

**Presidio Institute Advisory Council
August 18, 2014 San Francisco, CA
Meeting Notes**

The Fort Scott Council chartered under the Federal Advisory Committee Act (FACA), was renewed for an additional two years under the name, Presidio Institute Advisory Council (Council). The Council held a meeting on August 18, 2014 in San Francisco, CA at the Presidio Institute (PI) in Building 1202 at the Presidio.

Review Document

1. The Presidio Institute – Identity and Brand Attributes (August 18, 2014 version)

Opening of the Meeting

- Toby Rosenblatt, Chair of the Council opened the meeting
- Aimee Vincent, Designated Federal Official called the roll of Council members

Welcome

- Craig Middleton, Presidio Trust Executive Director – We are very pleased to report that the Cross Sector Leaders Fellowship Pilot has been very well received by both the participants and the learning hosts. The success of the first two phases of the program is a vote of confidence for next iteration in 2015. Thank you all for your input and support that has gotten us to this point.
- David Smith, Presidio Institute Managing Director – Today we will be working on messaging and communications. Thank you Gloria, John, Lester, Seth for your help in beginning to develop the new messaging platform. We will be led today by Bonfire Communications as they walk us through a slide deck aimed at getting Council members input.
 - We were looking for language grand enough to meet our ambitions, tight enough to be clear and applicable now, and accessible enough to be widely understandable.
 - Brief review of the Presidio Trust’s overall strategic plan for the next 15 years
 - Why: Purpose
 - What: Serve people, steward place
 - How: Community programs, wellness, recreation and hospitality, and stewardship of environmental and historic resources

Bonfire Communications

Presidio Institute needs a clear story that bridges long-term aspiration with near-term focus and articulates a compelling case for investment. If clearly defines and carefully activated this narrative can spark new levels of awareness, trust and participation. To do this, the Presidio Institute needs to define the space it occupies in the market, while finding a simple and human expression of its purpose. This document articulates ingredients for a story that will drive the organizational and behavioral changes needed to unlock the full potential of the marketplace.

(The Presidio Institute – Identity and Brand Attributes - August 18, 2014 version)

Council Member Comments

- Challenges
 - Complexity is a condition that makes it important to do the work, rather than something that impedes us.
 - “Lack of trust” sounds like people are not trustworthy. Better framing would be a lack of confidence that the current systems can get the job done.
 - This underlines the need to better equip people to overcome paralysis.
 - There is a need to build trust as well. Some doubt whether for-profits can be in it for the public good versus being in it for the money.
 - Yes, and on page 7, let’s remove the phrase, ‘can we make more money?’
- Meeting the Challenges
 - There is a major opportunity for connectivity here. Are my peers here? Who else can I meet outside of my usual sphere? How can we work better together?
 - The Presidio has a unique opportunity to leverage one of the only organizations who has increased public trust in recent years, the military. Connect the history with the present.
 - What: Social impact/solving problems, How: Service-oriented leadership/across sectors.
 - Promoting service brings people together to work in certain ways.
- Brand Attributes
 - We started with the concept of ‘service’, cross-sector came in later. We are not at odds in our hearts but the messaging is confusing.
 - The ‘bridge’ feels like we are trying to do too much in one place. What are we saying with bridge? Are we bridging place or as a way of connecting people?
 - Service as it is described here sounds self-serving, needs to be more outward looking.
 - We should not be working to mainstream Cross Sector Leadership as a phrase.
 - Cross Sector Leadership does have a lot of power; but we need to describe what we are actually doing.
 - Getting people together from public, private, non-profit, faith-based, etc. is an approach that is *not* that common. It is a special thing that we are doing.
 - We need to touch on inclusiveness, not just by sector but by class, culture, etc.
- Purpose Statement
 - Purpose here is defined as what we want to do, I prefer the purpose to address what we want to accomplish. Impact should be included in the purpose to show that we are accomplishing something.
 - Helping people drive toward social change/have an impact/transform communities – these are purposeful statements. What do we want to accomplish?
 - The words ‘leader’ and ‘purpose’ are so overused they have lost meaning; we need fresh language that differentiates us.
 - ‘Bold impact’ gives the sense of breakthroughs.
 - Is ‘leader’ too exclusive?
 - Is it about leaders, or about leadership?
 - Groups like AmeriCorps/Vista members will come together and they are at all different levels, and they are creating deep change in communities.
 - The purpose is the solving of social problems – there will be many means. Let’s not get overly precise. We don’t want elitism. We want to emphasize inclusion.
 - Moving to the verb, let’s make sure we’re ‘elevating’ leaders or impact.
 - This should be aspirational.
 - Be on a journey- we are looking not at an end, but toward continual improvement.

