



# Presidio Institute

FINAL REPORT | NOVEMBER 2017

# EXECUTIVE SUMMARY

The Presidio Institute was established in 2013 as an initiative of the Presidio Trust, an innovative federal agency that transformed the Presidio of San Francisco from a military post to a national park site through cross sector collaboration. Through the Presidio Institute, businesses, nonprofits, government agencies, foundations, and academic institutions invested in their problem solvers and gained a new lens on leadership.

The Presidio Institute's unique training methodology reinvigorated organizations' leadership culture by inspiring a collaborative mindset, imparting new skills, and bridging divides through collaboration across sectors. During its four years, the Presidio Institute convened more than 3,000 leaders and trained 1,600 problem solvers in person and online through its Presidio Institute Fellows, Cross Sector Leadership Boot Camp, and online LEADEROSITY programs.

The Presidio Institute's work concluded at the end of 2017. This Final Report highlights the institute's impact in furthering cross sector leadership and identifies ways that others can continue catalyzing this movement across the nation. The report delves into the Presidio Institute's programs, its community, and the team that helped launch and grow this initiative. It also covers plans for two of the Presidio Institute's compelling initiatives to continue with new sponsors as a means to continue momentum and spark the movement around cross sector leadership.

This report was developed by 2017 interns Emily Luy Tan, Dina Saba, and Alexandria Sisk through interviews with the following Presidio Institute staff, faculty, advisors, program participants, and supporters: Karen Baker, Cassandra Benjamin, Michael Boland, Sarah Carpenter, Quinn Ciesielski, Amy Cohen, Danya Del Val, Imee DuBose, Elizabeth Freer, Jack Fryer, Alison Gold, Robert Gordon IV, Robert Gordon III, Seth Hufford, Kathia Laszlo, Alyssa Martina, Miles McCluskey, Bob Menezes, Craig Middleton, Drew Remiker, Anna Sanders, Alicia Santamaria, David B. Smith, Lisa Spinali, Lester Strong, David Styers, Matthew Thomas, and Aimee Vincent. A complete list of Presidio Institute partners and their designations is in the Appendices.

# HISTORY

## “POST TO PARK” TRANSFORMATION AND PRESIDIO TRUST FORMATION

Established by Spain in 1776, the Presidio was the oldest continuously operating military post in the nation and served as a United States Army post from 1846 to 1994.

Long the Army’s premier west coast installation, the Presidio’s strategic significance began to decline in the late 20th century. In 1972, legislation creating the Golden Gate National Recreation Area in Northern California indicated that the Presidio would join that park should the Army choose to depart the post. In 1989, as the Cold War drew to an end, the Base Realignment and Closure Commission (BRAC) deemed the Presidio to be excess to the military’s needs. The US Army left in 1994 and, as anticipated, the Presidio was turned over to the National Park Service.

The costs and management challenges of converting a military post to public use were significant. In 1996 Congress, in a demonstration of innovative thinking and bipartisan collaboration, created the Presidio Trust and transferred jurisdiction of 80 percent of the Presidio to this new federal agency. The National Park Service, the Trust’s valued partner, manages the 300 coastal acres.

The Trust was given a mandate to preserve the areas of the Presidio under its jurisdiction and attract non-federal resources to ensure that it would ultimately be sustained without direct annual taxpayer support. If the Trust failed to achieve this mandate, the law directed that the Presidio would be sold as excess federal property.

In 2013, the Presidio Trust reached a crucial milestone by becoming financially self-sufficient. The Presidio Trust, considered in 1996 to be an experiment in the stewardship of a treasured American place, is today viewed as an innovation that works.

The areas overseen by the Presidio Trust include expansive open spaces and spectacular views, a 300-acre historic forest, and rare and endangered plants and wildlife. The park comprises nearly six million square feet of buildings, including 469 structures that contribute to the Presidio’s status as a National Historic Landmark District. The Presidio is home to 200 organizations and 3,000 residents, and it welcomes millions of visitors each year.

## THE ROOTS OF SERVICE IN THE PRESIDIO

The Presidio has a history of providing a space for the curation, development, and advancement of service.

In 1995, the Corporation for National and Community Service (CNCS) was one of the first tenants of the Presidio. When AmeriCorps was created in 1994, the Corporation for National and Community Service supported the development of a National Service Leadership Institute (NSLI) at the Presidio to prepare AmeriCorps and other national service programs. The mission of the [National Service Leadership] Institute, also called the Presidio Leadership Center, was to “equip and support leaders of community service organizations, state commissions, and the CNCS staff with the leadership skills and service strategies to achieve the Corporation’s mission . . .

of engaging Americans of all ages and backgrounds in community-based service.” The [National Service Leadership] Institute incorporated three core components: a feedback tool to help participants understand their strengths and weaknesses as a leader; training in Facilitative Leadership, a trademarked program created by the Interaction Institute; and follow up coaching for the trainee after completing the five day training.<sup>1</sup>

In 1997, the Corporation for National and Community Service moved the NSLI from the Presidio, and in 2004, the program was discontinued due to a reallocation of federal funds. As a testament to its value, however, staff at the CNCS noted that they received calls every week about bringing back the NSLI.

## A NATIONAL “CALL TO SERVICE”

Although the NSLI closed its doors in 2004, the desire for a “home and headquarters for civilian service” still continued. The Obama administration emphasized the importance of the service movement, formally issuing a “Call to Service” in 2009:

All that’s required on your part is a willingness to make a difference. That is, after all, the beauty of service. Anyone can do it . . . We need your service, right now, at this moment in history. I’m not going to tell you what your role should be; that’s for you to discover. But I’m asking you to stand up and play your part. I’m asking you to help change history’s course. Put your shoulder up against the wheel. And if you do, I promise you – your life will be richer, our country will be stronger, and someday, years from now, you may remember it as the moment when your own story and the American story converged, when they came together, and we met the challenges of our new century.

This yearning to rekindle the notion of service fueled the passage of the landmark Edward M. Kennedy Serve America Act in 2009, which increased the size of AmeriCorps exponentially. It seemed imperative to those in the public sector that a strong service sector be developed in order to efficiently mobilize talent and resources across the country.

