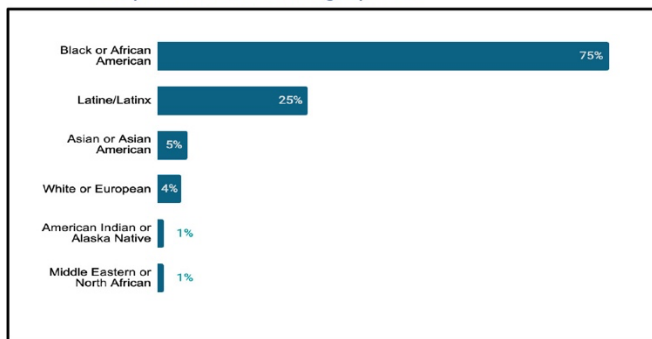
- **Cohorts 2015–2019** (1 focus group; n = 4): Even though the survey was administered to all Surge program participants and alumni, the majority of respondents to the study participated in their Surge program during the last 5 years. Since this was a 10-year impact assessment, it was important to hear from some of the participants who started this journey with Surge early on in its inception to see how their participation has impacted their careers.
- **Latinx/Latine** (2 focus groups; n = 11): During the kickoff meeting with the Surge Institute, the evaluation team learned that while the Surge Institute was founded to serve aspiring Black and Latine respondents, there were some concerns among staff about whether Surge was equipped to serve Latinx/Latine and AAPI participants. Some participants and alumni also shared similar sentiments in the survey. To further explore this theme, the evaluation team conducted focus groups for participants who identify as Latinx/Latine to create a space where they could share more about their experiences, learn about areas where they think Surge is doing well, areas for improvement, and suggestions on how Surge can best serve Latinx/Latine leaders. Focus groups included a mix of participants from the Surge Fellowship (n = 10), from Chicago and Oakland, and from Surge Academy (n = 1).
- **Power Surge** (1 focus group; n = 7): Since Power Surge serves a different audience than other Surge cohort-based programs, participants were also excluded from the survey based on a recommendation from Surge staff. The Surge team shared that participants in Power Surge would be less likely to complete a comprehensive survey and more likely to participate in a focus group based on their schedules.
- **Surge Academy** (1 focus group; n = 5): Since the Surge Academy is a shorter program than the Surge Fellowship and the fellowship has a program team specifically dedicated to the participants in those cities, the evaluation team wanted to explore whether the experience of participants in the academies differs from those in the fellowship. The team felt it was important to hear from this group to learn more about their experiences and what additional support they might need from Surge.

## Participant and Alumni Representation

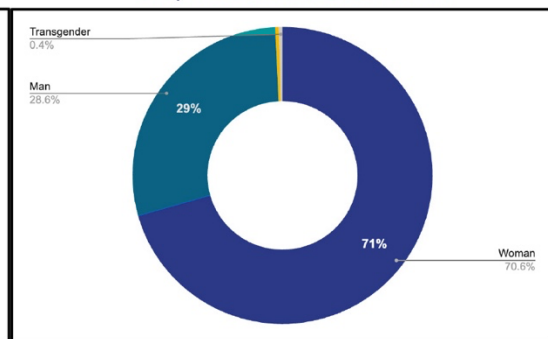
### Sociodemographics

Respondents were asked about their racial and ethnic identity and had an opportunity to check all the options that applied to them. Most respondents (75%) identified as Black or Latinx/Latina (25%)—a small percentage identified as Asian (5%), and another 4% as White. As a program that serves the BIPOC community, it was important to further explore the nuances of their identity. Thus, respondents were asked to further describe their race and ethnicity as a potential variable to explore. Of those who identified as Black, 87% reported being African American. More than half of those who identified as Latinx/Latina reported being Mexican (55%). The majority were female (71%) and between the ages of 30–39 (62%).

Graph 1: Racial Demographics



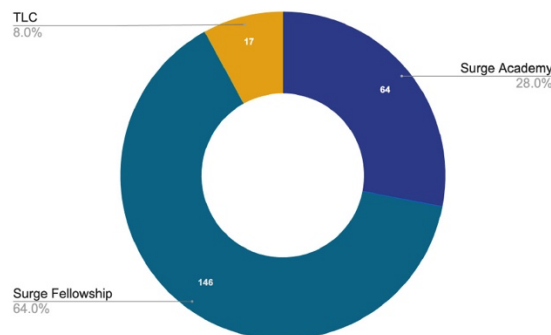
Graph 2: Gender Breakdown



### Surge Participation

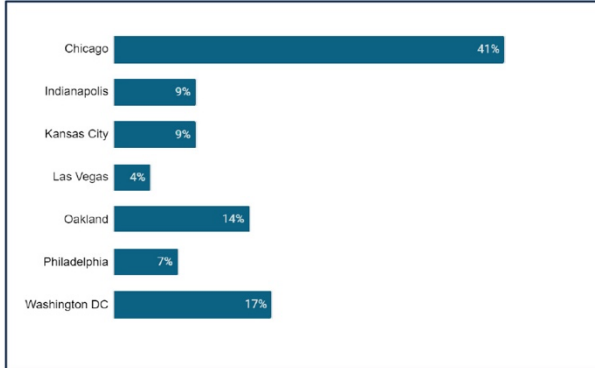
Surge Fellowship (64%) was most represented followed by the Surge Academy (28%). Of those who responded to the survey, 26% also participated in a second Surge program. These included BPN (10%), Surge Angels (10%), Surge Academy (2%), TLC (2%) and Power Surge (1%).

Graph 3: Surge Program Participation

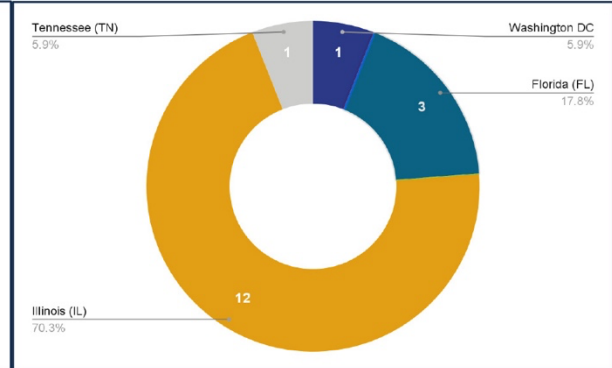


For those who participated in the Fellowship or Academy, almost half served in Chicago (41%), followed by DC (17%) and then Oakland (14%). Respondents from TLC, served primarily in Illinois (71%), followed by Florida (18%), DC (6%), and Tennessee (6%).

Graph 4: Fellowship and Academy City Representation

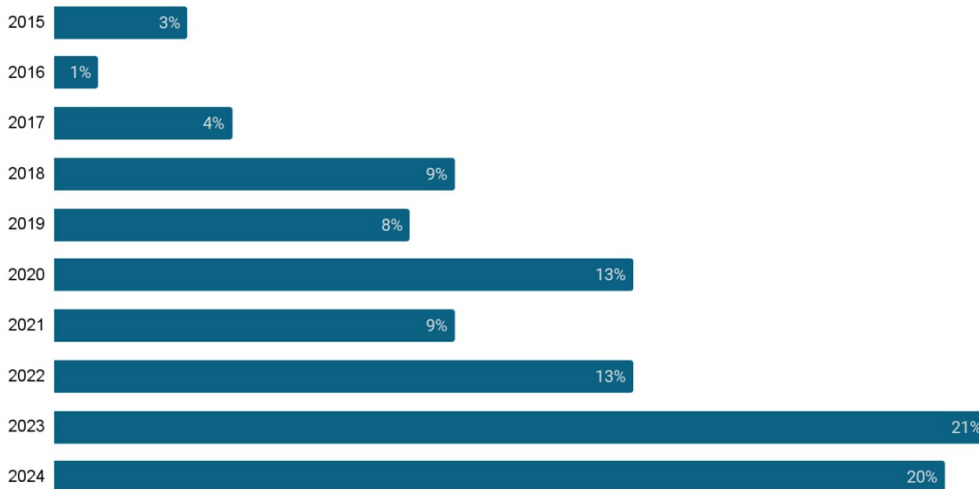


Graph 5: The Leadership Collaborative City Representation



While there was representation from all cohorts, the majority of respondents to the survey participated in Surge within the last 5 years. Graph 6 below shows the breakdown of survey participation by Cohort. Since this was a 10-year evaluation, it was important to hear from the earlier cohorts to see how their experiences at Surge have impacted their career over time. The team conducted one focus group with participants in Cohorts 2015–2019 to provide them an opportunity to share their experiences as well.

Graph 6: Cohort Representation (Survey)



### Focus Group Participants

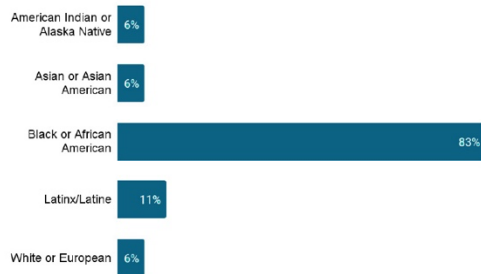
The following table shows a breakdown of the focus group participants and the cities that were represented:

Program/Network	Number of participants	Cities Represented
Black Principal's Network	2	BPN (n =1) TLC (n = 1)
Cohorts 2015-2019	4	Chicago (n =3) Oakland (n = 1)
Latinx/Latine	11	Chicago (n =6) Oakland (n = 4) Washington DC (n =1)
Surge Academy	5	Kansas City (n=5) Philadelphia (n = 1)
Power Surge	7	n/a
<b>Total</b>	<b>29</b>	

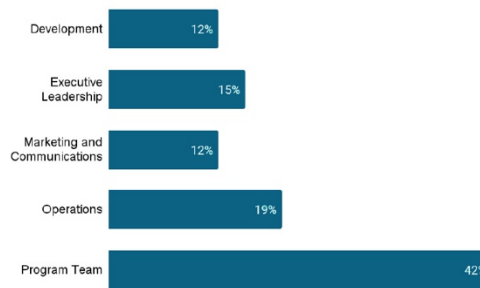
## Internal Staff Representation

With 26 responses, 90% of the staff participated in the survey. Most of them identified as Black/African American (83%) followed by Latinx/Latina (11%). Of those who identified as Black, the majority were African American (80%) followed by Afro-Caribbean (13%) and African (7%). Of the Latinx/Latine, all identified as Mexican. The majority were female (66%), a third were male (33%), and 6% were gender-fluid. All Surge teams were represented. As far as their experiences, almost a quarter (23%) were also alumni of Surge programs. The majority (73%) were fairly new to Surge with more than half 58% having been at Surge for 1-2 years and another 15% having been a part of Surge for less than a year.

