

StartingBloc

2019 Transparency Report

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Mission

StartingBloc envisions a thriving planet stewarded by leaders who are self-aware, mature, competent and connected.

Vision

To convene and develop leaders and companies who value connection, community and courageous leadership.

Values



Seed

We believe that unearthing the inner wisdom, purpose, and power of each person has the potential to shift culture.



Curiosity

We believe in creating experiences that include space for introspection, reflection and questions to explore the unknown and to reimagine what's possible.



Presence

We believe that by fully showing up for ourselves and each other, we create the conditions in which we will all flourish and thrive.



Freedom

We believe that claiming individual dignity and the full expression of self is powerful.



Belonging

We believe that our greatest successes arise out of interdependence; that being held and celebrated in community accelerates our individual and collective advancement.



Evolution

We believe that changes in systems and structures of leadership are powered by the grace and maturity to adapt, transform, and grow in generational time.

Manifesto



The world is in a period of tremendous shift. People matter. Leadership matters. Culture is created and malleable. Humans can build systems that enable the planet and one another to thrive. To get there, leadership needs to be self-aware, competent and mature. To get there faster, we need to build greater collective belonging and relationship. StartingBloc works to identify individuals on a journey to embody these traits and we do everything we can to amplify their work. We invest in individualized development and in holding the container for a high-trust community of practice. By finding the right people, providing them with training, and connecting them with a network of allies, we are intentionally designing a network effect. Enough of these people, with enough influence, and the culture of leadership will shift: creating justice, sustainability, and co-evolution - a thriving planet. StartingBloc envisions a thriving planet stewarded by leaders who are self-aware, mature, competent, and connected.

Opening Letter

from our CEO, Kristine Sloan.

**“look further ahead, like our
ancestors did, look further.
Extend, hold on, pull, evolve.”**

—adrienne maree brown



As we enter a new year and a new decade, we also enter StartingBloc's 17th year as an organization and the culmination of my first full year as CEO. During this season of transition and celebration, I can't help but think about who we are, where we've been, and where we're going. I love this Adrienne Maree Brown quote because it pulls in all of the ways that leadership is about external change and internal evolution—the competence to move forward and humility to understand the necessity of your own continuous change.

And, as StartingBloc's sixth CEO, I wanted to do just that. As part of this exploration, I connected with each of StartingBloc's past CEO's to hear about their work. I asked questions about their values, the StartingBloc Fellowship community during their tenure, and their personal experiences leading the organization.

In addition to deepening relationships and learning more about the leaders I spoke with, I realized that a clear picture of StartingBloc was emerging: who we

were built for, how we have evolved, how we have stayed the same, and now looking forward, how we hope to guide the organization into the next decade-and beyond.

The annual transparency report is intended to go behind the scenes of the organization and reflect honestly with you on where we did well and where we fell short. It is both a record of the last year, full of programs and ideas, energy and value, and an organizational retrospective that accounts for our history. By seeing where we have started and all the lives we have lived in the run up to who we are today, we're clearer than ever on where we are going and how you can help us get there. I look forward to the next iteration of our organization. We are grounded, motivated, and ambitious. Happy New Year. Happy next decade. Welcome to StartingBloc year 17. Thank you for walking with me. I look forward to how we extend, hold on, pull, evolve.

Organizational Timeline





2003-2007: Origins in Social Entrepreneurship

In 2003, Martin Smith and Blake Bible sought out a place to explore the newest, previously unnamed sector of work—social entrepreneurship. Not finding learning opportunities or communities within traditional institutions, they created their own container for exploration: StartingBloc.

The first StartingBloc Institute was held in 2005, then built primarily as a launch point for 18-27 year old leaders creating a career as social entrepreneurs. It immediately became clear that not only were mission-driven professionals seeking a space to explore their new ideas, but were also seeking community.

2007-2015: Broadening to Social Impact

Under the leadership of Jo Opot, and later Adriana Pentz Zagorski, StartingBloc broadened the scope of work. We moved from focusing solely on social

entrepreneurs, to focusing on the social impact sector as a whole, recognizing the need to support leaders from all different types of industries as they brought more of their values into their work.

We were driven by some of the emerging paradigms of that time: the desire to balance both purpose and profit, and a focus on real-world business challenges. In the room, we had challenges lead by business leaders and Fellows engaged in a case competition. In this time, StartingBloc hosted its first international institute (London 2007 & 2008) and diversified in both age and industry, and our Fellowship community grew from a few hundred to a couple thousand, reaching more leaders around the globe.