A series of examinations and significant research backed this call to service, including:

1. Bridgespan’s Nonprofit Leadership Deficit article, which predicted that the nonprofit sector would need to recruit 640,000 new senior managers between 2007 and 2016.
2. CompassPoint’s surveys on nonprofit management burnout, starting with 1999’s well-known “Leadership Lost” survey which reported that most nonprofit executive directors were first-timers who would not take a nonprofit executive director job again (only 20% would in “Leadership Lost,” 50% would in 2001’s survey “Daring to Lead”).

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1 Shirley Sagawa and Deb Jospin, *Sagawa-Jospin Fort Scott Report*, 2009.

## COLLABORATION ACROSS SECTORS AND ACROSS THE COUNTRY

With this need for service in mind, conversations around how best to address society's increasingly complicated issues sprung up across the nation:

*The solutions we bring to bear on the challenges before us can no longer be confined to sector–government, philanthropic, and private sectors—or to geographic boundaries. Government can't solve all of our problems, nor should it. But that way of thinking requires a new strategy for civic engagement, both at home and abroad. If we're going to find widely shared economic security and well-being for all Americans, we are required to see this as a moment of opportunity and commit ourselves to building the country and the society that we want.*

- 2011 Eli Segal lecture on citizenship at Brandeis University

*We believe that solutions to some of our greatest challenges exist in communities across the country and the world. We also believe that given the nature of these problems, government cannot solve all of them. Government can get the policies right, but it requires an "all hands on the deck" mentality if we want to make a quantum leap in solving some of our toughest challenges. And this requires collaboration between government, nonprofits, citizens, and corporations/businesses.*

- Sonal Shah, Georgetown University

This idea of engaging and collaborating across the government, private, and nonprofit sectors in order to create solutions was not new. Institutions have tried different approaches to partnering with each other for decades – including public-private partnerships, collaborative governance, and collective impact. In 2011, Dominic Barton, McKinsey & Company's global leader, wrote in the Harvard Business Review that "leaders must be nimble 'tri-sector athletes' . . . able to engage and collaborate across the private, public, and social sectors." This was one of the first times that the term "tri-sector athlete" was used, and it inspired Matthew Thomas and Nick Lovegrove to conduct research within McKinsey & Company to identify the character and capacity traits of such cross sector leaders. After interviewing 120 cross sector leaders across multiple countries, Thomas and Lovegrove published their findings in an article entitled "Triple Strength Leadership" in the 2013 Harvard Business Review.

In parallel, a team of White House and U.S. Government officials committed to launch a more "sector-balanced leadership development program that would be valuable for high potential leaders across the business, government, and nonprofit sectors." This team was led by:

- Jonathan Greenblatt (Director of the White House Office of Social Innovation and Civic Participation),
- Jonathan McBride (Director of the White House Office of Presidential Personnel), and
- Matthew Collier (Senior Advisor to the Director, U.S. Office of Personnel Management)

After observing both the lack of preparedness and apparent need for cross-sector leaders, the White House team, in partnership with IDEO, Luma Institute, and McKinsey & Company, hosted a series of convenings with about 65 practitioners and thought leaders across sectors. While the idea of cross-sector collaboration was not new, no one had ever brought these cross-sector leaders together. These convenings did exactly that: create a community for cross-sector leaders in America and propose new and innovative ways to cultivate Cross Sector Leadership more explicitly and effectively. Thomas and Lovegrove shared their findings on tri-sector leaders with the White House team and others, ultimately partnering to facilitate a White House convening in 2012.

In March of 2013, the White House held the first Forum on Cross Sector Leadership. Presidio Trust leaders were present at this convening, and saw a strong alignment between their vision and this nascent Cross Sector Leadership movement.

## THE PRESIDIO AND CROSS SECTOR LEADERSHIP

Concurrently with these national conversations, in 2010 the Presidio Trust returned to the notion of service at the Presidio and what it could look like.

The Presidio's Fort Winfield Scott was commissioned in 1912 as a "fort within the fort" to serve as a preeminent training facility for the Coastal Artillery division. With a history of service, Fort Scott was a prized site within the park: its 11 historic Mission Revival-style buildings arranged in a crescent overlooking the Golden Gate Bridge and the Pacific Ocean had long been imagined as a campus of national significance and enduring public purpose. After many land use and mission-oriented studies, the idea of creating a National Center for Service and Innovative Leadership (NCSIL) at Fort Scott emerged in the midst of the nationwide conversation around national service.

To many, Fort Scott seemed like the perfect location for the new home for a center focused on service. Nestled within the natural beauty of the Presidio, yet minutes away from urban San Francisco, it could provide refuge and a wealth of opportunities for service-related training and learning.

A Federal Advisory Council was established in late 2012 to assist the Presidio Trust in repurposing the iconic Fort Scott campus as a place that built upon the Presidio's 200-year legacy of service. Specifically, the Council was to provide advice on the development of the NCSIL as a place focused on service and leadership development. Joshua Steinberger led development of the Fort Scott project, with support from Sarah Locher, until NCSIL was ready for its first director.

*We wanted to explore how the Presidio could be not only the landmark that it is, but also how it could be a container for national service in the United States. It could be a catalyst to make people understand and motivate people to offer service of any kind in their communities. We wanted to normalize the idea of service through this initiative. The Presidio seemed like the perfect place for this to be done.*

- Lester Strong, Member of the Federal Advisory Council

In January 2013, the Presidio Trust launched NCSIL and in September of that year changed its name to the Presidio Institute. Through a co-convened White House Forum on Cross Sector Leadership, the Presidio Institute publicly announced the mission of reimagining Fort Scott, sparking a movement around Cross Sector Leadership, and piloting several programs – the Presidio Institute Fellows, LEADEROSITY, and Reimagining Service.

The Presidio Institute aimed to address the great challenges of our time by inspiring transformative collaboration between innovators in the fields of social entrepreneurship, national service, political engagement, corporate social responsibility, volunteering, philanthropy, and military service, among others. Working with a spectrum of partners, the Presidio Institute’s programs aimed to nurture new generations of cross sector leaders, convene existing leaders to achieve greater impact, conduct research into pioneering new solutions to social challenges, and recognize exemplary service leaders across the country.

