



Leap Futures Initiative (LFI) Process: March 2022 – February 2023 Executive Summary

Where We Are – February 2023 (1 of 2)

This has been a strong process with broad engagement and involvement of many in the community. Yet, despite our efforts, we are short of identifying a path forward with a partner organization and the requisite funding to continue the Leap Ambassadors Community (LAC) as we know it today.

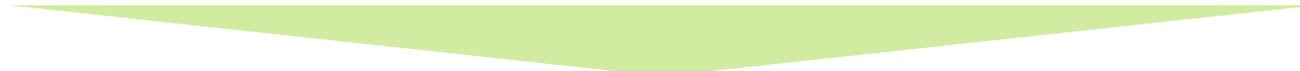
- **The Steering Committee and Working Groups aspired to have support for a small team (3-4 highly qualified staff) to continue delivering the community’s core elements most valued by Ambassadors** (e.g., the online forum, collaborative knowledge development, community gatherings, and support of micro-communities).
- However, **it became clear in the process that we needed to shift our focus from what was *possible* to what was *available*** to finalize a partner organization, secure funder commitments, get LAC approval to move forward, and effectively begin the LAC transition by the end of May 2023.
- As of February 2023, **we are hopeful the LAC can continue with significant changes**. We see three potential scenarios:
 - **In the best-case scenario, we would secure a partner organization and have funding for 1-2 FTEs**. The community would more closely resemble how it began (e.g., maintaining the online forum where Ambassadors can ask questions, provide support, and learn from each other, and have continued access to existing content through the website) vs. what it looks like today.
 - **In the intermediate case, we will have secured a partner organization, but not adequate funding for an FTE**. In this case, the partner would serve as a “home” for the online forum, which could be volunteer-led, and a “warehouse” for existing content and community resources.
 - **In the base case, the LAC would sunset completely**, with assets archived and the other online options discontinued unless a volunteer or group of volunteers comes forward to sponsor the online forum.

Where We Are – February 2023 (2 of 2)

- **We are in meaningful discussions with a potential partner organization**, and there are other organizations that have surfaced as possibilities. While we are positive about the discussions so far, we acknowledge that much is still to be worked out to make this a reality.
- **Two funders—the Ford Foundation and the Jesse Ball duPont Fund—have committed to providing funding to cover basic operations over the next three years.** That funding is provisional on other funders joining, **with the overall goal of enabling the equivalent of 1-2 FTEs to continue supporting the community.** If we are able to garner support for 2 FTEs, it creates a more robust funding base and an opportunity for additional support activities.
- **There are a number of transition next steps in progress, including:**
 - As planned, **the Monitor Institute by Deloitte (MIbD) team has wrapped up its work and passed the baton to Venture Leadership Collective.** Andrew Niklaus is leading the next phase of work, supported by Debra Natenshon (Andrew and Debra are both Ambassadors). They will lead **two key work streams through the end of May** with the goal of either finding a home with a partner organization and funding for at least 1 FTE or moving the LAC to a partner organization (unfunded) to hold the assets and allow for a limited continuation with volunteer support by the end of May 2023.
 - **The goals for the next phase of work include:** 1) continued exploration and negotiation with the potential partner organization to quickly get to a go/no-go decision; 2) if a partnership is viable, confirming additional funders; and 3) determining what Ambassador-led activities will be possible in a more resource-constrained future or working with the LST on sunseting if necessary.
 - **The Leap support team (LST) is in the process of phasing down current activities** and preparing the community's assets for transition or archiving.