2015-Present: Changing Landscape of Work and Leadership

Under the leadership of Cesar Gonzalez and presently, Kristine Sloan, StartingBloc has taken a step back and begun to look at the landscape of work and leadership as a whole. Now, our position is that, no matter where you're working or what your company's intended focus is, there must be an ethical and moral foundation to your work.

We are focused on emerging a new paradigm of work and leadership that moves the world away from traditional norms of accumulation and command-and-control, towards distribution and trust. In these years, we've intentionally woven historical context into our programming, and brought equity and transformative justice into our core curriculum and our community practices. We've become much more diverse.

Today, StartingBloc is an organization that serves to support a community and

advance a new paradigm of leadership. Our Fellowship is made up of 3,100+ leaders living in 56 countries around the world with 18 activated regions. We're 65% people of color, 60% female or non-binary, and represent ages 18-70.

2020-2022: Expansion and Global Reach

From 2020-2022, we will lean into our global community and launch StartingBloc Institutes and workshops in cities and communities around the globe. We will fundraise and resource the organization to better support and enable our community of Fellows and partners. We will share more of the stories of our Fellows and uplift their work as an example of what is possible. On our minds for the next few years: How might a new paradigm of leadership pave the way towards just transition within the climate crisis? How might we mobilize leadership and collective power to achieve racial and gender justice? What are the trends in organizational design that reflect a

commitment to self-awareness, maturity, competence, and connection? And finally, How might we center our organization in multiple locations around the world, so that we can better localize our programming to support the needs of global leaders, while keeping the thread of our community strong across locations?



Organizational Timeline



In 16 years StartingBloc has fundamentally changed

The organization started with a focus on social entrepreneurship and a case study competition featuring local businesses. We have evolved to an organization that creates space for individuals and companies to explore the unknown and reimagine what's possible. We're intent upon unearthing the inner wisdom, purpose, and power of each person in order to shift the culture of work and leadership towards justice, abundance and sustainability. The way we lead has evolved to center on creating a space for Fellows to step away from their busy lives to invest in themselves through reflection.

It is (and has been) a space to be brave, to make sense of their leadership and work, and to dream about who they can be - and what they can do.

Our physical Institute spaces have also shifted to reflect this way of thinking. Last year was the first year we had Allison Brewer, an Accessibility Coordinator, at every Institute. In a structural way, this models our commitment to ensuring that everyone has what they need in the StartingBloc space.

As a result of our evolution away from social entrepreneurship and towards leadership culture as a whole, we have begun to engage a broader range

of incoming Fellows, partners, and community advocates. If, like us, you're intent on shifting the culture of leadership and supporting spaces for leaders to come together, reflect, and question what's possible, we could use your support in donations, nominations for future Fellows, and sponsorships.

Evolving Fellowship



Just as Institute programming has evolved, so have the Fellows. In the last few years, Fellow demographics have skewed older (the majority of our Fellows are now in their mid-late thirties) and brought with them rich experiences and insights that have diversified the broader StartingBloc community to be more intergenerational and intersectoral.

Since 2016, the number of international Fellows has continued to decline, as it has become increasingly more challenging to obtain American visas. Despite a clear process to support incoming Fellows, we have been unsuccessful in securing visas for a good percentage of our international Fellows. As a result, StartingBloc has committed to building a more intentional international presence (you can read more about our Lagos bootcamp and South Africa Institute) and strengthening the vibrant communities of Fellows we have across Europe, West and South Africa, Southeast Asia, and Brazil.

One of our core operating principles is to

go an inch wide and a mile deep. If change moves at the speed of trust, how might we build relationships that allow us to bring values into the world that reflect what we believe to be the future of work?

As part of this principle, we have committed to the following:

Regional Leadership Structures

This includes StartingBloc making investments by providing regional teams with budgets, checking-in monthly, and working from behind regional leaders who cultivate and nurture the local StartingBloc community. In 2019, we supported 25 application-based Regional Chairs in 18 activated regions around the world.