From 2013 to 2017, the Presidio Institute convened more than 3,000 leaders, trained 1,600 problem solvers (300 in-person and 1,300 online), and garnered \$2.6M in philanthropic support and \$1.2M in revenue from program fees.

## WHY CROSS SECTOR LEADERSHIP

*With the way that things are set up now, we silo the professional class of many industries. We teach them different languages, a different lexicon, even when they are describing the exact same things. We teach them how to advocate against...or position themselves as adversaries to one another...In some cases we teach the art of negotiation, but rarely is negotiation moved all the way to collaboration.*

- David B. Smith, Managing Director, Presidio Institute

The Presidio Institute was formed because society’s problems have become increasingly complex. No single sector can work alone to tackle modern challenges. The most effective way to solve such problems is through the confluence and engagement of all the major sectors: private, public, and nonprofit. A cross-sector lens allows leadership through:

- influence rather than authority,
- difference and diversity as an asset rather than what divides us, and
- collaborative settings where strength comes from not what can be done on your own but what can be done together.

Initially, Fort Scott was to become a place where service sector leaders, practitioners, and researchers could come together and advance the greater good; to provide space for participants from the nonprofit, corporate, and public sectors to collaborate and, in doing so, inspire new ideas around service.

The history of the Presidio and Fort Scott within it embodied the traditions of service and values of working across sectors. Saving the Presidio by the Presidio Trust becoming financially self-sufficient could not have happened without a deeply collaborative group of leaders from all sectors. These were the ideas that the Presidio Institute set out to advance through innovative programs of leadership development.

# PROGRAMS OVERVIEW

For the Presidio Institute, the growing percentage of workers seeking careers that tangibly improve lives represented opportunity. As “neutral” ground where organizations invested in human capital, the Presidio Institute partnered with individuals and entities alike to train leaders driving change via collaboration. Dedicated to a common ethos of service, the Presidio Institute’s three programs imparted skills to foster relationships between and challenged the boundaries of 1,600 emerging to C-suite leaders. The Presidio Institute Fellows program, Cross Sector Leadership Boot Camps, and LEADEROSITY online courses adapted citizens to succeed in a rapidly changing world.

## PRESIDIO INSTITUTE FELLOWS

The Presidio Institute Fellows program was created for organizations and leaders that wanted to enhance their internal capacity for problem solving, bring a fresh perspective to their leadership approach, and build a network that transcended traditional boundaries. Senior leaders came together to “move the needle” on major challenges by developing their skills and thought leadership around a 21st century approach to collaboration.

For four classes of Fellows, this year-long, multi-city experience brought together a curated cohort of 24 senior executives from business, nonprofit, government, philanthropy, and academia for leadership education to alter their problem-solving mindset.

Fellows came to the program facing a specific real world, cross-sector problem. They then worked with Presidio Institute faculty – and with each other – to apply Cross Sector Leadership methodology to yield breakthrough results. Fellows participated in five-day experiences held in San Francisco; Washington, DC; and New York City. In these distinctive settings, they were trained on Cross Sector Leadership curriculum complemented by onsite engagements with inspirational leaders from diverse organizations. Participants benefited from access to senior level leaders at the White House, Tesla, Blackrock, McKinsey & Co, Google, DC Central Kitchen, the City of Oakland, Facebook, the United Way, New York University, the Case Foundation, and many others.

Capitalizing on time for real relationship-building across multi-day sessions, the program’s intensive approach fostered intimate and meaningful connections between Fellows, who have stayed in touch before, during, and after the experience through the Presidio Institute’s online leadership education platform, LEADEROSITY. Additionally, the focus on building strong cohort connectivity has allowed them to keep collaborating long after the program ended.

Take Kunal Merchant, for example, a 2014 Presidio Institute Fellow: as the Vice President of Strategic Initiatives for the Sacramento Kings NBA basketball team, he had been tasked with developing a portfolio of economic and community benefit programs in tandem with the construction of a new arena for the Kings in the heart of downtown Sacramento. This project required significant cross sector collaboration among the business and government sectors.

Kunal found that successful change initiatives came from “deep and sophisticated” cross sector collaboration—a harmony that often is hard to come by due to the narrow mindset that frequently plagues leaders in any sector. He turned to the Presidio Institute to further understand the cross-sector approach to solving complex problems.

The journey of the cohort throughout the program was structured to reflect the Cross Sector Leadership skills trefoil of Building Teams, Solving Problems, and Achieving Impact, developed by the Presidio Institute through independent research and observation. Fellows had highly variable backgrounds, knowledge bases, training, education, learning styles, life experiences, and cross sector projects. Key elements of the program to help participants learn how to engage in cross sector collaboration productively included:

- strong self-awareness and support in their personal leadership development through a strengths-based approach and individual coaching
- a diversity, equity, and inclusion (DEI) lens to learn to serve all people and to create effective strategies to address problems and produce better results
- exposure to tools they could use in their work through specific content

According to a study done by Elon University<sup>2</sup>, 73% of respondents said that the Fellows experience prompted them to collaborate more. The Presidio Institute not only offered the skills for Fellows to collaborate more effectively in their own communities, but also allowed the space for Fellows to maintain conversation and to forge long-lasting relationships with each other. In fact, approximately 23% of respondents said that as a result of the Fellows experience, they have collaborated with other Fellows beyond the fellowship.

- 2014 Fellow Daniel Homsey, Director of Neighborhood Resilience at City and County of San Francisco, and Team Rubicon collaborated with 2014 Fellow Matt Runyon to secure a grant from the Rockefeller Foundation. They then built their new Empowered Communities Program Toolkit with the support of local veterans.
- 2017 Fellow Gustavo Herrera, Director of Young Invincibles, used the Building Teams model to launch an advisory board initiative.
- 2016 Fellow Ana Montero, CEO of the American Red Cross, New Jersey Region, used her learnings to assist her in her first year tenure in a leadership position. She keeps the Cross Sector Leadership skills at the top of her mind, and continually shares them with her team in order to achieve a collective impact.