- We are talking about leaders working toward the common good.
- How about, “elevating changemakers across sectors” / something more action oriented – ‘lead with purpose’ fell flat.
- The vision is of a collaboration lab or action tank. We are bringing people together here and infusing something catalytic – a cultivation shop for high grade leaders.
- How do people feel about the history of the Presidio? It’s honest but can be alienating.
- We need to integrate the fact that this was a training ground for soldiers / a sacrificial sort of leader. It is hallowed ground where sacrifice to the country is profound and now it is a training ground again.
- BBQ Test - Reactions
 - Is it about ‘getting’ people to work together? Or that there are skills and assets they need to do that better?
 - It is too negative and sounds like we invented cross sector leadership, which is false – much more positive to say that something promising is happening in America that we want to nurture.
 - We should use Presidio Trust as a model but don’t brag about financial self-sufficiency; not relevant and sounds negative that some things require taxpayer support.
 - What does cross sector really mean? Drawing on the skills and assets of all sectors; fluency and empathy across sectors.
 - The word service needs to be included; people don’t know what cross sector means.
 - Cross sector feels sterile.

Toby Rosenblatt, Council Chair - Presidio Institute staff will work together with Bonfire to incorporate the feedback in to the messaging strategy. Next we will have program updates from the Presidio Institute staff.

Program Updates

- AmeriCorps Event - 9/12/14
 - Presidio Institute serving as host sponsor of the AmeriCorps 20th Anniversary event.
 - This is a test case of the Presidio Institute working across sectors with a state entity on a large scale special event. There are opportunities to capture lessons for future events.
 - Presidio Institute will be providing some of the training.
 - Funding \$50k from state funds, \$50k from feds, and some sponsors, plus in-kind contributions (Event is estimated at over \$325k in value)
 - Event components: VIP breakfast with recognition of 20 ‘service trailblazers’ and Governor’s awards for volunteerism and CSR; swearing in ceremony for at least 1300 on main parade ground; buses to 4 different service projects.
 - Presidio Institute will be hosting a Bay Area Executive convening during the event.
- CSL Fellows
 - SF Experience – 3 days of learning here at the Presidio, 2 days of site visits with Gap, Year Up, City of SF, Omidyar, Singularity, Google; worked with Interaction Institute for Social Change, FSG, and Smallify.
 - DC Experience – convened at the White House, McKinsey, and the Office of Personnel Management. Fellows had the opportunity to deepen their connections and work on their skills individually and in groups.
 - NY Experience – Scheduled for October 2014 with NewsCorp, City of NY, etc.
 - Reviews from the fellows have been extremely positive.
 - The program is getting high level attention. The White House was very engaged.
 - We are getting inquiries about the next round of the Fellowship. We are expecting to launch the next call for applications in the fall.

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
Seth Barad	Present
AnnMaura Connolly	Present - Remote from Washington D.C.
Stephanie DiMarco	Absent
Ernestine Fu	Absent
John Gomperts	Present - Remote from Washington D.C.
Kenneth Harbaugh	Present
Sandra H. Hernández M.D.	Phoned-In
Tracy Hoover	Present
Gloria Johnson-Cusack	Present - Remote from Washington D.C.
Wendy Spencer	Present - Remote from Washington D.C.
Lester Strong	Present - Remote from Washington D.C.

Presidio Trust Staff	
Craig Middleton, Executive Director	Present
David Smith	Present
Sarah Locher	Present
Robert Menezes	Present
Kaira Esgate	Present
Aimee Vincent	Present
Christen Brunner	Present

Members of the Public	Comment
No members of the public attended.	