Graph 7: Racial Demographics



Graph 8: Team Representation



## Surge’s Core Program Objectives

Survey respondents were asked about Surge’s Core Program Objectives: Focus Inward, Know the Landscape, Dream Big, and Make an Impact. These objectives are present across all programs.

### Focus Inward

Focus Inward is defined as “the ability to show up authentically as a leader of color by doing the tough but necessary work of self-reflection, self-evaluation, humility, and resilience that will make them more aware of their power and value.” Participants were asked to reflect on their personal and professional selves.

**Personal Reflections: When reflecting on their professional selves, participants fared well.** Almost all (97%) believed in their leadership capacity and the majority (90%) were unapologetic in their transformative leadership style. Overall, participants reported a high level of emotional intelligence, with 100% reporting they considered other people's thoughts and emotions as a leader and 100% reporting they admit when they are wrong as a leader. Almost all agreed they listen and are willing to hear perspectives that are different from their own. Compared to the other items, there was slightly more disagreement with prioritizing wellness and healing.

Graph 9: Focus Inwards Personal Reflections



Participants appreciated all the opportunities Surge provided during the sessions to focus inwards and identified this area as one of the top areas of success in Surge. One survey respondent explained:

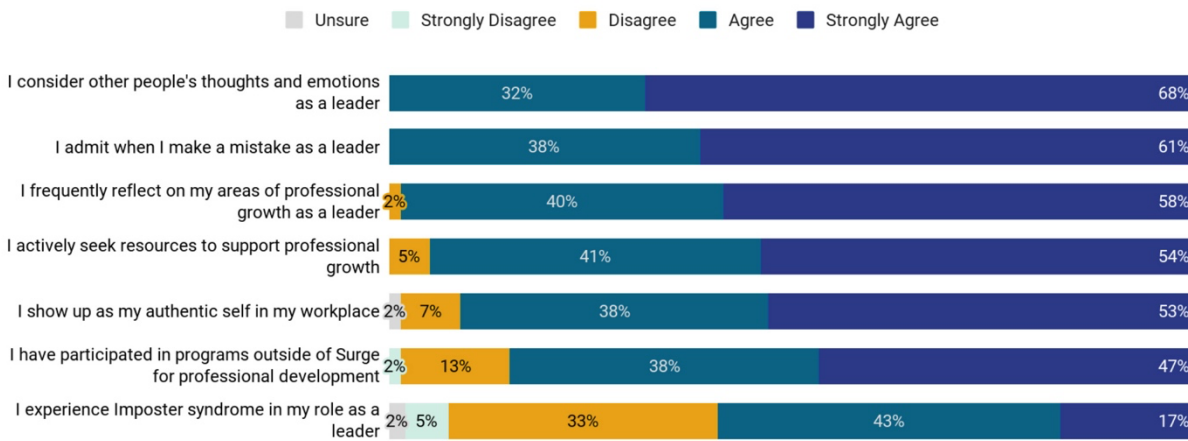


“ Surge has allowed me to be comfortable with just "being" and recognizing that within that I possess greatness. I'm continuing to learn and tap into and trust my innate skills and strengths.

- Survey Participant

**Professional Reflections:** Almost all respondents (98%) reported that they frequently reflected on their areas of professional growth as a leader and 95% actively sought out resources to support their professional growth. Most (85%) have also participated in programs outside Surge for professional development. Even though the majority (91%) agreed or strongly agreed that they can show up as their authentic self at work, **more than half (59%) reported experiencing imposter syndrome in their role.** The Oxford Dictionary defines imposter syndrome as “the persistent inability to believe that one’s success is deserved or has been legitimately achieved as a result of one’s efforts or skills.”

Graph 10: Focus Inwards Professional Reflections



### Imposter Syndrome

The evaluation team further explored the topic of imposter syndrome in the focus groups. Participants shared they experienced imposter syndrome in a couple of scenarios such as **during career transitions.** Some were experiencing it for the first time as they were transitioning out of the field of education, starting their businesses, and becoming first-time entrepreneurs.

Two respondents also experienced imposter syndrome **based on age** but for different reasons. One felt that being surrounded by older, more experienced fellows sometimes made them feel like an imposter. The other respondent expressed that they were experiencing imposter syndrome after transitioning into a new field and being surrounded by people who have already accomplished so much in the field.

A few participants also experienced imposter syndrome **during the fellowship as they did not have entrepreneurial aspirations**. They identified this as a barrier to them seeing themselves as transformative leaders as they felt entrepreneurship was highly valued at Surge. Some respondents further described this feeling as elitism explaining that Surge seemed to value participants with entrepreneurial aspirations, those who completed a Freedom Dream Project, those who held certain academic credentials (e.g., PhDs) or held certain professional titles over participants who wanted to work within their current system. One focus group participant further explained:

“I think why I have imposter syndrome sometimes is that Surge highlights the folks that are doing entrepreneurship. Shout out to you all for being so brave to do all that. But that pushes this narrative that aspiration of like, you have to think so outside the box. And for me, it's like, well, what if I don't want to be an entrepreneur, and I do want to work within the system? Like, how do you support me to be a leader? That is staying in the system. I'm not going to start a nonprofit. I'm not going to start a business, right? Like, I don't see that in my future. I don't have that current aspiration, and yet it makes me feel like an imposter. It makes me feel imposter syndrome because it feels like I should be aspiring to that, you know, and if I'm not excellent, I'm not successful, I'm not the thing. It feels almost like a disservice to myself, as if I was settling. And that's the kind of reason why I feel imposter syndrome.”

**- Focus Group Participant**

Participants also shared that they have noticed a shift from a focus on education at Surge in earlier years to entrepreneurship in more recent years. One Surge Academy participant expressed,

“I also want to say that 2020, kind of shifted a lot of that thought process to, a larger scale. I don't think it was intended for you to become an entrepreneur. Surge Angels came about after 2016 through 2020 and everybody's coming out with businesses and looking for support. So, they were like, oh, let's find a way where you can connect with investors, and let's teach you how to do that method. Because a lot of us weren't coming from that background to understand it. So, it was just an additional component, as I think I put in the chat, innovation based on necessity. ”

**- Focus Group Participant (Surge Academy)**

The theme of imposter syndrome also arose in the internal staff survey. While the majority of Surge staff did not experience imposter syndrome in their role, over a third (35%) reported that they experienced it. This is one area in which Surge could provide some additional support for both program participants and internal staff.

### Dream Big

Surge defines Dream Big as “seeing oneself as a visionary who speaks from the heart, inspires others, and challenges mediocrity and implicit bias that will create more equitable systems for schools and communities of color.”

“I am thrilled to **accelerate so quickly in my career** and take on a strong leadership role as an ED/CEO of a well-functioning, successful organization. My vision for my leadership is to ensure that I am always **creating a staff that is equitable in terms of cultural competency, care, and concern, and practically via strong salaries and benefits.** I want my organization or anywhere I work to be known as a place that centers on social justice, and civil and human rights, and that actively cares about educational equity, but not in a vacuum. **My impact will always be tied to legislative and political advocacy. Passing high-quality bills that affect our most under-resourced children and families is critical for my leadership and impact.** Developing and working on campaigns to ensure high-quality elected officials is one such tactic to get us to better and stronger policy outcomes for the families I serve.”

- Survey Participant

“Surge had a profound impact on shaping my vision as a leader, as it not only empowered me to support the progress of BIPOC students and teachers but also encouraged my personal growth and healing. Through the Surge, I was inspired to heal and rediscover my ability to dream again.”

- Survey Participant

**Participants and alumni reported that Surge either expanded their vision or helped them to focus on their vision.** They felt more knowledgeable about and more confident in their vision after participating in their Surge program. They appreciated having access to Surge’s network, mental health support, and all the tangible resources shared to carry out their vision. One survey respondent shared:

“Surge has profoundly influenced my vision as a leader by providing me with a framework for understanding and addressing systemic inequities. Overall, Surge has reinforced the importance of centering the voices and experiences of marginalized communities in leadership and decision-making processes. It has challenged me to continuously learn, grow, and take action in pursuit of a more equitable and just society.”

- Survey Participant

When asked about challenges they anticipate in carrying out their vision, respondents identified the following challenges: burnout, systematic oppression, and financial insecurity. Respondents are hoping to receive the following support after programming to help them execute their vision: access to networking, coaching/mentorship, and financial support.

**Know the Landscape**

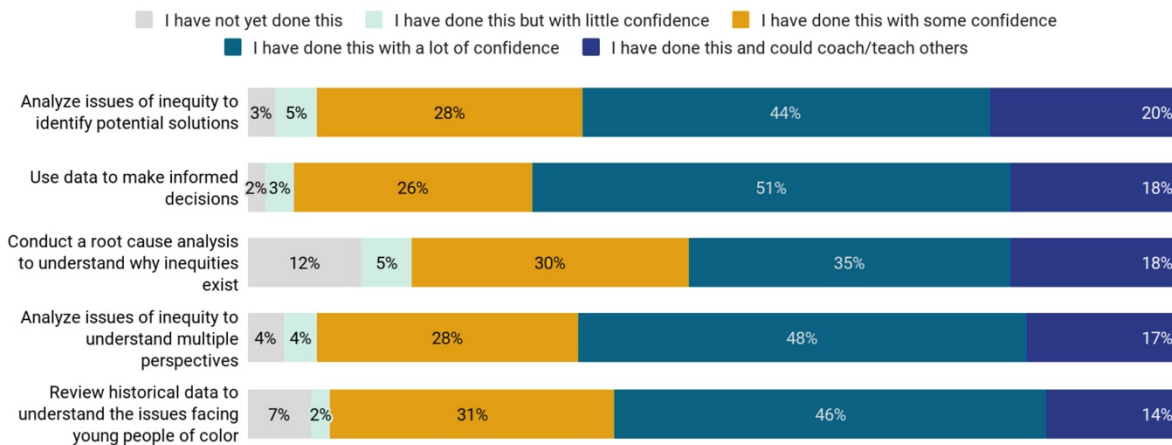
Surge defines Know the Landscape “as understanding the complexity of navigating institutionalized racism and systems that reinforce inequities for communities of color”.