*From the perspective of being a [participant] of the program, it is incredible. It's not like any other training that I have had in so far as bringing together a group of individuals from across the country, and from different professional backgrounds. It is a very diverse group of individuals coming together to have a conversation about leadership...They've had cross sector lives. Almost everyone there has worked in more than one sector...what is most beneficial is that people come from so many different professional disciplines. It's very rare that you get the opportunity to interact with people from so many different backgrounds.*

- Michael Boland, 2017 Presidio Institute Fellow and Chief of Park Development and Operations, Presidio Trust

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2      Elon University "Wicked Problem Warriors," 2017

The Presidio Institute Fellows program had many contributors including but not limited to: Jonathan Greenblatt, Jonathan McBride, Matt Collier, Matthew Breitfelder, Rafael Lopez, Sydney Heimbrock, Lenny Mendonca, Lisa Spinali, Matthew Thomas, Jamie Gardner, Paul Thallner, Claudia Sandoval, Alicia Santamaria, and Cassandra Benjamin, and was stewarded with the staff leadership of Sarah Locher, Alison Gold, David Styers, Anna Sanders, and David Smith.

## CROSS SECTOR LEADERSHIP BOOT CAMP

As the middle ground between LEADEROSITY and the Presidio Institute Fellows programs, the Presidio Institute's Cross Sector Leadership Boot Camps targeted mid- to late-career social impact leaders who wanted a short, in-depth training in Cross Sector Leadership. From March 2016 to June 2017, four Boot Camps offered 54 participants the opportunity to develop solutions to a predefined personal or organizational challenge. Curated cohorts engaged in team-based training led by Seth Hufford, Kathia Laszlo, and David Styers on the nine universal skills of Cross Sector Leadership:

- Developing Trust
- Managing Power Dynamics and Conflict
- Fostering an Innovation Culture
- Understanding Impact on People
- Taking a Systems Approach
- Defining Results and Using Data
- Sharing Knowledge and Learning
- Using Leverage Points
- Aligning Motivations and Values

In combination with a Rapid Innovation Lab led by SMALLIFY's founder Dave Viotti, these sessions allowed participants to gain an appreciation for collaboration while developing intimate networks of colleagues. Perhaps the ultimate takeaway from the Boot Camps, these participant networks functioned as applied microcosms of the cross-sector collaboration model. They combined leaders from different locations, industries, and viewpoints to allow for deep discussion and learning:

*Sometimes it can be hard to come work with others from the coasts because I'm from such a different place – others are sometimes dismissive of our work. Here, I was invited in, valued, and found connections to people doing other work in very different environments. Our locations were not a barrier. I know it won't be easy to bring it home and replicate it, but I believe it is possible, and that's incredible.*

- Dayna Del Val, President and CEO of The Arts Partnership in Fargo, ND

The Boot Camps provided participants with not only the skills of Cross Sector Leadership, but also the confidence to deploy them.

## LEADEROSITY

While integral to a transformational experience, the need to come together in person limited the Presidio Institute Fellows and Cross Sector Leadership Boot Camp programs. The Presidio Institute addressed this limitation by using technology to scale its ability to connect people and democratize leadership training, allowing people across the world to connect with and learn from each other.

The concept for an online platform with a curated leadership development curriculum for emerging social-purpose leaders dates back to the White House Forum on Nonprofit Leadership in November 2011. Stakeholders emerged from several years of conversations with a desire to explore online blended-learning that could provide quality leadership development content from existing market leaders at scale and with greater affordability.

*E-learning will play a role in changing the way we transfer and access knowledge in all aspects of life, and, in turn, how we learn and continuously adapt how we learn. It is through this lens that a vivid picture emerges of the potential impact E-learning could have on how individuals, organizations, and networks operate and interact— individual-to-individual, individual and organization, and organization-to-organization.*

- Morino Institute

With this idea of LEADEROSITY, the Presidio Institute's online leadership development program was born. Officially established in 2015 with the support from American Express, the Kresge Foundation, and the Annie E. Casey Foundation, LEADEROSITY was to “democratize and scale Cross Sector Leadership training” by developing and running online courses that challenged participants to be more adaptable and collaborative changemakers. To create the program's initial content, the Presidio Institute partnered with NovoEd—an online learning management system provider that focuses on social, collaboration, and mobile capabilities—to deliver an engaging learning experience. Together, they were able to translate the already-established in-person curriculum of the Presidio Institute to an online space. Stemming from the Presidio Institute Fellows program pedagogy and the Cross Sector Leadership Skills, LEADEROSITY's curriculum focused on three courses: Building Teams, Solving Problems, and Achieving Impact. Presidio Institute Faculty members Alison Gold, Renee Baiorunos, Seth Hufford, Kathia Laszlo, Matthew Thomas, and Jewlya Lynn contributed to the online content.

*It's hard to get up to San Francisco to actually take the other courses, so I really appreciated it being offered online. I also actually keep in touch with the people I was put in a group with ... so I was certainly able to network.*

- Imee Dubose, LEADEROSITY alumna

The Presidio Institute partnered with the Nonprofit Leadership Alliance (NLA) in 2015. Through this partnership, NLA sought to provide its Certified Nonprofit Professional (CNP) credential to a larger audience. In 2015, LEADEROSITY prototyped the online Cross Sector Leadership training by beta testing the first courses with about 500 participants. In 2016, NLA launched eight courses that collectively made up the online CNP through a beta test of nearly 100 participants. In early 2017, Berlin-based LEAD Academy joined on to the content development team as well.

Since 2015, LEADEROSITY grew to include original video production, curated readings, and individual and group-based assignments as part of its content. In total, 12 LEADEROSITY courses were added to original content from the Presidio Institute, the National Leadership Alliance, and LEAD Academy. With the online platform, Cross Sector Leadership training became increasingly accessible anywhere in the world, an organic connector for networks at a fraction of the cost of in-person leadership development programs.

LEADEROSITY has many contributors including but not limited to: Richard Brown, Rafael Lopez, Ashley Stewart, Caroline Altman Smith, Aaron Hurst, Joel Bashevkin, and was stewarded primarily with the staff leadership of Robert Gordon IV with early support from Sarah Locher.