BONFIRE

The Presidio Institute Identity and Brand Attributes

August 18, 2014

Round Three

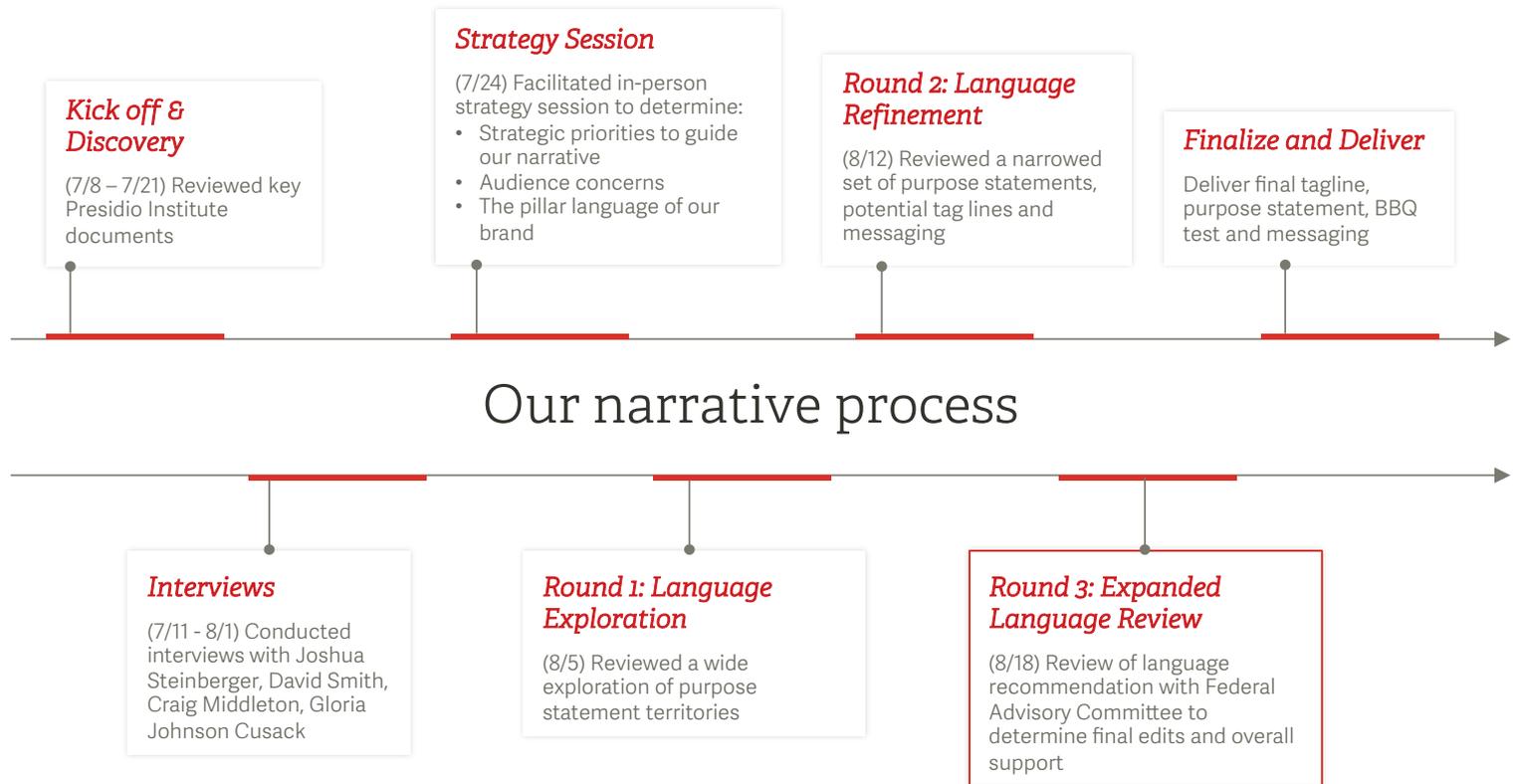
Presidio Institute needs a clear story that bridges long-term aspiration with near-term focus and articulates a compelling case for investment.

If clearly defined and carefully activated, this narrative can spark new levels of awareness, trust and participation.

To do this, Presidio Institute needs to define the space it occupies within the market, while finding a simple and human expression of its purpose.

This document articulates ingredients for a story that will drive the organizational and behavioral changes needed to unlock its full potential in the marketplace.

BONFIRE



BONFIRE

During the strategy session, we heard that the Presidio Institute faces challenges of an environment mired with skepticism and complexity.

Lack of trust

in public institutions

Complexity

of issues and difficulty of system change

Inadequate funding

for social problem solving

BONFIRE

We also heard that you have the right foundation in place to meet these challenges.

Strong partnerships

with companies, non-profits and the public sector

Clear focus

on problem solving

Iconic location

to attract participants and provide inspiration

Our narrative should help us achieve key business objectives.

Success
measures:

one

Drive participation in events and programs

two

Increase understanding of the rationale for cross-sector leadership

three

Increase Presidio Institute's ability to self-fund and attract investors

four

Our expertise is widely sought

And it must resonate with our audiences to address their most pressing concerns.