Learning Circles and Virtual Gatherings

We heard a clear need from Fellows for more spaces to connect and learn after their Institute. Last year, we launched cohort-based 4-6 month Learning Circles



on topics such as storytelling, designing justice, and financial freedom, engaging over 60 Fellows. We also began hosting virtual gatherings where Martha, Director of Community Engagement, connected with a cross-sector of Fellows who joined calls to catch-up, hear StartingBloc updates, and engage with one another.

The Bloc

The Bloc has continued to serve as a hub and searchable directory for over 1,000 Fellows who have created profiles and use the platform's expanded functionality to make asks (there's an algorithm that matches skill sets on the backend and pings Fellows when an ask matches their expertise)! We heard a need for spaces to connect outside of Facebook and look forward to continuing to build an online space for connections, hiring and support through the Bloc.

Fellow-led Advisory Teams and Community Centered Projects

We have begun to work with a Digital

Engagement Advisory Team to understand how we can best leverage our analytics to connect with Fellows across the platforms Fellows use most (e-marketing, the Bloc, Facebook, Instagram, etc.). We also began to work with a Mentorship Program Advisory Team to redesign our mentorship program both during Institute and through a to-be-launched virtual mentorship program.



Board, Team, & Facilitators

Board, Team, & Faciliators



Last year we went through an intensive search process to turn over the Board of Directors that supported us for the last two years. It was the first time we conducted an open application search that resulted in over 50 applications. Our Board maintains a level of responsibility, accountability, and capacity to share skills, passions, time, and resources in an effort to help StartingBloc grow and advance. Elected in April 2019, the new all-Fellow board has committed to two years in leadership, supporting the organization in executing against a clarified vision and five strategic priorities.

2019 Board of Directors



Alen Amini



Kenneth Andjeski



Callie Chamberlain



Margaret Chapman



Aldea Coleman



Rachel Fagen



Nils Klinkenberg



Pamela Pelizzari



Julian Rhoads



Michelle Rhodd



Rhoda Tamakloe

2019 Team



Dieudonne Allo

South Africa Institute Coordinator
September 2019 - present



Ashley Bernard

Creative Projects & Admin
March 2019-present



Martha Cavazos

Director of Community Engagement



Cortni Grange

Sales Strategy Consultant
January-March, 2019



Kristine Sloan

CEO



Will Smith

Digital Strategy Consultant
January-March, 2019

Speakers, Consultants, & Coaches



Abby Allen

LA'19 Mindfulness Coordinator
Founder, Present Day Urban Retreats // Neon Butterfly



Joyell Arvella

Core 2019 Institute Facilitator,
StartingBloc Consulting Facilitator
NOLA'18 Fellow
Womanist Facilitator and Writer



Jes Averhart

RDU'19 Speaker
Executive Director, Leadership Triangle



Allison Brewer

LA'19 Accessibility Coordinator, NY'19
Accessibility Coordinator
NOLA'17 Fellow
Founder, Voice(Is)



Laine Forman

LA'19 Facilitator
Organizational Development, The Ready



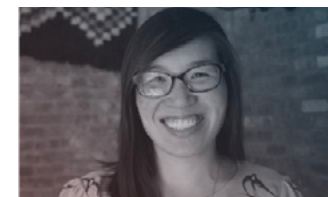
Dan Gonzalez

Durham Community Workshop
Facilitator
Co-Founder, District C



Anne Jones

Durham Community Workshop
Facilitator
Co-Founder, District C



Christine Lai

LA'19 Facilitator
LA'13 Fellow
Network Connector, The Ready



Chianti Lomax

NY'19 Mindfulness Coordinator
NOLA'17 Fellow
Mindfulness Advocate and Speaker



Ali Randel

NY'19 Facilitator
Partner, The Ready



Kat Short

Core 2019 Institute Facilitator, Learning
Circle Facilitator
NY'15 Fellow
Founder, Tell Your Damn Story



Douglas Tsoi

LA'19 Speaker, Learning Circle Facilitator
LA'18 Fellow
Founder, School of Financial Freedom

Speakers, Consultants, & Coaches



Larry Williams Jr

NY'19 Speaker
Founder, UnionBase.org



Michelina Ferrara

StartingBloc Consulting Facilitator,
Learning Circle Facilitator
Deputy Director, Atlas:DIY



Neha Mathew-Shah

NY'19 Speaker
President, Progressive Workers Union.
International Environmental Justice
Representative, Sierra Club