## EVENTS AND CONVENING

In addition to regular leadership education programs, the Presidio Institute applied its methodology by collaborating with nonprofits, government, academia, business, and philanthropy to convene special events. Highlights include:

- RiseLocal, in collaboration with New America CA and headlined by New America President and CEO Anne Marie Slaughter and Mayors Libby Schaaf (Oakland), Sam Liccardo (San Jose), and Michael Tubbs (Stockton) in May 2017
- Speaker Series with NAACP President Cornell Brooks at NYU, in collaboration with the NYU Steinhardt School of Culture, Education, and Human Development in October 2016
- Forum on The Super Bowl 50 Fund, headlined by CEO and Founder of Tipping Point Community Daniel Lurie in April 2016
- Growing the Impact Economy, in collaboration with The White House, the Stanford Center on Philanthropy and Civil Society, the Federal Reserve Bank of San Francisco, Fourth Sector Networks, University of California Berkeley Haas School of Business, the California Economic Summit, California Forward, and Ashoka, and headlined by Kim Meredith, Executive Director, Stanford Center on Philanthropy and Civil Society, Laura D'Andrea Tyson, UC Berkeley Haas School of Business, Gary Glickman, Managing Director, Pay for Success Initiatives, Accenture, Paula Goldman, Senior Director, Global Lead for Impact Investing, Omidyar Network, Kish Rajan, President, Southern California Leadership Council; former Director, California Governor's Office of Business and Economic Development, Mayor Ashley Swearengin (Fresno), and Rob Evans, Managing Partner, Imaginal Labs in June 2015
- The AmeriCorps 20th Anniversary, in collaboration with California Volunteers and headlined by California Governor Jerry Brown and California Volunteers CSO Karen Baker in September 2014
- The Civic Innovation Summit, in collaboration with FUSE Corps and headlined by San Francisco Mayor Ed Lee and UC President Janet Napolitano in March 2014
- The White House Summit and Forum on Cross Sector Leadership, in collaboration with The White House and headlined by California Lieutenant Governor Gavin Newsom in September 2013

## NEXT STEPS

The Presidio Institute aimed to address the great challenges of our time by inspiring transformative collaboration between innovators in different fields, thus disrupting the status quo that had long kept them apart. Working with a spectrum of partners, the Presidio Institute's programs encapsulated the importance of investing in new generations of cross-sector leaders, convening existing leaders to achieve greater impact, conducting research into pioneering new solutions to social challenges, and recognizing exemplary service leaders across the country for a better and brighter future.

The Presidio Institute programs were created to pilot and help envision what could happen on the Fort Scott campus over the next decade. As a place for contemplation and retreat, Fort Scott spawned the Presidio Institute, built up by a small team, partnerships, and many roundtables and events. From 2014 to 2016, the Presidio Institute pushed its programs "from paper to reality," hosting hundreds of events with different partners and organizations to help flesh out what could happen at Fort Scott. Ultimately, the goal of the Presidio Institute was to start a conversation— to turn the space into something that could emulate Cross Sector Leadership in the future.

Upon the completion of the Federal Advisory Council report in 2017, it became apparent that catalyzing a movement for public good required effort beyond the Fort Scott campus and Presidio Institute alone. The need calls for external organizations to locate their visions at Fort Scott, rather than the Presidio Trust internally running programs through the Presidio Institute. The Presidio Institute, in turn, has identified other organizations to sponsor two of its most compelling initiatives:

- The Pepperdine School of Public Policy is now sponsoring the Fellows program and shares the vision that Cross Sector Leadership offers a new lens, a core skillset, and an adaptive mindset necessary for effective 21st century problem solving.
- The Nonprofit Leadership Alliance is now sponsoring LEADEROSITY and shares the vision of making it an accessible and affordable destination for social sector leaders seeking best-in-class online leadership development opportunities.

# LESSONS LEARNED

This section provides qualitative findings from surveys and interviews completed by Presidio Institute program participants and faculty, years 2014-2017, inclusive. These findings provide positive insight for use and development.

**Presidio Institute Fellows Program:** Summarizes SF, DC, and NY Experience Evaluations by Fellows and Faculty, Classes 2014-2017, inclusive.

- Numerous Fellows found that the program’s strenuous pace and depth of content negatively affected their ability to reflect and absorb concepts, or to rest and decompress. Ensuring there was sufficient time for reflection and group interaction outside of the Fellowship context was important to building the best possible dynamic.
- Fellows encouraged more practical examples and case studies in the curriculum. Further, fellows emphasized how applying their learning to real-life examples is very valuable (especially their projects), and it is recommended to increase the balance towards practical application.
- One challenge encountered by numerous Fellows was that their project goals and activities evolved significantly over the year – often for reasons independent of the Fellowship. This could have affected the value of workplace/project impact that Fellows received from the program.
- Ensuring diversity, equity and inclusion was integrated throughout the Fellowship experience became essential. This topic quickly adapted from a taught skill to an overarching lens connected to nearly every session and case study.
- Allowing Fellows to guide the topic of discussion – and be positioned as leaders with rich experience to learn from – whenever reasonable was important to meeting their needs.
- There exists a unanimous intention amongst Fellows to connect with each other, faculty, and site hosts beyond the Fellowship.

**Cross Sector Leadership Boot Camp:** Summarizes March 2016, September 2016, January 2017, and March 2017 Boot Camp Participant Evaluations and Faculty Debriefs.

- The presence of participants from different sectors was valuable in the classroom but complicated registration as having differentiated price points and early-bird discounts created six different potential payments.
- The term “Cross Sector Leadership” was not as self-explanatory as hoped and lacked resonance with potential audiences.
- Focusing on the problem solving aspect of Boot Camp resulted in the greatest degree of buy-in.
- Partnerships were instrumental; Boot Camps were most successful when third parties partnered with the Presidio Institute as an advocate and funder.
- Boot Camps functioned best with a core group of participants linked together beyond the scope of the course.

**LEADEROSITY:** Summarizes 2014-2017 LEADEROSITY learnings based on post-course evaluation data provided by 1,323 registered users.