<i>Payers</i>	<i>Recognition</i>	<ul style="list-style-type: none">• How will I be acknowledged?• Does this strengthen my brand?• Can I trust that this is sustainable and will support my goals?
<i>Participants</i>	<i>Value</i>	<ul style="list-style-type: none">• Is this the best option and is it worth my time?• How will this advance my career?• How do I find the time?
<i>Social Impact Leaders</i>	<i>Trust</i>	<ul style="list-style-type: none">• Do we know it will work?• Is it consistent with my worldview?• Are they sincere and will their work have a positive impact?
<i>Presidio Board & Leadership</i>	<i>Risk & Sustainability</i>	<ul style="list-style-type: none">• Is this a priority and how does it fit with our brand and vision?• Can we authentically deliver on the promise?• Who is funding it and can we make more money other ways?• Why do we need to do this at Fort Scott?

Language for review



Round Three – Refined Language for Expanded Review

We are developing language that fits together to tell a cohesive story.

<i>Brand Attributes</i>	<i>Purpose Statement</i>	<i>Messaging</i>	<i>BBQ Test</i>
Attributes that define who we are and the experience we promise our stakeholders.	The most succinct articulation of what we aspire to do.	The starting place for writing copy and other communications.	A clear, memorable and easily sharable description of our organization.
<i>Potential uses:</i> <ul style="list-style-type: none">• Filter for decision-making• Set tone (may not appear in copy)• Inspire design• Woven into messaging and copy as appropriate	<i>Potential uses:</i> <ul style="list-style-type: none">• Mentioned on the website• Included in marketing materials• Used in proposals and pitches• Rally cry for employees	<i>Potential uses:</i> <ul style="list-style-type: none">• Incorporated into marketing and internal copy, as appropriate	<i>Potential uses:</i> <ul style="list-style-type: none">• Given to employees to use as a guide for conversation• Incorporated in speeches and talking points

BONFIRE

Our brand attributes define the experience we promise our stakeholders and serve as our highest-level decision-making filter.

Brand Attributes

Purpose Statements

Messaging

BBQ Test

Service

The drive to serve others is our legacy, our soul and our priority.

Bridge

We forge powerful connections between people, place and possibility.

Courage

We prize brave action and bold impact.

Changemaker

We give leaders the tools and confidence to transform their communities.

Experiential

We create inspiring and immersive experiences.

A purpose statement should be the ultimate distillation of our story.

It should:

- Be personally inspiring
- Help you decide what to pursue
- Define a long-term ambition
- Be authentic and greeted with enthusiasm by employees and partners

BONFIRE

Brand Attributes

Purpose Statements

Messaging

BBQ Test

Potential Tagline

Lead with Purpose

Purpose Statement

We forge powerful connections between
people, place and possibility.

Our messages should outline the key information and actions we want audiences to take.

It should:

- Provide a clear call to action
- Balance inspiration and information
- Provide a starting place for promotional copy

High-level Messaging

People

We are building a movement that aligns leaders in service of a common purpose.

In order to find bold solutions to the challenges facing our communities, we need to align leaders by putting purpose at the center.

The Presidio Institute offers leadership development programs that equip and connect champions for change.

This is the future of leadership.

Place

Our goal is for our iconic Presidio location to be synonymous with inspiration and impact.

Building on the legacy of service at the Presidio, we're making our Fort Scott campus a hub for social change.

We're piloting programs that equip leaders with the skillset, mindset and network to reverberate purposeful impact in their communities.

Possibility

Working together better, we can amplify the possibility of progress.

Let's reimagine what seems possible. Let's readdress the challenges that seemed too big, too complex to tackle.

By working with leaders across sectors, possibility is vast and change is attainable.

This requires you, as a leader, to join us in building momentum for bold, connected leadership centered on purpose.

Invest in possibility.

- Brand Attributes
- Purpose Statements
- Messaging
- BBQ Test

A BBQ test should be easy for anyone to understand.

It should:

- Be conversational and human
- Avoid marketing-speak or jargon
- Articulate in plain language what we do and the value we deliver
- Be easy to remember and share

BBQ Test

We started the Presidio Institute because we saw perpetual political gridlock and the general sense that society's problems are too big and too complex for individuals or even organizations to make any real impact. We knew there had to be a new approach and a new way to spark change.

And we think this new approach is about getting people to work together across sectors - from private, public and non-profit – with a common goal or purpose.

The Presidio Trust is a great model for this approach. It was charged with saving the Presidio and preserving it as a public place. When it began in 1996, the Presidio was the most expensive public park to maintain but through innovative strategies and partnerships with non-federal organizations, it is now financially self-sufficient and doesn't require any direct taxpayer support.

We think society's challenges – big and small – could benefit from applying the same technique.