When asked whether they were continuing several practices they learned during Surge programs to continue to dismantle institutionalized racism and systems, the majority of respondents were still engaging in those practices with lots of confidence. Many were still **reviewing historical data**, with almost half (46%) reporting that they have done this with a lot of confidence, and 14% felt confident enough to teach or coach this. The majority were also **using data to make informed decisions** with over half (51%) doing so with a lot of confidence or feeling confident enough to teach or coach someone else (18%).

Participants and alumni were also continuing to analyze **issues of inequity to understand multiple perspectives**. Almost half have done this with a lot of confidence (48%) and another 17% felt confident enough to teach or coach others. When asked whether they **analyze issues of inequity to identify potential solutions**, almost half (44%) have done this with a lot of confidence (44%), and another 20% felt confident enough to teach or coach others.

One area where respondents reported a little less confidence and could use some additional support was when it came to **conducting a root cause analysis to understand why inequities exist**: Only a third (35%) have done this with a lot of confidence and only 18% felt confident enough to teach or coach others compared to some of the other areas.

Graph 11: Know the Landscape Reflections

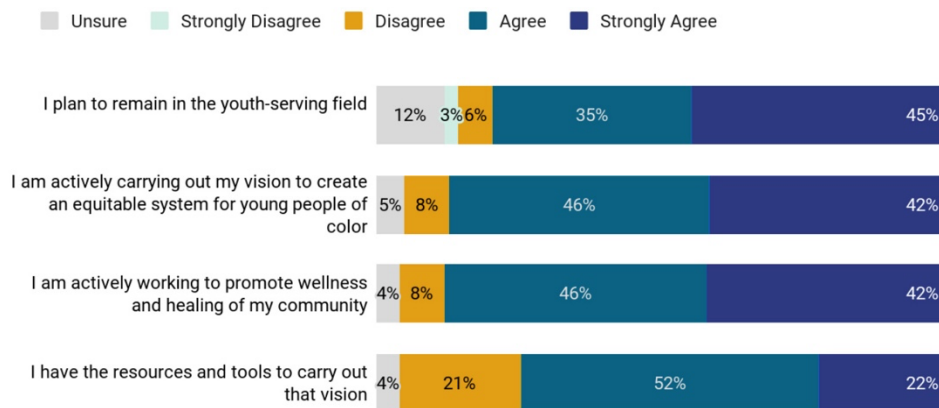


**Make an Impact**

Make an Impact is “the ability to compel, inspire, and execute a vision that strengthens and empowers all stakeholders with measurable outcomes through thoughtful and strategic planning and championing others producing transformative communities.”

The majority (88%) of respondents are actively working to promote wellness and healing in their community, and most (80%) plan to remain in a youth-serving field. While the majority of respondents (88%) reported actively carrying out their vision, 21% reported that they do not have the resources to carry out their vision.

Graph 12: Make an Impact



In addition to their contributions, most participants felt the organization they worked for was also impacting youth and communities of color. Three-quarters of the respondents (75%) agreed that their organization had **implemented changes** that reimagined the way they work. Most (79%) agreed or strongly agreed that their organization’s work has **increased achievement for students of color**. Three-quarters (75%) agreed or strongly agreed that their organization's work has led to an **increase in the quality of life for students of color**. Seventy percent (70%) agreed or strongly agreed that their organization has implemented changes that **invest financial capital in communities of color**.

## Program Specific Findings

Survey respondents were asked to rate the components of their Surge program from not at all beneficial to extremely beneficial. Overall, participants found most program components to be extremely beneficial.

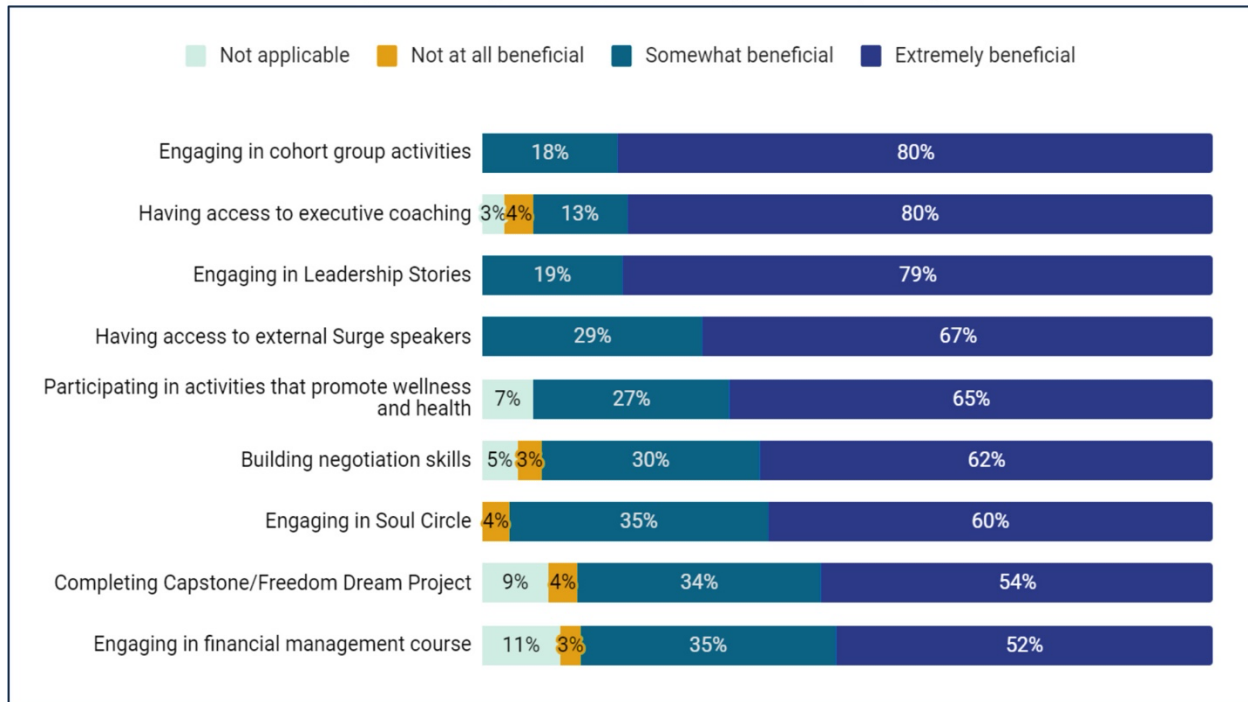
### Surge Fellowship/Academy

When asked to rank the common components of the Fellowship and Academy, the **top three** that respondents found extremely beneficial were:

1. Engaging in cohort group activities (80%),
2. Having access to executive coaching (80%), and
3. Engaging in Leadership stories (79%).

The results were mixed when it came to completing the **Capstone/Freedom Dream Project** and engaging in the financial management course. Even though more than half found both of these components extremely beneficial, these were the two areas that received lower ratings.

Graph 13: Ratings of Surge Fellowship/Academy Components



The evaluation team **further explored the topic of the Capstone/Freedom Dream project during the focus groups**. Participants expressed wanting more time to complete their projects and some experienced challenges getting their organizations up and running after the fellowship as first-time entrepreneurs. They expressed wanting more support after the fellowship to help them to execute their vision.

“My Freedom Dream is in its nascent stage. I'm grateful for the opportunity to plan and dream but wish I had further capacity to build it out more.”  
– Survey Participant

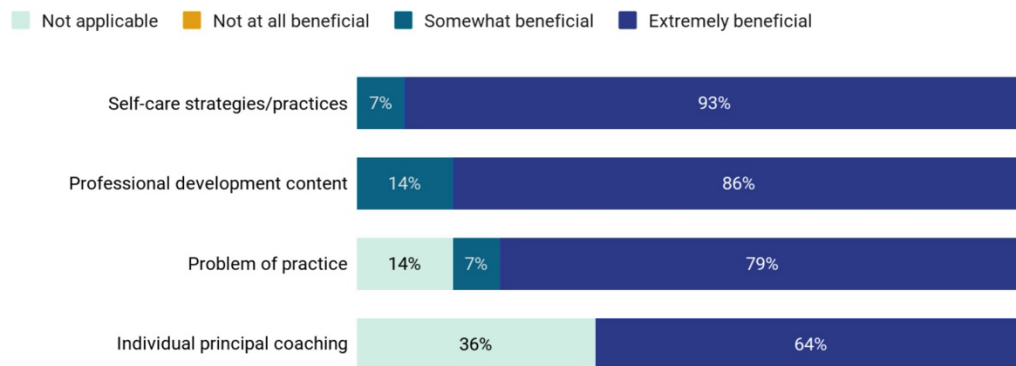
**When the findings were disaggregated to compare the Academy to Fellowship, no notable differences were observed among the responses.** The evaluation team also conducted one focus group with participants in Surge Academy to learn more about their experiences. Focus group participants found it easy to connect with other alumni and felt that the executive coaching they received had a positive long-term impact on them. Participants also shared that the 6-month program felt too short to truly bond with their cohort mates, especially for participants who experienced a virtual or hybrid version of the program and felt a one-year program could be more beneficial for cohort bonding.

Surge staff were asked to share their feedback about the application process for the Fellowship as well as for the Academy on the internal staff survey. Of the staff who were involved with the application process for the Fellowship and the Academy (n = 13), the majority found the process to be equitable for the Fellowship (n = 11) as well as for the Academy (n = 12). Nine staff members agreed that the application process identified the right applicants for the Fellowship and 10 agreed that it did for the Academy. Most of the staff were satisfied with the application process for the Fellowship (n = 10) as well as for the Academy (n = 11).