- We were unable to find a significant market for Cross Sector Leadership and online leadership development together as this required selling two unproven concepts concurrently.
- The Presidio Institute does not carry a big enough national brand recognition or breadth of proven offerings to convince risk averse organizations across sectors to pay for its products.
- Much of the success of LEADEROSITY was dependent on a sales function and CRM solution in order to efficiently track and acquire its potential users and partnerships, which was never fully developed.
- When it comes to video content, shorter is better – with optimal lengths being under 8 minutes per video. Furthermore, our target audience valued content released on a weekly basis as well as live faculty to respond to submissions and questions around content.
- While individual assignments are easier to manage, team assignments are more impactful and scored the highest content ratings. Like our offline experiences, small teams/groups and peer reviews are an effective way to teach core competencies, facilitate discussions in a safe space, and foster strong relationships between online learners.
- LEADEROSITY LIVE sessions, such as a live case study discussion with practitioners (we held multiple iterations of this for our Cross Sector Leadership: Building Teams courses to include case studies on Albuquerque, NM and San Francisco, CA ), live panels for NLA's virtual conference, and live intro webinars, add significant value to our online courses to make them feel alive.

# APPENDICES

# APPENDIX A: STAFF, CONSULTANTS, AND INTERNS

## **Staff, Presidio Institute and Presidio Trust**

Genevieve Bantle | Associate Director of Landscape Rehabilitation, Presidio Trust  
Jeanine Becker | Manager of Networks and Learning, Presidio Institute  
Kaira Esgate | Executive Director, ReImagining Service  
Alison Gold | Manager of Leadership Education, Presidio Institute  
Robert Gordon IV | Manager of Business Development & Partnerships, Presidio Institute  
Sarah Locher | Project Coordinator, Presidio Institute  
Amanda Marconi | Executive Assistant, Presidio Institute  
Robert Menezes | Senior Communications Account Executive, Presidio Trust  
Craig Middleton | Executive Director, Presidio Trust  
Anne Nowlin | Business Development & Partnerships Coordinator, Presidio Institute  
Anna Sanders | Project Coordinator, Presidio Institute  
David Smith | Managing Director, Presidio Institute  
Joshua Steinberger | Chief of Strategy and Communications, Presidio Trust  
David Styers | Manager of Programs and Leadership Education, Presidio Institute  
Cres Van Keulen | Executive Assistant, Presidio Institute  
Aimee Vincent | Project Coordinator, Presidio Institute  
Linh Vu | Executive Assistant, Presidio Institute  
Greg Werkheiser | Director, Presidio Institute

## **Consultants, Presidio Institute**

Season Eckardt | Project Consultant, Common Impact  
Dave Foster | Bastogne Development Partners  
Andrew Linford | Instructional Designer, NovoEd  
Chris Marvin | Principal, Marvin Strategies  
Tom McCarty | Principal, Tom McCarty Consulting  
Lenny Mendonca | Senior Fellow, Presidio Institute; Director Emeritus, McKinsey & Company  
Michael Phelps | Cinematographer, Alexander Thomas Media Co  
Drew Remiker | Instructional Designer, NovoEd  
Alexander Thomas | Creative Director, Alexander Thomas Media Co

**Interns, Presidio Institute**

Christian Brunner | Marketing and Communications

Kevin Lindsay | Marketing and Communications

Andrew Luskus | Programs

Emily Luy Tan | Business Development & Partnerships

John Robinson | Leadership Education

Dina Saba | Marketing and Communications

Alexandria Sisk | Programs

Ariel Wang | Programs

# APPENDIX B: FACULTY

Obi Amachi | Leadership and Organizational Consultant

Renee Baiorunos | Vice President, LeaderFit

Cassandra Benjamin | Philanthropy Consultant, CSB Consulting

Kirsten Cronlund | Director, Bryn Athyn Church School

Amy Farley | Senior Consultant

Idalia Fernandez | Director and Leadership Coach, Community Wealth Partners

Ray Fisher | Clinical Social Work/Therapist

Jamie Gardner | Founder, CLARITY and Impact Advisor, Gardner Consulting

Seth Hufford | Partner, The People Group

Lyn Kathlene | Director, Spark Policy Institute

John Kern | Senior Director, Community Wealth Partners

Emi Kowalole | Communications Manager, X, the moonshot factory

Kathia Laszlo | Consultant, Magenta Wisdom

Amy Lazarus | Founder and CEO, InclusionVentures

Jewlya Lynn | CEO, Spark Policy Institute

Kathy Merchant | President and CEO, The Greater Cincinnati Foundation

Isabelle Moses | Director, Community Wealth Partners

Rachel Mosher-Williams | Director of Learning and Impact, Community Wealth Partners

Emily Neubig | Director of Primary Market Research, Capitol One

Rebecca Ochtera | Senior Researcher, Spark Policy Institute

Curtis Ogden | Senior Associate, Interaction Institute for Social Change

Meggan Parezo | Senior Project Manager, Spark Policy Institute

Cynthia Parker | Senior Associate, Interaction Institute for Social Change

Nicolette Pizzitola | Founder and CEO, Compass Point

Natalie Portman Marsh | Owner, NPM Consulting

Claudia Sandoval | Principal, COS Consulting

Alicia Santamaria | CEO, adelante coaching + consulting

Lisa Spinali | Consultant

Paul Thallner | Partner, Great Place to Work

Matthew Thomas | Co-Founder and CEO, Paddle

Cara Valentino | Senior Principal, The Clearing

Gregg Vanourek | Adjunct Instructor, Stockholm School of Entrepreneurship

Dave Viotti | Founder and CEO, SMALLIFY

Lorena Zimmer | Director, Talent Pipeline, Denver Metro Chamber of Commerce

# APPENDIX C: FEDERAL ADVISORY COMMITTEE

*(Organization at time of participation)*

Toby Rosenblatt, Chair | President and General Partner, Founders Investments, Ltd.

