

# Hope, Money, Love:

## The Story of LIFT and Its Mission To Lift People Out of Poverty for Good

A Case Study Developed for the Kresge Foundation's Next  
Generation Human Services Initiative



LEADERSHIP FOR A  
NETWORKED WORLD



# Contents

Hope, Money, Love: The Story of LIFT and Its Mission To Lift People Out of Poverty for Good .....	3
Background .....	5
Launching LIFT: 1998-2009.....	6
Growing LIFT: January 2010 – August 2014 .....	9
Reinventing LIFT: 2015-2017 .....	12
Looking to the Future: 2018-2019.....	16
A Pair of Leadership Transitions and Governance.....	17
Next Steps and Impact .....	19
Acknowledgements and Credits .....	20





# Hope, Money, Love: The Story of LIFT and Its Mission To Lift People Out of Poverty for Good

Late one evening in January 2015, LIFT Founder and CEO Kirsten Lodal gazed out at a circle of nearly 30 people representing her organization's senior staff and felt a mixture of pride and trepidation.<sup>1</sup> Her joy stemmed from the fact that, over the past 17 years, she and the people in that room had helped more than 100,000 families and established LIFT "as a national model for more effective and human-centered social services."<sup>2</sup> At the same time, Lodal was nervous: she had just delivered a speech arguing that LIFT was falling short of its mission of lifting people out of poverty for good. From Lodal's perspective, LIFT was largely serving as a safety net for people in crisis, helping to make poverty more tolerable for the majority of those who walked through its doors. What Lodal wanted instead was to be a springboard out of poverty.<sup>3</sup> To help people exit poverty on a permanent basis, she believed LIFT needed to employ a two-generation approach and narrow its target population to parents with young children (at the time, the organization was serving anyone in need).<sup>4</sup> This would position them to break the cycle of intergenerational poverty at the transmission point. "I'm so proud of this organization and what we've accomplished," Lodal recalled expressing, "and I think we have a ways to go to fully live up to our aspiration."<sup>5</sup>

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1 Personal communication with Molly Day, Chief Strategy Officer, LIFT, by e-mail, October 17, 2018; and Interview with Molly Day, Chief Strategy Officer, LIFT, by telephone, October 17, 2018. Hereafter cited as Day interview. Unless noted, subsequent quotations from and attributions to Day come from this interview, a previous telephone interview with Day and Kirsten Lodal on March 23, 2018, and a separate personal communication with Day, also by e-mail, on March 1, 2019.

2 "LIFT 3.0 Concept Paper: Breaking the Cycle of Poverty," March 17, 2015, obtained via a personal communication by e-mail with Molly Day, Chief Strategy Officer, LIFT, on October 17, 2018.

3 Day, personal communication by e-mail, March 1, 2019.

4 "Two-generation approaches focus on creating opportunities for and addressing needs of both children and the adults in their lives together." For additional details, see "What is 2Gen?" Ascend, The Aspen Institute, available at <http://ascend.aspeninstitute.org/two-generation/what-is-2gen/> (accessed on January 15, 2019).

5 Interview with Kirsten Lodal, Founder and Senior Advisor, LIFT, by telephone, December 21, 2018. Hereafter cited as Lodal interview. Unless noted, subsequent quotations from and attributions to Lodal come from this interview and additional telephone interviews conducted in 2018.



Lodal listened as the senior staff went around the room and shared their reactions one-by-one. Some expressed optimism about the opportunity to effect deeper change. Others shared passionate concerns about ending service to members who had come to depend on LIFT. One attendee brought up the example of a 55-year-old chronically homeless man who, as Molly Day, LIFT's Chief Strategy Officer, said, "we knew in our heart of hearts was not making tremendous progress but [for whom] LIFT was the one safe space he could come to where he felt loved." As Day noted, for many staff, the faces and stories of the members they served and may no longer be able to serve felt present, and the mood grew heavy. "There were a lot of tears in the room, and the conversation went on for a couple hours," Day added. "But it was important to give people that space to share their raw reaction to what was ahead of us."

