

Presidio Institute Advisory Council
June 30, 2015 San Francisco, CA
Meeting Notes

The Presidio Institute Advisory Council (Council) held a meeting on June 30, 2015 in San Francisco, CA at the Presidio Institute (PI) in Building 1202 at the Presidio of San Francisco.

Pre-Reading Meeting Materials

- Cross Sector Leadership Fellows – Update
- Online Leadership Platform – Update
- Presidio Institute Strategy Documents

Meeting Objectives

Obtain Council input on programmatic offerings with an emphasis on the Cross Sector Leadership (CSL) Fellows program. In response to Council member requests, three CSL Fellows were present to speak about their projects and experiences in the program.

Welcome

- Toby Rosenblatt, Chair of the Council opened the meeting
- Aimee Vincent, Designated Federal Official called the roll of Council members
- David Smith, Presidio Institute Managing Director introduced Presidio Institute staff

Managing Director Update

- Trust Board of Directors, Meeting Report – David Smith
 - The Presidio Trust Board of Directors reaffirmed the commitment to dedicate the Fort Scott campus to solving our society's most complex social challenges, as outlined by the Presidio Institute.
 - The Presidio Institute's core areas of focus that support the Trust Strategy 2020 are:
 - Civic Engagement and Service
 - Innovations in Public Land Management
 - Veterans
 - Board members were also open to other social issues and appreciate the focus on leadership development, while encouraging action
 - There were questions, and an interest in further investigating the following:
 - Options for funding campus development
 - Size and scope of Presidio Institute programs
 - Learning more about Cross Sector Leadership
 - Land Use Study underway – The Presidio Trust has engaged an external consultant to develop three planning scenarios for the continued revitalization of the Fort Scott district, and the study should be complete in a 6-9 month timeframe
 - Three new board members will be joining this summer and will need to be oriented to the Presidio Institute

Council Member Comments

- It's important for the Institute to amplify proven practices in the field
- How are we tracking our progress relative to our goals? It's hard to assess our progress as the vision is so broad
- Is the focus on cross sector work enough of a differentiator?
- It feels like we've pivoted away from service, which might have potential as a differentiator given the history of the place
- There's place, and place leads naturally to our ability to convene; this could be a helpful way to frame it
- It is not so much about the what and the how anymore, but the who; not only training the leader, but sharing the practices; tell the stories about the types of leaders that could be coming here and focus on the customers
- There is a challenge in managing the brand at this stage so that it's not 100% focused on CSL Fellows program; be cautious about the pilot programs defining the brand
- The cross sector leadership language is clunky, isn't rich enough, and doesn't inspire a special vision for the place; the direction we're moving is right, but we shouldn't be married to the phrase

Program Updates

Business Strategy and Convening – David Styers, Manager of Program and Business Development

- Since September 2015, more than 50 gatherings have convened at the Presidio Institute. We are finding that there is an interest in the space for both small and mid-scale meetings and events
- Staff members are conducting cross sector trainings at 4 conferences this year (Council on Foundations, Points of Light, Independent Sector, and Board Source) to get the word out; seeing strong interest
- Recently launched the X Sector Lab – a rapid innovation workshop in partnership with Smallify
- [X Sector Lab - promotional video was shown]
- Co-hosted, "Growing Impact Economy Summit" in June 2015, which convened over 230 participants to leverage for-benefit enterprise and cross sector leadership to tackle complex challenges
- Hosted a design lab with Stanford, College Compact, others to explore how the Presidio Institute could support undergraduates; Stanford is very interested in partnering with us for an experimental exchange program – will be providing more details as this idea develops

Cross Sector Leadership Fellows – Alison Gold, Manager of Leadership Education

- This year several key changes were made in the Fellowship curriculum –
 - defining concept of cross sector leadership;
 - more explicit emphasis on systems thinking;
 - looking at a range of leverage points beyond policy;
 - increased focused on diversity and inclusiveness;
 - brought in a stronger emphasis on learning from other practitioners;
 - added coaching and curriculum in-between sessions
- In an effort to build the bench of faculty – we have released an Request for Proposals

- Launching recruitment for 2016 now and hopeful that extended timeframe will allow more people to plan for the experience
- Would like to invite FAC members to be readers of applications if interested
- In response to the request by the Council Members to hear directly from the CSL Fellows we have assembled a panel for today's meeting