### The Black Principals Network and The Leadership Collaborative

Overall survey respondents rated the components of The Leadership Collaborative (TLC) favorably. Of those who opted into receiving individual principal coaching, 100% rated it as “extremely beneficial.” The majority (93%) also found the self-care strategies and practices extremely beneficial, followed by professional development content (86%) and the problem of practice (79%).

Graph 14: Ratings of The Leadership Collaborative Components



Participants in the Black Principals Network (BPN) who registered for Surge events over the last 6 months (February 2024–July 2024) were invited to participate in a focus group to share their experiences with the program. Of the 6 who signed up, 2 participants attended the session: one from BPN and another from TLC. Both focus group participants reported great experiences overall with their respective programs and felt the program created a safe and healing space for them. The BPN member appreciated that Surge could offer sessions and mixers to those who did not have the funding to participate in TLC. The TLC participant, who was a part of cohort 2024, was having a great experience with the program and wanted to continue the program after completion. The TLC participant raved about their experience in the program explaining:

“I recently connected with someone who was able to kind of get a preview of BPN in person, and that person was also a Surge alumnus, and he specifically said to me, I’m glad you started with BPN, because I did Surge, and I wish I had this experience. That person was a black principal.”  
**– Focus Group Participant (TLC)**

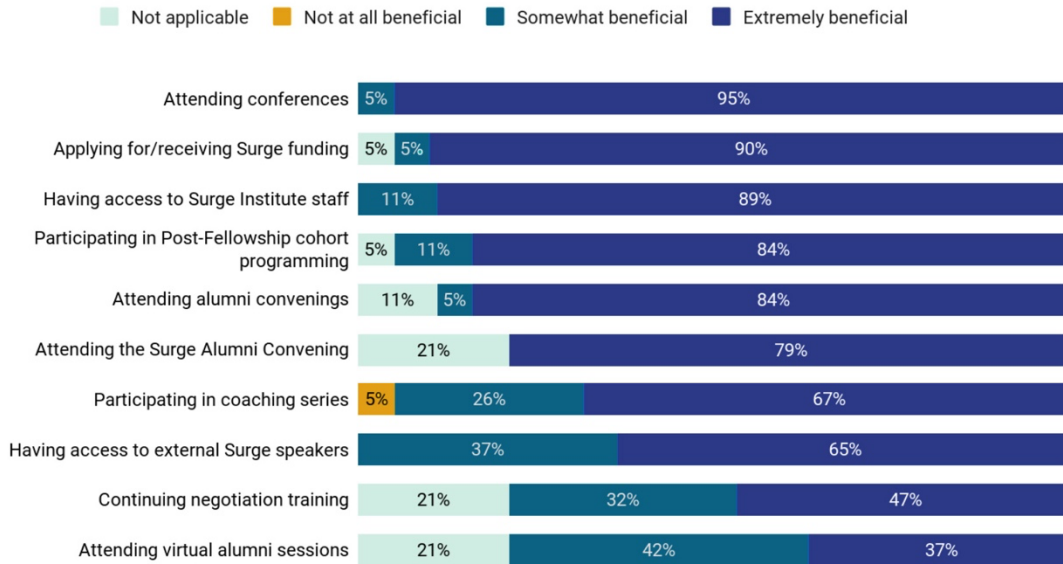
There were few Surge staff who were involved in the TLC application process. Surge staff were engaged in the interview process. The majority felt the application process identified the right candidates for the program (n = 5) and were satisfied with the application process as is (n = 5).

### Alumni Programs

Surge Alumni found attending conferences to be the most beneficial aspect of alumni programming, with the majority (95%) reporting that it was extremely beneficial. Most (89%) also found applying for and receiving Surge funding and having access to Surge Institute staff (89%) extremely beneficial. A large percentage (84%) found participating in post-Fellowship cohort programming (i.e., Angels, BPN’s TLC, Liberatory Design) and attending alumni conferences (84%) to be extremely beneficial. More than three-quarters (79%) found attending the Surge Alumni Convening extremely beneficial.



Graph 15: Ratings of The Alumni Programs Components



Over half of the participants found participating in the coaching series extremely beneficial (68%) or somewhat beneficial (26%). More than half also reported that having access to external Surge speakers was either extremely beneficial (63%) or somewhat beneficial (37%).

**Surge participants raved about the Surge alumni network and appreciated all the opportunities they had to remain involved with Surge.** Internal staff at Surge shared that Surge does a great job including alumni in the application review process and other processes. Alumni are extremely interested in being even involved in other aspects of Surge programming (e.g. site selection, mentoring, recruitment, etc.). Participants in Cohort 2015–2019 felt deeply connected to Surge, described cohort mates as their “cousins” and felt significant comradery from the first few cohorts and a connection across cohorts. These early starters want to continue to give back as speakers for the newer cohort and want additional leadership roles at new academy sites. One participant expressed,

“I think we have enough alums now where people would probably even move or relocate to work for the surge to be that person. But like, there has to be some local context and local leadership.” – **Focus Group Participant (Cohorts 2015–2019)**

Surge staff were asked to share their feedback about the **application process for Surge Angels**. Of those who worked on the Surge Angels application process (n = 8), most agreed that the process was equitable (n = 5), identified the right applicants (n = 7), and were satisfied with the application process overall (n = 7).

### Power Surge

Participants in the Power Surge focus group spoke highly of Carmita. They saw her as someone that they "trusted" and held in "high regard." They described their experience as **"personal, contextual, and emotional."** They described the experience as a "spiritual transformation" explaining that it differed from more technical leadership programs. Participants were able to connect past, present, and future through the historical knowledge that they learned. The experience modeled for them things that they could do in their work and even helped them to have deep conversations with their colleagues.

When asked about the impact of the program, they described them being sustained in the work. They left the program feeling healed, more courageous, confident, and connected.

With agreement from others, one participant shared that Power Surge is a response to a huge unmet need, especially now as communities need leaders of color who are working toward liberation more (about the national and international climate).

## Overall Program Reflection

### Met Expectations

There is alignment between what Surge intends to do and the participant's expectations. When asked what they were hoping to gain by participating in a Surge program, the top three reasons that emerged were:

- 1) Finding a community of linked-minded Black and Brown leaders who they could rely on for support;
- 2) Developing their leadership capacity; and
- 3) Learning new skills and gaining new knowledge.

Expectations are consistent with the intended impact to equip leaders with the skills and networks. The majority of survey respondents (85%) felt that Surge met their expectations. For more than half (59%), Surge exceeded their expectations.

"I've done a lot of fellowships. I've been doing fellowships since 2016. Every year I do one, but I think this one is the most authentic, in that it allowed me to unarmor and I felt accepted. I think that in it is transformative to just have a fellowship that's not expecting anything out of you, other than to be your authentic self."

**-Focus Group Participant**

### Building a community of BIPOC Leaders

When asked what Surge was doing well, the top categories that emerged were:

- 1) Building a community of Black and Brown leaders who share the same values
- 2) Providing an opportunity to focus inward (self-reflection/overcoming self-doubt etc.)
- 3) Facilitating engaging sessions (sessions, programming, speakers, etc.)

In terms of building a BIPOC network, participants and alumni also felt that they have grown and strengthened their network as a result of participating in Surge. The majority (96%) felt that they had **increased the strength of their professional network** and had intentionally built a **professional network to include fellow disruptors** (93%). Most (88%) felt that they were leveraging their network to influence their overall goals.

One survey respondent described the experience of the IPOC community:

"The sense of community is incomparable! Being surrounded by fellow Black and Brown folks who share the same passion for making a difference is incredibly gratifying. There's ample opportunity to embrace our true selves, forge connections, explore, inquire, share love and positivity, and offer support."

**- Surge Academy Participant**

Providing a safe space

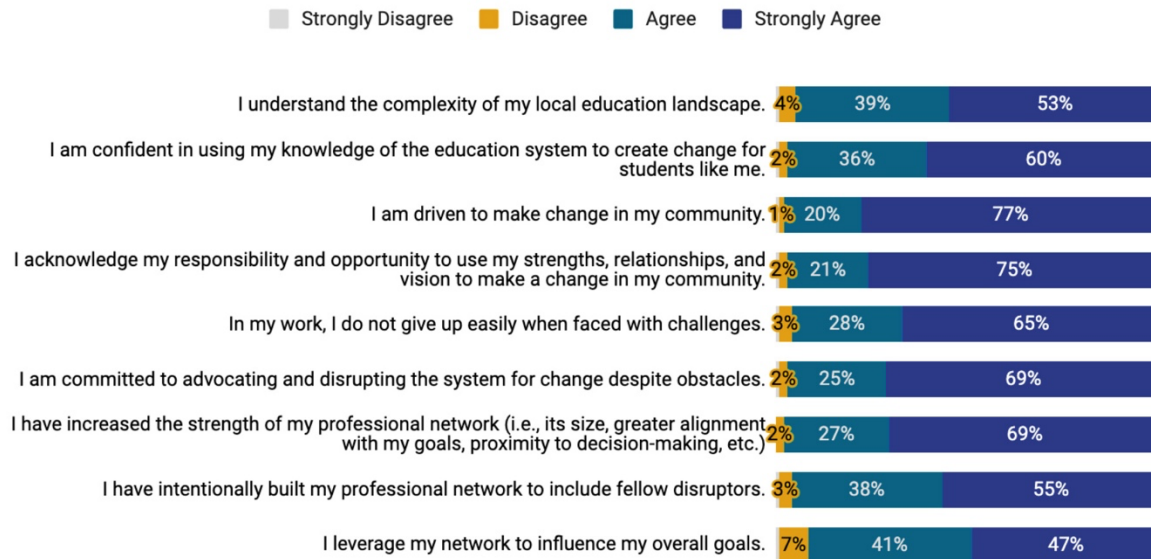
Overall respondents felt that Surge was doing an exceptional job of creating a safe space. **The majority of respondents (86%) reported experiencing a safe and healing environment** during their engagement with Surge.

“I think Surge is giving you a group of people who see you, hear you, and want to support you in a way that I've not experienced in any other place. There's no other work thing that I've done where I can be in a room full of black and brown people and **say what I feel and not feel worried about being judged.**”  
- Survey Respondent

Creating a pipeline of leaders

Almost all participants and alumni agreed or strongly agreed that because they participated in Surge, they were driven to make changes in their communities (97%) understood the complexity of their local education landscape (92%), were confident in using their knowledge of education to create change for students like themselves (96%). The majority (94%) reported that because of Surge, they were committed to advocating and disrupting systems despite obstacles (94%).