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- Molly Day  
Chief Strategy Officer, LIFT

That conversation marked the beginning of a multi-year transformation during which LIFT dramatically revamped its program. Along the way, Lodal and her team grappled with challenging questions. Among them: As LIFT exited members and restructured its national footprint to support the new mission, how would it preserve its loving and supportive culture? How would LIFT build and participate in ecosystems at the local level in order to position it to achieve two-generation impact? How would LIFT refine its evaluation system? How would the organization sustain and enhance its commitment to advancing racial equity and social and economic mobility? Even as it focused on the current shift, how would the organization strategize for the future? Most fundamentally, was it feasible to lift people out of poverty for good?





## Background

Lodal had begun developing a passion for social justice when her mother—a public school teacher and principal—had given her “social justice tuck-ins” before bedtime during which she would tell her daughter about change agents like Martin Luther King, Jr. and Cesar Chavez. As a high school student in the mid-1990s, Lodal began her own path of service by securing two internships. The first was with Marian Wright Edelman, the founder and then-President of the Children’s Defense Fund; the second was as an assistant teacher at a Head Start Program for predominantly homeless families. Edelman, as Lodal recalled, was “on the front lines of the country’s response to welfare reform” and helping to shed light on the unaddressed needs (e.g., childcare) of mothers transitioning to the workforce.<sup>6</sup> Through her work with the Head Start Program, where she developed close relationships with her students’ mothers, Lodal realized that the image of the “Welfare Queen”—a stereotypical and racist depiction of black women fraudulently living off of welfare benefits—was completely inaccurate.<sup>7</sup> Rather, Lodal saw how these women were overcoming obstacles to care for their families; seen from this perspective, Lodal said, “These women were superheroes.”

Looking back, Lodal recognized that the relationships she formed with these women were foundational for LIFT. She reflected:

I saw how a little bit of listening and empathy, open-mindedness about their dreams and aspirations and then support along the way could be helpful. We often talk about LIFT’s secret sauce being this combination of hope, money, and love. Looking at the aspirational, the financial, and the relational aspects of what needs to happen for people to make change in their life, and all those seeds were planted early on.<sup>8</sup>

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6 In 1996, President Bill Clinton signed the “Personal Responsibility and Work Opportunity Reconciliation Act.” Among other provisions, the bill created work requirements for welfare beneficiaries. For additional details, see Andrew Glass, “Clinton Signs ‘Welfare to Work’ Bill, August 22, 1996,” *Politico*, August 22, 2018, available at <https://www.politico.com/story/2018/08/22/clinton-signs-welfare-to-work-bill-aug-22-1996-790321> (accessed on January 11, 2019); and Richard Moffitt, “From Welfare to Work: What the Evidence Shows,” *Brookings*, January 2, 2002, available at <https://www.brookings.edu/research/from-welfare-to-work-what-the-evidence-shows/> (accessed on January 12, 2019).

7 Rachel Black and Aleta Sprague, “The Rise and Reign of the Welfare Queen,” *New America*, September 22, 2016, available at <https://www.newamerica.org/weekly/edition-135/rise-and-reign-welfare-queen/> (accessed on January 12, 2019).

8 Lodal interview; and Kirsten Lodal, *Achieve Great Things* Podcast, Season Two, Episode Seven, available at <https://soundcloud.com/achieve-great-things/season-2-episode-7-kirsten-lodal> (accessed on January 11, 2019).



## Launching LIFT: 1998-2009

Several years later, as a 19-year-old Yale undergraduate, Lodal and her friend Brian Kreiter were exiting a pizza shop in New Haven, Connecticut, when a homeless man asked them for change. They then had a lengthy conversation with the man—who had lost his job and family—and met with him several times to help him write his resume and land a job. Lodal identified a meaningful pattern: the same ingredients that had strengthened her relationship with the mothers in the Head Start Program had been integral to her work with this man. “To think that something as simple as treating him with kindness could be so powerful for him,” Lodal said. “That was the tipping point for me. I knew then that I had to make helping others my life’s work.”<sup>9</sup>