Project Context and Objectives

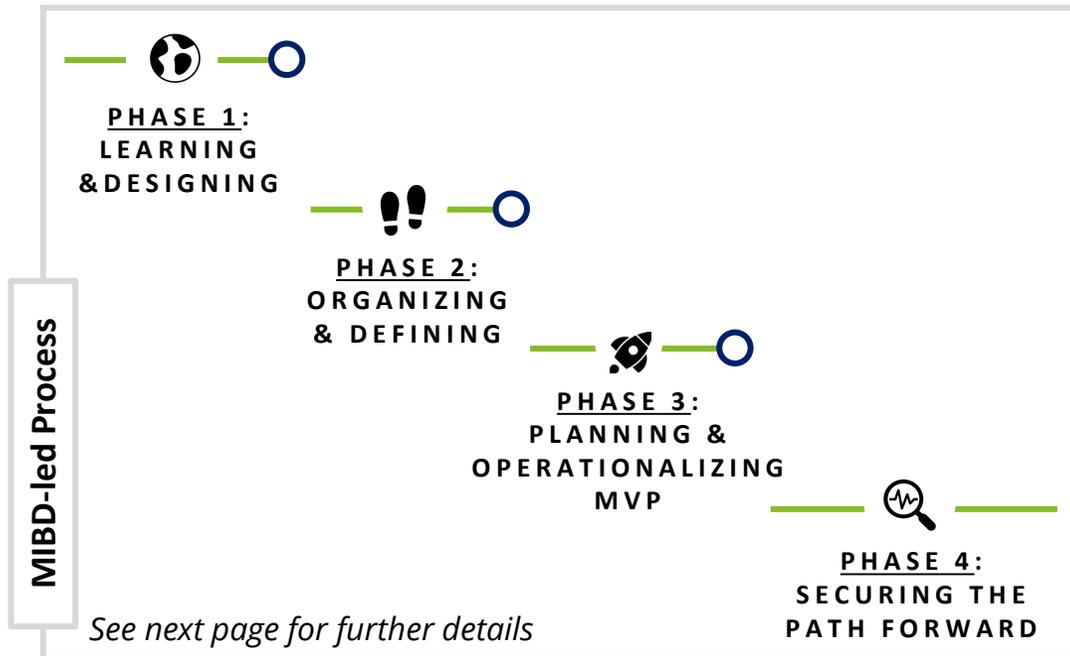
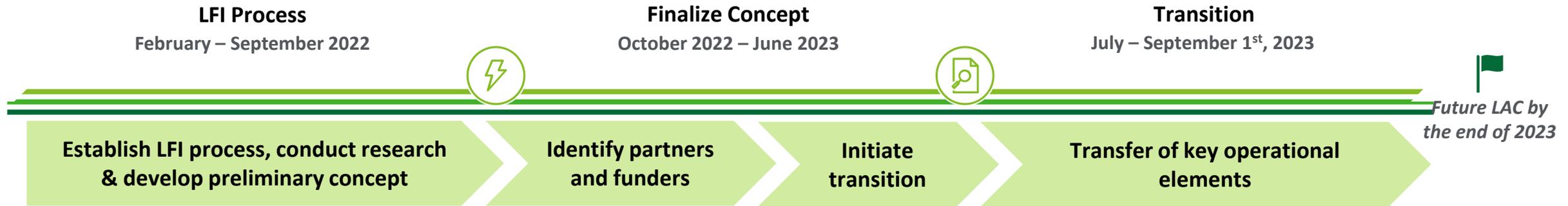
- Since its 2013 founding, the LAC has grown to **300+ leaders aligned around the mission of improving performance in the social sector.**
- Leaders come from different types of organizations, bring different expertise across all seven pillars of the Performance Imperative, and represent broad demographics (e.g., race, age, gender, and geography). This **wide array of backgrounds, experiences, and perspectives** contributes to the LAC's creativity, empathy, and effectiveness.
- The **Leap Futures Initiative (LFI) process was initiated in early 2022** to help the LAC map out scenarios to become a sustainable, self-governed entity by the end of 2023. The process was facilitated by a team from Monitor Institute by Deloitte (MIbD), led by Leap Ambassadors Dana O'Donovan and Rhonda Evans, until February 2023 when it was transitioned to Venture Leadership Collective and Ambassador Andrew Niklaus, supported by Ambassador Debra Natenshon.



With this context, the **objectives** for this project were:

- The LAC will define, in clear terms, what it is.
- The LAC will agree upon how it will govern itself and how it will operate via a collaborative, participatory, and consent-driven decision-making model.
- The LAC will develop a minimum viable plan for how it will become a sustainable, self-governed entity by the end of 2023.