The Institute offers leadership programs that connect and equip people to have a greater impact by focusing on a common challenge. We are piloting programs which include a Cross-Sector Leadership Fellows program as well as shorter leadership experiences for teams and groups.

Our programs and events are based on our Fort Scott campus at the base of the Golden Gate Bridge. In the future, we also hope to create a space in which other mission-aligned companies or organizations convene to find practical answers to real-world problems.

We are taking a bold step to redefine connected and purposeful leadership.

Presidio Institute Story

Our aspiration

Lead with Purpose

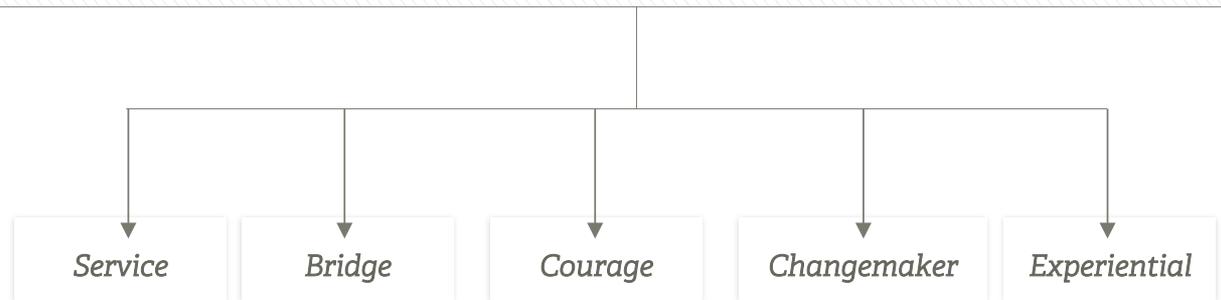
We forge powerful connections between people, place and possibility.

Our story

We are building a movement that aligns leaders in service of a common purpose.

Our goal is for our iconic Presidio location to be synonymous with inspiration and impact.

Working together better, we can amplify the possibility of progress.



Who we are

Appendix

||||| Audience-Specific Messages

Audience Messaging

People

Brand Attributes

Purpose Statements

Messaging

BBQ Test

We are building a movement that aligns leaders in service of a common purpose.

In order to find bold solutions to the challenges facing our communities, we need to align leaders by putting purpose at the center.

The Presidio Institute offers leadership development programs that equip and connect champions for change.

This is the future of leadership.

Payers:

We believe we need a new approach to social change - a new way of thinking about solutions to challenges facing our communities. Presidio Institute brings together great minds with powerful aspiration to take the lead in this change.

Participants:

We can help equip you with the network, skillset and mindset to lead change that matters in your communities.

Social Impact Leaders:

We are taking bold steps to change the nature of purposeful leadership. We want to help connect leaders like you with others who can further your cause and help you drive real change in your communities.

Audience Messaging

Place

Brand Attributes

Purpose Statements

Messaging

BBQ Test

Our goal is for our iconic Presidio location to be synonymous with inspiration and impact.

Building on the legacy of service at the Presidio, we're making our Fort Scott campus a hub for social change.

We're piloting programs that equip leaders with the skillset, mindset and network to reverberate purposeful impact in their communities.

Payers:

We want to make Fort Scott at the Presidio the place where leaders from across the globe want to come to renew their commitment to change and recharge their ambition.

Participants:

Come experience our beautiful Fort Scott campus in the Presidio. We are creating immersive experiences intended to help you connect with your purpose and find inspiration for the future.

Social Impact Leaders:

Our campus provides the space for big thinking and bold problem solving. We're creating experiences that can help you reconnect and recharge your purpose while expanding a network of changemakers in one of the most beautiful locations in the Bay Area.

Audience Messaging

Possibility

Brand Attributes

Purpose Statements

Messaging

BBQ Test

Working together
better, we can
amplify the
possibility of
progress.

Let's reimagine what seems possible. Let's readdress the challenges that seemed too big, too complex to tackle.

By working with leaders across sectors, possibility is vast and change is attainable.

This requires you, as a leader or a partner to join us in starting a movement for bold, connected leadership centered on purpose.

Invest in possibility with us.

Payers:

Any new movement requires aspiration – believing we can do even more if we take the right steps now. We ask you to join this movement. We want your support to build new programs and new opportunities to empower purposeful leadership.

Participants:

Lead with purpose. Join our programs to be a part of the future of leadership – finding meaningful connections to expand the meaning of possible.

Social Impact Leaders:

We want to help you make even more progress by connecting you with the tools and network you need.