Patrice Graham

RDU'19 Mindfulness Coordinator
Owner & Instructor, Colors of Yoga
Studio



Rachel Ishofsky

StartingBloc Consulting Facilitator
LA'19 Fellow
Strategist and Independent Consultant



Renee Freedman

Director, StartingBloc Coaching Program
Founder, Renee Freedman & Co



Russ Finkelstein

StartingBloc Coach-in-Residence
NY'17 Fellow
Co-Founder & Managing Director,
ClearlyNext



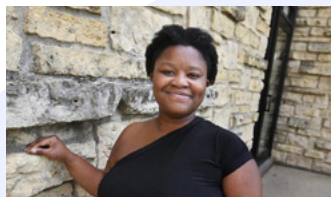
Sam Spurlin

RDU'19 Facilitator
Partner, The Ready



Sharan Bal

RDU'19 Facilitator, NY'19 Facilitator
Partner, The Ready



Tiye Sherrod

Social Justice Consultant
Founder, The Tiye Sherrod Agency for
Diversity/Inclusion



Vicki Saunders

NY'18 Speaker
Founder & CEO, SheEO

Bootcamp Lead Community Partners



Creative Reaction Lab

St. Louis Bootcamp Partner



Susie Lee, Board Member of Ecotrust

Seattle Bootcamp Partner



James and Grace Lee Boggs Center to Nurture Community Leadership

James and Grace Lee Boggs Center to Nurture Community Leadership

Detroit Bootcamp Partner



Acumen West Africa

Lagos Bootcamp Partner

BALTIMORE · CORPS · CO

Baltimore Corps

Baltimore Bootcamp Partner

What Went Well





Regional Leaders, Bootcamps, and Institutes outside of the US

We are a global Fellowship, and this year, our programming reflected it. In 2019 we launched a Bootcamp in Lagos and this year we will launch an Institute in Johannesburg. We hope this is the emergence of a continued global presence and recognition of our value to make the Institute accessible. We launched our Bootcamps in an effort to bring core pieces of StartingBloc to a broader audience and build a pipeline of applicants to our Institutes. In addition to ‘re-upping’ the skill sets of existing Fellows, we were able to engage with folks who had heard about StartingBloc but were unsure or unable to commit to a full Institute. Bootcamps also helped us to cultivate and deepen existing relationships with our community partners in each city where they were hosted. Similarly, in a push to move leadership down to local ecosystems, the structure of regional leaders and Fellow

volunteers proved successful in setting up and sustaining hubs of engagement and ideas.

Hiring Expert Subcontractors to Support on Projects

While we are a strong and mighty team, it’s important for us to obtain information from the community around StartingBloc and tap into the collective knowledge within our Fellowship. By hiring subcontractors, like Allison, who helped us make our Institute spaces more accessible and like Tiye, our social justice consultant, who continues to be an invaluable resource for us as we make decisions, we’ve been able to have more voices influencing the direction and the structure of our community and organization. At the start of 2019, we hired Cortni Grange and Will Smith, who helped us build systems and tools around lead generation and sales strategy. We also brought on Ashley, our creative projects and administrative support lead, who has strengthened our information packets,



our systems to support international Fellows, and our messaging strategy. In the Fall of 2019, we hired Allo, our South Africa Institute Coordinator, who built a groundswell of support and momentum for our South Africa Institute.

Receiving the amazing gift and support of committed volunteers

On the volunteer side, we've been deeply fortunate to have received the gift of time and expertise from Kelsey Kratch who gave us a fresh rebrand informed by Fellow interviews and insights and Avish Jain, who automated a ton of our backend processes and streamlined our online infrastructure. We feel fortunate to work with all of you. Thank you for helping us bring the mission and vision of StartingBloc to life.

Engaging with Funders and Sponsors in new ways to grow our impact

We also began to engage with funders in new ways. Blue Cross Foundation of

North Carolina supported the Raleigh Institute and also funded two leadership development workshops that were open to the public - allowing us to bring our content into our local community here in NC in a price accessible way. USC Marshall School of Business's Masters of Science in Social Entrepreneurship program continued to support StartingBloc but engaged with us in a new (huge) way by hosting the LA Institute on their campus and sponsoring all of the venue, catering, and speaker travel costs. In 2020, we're excited to build upon the success of new and in-kind partnerships to expand the ways we can engage with funders and sponsors. If you're interested in funding or sponsoring our work, please get in touch.