Overall Leap Futures Initiatives (LFI) Timeline



MibD-Facilitated Process (March 2022 – January 2023)

A team from Monitor Institute by Deloitte (MibD), led by Leap Ambassadors Dana O’Donovan and Rhonda Evans, facilitated the LFI Process from March 2022 through January 2023.



Key Activities

- Gathered **initial survey responses from 220+ ambassadors**
- **Formed 19-member LFI Steering Committee** emphasizing broad inclusion and diversity
- **Facilitated 20+ in-depth interviews and focus groups** with ambassadors
- Analyzed current **LAC cost and operational data**
- Conducted **research on 10+ analogue organizations**
- Gathered **survey responses from 100+ ambassadors on membership dues**
- Synthesized a **proposed path forward**

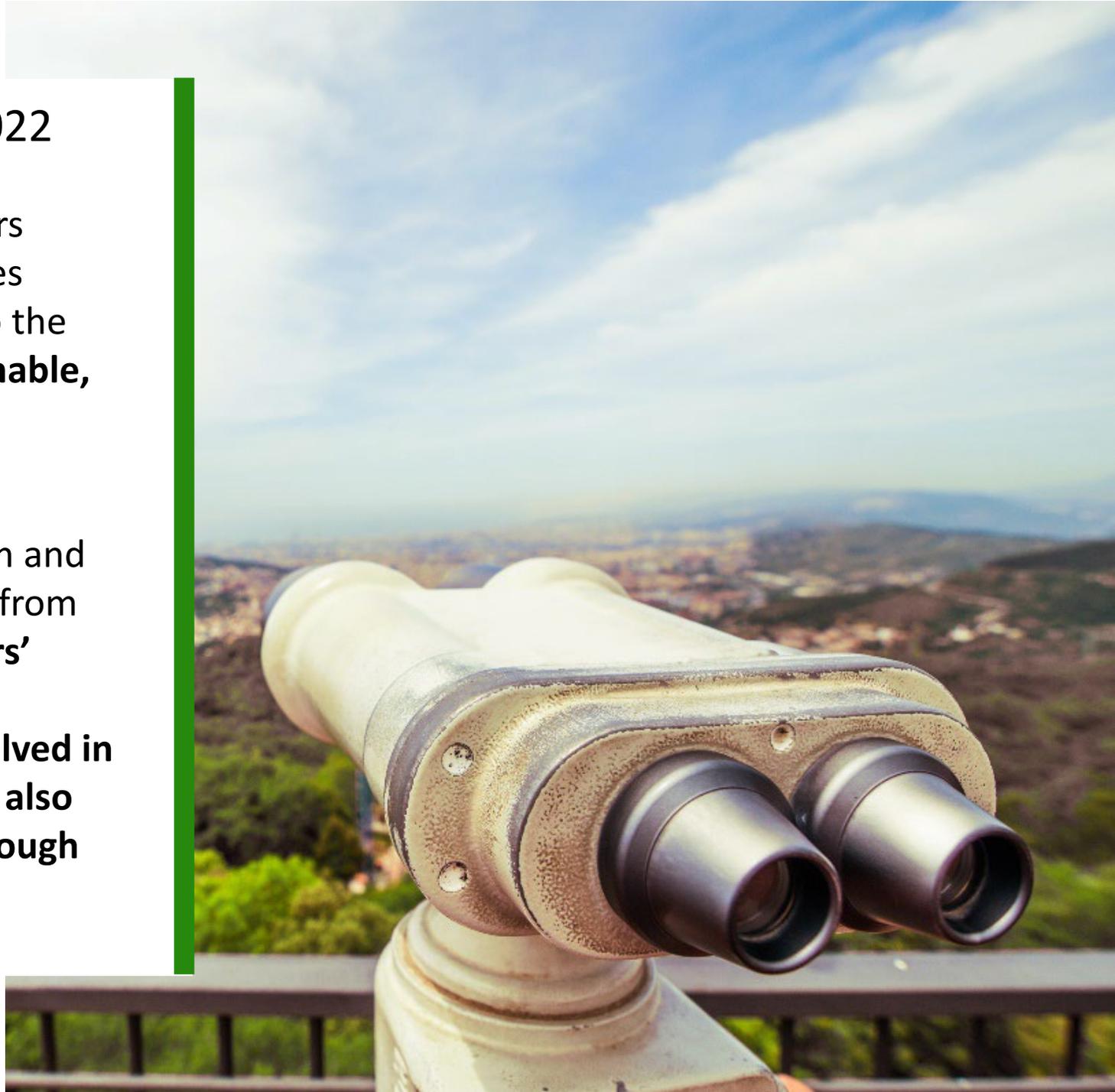
- **Formed 3 working groups** to explore key outstanding questions related to Value Proposition, Fundraising, and Partnership
- **Held 10+ conversations with funders** in the LAC
- **Screened 60+ potential partner organizations**, including academia and fiscal sponsor options
- **Identified the best fit partners** for further conversations
- Developed a current state value proposition and **ideas for potential future LAC value propositions**
- Developed **negotiation and transfer plans**