Karen Baker, Vice Chair | Chief Service Officer, CaliforniaVolunteers, State Of California

Seth Barad | Independent Management Consultant for Nonprofit Organizations

AnnMaura Connolly | Executive Vice President and Chief Strategy Officer, City Year; President, Voices for National Service

Stephanie DiMarco | Founder, Advent Software

Ernestine Fu | Venture Capitalist and Student, Stanford University

John Gomperts | President and Chief Executive Officer, America's Promise Alliance

Kenneth Harbaugh | Chief Operations Officer, Team Rubicon

Tracy Hoover | Chief Executive Officer, Points of Light

Sandra R. Hernández, M.D. | Chief Executive Officer, California Healthcare Foundation

Gloria Johnson-Cusack | President and Chief Executive, National Human Services Assembly

Wendy Spencer | Chief Executive Officer, Corporation for National and Community Service

Lester Strong | Vice President and Chief Executive, AARP Experience Corps

# APPENDIX D: FELLOWS

*(Organization at time of Fellowship)*

Marty Alvarado | Director, Learning Communities, Jobs for the Future

Sandra Ambrozny | Senior Program Officer, The Kresge Foundation

Noel Anderson | Director of Educational Leadership Programs, New York University

Stephanie Andrews | Talent and Leadership Development Director, Bush Foundation

Maritza Arroyo | Vice President, United Way of New York City

Josh Bagley | Associate Director of Business Operations, Real Estate Development, Presidio Trust

Renee Baiorunos | Director, Community Wealth Partners

Allison Barmann | Vice President, Strategy and Learning, Bush Foundation

Jarrett Barrios | CEO, American Red Cross of Greater Los Angeles

Vincent Baxter | Deputy Chief, The District of Columbia Public Schools

Keith Bergthold | Assistant Director of Planning/Fresno, Fresno Metro Ministry/RCI

Michael Boland | Chief of Park Development & Operations, Presidio Trust

Kirsten Breckinridge | Consultant, Corporation for National and Community Service

Nicole Brown | Community Relations Manager, Detroit M-1 Rail

Ruth Browne | CEO, Ronald McDonald House New York

Robin Brule | Executive Director, New Mexico Educators Federal Credit Union

Claire Burns | Chief Customer Officer, MetLife Foundation

Allison Clements | Senior Attorney and Director, The FERC Project, Natural Resources Defense

Daniel Marks Cohen | Vice President, New York Housing Partnership

Jaime Pursuit Coleman | LinkedIn for Good, LinkedIn

Steve Colwell | CEO, Philanthropy Associates, LLC

Cynthia Comerford | Manager of Planning and Fiscal Policy, Health Program Director, San Francisco Department of Public Health

Todd Connor | CEO and Founder, Bunker Labs

Kevin Cottrell | Director, The German Marshall Fund of the United States

Jorge Cruz | Marketing Manager, Midwest Insurance Company

Josh Davis | Vice President of External Affairs, Delta Health Alliance

Marco Davis | Partner, New Profit

Recy Dunn | Chief Operating Officer, YES Prep Public Schools

Bart Ferrell | Director of Human Resources, Presidio Trust

Christina Garcia | Senior Program Officer, James Irvine Foundation

Robert Goodwin | President and COO, OceanWorks, Inc.

Suzie Graham | President, Downtown Akron Partnership

Susan Greenwell | Senior Vice President , MetLife Foundation

Andy Hall | Vice President and Chief Program Officer, San Diego Workforce Partnership

Meredith Hansen | Vice President, Strategic Partnerships and Special Initiatives, City Year, Inc.

Noël Harmon | Senior Vice President, Strategic Partnerships, Say Yes to Education

Meriah Heredia-Griego | Director and Research Assistant Professor, University of New Mexico Center for Education Policy Research

Gustavo Herrera | Western Regional Director, Young Invincibles

Sue Hildick | President, Foundations for a Better Oregon; The Chalkboard Project

Lara Hitchcock | Executive Director, YMCA of San Francisco

Jane Hodgdon | Education Program Specialist, United States Department of Education

Danielle Holly | CEO, Common Impact

Devin Holmes | Co-Founder, Big Sky Code Academy

Daniel Homsey | Director of Neighborhood Resilience, City and County of San Francisco

Jamie Horst | Director, McKesson Corporation

Najla Husseini | Deputy Director, DC Public Schools

Elaine Ikeda | Executive Director, California Campus Compact

Nanci Jimenez | President, Luna Jimenez Seminars and Associates

Ryan Johnson | Executive Director, The Fairness Project

Kristina Kaufmann | Executive Director, Code of Support Foundation

Laura Kohn | Executive Director, Education Synergy Alliance

Paul Kruchoski | Deputy Director, United States Department of State

Jeanose Lexima | Founder and CEO, Women on Change

Philip Li | President and CEO, Robert Sterling Clark Foundation

Stephen Lowe | Geospatial Information Officer, United States Department of Agriculture

Jewlya Lynn | CEO and Research Director, Spark Policy Institute

Odetta MacLeish-White | Program Director, Enterprise Community Partners

Tiffany Manuel | Vice-President, Enterprise Community Partners, Inc.

Cheryl Markham | Strategic Policy Advisor, King County Department of Community and Human Services

Chris Marvin | Principal, Marvin Strategies

Zach Maurin | Executive Director, ServiceNation

Dekonti Mends-Cole | Director of Policy, Center for Community Progress

Kunal Merchant | Managing Director, Lotus Advisory, Ltd.

Frank Mirabal | Director of Collective Impact, Office of the Mayor, City of Albuquerque

Ana Montero | Chief Operating Officer, American Red Cross, New Jersey

Tulaine Montgomery | Managing Partner, New Profit, Inc.

Marisol Morales | Director of Civic and Community Engagement, University of La Verne

Erin Muffoletto Baca | President and Owner, Muffoletto Government Relations

Jim Murray | Program Director, Stanford University Haas Center for Public Service

Matthew Murray | Regional Vice President, PepsiCo

Katie Nedl | COO, BlackRock

Michelle Ng | Community Engagement Leader, Ernst & Young, LLP

Jenefer O'Dell | Program Officer, W.K. Kellogg Foundation

Jane Packer | Vice President, Communications and Membership Marketing, YMCA of San Francisco

Beto Pallares | President and CEO, Joseph Advisory Services, LLC

Charmaine Peart-HoSang | Director, Year Up, Inc.