What Didn't Go Well



Poor financial performance caught up to us

We didn't start off the year on solid footing financially. We had undersold most of our Institutes from 2016-2018, leading to a significant cash shortfall that caught up with us in 2019. When one of our team members resigned, we took the opportunity to catch up from these shortfalls by maintaining a two person team throughout the year, though even that measure did not catch us up fully.

We ran big experiments instead of small ones

Additionally, while our Bootcamps experiments were a great way for us to engage locally and strengthen relationships, we did not meet our sales goals and we could not cultivate donor support. As a result of relying on Bootcamp revenue instead of hosting a fourth Institute this Fall, we spent almost five months this year with less than \$10k in the bank account and it created a level

of stress and anxiety that was hard to pull out of. We experimented too big - in retrospect, we should have run a fourth Institute and piloted one-two Bootcamps with no revenue expectations attached to them.

9 major programs in 9 different cities with 2 full-time staff

We ran nine major programs in nine different cities around the world, on top of smaller community-based programs and workshops and we had two full time team members. This meant our core leadership team was more focused on logistical, top of mind activities like addressing ticket sales for Institutes instead of focusing on long term strategy and donor cultivation.

This year, one of our Fellows told us that they are exhausted of hearing this same story from StartingBloc year after year. Same.



Struggling to build a culture of philanthropy

We struggle to share a compelling story of StartingBloc's need for a community of donors. While we generate income from our Institutes, it is only enough to cover the costs of Institute programming and one full time team member. All of our other earned-income programs go into funding regional budgets for our Fellow-led teams, Fellow pro-bono Coaching Awards, our Fellows-only directory, The Bloc and our Community Engagement Director, part-time staff, and all of our operating expenses. As you can imagine, we earn nowhere near the income from these programs that it takes to cover our costs. We need to build a stronger community of philanthropists, donors, and financial supporters in order to continue to do impactful work. Otherwise, we will remain an organization simply focused on growing our Fellowship community which is not mission-aligned or our intent.

Financial Summary



This year, we wanted to stop focusing so much on Institute sales and instead focus on building systems, clarifying our message, and creating new options for continued learning and development for our existing community. **We called 2019 “Mile Deep”** - with the intent of going from a mile wide, inch deep organization to an organization that was “inch-wide, mile deep”. Instead of running five Institutes this year, we ran three. As a result, our annual budget shrunk significantly, by over \$45k.

However, this was our first year with positive net income since 2014. Getting us into the black meant keeping our payroll expenses low and searching for in-kind gifts and options to lower our costs. **2019 was a tough year financially, but ultimately, it was one of our healthier years overall.**

Costs

\$371,414

COGS, Institutes & Events	39%	\$143,241
Sales & Marketing	9%	\$33,862
Administrative	44%	\$163,803
Finance & Accounting	6%	\$23,015
IT	1%	\$4,473
HR & Professional Development	.5%	\$1,853
Interest & Depreciation	.3%	\$1,167

Annual Operating Budget

\$377,432

2018	\$422,915
2017	\$434,195
2016	\$400,519
2015	\$398,304

Revenue

\$377,432

Program Revenue	83%	\$313,395
Application Fees	3%	\$12,820
Sponsorships	1%	\$5,000
Donations	12%	\$44,404

Scholarships Utilized

2019	\$105,340
2018	\$102,633
2017	\$91,175

Closing Letter



Over the last 16 years, StartingBloc has been a lot of things.

We've interacted with a lot of people, transformed because of those people, and we continue to evolve and emerge as an organization. In 2020, we're committed to living into our values of seeding transformation, claiming individual dignity, creating space for curiosity, showing up fully, relying on our interdependence, and yes, continuing to evolve.

We're hosting our first Institute outside of the US in 12 years, growing our regional presence all over the world, deepening our commitment to each community where our team lives and works, and ultimately, getting this thing funded.



If you're on board, here's how you can help.

- **Donate** - we need thousands of people to fund this vision.
- **Partner or Sponsor** - help us grow our outreach and invest in our community.
- **Volunteer** - for StartingBloc's operational needs, for a Fellow-led advisory team, or for a Fellow's organization.
- **Engage** - show up for other Fellows, provide your feedback and input on community-based surveys, be present at events, make new friends and continue your learning in a learning circle, and prioritize relationship.

Welcome to StartingBloc's third decade.
Let's do this.