Held 20+ working sessions with the Steering Committee on the above topics.

Recapping the Process – February 2022

In late February 2022, the Leap Ambassadors Community (LAC) kicked off the Leap Futures Initiative (LFI), a crucial engagement to help the LAC **map out scenarios to become a sustainable, self-governed entity by end of 2023.**

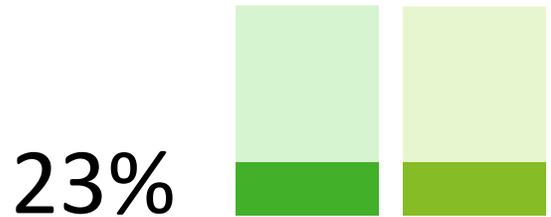
In kicking off the LFI process, the MIbD team and Leap support team (LST) launched a survey from March to April 2022 to capture **ambassadors' input on the direction of the LAC and to understand how they would like to be involved in shaping its future.** The MIbD team and LST also engaged a number of LAC stakeholders through interviews and focus groups.



LFI Spring 2022 Survey: LAC Engagement and Participants

We received **225 responses to the survey**¹—an impressive response rate of about 75 percent. We shared the survey results with the LAC in email and webinar formats.

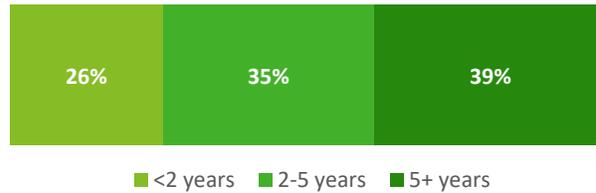
YOUR WORK



of survey respondents work in nonprofit delivery/advocacy, and 23% of respondents work in funding organizations. While there is a **slight under-representation of nonprofit delivery/advocacy respondents by about 3%, funder representation in the survey is almost exactly proportional to the LAC.**

¹Analysis on this slide includes the survey responses from six members of the Leap support team.

YOUR TENURE

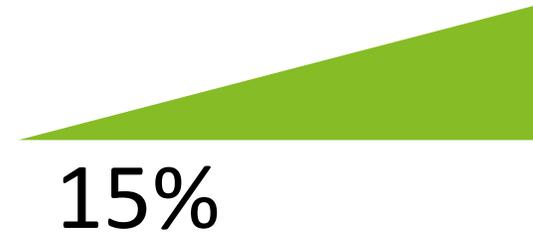


A plurality of survey respondents have been ambassadors for over 5 years, with the smallest amount of survey respondents having been in the LAC for less than 2 years.

Survey respondents' duration of tenure was almost **exactly proportional to the LAC.**



YOUR RACE/ETHNICITY



of respondents are Black or African American or Latino, which is a **slight under-representation vis-a-vis the LAC, of which approximately 18% is Black or African American or Latino.**

1% average over-representation of survey respondents who are **White, Asian, and Multi-racial** compared to LAC demographics.