Matthew Runyon | Development Associate, Team Rubicon

Patrick Schaefer | Executive Director, Hunt Institute for Global Competitiveness

Kate Schwass | Executive Director, Bay Area, CollegeSpring

Todd Shenk | Senior Director Strategic Engagement and Initiatives, Casey Family Programs

Amy Silverman | Education Program Officer, United Way of Greater Los Angeles

Amy Smith | Director of Career Pathways Support Services, Long Beach City College

Jacqueline Smith | Assistant Vice President and Director of University Initiatives, Arizona State University

Evelyn Stark | Assistant Vice President, MetLife Foundation

Peggy Stewart | Assistant Director of Culture, Arts, and Nature, Chicago Park District

Abigail Stewart-Kahn | Director of Strategic Initiatives, Department of Homelessness and Supportive Housing, City and County of San Francisco

Allison Stone | Associate Director, Presidio Trust

Lori Strauss | Program Manager, AARP Foundation

Jer Swigart | Co-Founding Director, The Global Immersion Project

Jami Taylor | Senior Director of Global Public Health Systems Policy and Partnerships, Johnson & Johnson

Graham Walker | Senior Research Scholar, The Witherspoon Institute

Jeffery Wallace, Jr. | President, LeadersUp

Tyrone Williams | Director, Sacramento Promise Zone, Sacramento Housing and Redevelopment Agency

Lynsey Wood Jeffries | CEO, Higher Achievement

Craig Ziegler | Vice President, Finance, Administration and Investments, California Health Care Foundation

# APPENDIX E: PARTNERS

*(Funding partners in bold)*

AARP Foundation

Achieve

Adelante Coaching and Consulting

## **American Express**

American Heart Association

American Red Cross of Greater Los Angeles

America's Service Commission

AmeriCorps Alums

## **Annenberg Foundation**

### **Annie E. Casey Foundation**

Arizona State University – Public Service Academy

Arthur Ashe Institute for Urban Health

Ashoka

Aspen Institute

## **Bank of America**

Big Sky Code Academy

BlackRock

Bloomberg Foundation

BoardSource

Brookings Institute

Brunswick

Bunker Labs

## **Bush Foundation**

California Campus Compact

California Economic Summit

California Forward

California Health Care Foundation

California Volunteers

Case Foundation

Casey Family Programs

Center for a New American Security

Center for California Studies

Center for Community Progress

Chicago Park District

City and County of San Francisco

City of New York

City Year, Inc.

Coalition for Public Safety

Code for America

Code of Support Foundation

Collective Impact Forum, FSG and Aspen

CollegeSpring

Common Impact

Community Wealth Partners

Conveners.org

CORO

Corporation for National and Community Service

Council on Foundations

CSB Consulting

DC Central Kitchen

DC Public Schools

Delta Health Alliance

Democracy Fund

Detroit M-1 Rail

Downtown Akron Partnership

Drucker Institute

Education Synergy Alliance

Encore.org

Enterprise Community Partners, Inc.

Ernst & Young, LLP

Federal Reserve Bank of San Francisco

Flightpath/DoSomethingGreat.com

For Goodness Sake (FGS)

Foundations for a Better Oregon/The Chalkboard Project

Fourth Sector Networks

Fresno Metro Ministry/RCI

FSG

FUSE Corps

**Gap Foundation**

GlobalTies SF

Google

**Got Your 6**

Government Alliance for Race & Equity

GSK

Haas Jr. Fund

High Peaks Group

Higher Achievement

Housing Partnership

Hummingbird Labs

Hunt Institute for Global Competitiveness

InclusionVentures, LLC

Independent Sector

Interaction Institute for Social Change

Intersector Project

James Irvine Foundation

Jobs for the Future

Johnson & Johnson

Joseph Advisory Services, LLC

King County Dept. of Community & Human Services

**Knight Foundation**

Koch Companies

**Kresge Foundation**

La Piana Consulting

LEAD Academy

LeadersUp

Leaders' Quest

LinkedIn for Good

Lisa Spinali Consulting

Living Cities

Long Beach City College

Lotus Advisory, Ltd.

Luna Jimenez Seminars & Associates

Magenta Wisdom

Maoz

Mattel

McChrystal Group

McKesson

McKinsey & Co.

McLeod-Grant Advisors

MetLife Foundation

Midwest Insurance Company

Mills College

Muffoletto Government Relations

NAACP

National Conference on Citizenship

National Defense University

NationSwell

**NCIRE**

New America CA

New Mexico Educators Federal Credit Union

New Profit, Inc.

New York University

NewCo.

News Corp

Nonprofit Leadership Alliance

NovoEd

Office of the Mayor, City of Albuquerque

PACE-Philanthropy for Active Civic Engagement

Partnership for Public Service

Pepperdine University, Davenport Institute

PepsiCo

Philanthropy Associates, LLC

**Points of Light**

Presidio Graduate School

ProInspire

Prospect Madison

Robert Sterling Clark Foundation

Sacramento Housing and Redevelopment Agency

San Diego Workforce Partnership

San Francisco Department of Public Health

Say Yes to Education

ServiceNation

Silicon Guild

SMALLIFY

Solar City

Southern California Leadership Network

Spark Policy Institute

Sanford Center on Philanthropy and Civil Society

Stanford Social Innovation Review

Stanford University, Haas Center for Public Service

Team Red, White, & Blue

Team Rubicon

Tesla

Texas Home Visiting

The Fairness Project

The FERC Project, Natural Resources Defense

The German Marshall Fund of the United States

The Global Immersion Project

The Mission Continues

The Witherspoon Institute

Tipping Point Community

U.S. Department of Agriculture

U.S. Department of Education

U.S. Department of State

U.S. Office of Management and Budget

U.S. Office of Personnel Management

Unilever

United Way - Bay Area

United Way of Greater Los Angeles

United Way of New York City

United Way Worldwide

University of California Berkeley Haas School of Business

University of La Verne

University of New Mexico Center for Education Policy Research

Urban Institute

Veritas Prep

VolunteerMatch

W.K. Kellogg Foundation

White House Office of Social Innovation and Civic Participation

Women on Change

Year Up

YES Prep Public Schools

YMCA of San Francisco

Young Invincibles



Presidio Institute



Presidio  
Trust

The Presidio Institute is a Presidio Trust initiative.

[www.presidio.gov/institute](http://www.presidio.gov/institute)