Graph 16: Changes in knowledge/practices after Surge participation



## System Level Change

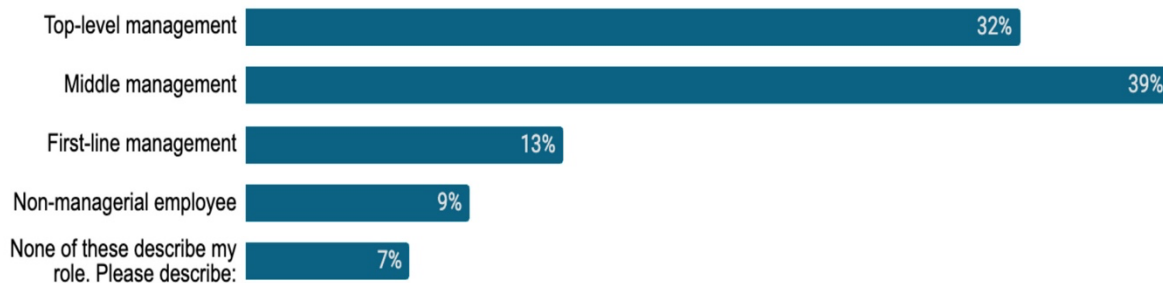
Surge aims to create a pipeline of transformative leaders capable of driving systemic change and creating equitable spaces in education and beyond. Surge aims to educate and elevate leaders of color, foster systems transformation nationally, and positively impact young people of color, their families, and their communities. This aim is operationalized by these systems-level outcomes as outlined in the Impact Model:

- Increased presence of transformative leaders of color at the local and national levels
- Increased number of young people of color impacted
- Improved quality programming
- Improved responsiveness to the needs of young people of color
- Improved cross-system coordination focused on the needs of young people of color
- Improved institutional structures that support young people of color.

**The 242 leaders who participated in the survey reported working towards systems-level change, translating into improved lived experiences and outcomes for the more than 50,000,000 people they serve. Most serve communities where 50% or more of the population are people of color.** These leaders reported that they are positively impacting these communities according to the systems-level outcomes outlined in the Impact Model.

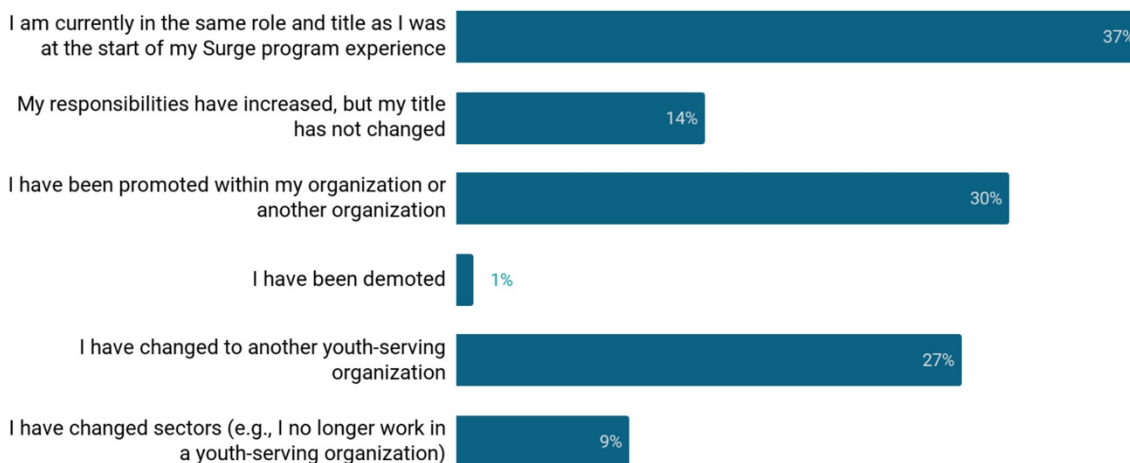
Increased presence of transformative leaders of color at the local and national level  
 Surge participants and alumni **are bringing about change in their organizations and their communities.** Most respondents are working for a non-profit organization focused on education (37%) school district (19%) or charter school organization (13%). The majority of survey respondents are in middle management (39%) or top-level management positions (32%) indicating that Surge alumni are taking on leadership roles in their organizations and **have the decision-making power to bring about change at the local level.**

Graph 17: Leadership Level



Even though most respondents (37%) are in the same role and title they were in when they first joined Surge, almost **one-third (30%) of them received a promotion within their current organization after completing their Surge program**. The majority of those who received a promotion (82%), received it within one year of completing their Surge program showing a correlation between participation in Surge and increased leadership opportunities.

Graph 18: Professional Growth



Surge alumni are also taking on leadership roles outside of their organizations. **Over half (52%) currently serve on an advisory or governing board.**

While participants are more likely to be working at the **community level** (42%), fewer reported that they are working at the national (15%), country (14%), state (12%), or regional (9%) level.

Because Surge’s role is to equip transformative leaders of color, participants were also asked about not only the work that they are doing but also their confidence in doing the work. Consistent with their reported actions, participants **felt more confident in their ability to bring about change at the local level**. When asked about their confidence in playing an active role in bringing about change within **their organization**, the majority of respondents were either extremely confident (40%) or confident enough to support others<sup>2</sup> (35%). Similarly, respondents felt extremely confident (41%) or confident enough to support others (24%) when it came to playing an active role in bringing about change in **their communities**.

<sup>2</sup> Confidence to support others was included among the response options because often the role of leaders is to coach and train others.

**Respondents reported slightly less confidence when it came to playing an active role in bringing about change at the state and national levels.** When it came to the state level, 18% reported being extremely confident and 12% reported being confident enough to support others. Similarly, when it came to the national level, 15% of respondents felt extremely confident and 12% felt confident enough to support others.

Graph 19: Confidence in Leadership Ability



This indicates that while Surge participants and alumni are bringing about change and are confident in their ability to do so at the organization and community levels, **they need some additional support to bring about changes at the state and national levels.**

### Increased number of young people of color impacted

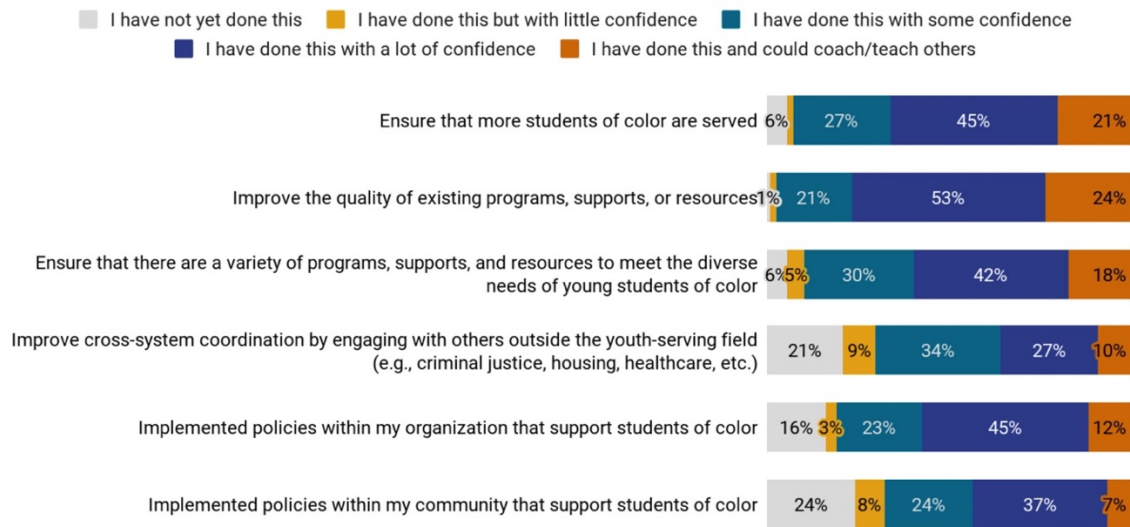
Surge participants and alumni reported that they are collectively serving over 50,000,000<sup>3</sup> individuals, including young people. Most (86%) are in organizations that serve a population that is 50% or more people of color. The majority of Surge respondents are working with high school-aged youth (63%), followed by middle school youth (58%) elementary school youth (49%), and college-aged youths (45%).

Surge participants/alumni are doing work to **ensure that more students of color are being served** and most are doing this with a lot of confidence (45%) or felt confident enough to coach/teach others to do this as well (21%).

Additionally, they are **working to ensure that there are a variety of programs, supports, and resources to meet the diverse needs of students of color (78%)** with over half doing this with a lot of confidence or feeling confident enough to coach others.

<sup>3</sup> This is a self-reported number. It is possible that some of the respondents are working for the same organization or with the same population thereby inflating the number. For a more accurate and complete number, this data point can be collected on the application form or post program survey.

Graph 20: System-level impact



### Improved quality programming

The majority (98%) of respondents are **working to improve the quality of existing programs, supports, or resources** with more than half (53%) doing this with a lot of confidence and 24% feeling confident enough to coach others in this area. A couple of survey respondents shared the following examples of the work they had done so far:

“I carried out my capstone at my previous org and collaborated with fellows on its design and execution. **I designed a leadership program for the high school students** I served throughout all of Chicago and had it carried out with collaboration and support from for-profit local organizations.” – **Survey Respondent.**

“My capstone project is now my nonprofit organization that is beginning to make an impact for newcomers in the Bay Area.” – **Survey Respondent.**

“I was able to get my project funded by the Board of Supervisors budget add-back process in SF- leading to case management services for transgender youth of color.” – **Survey Respondent**

### Improved institutional structures that support young people of color

The majority (84%) of the respondents have **implemented policies within their organization that support students of color** with 45% doing so with a lot of confidence, and another 12% feeling confident enough to coach others in this area. Respondents have also had some success with **implementing policies in their community** to support students of color expressing a lot of confidence (37%) or enough confidence to coach others.