YOUR AGE



All age groups represented in the survey were almost exactly proportional to the age groups in the LAC, with 60% of survey respondents being Generation X, 31% being Baby Boomers, 7% being Millennials, and 1% being part of the Silent Generation.

LFI Spring 2022 Survey: Insights on Aspects of the LAC to Carry Forward

When asked to select the aspects of the LAC that should be carried forward as the community decides on its future, the top three choices were the online forum, connections to other ambassadors, and collaborative knowledge development.

Responses Greater than 50%

 Online forum	75.1%
 Connections to other ambassadors	65.3%
 Collaborative knowledge development	63.6%
 Community conversations	53.8%
 Gatherings	52.9%
 Micro-communities	50.7%

Responses Less than 50%

 Announcements about new actions, issues, stories, and progress	41.3%
 Communications on behalf of the LAC to the field	34.7%
 Aligned initiatives that are coordinated and created by the LST	31.6%
 1:1 calls with an LST member	16.9%
 Other (e.g., in-person connections, facilitated dialogue, Speakers' Bureau Initiative, Performance Imperative implementation, new member onboarding, etc.)	6.2%
 None	0.9%

The Charge of the LFI Steering Committee – Spring 2022

Through the LFI Spring 2022 Survey, we identified ambassadors who would be willing to serve on the LFI Steering Committee to steward the LFI process. The process intentionally sought to assemble a Steering Committee that would represent the diversity of the community across multiple dimensions, including type of work (funder, NPO, etc.), tenure in the LAC, race/ethnicity, and age.

The LFI Steering Committee was made up of a subset of ambassadors who have **vested stakes in the community, want to see the community continue**, and are able to **invest the time to do the “heavy lifting”** needed for essential definition and development. Specific objectives are to:

- **Design the process** to engage the LAC around potential options and recommendations, including decision rights
- **Develop the lead concept** and governance options to be further explored
- **Refine and recommend the option** for the community to vote on

Stakeholder Interviews and Findings – Spring – Summer 2022

We conducted 30 stakeholder interviews to gather insights, perspectives, and qualitative data on future paths for the LAC.

Stakeholders Interviews

Purpose: gather unique perspectives as part of research on funding and governance mechanisms for the future of the LAC

Leap Ambassadors

20 Interviews

Leap Support Team

6 Interviews

External

4 Interviews

KEY THEMES

Value Proposition

- Cross-sector breadth and quality of participants **“represents what we want the sector to be”**
- **Provides “Philanthropy 301,”** which others do not
- **Outcome equity micro-community doing deep work** relevant to broader sector practice
- Have been **more internally focused**, but over time may be **easier to sustain with action focus**
- Should be able to **come together to solve big challenges**

Funders

- Will want to **better understand the gap** the LAC is filling
- Are **oriented to action**
- Prefer **not to fund initiatives built by other funders**
- May be interested in **the depth and breadth of expertise** across domains within the community
- **May provide transition funding for a clear long-term vision**
- Would want **1-3 seed funders**

Membership Groups

- Have both **individual and organizational members and often charge members based upon size and type** of organizations
- Have **exclusive membership models but provide events to non-members** for an additional revenue stream
- **Leverage members** to support internal work

Path Forward – Fall 2022

Based on learnings from the research, a lead concept emerged; we proposed a way forward to continue to refine and test the viability of this concept.

The lead concept suggests that beginning in 2024, the LAC will be **housed within a partner organization**, which helps offset infrastructure costs and has the potential to mutually advance missions. The LAC will **offer ambassadors a set of key services similar to the services currently provided** and will be **sustained through a mixed funding model**.

The LFI SteerCo has **designed and started to execute the plan to pursue this concept**, including outlining the LAC value proposition, interviewing potential partners and potential funders, and building out full operational and transition plans. The work is being executed through a high engagement process with numerous ambassador volunteers in three working groups who are focused on driving the work forward quickly.

I totally support the funding approach and see real potential to attract funders by elevating Leap's work around capacity building for orgs led by folks of color.

– Omar Butler, SteerCo Member

There's a lot of possibility around future partners, and this is really how we could get to the next generation of the LAC.