Cross Sector Leadership Fellows- Panel (Bios are attached)

CSL Fellows Panel Discussion - Moderated by Lenny Mendonca, Presidio Institute Senior Fellow

- Keith Bergthold - Executive Director, Fresno Metro Ministry (2014 Cross Sector Leadership Fellow)
- Christina Garcia – Managing Director of Strategic Advancement and Public Affairs, REDF (2015 Cross Sector Leadership Fellow)
- Jaime Horst – Director of Community Engagement, McKesson Corporation (2015 Cross Sector Leadership Fellow)

Lenny Mendonca – All being busy professionals, how have you been able to make time for the Fellows program?

Jaime – The program is immersive during the weeks away which is both challenging and rewarding. It isn't easy but I appreciate the commitment everyone is making.

Christina – REDF has a strong support for continual leadership training. It may be rare to find organizations that can be as supportive in terms of time and cost.

Lenny Mendonca – What have been the program highlights?

Christina – The opportunities to connect with and learn from other fellows have been tremendous. The tour of Tesla was also a highlight. They shared a story about how difficult it is to say that something like meeting a deadline for submitting spreadsheet “can't be done” when you are reporting to a visionary like Elon Musk. Perspective!

Jamie – The fellows themselves are a highlight. Credit goes to the staff and faculty who are excellent. The authenticity of the conversations has been a luxury. The culture of “challenging the thinking of what's possible”. I have discovered where some of my own blind spots are. For example, learning that 80% of teachers are white – this challenged my thinking about education.

Keith – I really appreciated learning about Smallify. The innovation process is a powerful tool. I was also really impressed with the IISC (Interaction Institute for Social Change) facilitative leadership model. As a result of the program, I was able to get support from funders to apply the fellowship to my work in San Joaquin Valley. We are using the models and tools in our community work.

Ernestine Fu – Why did you apply for the fellowship? Where did you find out about it?

Christina – I found it via the Corporation for National & Community Service and as a grantee of the Social Innovation Fund where Kirsten Breckinridge was a fellow.

Jamie – I found out about it through Points of Light. I have a strong background in business and thought the cross sector approach was an excellent opportunity for growth.

Keith – I learned about the program from the Irvine Foundation. I consider myself a learning junkie.

Lester Strong – How do you keep this learning going within your workplaces?

Keith – I made it a career choice. I have been initiating community development projects for years that are all cross sector and this program strongly reinforced that work.

Jamie – It is a worldview that has started to permeate how I approach relationships. It has provided a framework for conversations and has helped me realize that I have a lot to offer other sectors as well. As a result of this learning, I now challenge people I am mentoring to think out of the box about where they can add value.

Christina – I as always been working to influence other sectors and this program has provided tools.

Gloria Johnson Cusack – Can you talk a bit more about the cross sector aspect of the program?

Jamie– I have been bringing the cross sector mindset to numerous individual relationships.

Christina – I haven't found a cross sector leadership model anywhere else in the training realm. There are many programs but none with this specific focus. I have been applying the learning in my relationships with REDF grantees.

Keith – Everyone needs to have projects that they can apply their work to. This is a key strength of the program. The learning is immediately applicable to the work of solving problems together.

Lenny – I see a real opportunity to build out alumni networks of programs like this and Fuse Corps to deploy highly capable leaders with cross sector experience.

What feedback would you like to give about the program?

Keith – We provided feedback last year to build in more time for reflection. It is always a tricky balance because there is so much content and we want to get to everything.

Jamie – As a member of this year's cohort, I can say that some of those periods have been built in this year (dinners, group coaching) but in the end there are time constraints and we need to self-reflect and organize between sessions. I have appreciated the coaching and the connections with other fellows.

Christina – The program has been doing a great job of iterating and listening to feedback and responding.

Public Comments

- Maria Cristini, Consultant across sectors – Feels the importance of this work and commends the Presidio Institute. Encourages organizations to look for leaders with skills to work across sectors.
- Anne Wilson, United Way Bay Area – Beyond the training of individuals, how can the Presidio Institute move the needle of a cross sector issue or group? If a group is working on an issue it would be helpful to bring it to

the Institute as a place to tackle it from multiple perspectives. Are there products the Presidio Institute currently offers for groups tackling cross sector issues together?