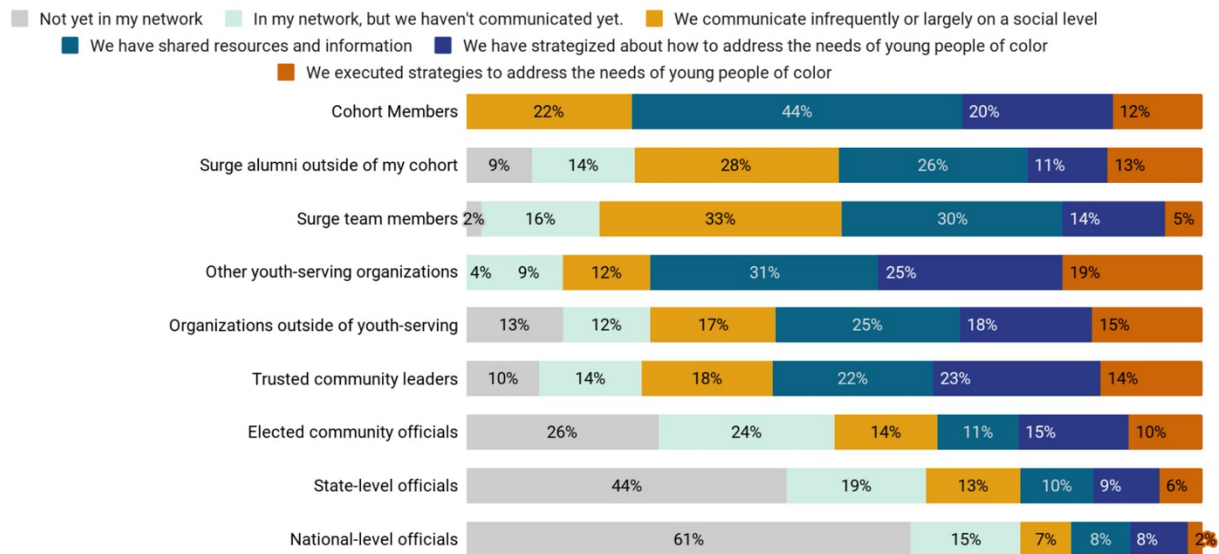


Improved cross-system coordination focused on the needs of young people of color. Surge respondents are also doing work **to improve cross-system coordination by engaging with other organizations outside of the youth-serving fields**. Most are doing this with some confidence (34%), others with lots of confidence (27%). Only 10% felt confident enough to coach others, which highlights an area of additional support.

When asked about their level of **collaboration with other cohort members**, the majority of respondents (56%) were collaborating with other members in their cohort. Almost half (44%) were **sharing resources and information** with cohort members and another 12% had **executed strategies** to address the needs of young people of color. Over half of the respondents (50%) are **collaborating with other youth-serving organizations** by sharing resources and information (31%) or jointly executing strategies to address the needs of young people of color (19%).

Respondents reported communicating with **Surge alumni outside of their cohort** infrequently or largely on a social level (28%), sharing resources and information (26%) and some have executed strategies together to address the needs of young people of color.

Graph 21: Cross-system coordination



Respondents reported less collaboration with Surge team members. While a third (33%) were in communication with **Surge team members, they were communicating** infrequently or largely on a social level. A few were also sharing resources and information (26%) and a small percentage (5%) had executed strategies together to address the needs of young people of color.

Survey respondents were less likely to be collaborating with **state and national level officials**. The majority (61%) did not yet have national-level officials in their network and 44% did not yet have state officials in their network.

This is in line with the earlier findings about participants/alumni not feeling confident in bringing about change at the state and national levels and needing additional support to make changes at these levels.

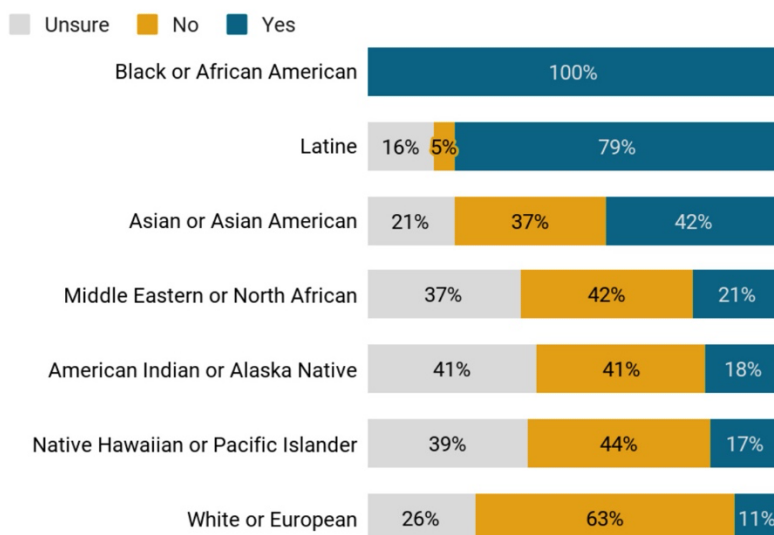
## Programmatic Challenges

### Racial and Ethnic Differences

During the kickoff meeting with Surge staff in January 2024, a conversation developed amongst the staff about who Surge was intended to serve and whether it was equipped to serve *all* BIPOC leaders. To better understand the staff perspective on this topic, Surge’s internal staff were also asked whether they felt Surge was equipped to support leaders from different racial backgrounds on the internal staff survey. While 100% of survey respondents agreed that Surge was equipped to support Black/African American leaders, only three-quarters (79%) agreed that Surge was equipped to support Latinx/Latine leaders. A little less than half (42%) felt that Surge was equipped to support Asian or Asian American leaders.<sup>4</sup> This is important as the organization continues to expand to other cities, each with its unique racial and ethnic makeup.

Graph 22: Surge Support of BIPOC leaders

### Do you feel like Surge is equipped to support leaders who identify as:



To get a better understanding of whether program participants had different experiences based on racial or ethnic identity, the evaluation team disaggregated the participant/alumni survey data and facilitated two focus groups for Surge participants/alumni who identified as Latinx/Latine. Of the 19 people who registered, 11 participated in the focus groups which were hosted via Zoom.

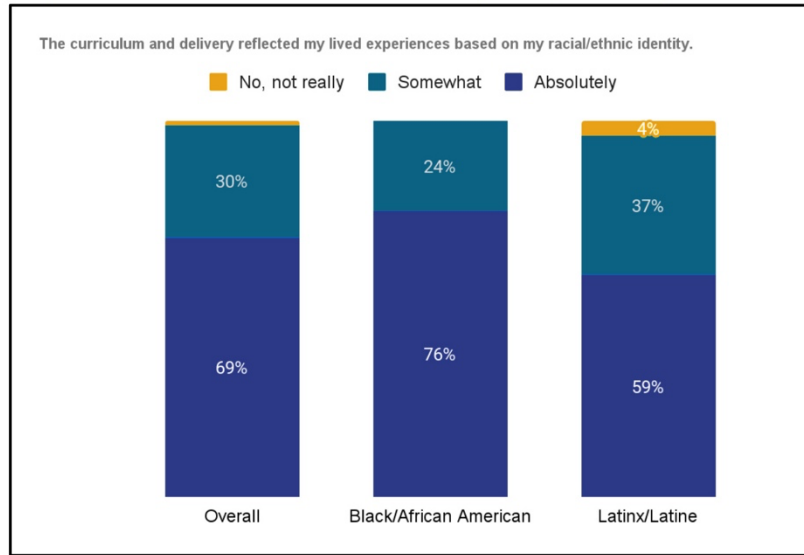
<sup>4</sup> Only a small percentage of survey respondents identified as Asian/Asian American (4%). The percentage was too small to conduct a meaningful comparison with the larger numbers of Black/African American and Latinx/Latine respondents. Because of the small number of Asian/Asian Americans respondents (n = 12), the data was not disaggregated for this racial/ethnic group.

There were slight differences in the responses of Latinx/Latine respondents and Black/African American respondents about whether the **curriculum and delivery reflected their lived experiences based on their racial/ethnic identity**. Overall, 69% of survey respondents reported “absolutely” and another 30% reported “somewhat.” However, 59% of Latinx/Latine respondents reported absolutely, which is slightly lower than the 76 % of Black/African American respondents who reported absolutely. Focus group participants wanted to see more topics that were relevant to the Latinx/Latine conversation such as immigration policy, supporting unaccompanied minors, language, and citizenship. One Latinx/Latine participant explained:

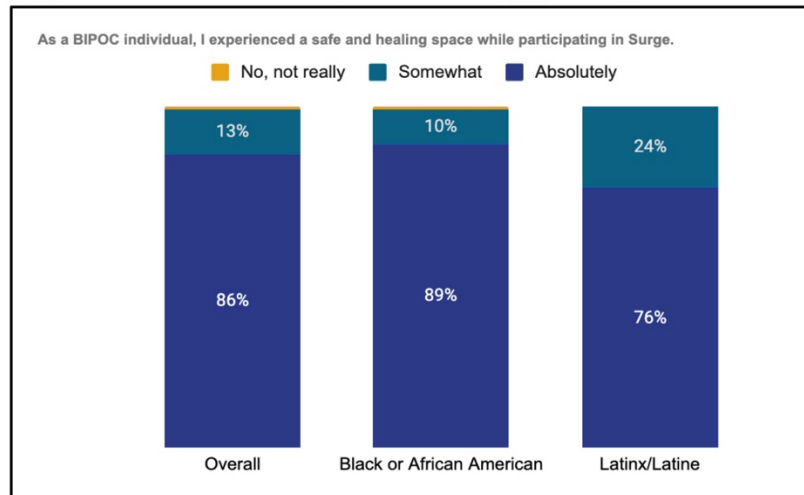
“Well, I think it would be important to consider, especially now in this day and age, with immigration, with migration, with students or unaccompanied minors, with this, you know, the students that like came here have come alone, right? And newcomers, and all those things to consider adding curriculum that helps everyone understand what it's like for Latinx students in education, given their nuances, coming from countries experiencing migration themselves, experiencing, you know, the border, experiencing concentration camps, for lack of a better word, right? Like, there's also that kind of content to consider if we're considering student experience, right? So, I think there's like something there to kind of unpack Latinas is complicated. So, it's not going to be just about, you know, Mexican young people, because Central American folks also migrate, right? Folks from the Caribbean migrate like, there's, there's the migration piece that I think is important, right? So, to consider that, consider a curriculum that helps them pack. Like, okay, maybe you're not, you are not a student as an immigrant, but what is the impact of having been first, second, third generation, right?”  
 – Focus Group Participant (Latinx/Latine)

Even though the majority of respondents experienced a safe and healing space at Surge (86%), there were some differences in the responses based on race/ethnicity. When asked whether they experienced a **safe and healing space** while participating in Surge, 76% of Latinx/Latine respondents reported “absolutely” compared to a slightly higher (88%) of Black/African American respondents.