– Kathy Park, SteerCo Member

As our dynamic community continues to grow and diversify, so do the possibilities of achieving our vision and adapting it to new horizons.

– Debra Natenshon, SteerCo Member

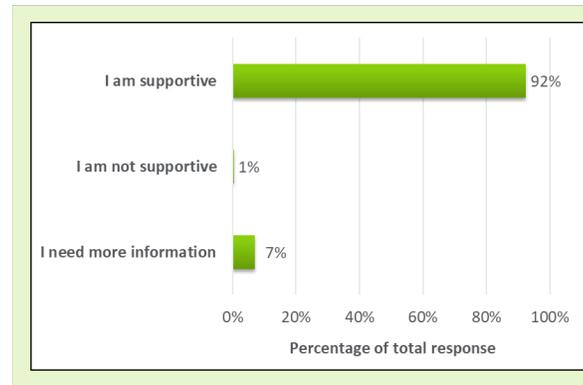
LAC Pulse Check Results – Fall 2022

The Steering Committee asked the LAC to complete a survey to affirm the community’s support for continuing to explore the path forward in order to answer outstanding questions related to value proposition, fundraising, and partnership.

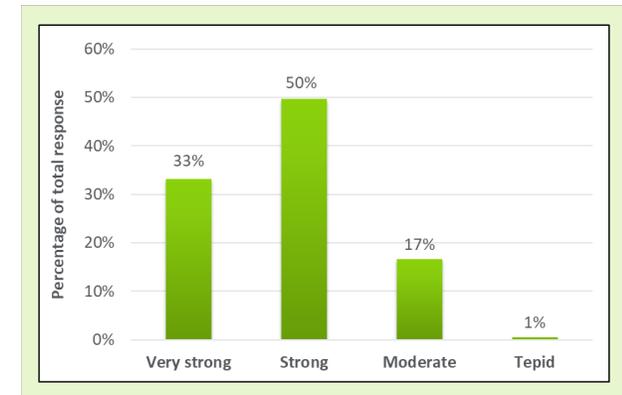
183 ambassadors (55% of the community) completed the pulse check.

- **92% of respondents were supportive** of the path forward
- **1% of respondents were not supportive** of the path forward
- **7% of respondents indicated that they needed more information** (follow up was conducted to these individuals separately to provide additional details/resources)

Question 2: Do you support the Steering Committee’s recommendation to continue the LFI process on behalf of the LAC?



Question 3 (contingent on Question 2): If you are supportive, is your support...



The purpose of this pulse check was not to decide on a final approach for the future of the LAC—the community will determine a final approach once there is a proposal in place on partnership and funding.

LFI Governance Approach – Fall 2022

Based on the community's strong support to pursue the lead concept, the Steering Committee designed a governance approach and stood up three working groups to answer key outstanding questions.

LFI Steering Committee

Oversee working groups and steward the input and decision-making process
during each phase of implementation

LFI Working Groups

Execute LFI implementation plan, **answer key outstanding questions related to funding and governance**, and provide regular updates and recommendations to the Steering Committee

Value Proposition

Fundraising

Partnership

Leap Ambassadors Community

Collective body for input and decision-making on funding sources and governance models
once viable options have been identified

CONFIDENTIAL

Working Group Objectives & Results – February 2023

As of February 2023, the Steering Committee and Working Groups have made significant progress towards answering the key outstanding questions related to value proposition, fundraising, and partnership.

	Value Proposition Working Group <i>12 members</i>	Fundraising Working Group <i>5 members</i>	Partnership Working Group <i>9 members</i>
Objectives	<i>Working group will engage the LAC on the development of future value propositions as relevant, with an initial focus on equity.</i>	<i>Working group will continue conversations with prospective funders in an effort to secure grant funding for the LAC, as well as make final recommendations on membership fees.</i>	<i>Working group will facilitate conversations with prospective partner organizations and initiate/manage the process to elicit other potential partners.</i>
Results	<ul style="list-style-type: none"> Produced a document that articulates the current state value proposition of the community Developed potential future state value propositions based on exciting ideas that have surfaced to date Developed additional value proposition materials for specific partner and funder conversations 	<ul style="list-style-type: none"> Gathered input from 17 high-priority funders to gauge willingness to provide grant funding or membership contributions Received commitments from two funders—the Ford Foundation and the Jesse Ball duPont Fund—provisional on other funders joining 	<ul style="list-style-type: none"> Developed partner criteria to screen potential leads Enlisted the broader LAC in generating ideas for potential partner organizations Held numerous partner conversations and ultimately narrowed the pool of potentially viable options