- Bijan Yaminafshar, management consultant – Interested in international development and wondering if we have experience with cross sector work in this space. International audiences will be very receptive to this learning. Found out about the CSL program from a management professor from Singapore.
- Paul Valva, as a small business owner – Interested in the opportunities for the general public to interact with the fellows program.
- Catherine Crystal Foster, Wesley Foundation – How do nonprofit participants finance their participation? Seems important to explore ways to lower the bar of entry for participants.
- Hafsa Khan, San Francisco State University– Interested in the relationship between cross sector work and community resilience.

Online Leadership Platform Update - Robert Gordon IV, Project Manager

- The project has been funded by American Express, Annie E. Casey Foundation, and Kresge Foundation
- Had a goal of 100 beta testers; actually recruited 200 registrants from 34 organizations
- We are currently three weeks into the beta-test of the course and the analytics are very positive
- Recently chose the name LEADEROSITY – e.g. process of becoming a leader – testing out the new name
- Working with Elixir Design to continue branding work through July
- Hoping to unveil 3 courses this next year; second course will launch in November
- Looking for additional content partners for additional courses

Closing the Meeting

Toby Rosenblatt, Fort Scott Council Chair thanked all of the attendees and closed the meeting.

**Fort Scott Council – Meeting Attendance
August 18, 2014 San Francisco, CA**

Council Members	Roll Call
Toby Rosenblatt, Chair	Present
Karen Baker, Vice Chair	Present/Arrived at 10:00
Seth Barad	Present
AnnMaura Connolly	Present
Stephanie DiMarco	Present
Ernestine Fu	Present
John Gomperts	Present
Kenneth Harbaugh	Present
Sandra H. Hernández M.D.	Absent
Tracy Hoover	Absent
Gloria Johnson-Cusack	Present
Wendy Spencer	Present
Lester Strong	Present

Presidio Trust Staff	
Alison Gold	Present
Robert Gordon IV	Present
Sarah Locher	Present
Amanda Marconi	Present
Robert Menezes	Present
Anna Sanders	Present
David Smith	Present
Joshua Steinberger	Present
David Styers	Present
Aimee Vincent	Present

	Members of the Public	Affiliation
1	Carlos Alicea	MSMGE
2	Andrea Andersen	Presidio Trust
3	Derek Aspacher	Marclad Foundation
4	Eric Bailey	
5	Joe Bassiani	McChrystal Group

6	Gail Benton-Shoemaker	Corporation for National and Community Service
7	Candice Byrun	Golden Gate National Parks Conservancy (GGNPC)
8	Peter Collier	Presidio Trust
9	Jenna Cooper	Non-Profit Leadership Alliance
10	Maria Cristini	Executive Coach
11	Kari Dorth	Presidio Graduate School
12	Maria Durana	GGNPC
13	Chong Ee	Twillio
14	Annarosa Ferrerini	VRC
15	Catherine Foster	Westley Foundation
16	Christina Garcia	REDF – CSL Panelist
17	Bob Hansen	Fund for People in Parks
18	Jaime Horst	McKesson- CSL Panelist
19	Ely Huerta Ortiz	GGNPC
20	Kathryn Inglin	Presidio Trust
21	Hafsa Khan	San Francisco State University
22	Marilyn King	Beyond Sports
23	Daniel Korenblum	Nanobio.md
24	Gene Kunde	ProInspire
25	Michael Marston	
26	Sandi Marston	
27	Betsy Merzenich	Hellman
28	Jenny McIlvaine	Presidio Trust
29	Randy McNamara	
30	Suzy McNamara	
31	Amy Meyer	People for a GGNRA
32	Desmond Murray	GGNPC
33	Dana Polk	Presidio Trust
34	Laura Sauer	GGNPC
35	Maya Smith	Born This Way Foundation
36	Paul Valva	VRC
37	Mary Vargas	
38	Juan Vera	Centro Legal De la Raza
39	Anne Wilson	United Way
40	Bijan Yaminafshar	San Francisco State University
41	Sharon Zimmern	

Attachment – Panel Bios

CROSS SECTOR LEADERSHIP FELLOWS PANEL



LENNY MENDONCA – MODERATOR

[PRESIDIO INSTITUTE SENIOR FELLOW](#)