Graph 23: Reflections on curriculum by race/ethnicity



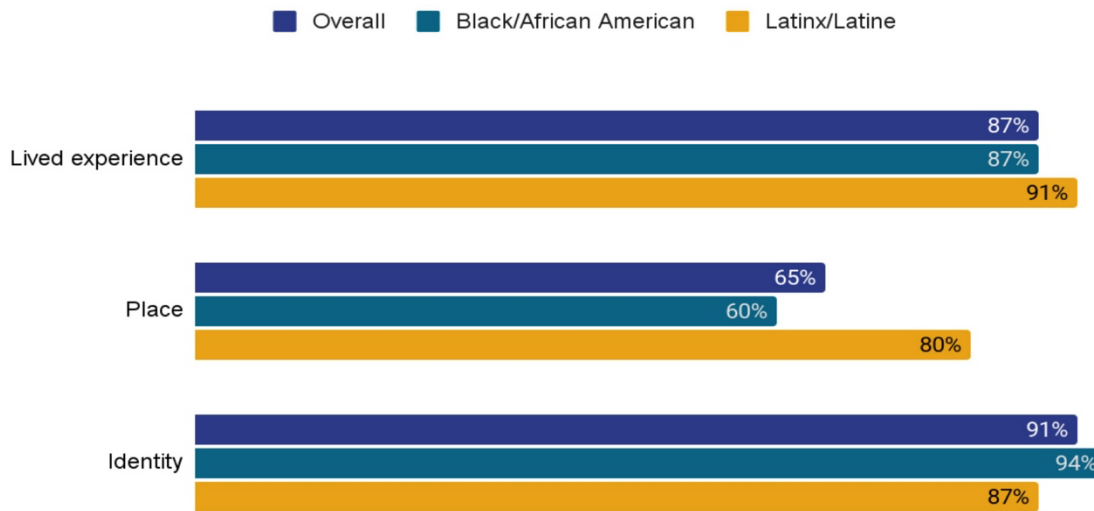
Graph 24: Reflections on safe and healing space by race/ethnicity



Survey respondents were asked to indicate whether they shared a lived experience, place, or identity with participants. **Lived experience** is defined as “personal knowledge about the world gained through direct, first-hand involvement in everyday events rather than through representations constructed by other people. **Shared place** indicates that “the leaders grew up in and/or have lived in for a significant period the geographic community of the population served”. A shared **identity** indicates “a close similarity or affinity with people who identify similarly”. Overall 91% of respondents reported sharing an identity with the people they serve, 87% shared similar lived experiences, and 65% shared a place with the people that they serve.

Some slight differences were observed in the responses of Black/African American respondents and Latinx/Latine participants. However, a bigger difference was noticed when it came to shared places. The majority of Latinx/Latine participants (80%) reported **sharing a place** with the people they served compared to a much lower 60% of Black/African American participants which indicates that more of the Latinx/Latine participants in Surge grew up in or have lived in the geographic community of the population they serve compared to Black/African American participants.

Graph 25: Shared identify, place, and lived experiences by race/ethnicity



Overall, the Latinx/Latine focus group participants were satisfied with their experiences at Surge, raved about the network of Black and Brown leaders and the lifelong friendships they’ve built, and expressed gratitude for the healing space that Surge provided. However, they also shared some recommendations to further help improve their experiences. **Some of these suggestions were small changes such as adding Mexican music to the playlists (“anything beyond the popular reggaeton”) and ordering Mexican food at cohort meetings. One larger suggestion was recruiting more Latinx/Latine staff members at the national level and hiring more diverse Latinx/Latine folks (e.g. staff outside of California.)**

“Sometimes programming felt centered on a more monolithic binary Black experience that tended to exclude others, though the program was intended for more than Black folks and differently identifying Black people.” – **Survey Respondent.t**

“As an afro Latina, I feel very attuned to my blackness in this space, but not necessarily my latinidad. I do see representation of Latina community members here in the education space, in our presentations and sessions as well, but more of the black community.” – **Focus Group Participant**

Some participants also raised some curiosity about the Black Principals Network (BPN). Many of the focus group attendees found out about BPN through email communications such as the newsletter and were unaware of the history of Surge inheriting the program. They were curious about whether there would be a similar leadership program that would be available for Latinx/Latine participants or whether BPN would eventually extend to include Latinx/Latine staff. One participant expressed,

“There is a Black Principals Network and not a Latinx one and so I feel like sometimes in those moments, I'm like, man. Now I think the word that came to my mind was transparency. Oh, why is that? I can respect a decision, or I don't have to respect it either, or if I just have that knowledge as to why the different programs exist.”  
**-Focus Group Participant (Latinx/Latine)**

### COVID-19 Related Challenges

One major event that occurred during Surge programming was the pandemic in 2020 as a result of the COVID-19 virus. The pandemic forced organizations worldwide, including Surge, to adapt rapidly to virtual sessions instead of in-person sessions to ensure the safety of employees and participants. While Surge participants credited Surge for its resiliency and continued support of its fellows and alumni during those unprecedented times, some participants experienced a very unique version of the Surge programming.

Both survey and focus group respondents who participated in virtual or hybrid versions of their programs reported feeling like they missed out on the true Surge experience. Participants reported that they would have preferred the in-person sessions to virtual sessions. Some participants in the Surge Academy focus group shared that they would have preferred to go on a break during the pandemic and resume in person when it was safe to do so. Some participants reported that certain components of the program did not work well virtually. For instance, leadership stories felt different when they were done in person versus done virtually.

Due to the virtual nature of the program during the pandemic, respondents who participated during this period reported that they did not have the opportunity to truly build relationships and bond with their cohort mates. As such, some of these participants did not remain connected with their cohort mates when compared to alumni who attended the sessions in person. One focus group participant expressed interest in Surge offering some in-person sessions for alumni who experienced a modified version of the curriculum due to COVID-19 so they could get a truly authentic experience. One focus group participant described what their Surge experience was like during the pandemic:

"I feel like we had a very unique experience because we were in 2020, so we started in person, and our academy was set up to be all in-person sessions. But of course, the world shut down, and so they had to pivot very quickly. I think because of that, the organization, like everybody else, was just trying to figure out how to kind of keep things moving, but honor what was going on in the world. I do think we missed out on some key components. We didn't get to pitch our Freedom dreams. Our graduation was virtual, and I think that would have helped our cohort, in particular, if we would have had additional time in person just to build some more cohesiveness."

**-Focus Group Participant (Surge Academy)**

### Understanding Local Context

Both survey and focus group participants from different Surge Academies shared some challenges related to understanding the local context. Because Surge does not have a deep history in some of these cities nor a dedicated team for the Academy cities, some participants shared that Surge did not always understand the local context and made some mistakes along the way. Respondents wanted to see more local experts represented including Surge fellows and alumni. They also wanted to focus on topics specific to their cities. Focus group participants explained,

"For Kansas City, one of my big things, and this happens for just about anything that I participate in, is who do they bring? What local experts do they bring into space? It always seems like you have to bring or step outside of Kansas City to be able to ignite the revolutionary thoughts that are present. But I'm like, no we got those people here. Who are they? Are they in the room? Can we elevate them? And some of them were in the room because they were in the cohort."

**-Focus Group Participant**

"All of our cities are very precarious places. DC is a very funky system, and there were some choices of speakers that they didn't realize were political choices that they're making right now. I don't know if I would have had that person. There were moments where I was like, oh, this is a Chicago-based program that knows a little bit about DC."

**- Focus Group Participant**

Alumni also shared some concerns about the sustainability of the Surge Academies and wanted to see programs return to certain cities (e.g., Oakland and Kansas City). Survey and focus group respondents were often asked to "bring back Oakland." Alumni in Oakland did not feel as connected to their cohort members and alumni network and wanted more support and opportunities to connect with others in Oakland now that there is no formal program there.



### Communication Challenges

Respondents also identified communication and transparency as another challenge. Respondents were curious to learn more about what is happening internally at Surge and to learn more about how Surge plans to incorporate their feedback. One example that was frequently mentioned was a change in leadership that sparked some conversation.

"I would appreciate that like an honest, like reflection, which, you know, it is kind of expecting leadership to be vulnerable, and like a space where they might get a lot of, you know, folks are vocal like so we might get a lot of thoughts and questions and feedback, but some of that tapping into, like, our humanity, to say, hey, you know what? Like, we hear what you're saying, and we're struggling with it. Like, we're trying to be intentional. We're not sure how these are kind of our ideas. This is our intent and our hope, and we'll keep a pulse, and check on it. And like, help us stay accountable. Like, just show me your roadmap. Show me your vision. Like, help me see where you're trying to go and that, to me, would show like you're staying committed and rooted in, like, the intent of why you even started this right, the reason why I even wanted to come to Surge." – **Focus Group Participant (Latinx/Latine)**

## Internal Staff Survey Findings

In addition to the leaders of color served by Surge, the staff—across all roles—play a pivotal role in advancing the organization’s mission, vision, and values. By actively translating Surge’s mission, vision, and values into their work, staff contribute to the organization’s capacity to achieve meaningful impact. Their buy-in and alignment with the mission significantly strengthen Surge’s ability to realize its goals.

### Mission, Vision, and Values of Surge

Overall, there was alignment between the organization’s intention and the staff’s perception. The majority (79%) felt that Surge was doing “extremely well” in regard to working towards their mission to transform communities of color. When asked to describe their vision for transformed communities of color, responses aligned with Surge. Descriptions included: “freedom from systemic barriers,” “abundance,” “joy,” and “authenticity.” One shared a vision where participants “advocate and pour back into Surge through reciprocal engagement.”