Summary of Key Learnings – February 2023

LAC VALUE

Ambassadors highly value the community and hope it will continue. The LFI process showed broad engagement and involvement of many in the community (e.g., in interviews, Steering Committee, Working Groups).

There was strong consensus that the online forum and ambassador relationship building are the highest value components of the LAC. There is ambition to go beyond those activities, but this must be balanced by the realities of resource availability. Additionally, equity is a key consideration for many ambassadors as we consider the future.

As of February 2023, we believe the LAC can continue, but with significant changes.

GOVERNANCE

The LFI process explored several governance options. Moving to a mission-aligned partner “home” was considered most viable because of the strategic opportunities and operational efficiencies. Other governance options (e.g., standalone 501c3, for-profit entity) were considered less viable for a range of reasons (e.g., high overhead, too far afield from current state).

We vetted 60+ potential partners. Many had similar focus areas to the LAC but not necessarily a focus on performance. Academia and fiscal sponsorship organizations were often costly and required infrastructure.

We are in meaningful discussions with a potential partner organization, and there are other organizations that have surfaced as possibilities. While we are positive about the discussions so far, we acknowledge that much is still to be worked out to make this a reality.

FUNDING

The LFI process sought to determine what level of funding the LAC could secure for the next three years. The Steering Committee and Working Groups aspired to have support for a small team of 3-4 highly qualified staff.

However, it became clear in the process that we needed to shift our focus from what was *possible* to what was *available*. Best-case scenario to-date would be garnering funding for 1-2 FTEs.

We found that grant funding opportunities for infrastructure and community leadership organizations are very limited, and a membership fee structure would not result in a material level of funding, so it would need to align with other strategic considerations to be a viable option.

Overall, the lack of significant funding has implications for what is feasible to carry forward and requires sunsetting a number of activities.

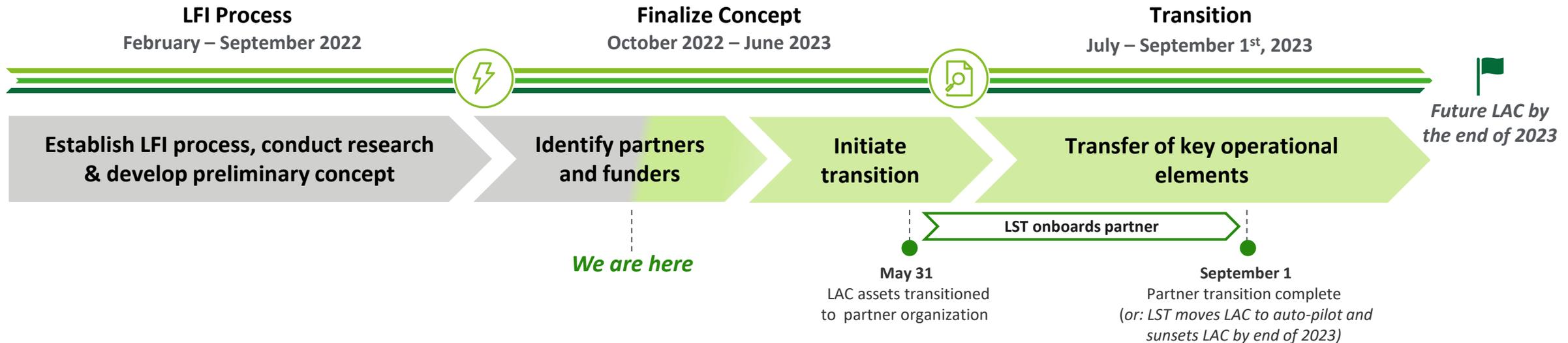
Where We Are and Looking Ahead

As noted above, the LFI has been a strong process with broad engagement and involvement of many in the community. Yet, despite our efforts, we are short of identifying a path forward with a partner organization and the requisite funding to continue the LAC as we know it today.