Lenny Mendonca is a former director (senior partner) in the Washington D.C. and San Francisco offices of McKinsey & Company, a global management consulting firm. Lenny is the Chairman Emeritus of the Bay Area Council and the Economic Institute of the Bay Area, and was vice-chair of the Stanford Graduate School of Business Advisory Council. He serves on the boards of The New America Foundation, The Committee for Economic Development, Common Cause, the Bay Area Science and Innovation Consortium, and The California Business for Educational Excellence Foundation. He is Chairman of Children Now, and he is co-Chairman of California Forward. He is a member of the

Council on Foreign Relations and founder and chairman of Fuse Corps. He is also a member of the Board of Trustees for Junior Statesmen of America.

Lenny received his MBA and certificate in public management from the Stanford Graduate School of Business. He holds an AB, magna cum laude, in economics from Harvard College. Lenny lives on the Half Moon Bay coast, south of San Francisco, with his wife and two daughters, where he is the founder and owner of the Half Moon Bay Brewing Company.



KEITH BERGTHOLD – 2014 COHORT

[EXECUTIVE DIRECTOR FRESNO METRO MINISTRY/RCI](#)

Keith Bergthold is the Executive Director at Fresno Metro Ministry. Prior to moving into that role, Keith spent seven years as the City of Fresno's Assistant Director of Planning, leading the team developing the Fresno General Plan Update. Concurrent with his City and Metro employment, Keith serves as the volunteer CEO of the Relational Culture Institute (RCI), a San Joaquin Valley nonprofit involved in its 11th year of a workforce development partnership with the Fresno, Madera, Tulare, Kings Central Labor Council, and affordable housing and rural economic development. RCI has also engaged in

congregation-based community organizing with PICO and helped launch Faith in Community, a network of congregations advocating for justice and equity in Fresno County.

Fresno Metro Ministry is a 43 year old nonprofit agency dedicated to achieving health people and healthy places, and is focusing its current energy and resources on community building, leadership development, advocacy, and networking to foster effective cross-sector leadership for healthy neighborhoods and vibrant local economies across the San Joaquin Valley. Keith has completed graduate course studies in Urban and Regional Planning and holds a Master's Degree in Organizational Behavior.



CHRISTINA GARCIA -2015 COHORT

MANAGING DIRECTOR OF STRATEGIC ADVANCEMENT & PUBLIC AFFAIRS REDF

As Managing Director of the Strategic Advancement & Public Affairs team, Christina Garcia leads strategy and integration of REDF's development, communications, policy, and evaluation initiatives. A key member of the Executive Team, Christina leads REDF's annual planning efforts and helps guide the overall direction for organizational strategy. In developing the necessary infrastructure to support the growth of her teams, Christina connects people, resources, and social enterprise knowledge to strengthen both REDF and the field. Driven by her passion for social justice, equity, and multicultural models of community development, Christina has dedicated her career to providing the critical resources that create opportunities for people who don't have them.

In addition to eight years working in the permanent supportive housing industry, Christina worked in San Francisco local government, focusing on community-based economic development and workforce opportunities for low-income and at-risk individuals, families, and entrepreneurs.



JAMIE HORST- 2015 COHORT

DIRECTOR OF COMMUNITY ENGAGEMENT MCKESSON CORPORATION

As Director of Community Engagement and Corporate Citizenship at McKesson Corporation, a healthcare company based in San Francisco, Jamie is responsible for leading the company's employee community engagement programs, including oversight of Regional Volunteer and Environmental Councils, technology to support the McKesson Volunteer Grants and Matching Gifts portal, and the production of the company's annual GRI G4 corporate social responsibility report. Previously, Jamie was Senior Director of Employee Engagement at Visa Inc., where she was responsible for 47% growth in volunteer participation and the formation of financial literacy training programs around the world. In addition, Jamie led internal communications for financial inclusion, philanthropy, engagement and diversity and inclusion. While serving as Director of Community Engagement with Alcoa Foundation in New York, Jamie worked across sectors to build meaningful programs, deepen partnerships and improve communities in 24 countries where Alcoa operated. In her prior ten years with Alcoa Inc., Jamie held roles of increasing responsibility in finance, strategy and supply chain operations.

Jamie holds an MBA from the University of British Columbia and a BS in Business Administration from Duquesne University, where she majored in finance and information technology