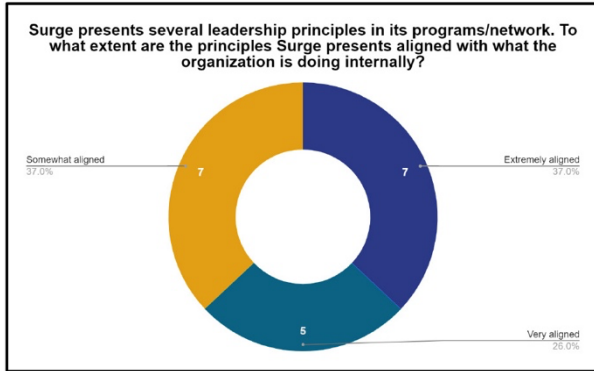
Similarly, most staff shared that Surge was doing extremely well in terms of its values related to connection (85%), community (80%), authenticity (70%), and excellence (60%). One of the areas where staff felt that Surge was not doing as well was “urgency” with half (50%) reporting that Surge is doing this “somewhat well” and another 10% reporting that Surge is not doing well at all in this area; thereby highlighting an area to further explore.

### Experience at Surge

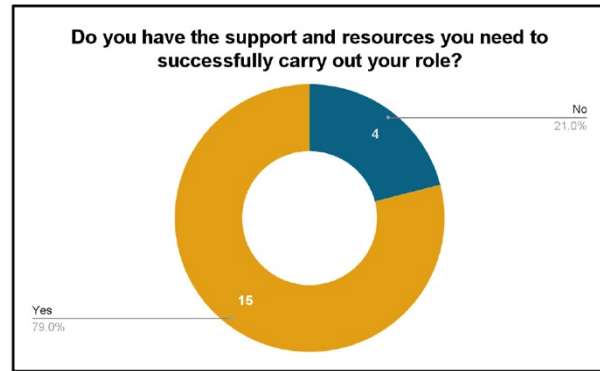
The majority of internal staff **(79%) felt that they have the support and resources they need to successfully carry out their role.** Surge staff also shared their feedback on the onboarding process at Surge with more than one-third (38%) sharing that they were not appropriately onboarded, which could potentially be an area to further explore internally.

Respondents were also asked about whether the leadership principles that Surge presented internally were aligned with those it presents in its program and network. The majority of internal staff felt the principles were either extremely aligned (37%) or very aligned (26%). However, a bit over one-third reported that this was only “somewhat aligned”.

Graph 25: Surge’s leadership principles



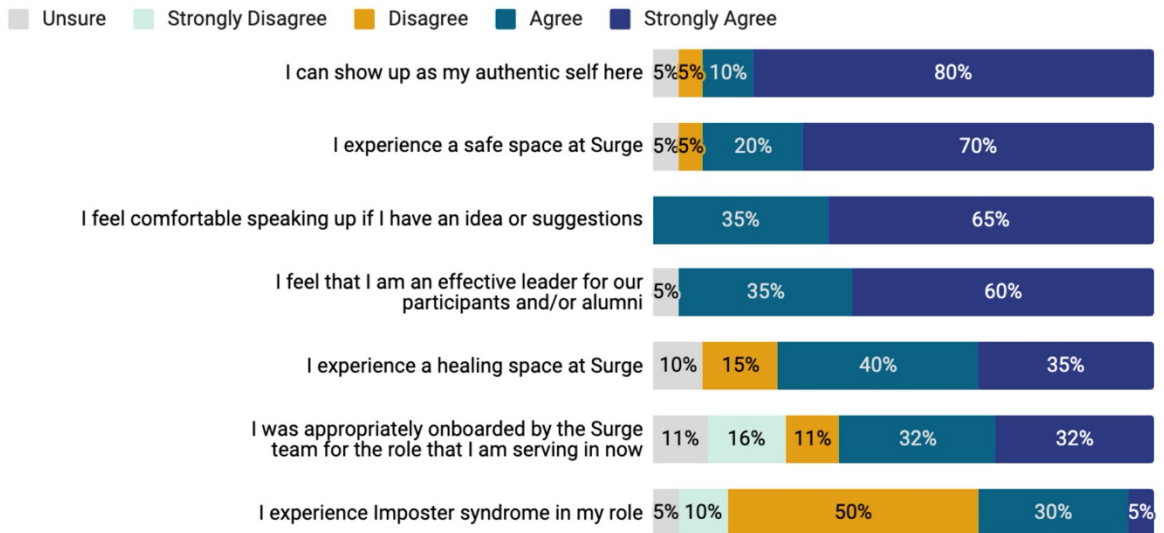
Graph 26: Surge support and resources



The majority of Surge staff (95%) felt that they were an effective leader for their program participants and alumni. Similarly to participants and alumni, the majority of Surge staff (90%) felt that they could show up as their **authentic selves** at Surge, experienced a **safe space** at Surge (90%), and felt comfortable **speaking up** if they had an idea or suggestion. However, while three-quarters (75%) reported that they experienced a **healing space**, a bit over a third (35%) shared that they experienced imposter syndrome in their role similar to Surge participants.

Graph 27: Experience at Surge

**To what extent do you agree with the following statements?**



## Planning for the Next 10 Years

Staff were asked to offer suggestions as Surge prepares for the next 10 years. Their responses included:

- Ensuring that the right people are in place to support where Surge is going
- Investing in marketing
- Revisiting the “why” behind the work and evaluating processes
- Include joy and wellness among impact metrics
- Reflect on employee retention
- Strengthen communication across departments and levels
- Increase alumni engagement
- Prepare alumni for roles within Surge

In summary, Surge is creating for staff the same environment that they aim to create for participants. Staff share and are committed to Surge’s mission and vision, which strengthens the organization to carry out its mission. Staff feel supported and have the resources they need. However, the value of urgency can be further explored in future organizational planning.

## Key Takeaways

This evaluation aimed to understand Surge’s anticipated impact on their participants, to explore the extent to which this was achieved, and to identify opportunities for continued growth and improvement. In their 10 years of programming, Surge has been successful in creating a cadre of leaders of color who are committed and equipped to create change for the communities of color that they serve. What follows are some key takeaways:

- **Surge programming is successful in its mission to equip transformative leaders.**

Most participants' expectations are aligned with Surge’s objectives and all participants felt that programming met their expectations. Even though the fellowship is an abbreviated version of the academy, there were no notable differences among the responses. This suggests that the programming is robust.

- **Surge participants and alumni are making changes at the organization and community levels.**

Most Surge alumni are in middle and top management positions within their organizations and have the decision-making power to bring about change. Many have implemented policies in their organizations and in their communities that support students of color. Over half are currently serving on advisory boards and are engaging in cross-system coordination with other organizations outside of the youth-serving fields. However, they do not yet have the connections at the state and national levels to confidently bring about changes at this level and need additional support from Surge to connect with colleagues and other leaders at the state and national levels.

- **Some Surge participants and alumni are experiencing imposter syndrome as a result of being first-time entrepreneurs or not having entrepreneurial aspirations which impacts their ability to bring about system-level change.**

Participants and alumni reported experiencing imposter syndrome primarily as a result of transitioning into entrepreneurship for the first time. Many of them, felt very confident in the education space but felt more unsure of themselves as they carried out a big business venture for the first time in a new field. Some participants are also experiencing imposter syndrome for not having aspirations for entrepreneurship. This is one area for Surge to further explore.

- **Even though Surge participants and alumni were satisfied with their Surge experience and felt the program met or exceeded their expectations, there were some slight differences in the experiences of participants based on race/ethnicity.**

While Surge’s programs and networks are designed to serve Black and Brown leaders, participants experience slight differences in their experiences based on their race/ethnicity. More Black/African American respondents reported that the curriculum reflected their lived experiences and felt they experienced a safe and healing space at Surge when compared to their Latinx/Latine peers. Some recommendations shared by respondents to improve their experiences included:

- Adding more topics into the curriculum that reflect the Latinx/Latine experience (e.g. immigration policy, migration, supporting students or unaccompanied minors, language and citizenship, etc.)
- Recruiting and hiring more diverse Latinx/Latine staff at Surge (e.g. staff from areas outside of California)

- **Surge participants support the expansion of the program through Surge Academies but offer suggestions to incorporate more local context**

Overall, participants enjoyed their experiences in the Surge Academy but also offered some suggestions to improve the experience so that it better reflects the local context.

Participants suggested the following:

- Revising the landscape analysis process for prospective cities
- Soliciting feedback from alumni who previously lived in prospective cities
- Tapping into the expertise of local alumni and speakers

Overall, Surge participants and alumni are extremely satisfied with their Surge experience and feel the program positively impacted them personally and professionally. As Surge continues to work towards its goal of reaching 5000 leaders by 2030, there is an opportunity to use the findings from this data in decision-making to continue to improve the programs and their impact and support participants and alumni as they bring about change at the system level. Respondents share their gratitude for Surge as it celebrates its tenth anniversary.

“Congrats!! This program is a dream project come true, and I truly feel freedom every time I’m in the surge environment in session or with my cohort members. I feel seen. The intentionality is felt. Even 10 years later. Especially 10 years later. I pray you can sustain this program for years and years to come. It’s one of a kind and like nothing I’ve ever experienced. Truly, thank you! – **Survey Respondent**”

Congratulations on 10 amazing years of uplifting black and brown educators, we are better because of Surge! – **Survey Respondent**

I feel clearer on how systems have been built to disrupt our dreaming and vision for something greater. My vision now anticipates this....plans both for it and to overcome it. – **Survey Respondent**

“A Huge THANK YOU! to Carmita for her vision and the SURGE team for your unwavering support and dedication to my leadership journey. Your commitment to fostering transformative leadership within BIPOC communities has not only equipped me with invaluable skills and knowledge but has also inspired me to pursue meaningful change with renewed vigor and confidence. The growth opportunities, the connections with like-minded leaders, and the continuous encouragement have been instrumental in shaping my vision and actions toward creating a more just, inclusive, and prosperous society. Thank you for believing in my potential and for being a beacon of empowerment and hope. Your impact on my life and the lives of countless others is profound, and I am honored to be a part of this incredible community. – **Survey Respondent**



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