- As of February 2023, **we are hopeful the LAC can continue with significant changes. We see three potential scenarios:**
 - **In the best-case scenario**, we would secure a partner organization and have funding for 1-2 FTEs. The community would more closely resemble how it began vs. what it looks like today.
 - **In the intermediate case**, we will have secured a partner organization, but not adequate funding for an FTE. In this case, the partner would serve as a “home” for the online forum, which could be volunteer-led, and a “warehouse” for existing content and community resources.
 - **In the base case**, the LAC would sunset completely, with assets archived and the other online options discontinued unless a volunteer or group of volunteers comes forward to sponsor the online forum.
- We are in **meaningful discussions with a potential partner organization**. While we are positive about the discussions so far, we acknowledge that much is still to be worked out to make this a reality.
- **Two funders—the Ford Foundation and the Jesse Ball duPont Fund—have committed to providing funding to cover basic operations over the next three years.** That funding is provisional on other funders joining, **with the overall goal of enabling the equivalent of 1-2 FTEs to continue supporting the community.**
- As planned, the Monitor Institute by Deloitte (MIbD) team has wrapped up its work and passed the baton to Venture Leadership Collective. **Andrew Niklaus** is leading the next phase of work, supported by **Debra Natenshon**. They will lead two key work streams through the end of May with the goal of either finding a home with a partner organization and funding for at least 1 FTE or moving the LAC to a partner organization (unfunded) to hold the assets and allow for a limited continuation with volunteer support by the end of May 2023.
- This process has benefitted from so many members of the Leap Ambassador Community; **particular appreciation is due to: the LST** for their collaboration in this process and all they do for the LAC; Ambassadors who committed their time, energy, and talents to the **LFI Steering Committee** and **Working Groups**; and **Mario Morino** for bringing this community together a decade ago, growing and nurturing it, and once again living the values of this community by investing in this Ambassador-driven process to chart the future of the LAC.

Transition and Next Steps – February 2023

At this point in the process, The Monitor Institute by Deloitte team will be stepping back as planned, and Venture Leadership Collective will take over the next steps in a limited four-month engagement. Concurrently, the LST is phasing down current activities and preparing the community's assets for transition or archiving.



Goals for the next phase of work include:

- 1) Continued exploration and negotiation with the potential partner organization to quickly get to a go/no-go decision
- 2) If a partnership is viable, confirming additional funders
- 3) Determining what Ambassador-led activities will be possible in a more resource-constrained future or working with the LST on sunsetting if necessary

Thank you!

Appendix

List of Ambassadors on Steering Committee and Working Groups

Steering Committee

- A. Toni Young
- Amy Morgenstern
- Andrew Niklaus
- Art Taylor
- Brad Dudding
- Britt Lake
- Carmen Moreno-Rivera
- Christine Robinson
- Debra Natenshon
- Doug Bauer
- Erika Van Buren
- James Stancil
- John Brothers
- Kathy Park
- Louis Erste
- Omar Butler
- Quentin Wilson
- Shelley Metzenbaum
- Tracy Gray

Fundraising

- Brad Dudding
- Doug Bauer
- Mari Kuraishi
- Kathy Reich
- Jenn Rothberg

Working Groups

Partnership

- John Brothers
- A. Toni Young
- Erika Van Buren
- Tosca Bruno-van Vijfeijken
- Hilda Polanco
- Meridith Polin
- Randal Pinkett
- Heather Carpenter
- Jeremy Kohomban

Value Proposition

- Debra Natenshon
- Louis Erste
- Amy Morgenstern
- Quentin Wilson
- Shelley Metzenbaum
- Brad Dudding
- Kathy Park
- Tracy Gray
- Keren Abina Sotomayor
- Pratiche Shah
- Steve Seleznow
- Dina Wilderson