Inspired by this relationship, Lodal and Kreiter began dreaming of what might be possible if they could harness young people’s spirit of service and connect it back to their own community. Lodal hit the ground and began building relationships with community organizations in New Haven; one of those relationships, with the New Haven YMCA, blossomed into an offer of dedicated space to organize programming if she and her friends would provide the volunteers and the services.<sup>10, 11</sup> Soon thereafter, in October 1998, LIFT—then known as the National Student Partnerships (NSP)—held its first organizational meeting. NSP then opened its first office in New Haven in January 1999 and was formally incorporated that May.<sup>12</sup> Lodal, who co-founded the organization with Kreiter, reflected on the spirit that animated NSP’s creation. She said:

There was a lot of brazen idealism in the start in terms of the respect for the immense strengths of these parents and a belief that, if we actually invested in peoples’ initiative, instead of tearing them down, their kids, over the long-term, would be a lot better off, and society would be a lot better off. That was really the catalyst.

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9 Beth Levine and Marti Attoun, “The Kindness of Strangers: Helping the Homeless,” *Woman’s Day*, February 29, 2012, available at <https://www.womansday.com/life/real-women/a6396/helping-the-homeless/> (accessed on January 12, 2019).

10 Day, personal communication by e-mail, March 1, 2019.

11 The facility was a YMCA-run childcare center that offered Lodal and Kreiter space on their second floor so that they could help the parents in the center. As Lodal noted, this reflects “[some] early 2Gen pieces were baked in.” Personal communication with Kirsten Lodal and Michelle Rhone-Collins, by e-mail, March 25, 2019.

12 Lodal interview; and Vanessa Blum, “Rookies With Heart,” *Fast Company*, November 30, 1999, available at <https://www.fastcompany.com/61968/rookies-heart> (accessed on January 17, 2018).

## The Initial Program and Rapid Growth

NSP experienced immediate success with an initial focus on two main outcomes and an emphasis on creating a supportive, empowering culture. The first outcome was providing welfare beneficiaries a wide array of services, including help navigating the maze of social services and support in finding a job.<sup>13</sup> The second was training the next generation of anti-poverty leaders, a benefit that would come from the student volunteers who helped to provide NSP's services and whom NSP recruited through partnerships with local universities.<sup>14</sup> Employing this approach, NSP grew rapidly; by November 1999, a little over ten months after the organization was launched, it had a national office in Washington, D.C. and over 20 campus chapters across the country.<sup>15</sup>

NSP was able to expand quickly in part because it secured a large influx of government funds. In 2001, Lodal—who had taken time off from school and moved to Washington, D.C. to help lead the organization—and her colleagues obtained a multi-year, million-dollar grant through the Department of Labor's Employment and Training Administration. The organization used this funding to begin professionalizing its staff (including hiring its first program director), and developing its clinical framework and methodology. Then, in 2002, after obtaining support from the AmeriCorps VISTA program, NSP added a layer of full-time support staff to their base of student volunteers. From the perspective of Lodal, who returned to Yale to get her degree in January 2000, this support gave NSP a runway, a rare luxury for young non-profits.<sup>16</sup> "We were doing some private fundraising," she explained, "but we didn't have a lot of pressure to do that because we had this amazing and kind of unusual public growth capital."

As valuable as this public funding was, there were downsides. The first was that the support was vulnerable to shifts in the political climate, and in 2005, the Bush Administration began cutting back on domestic human services funding streams. "It was clear the writing was on the wall," Lodal said, "so the kind of funding we had received at that point to grow was not going to be a long-term solution for us." Another drawback was that the government funding did not come with strategic support, something that Lodal sensed would be valuable moving forward. NSP had grown rapidly but, as Lodal said, "arguably too much," and Lodal felt the organization would benefit from identifying funders who could help them refine their approach.

A turning point came in 2007 when NSP secured a seven-figure investment from New Profit, a Boston-based venture philanthropy group. This included pro-bono consulting support from Deloitte (then Monitor), which allowed the organization to access strategic thinkers and business leaders who could help NSP think through its approach. For example, Monitor began discussing with Lodal and her team how to address the organization's overextension. Because NSP had leveraged low-cost student volunteers and AmeriCorps VISTAs, it had been able to expand rapidly and widely, but that often came at the expense of making a deeper impact in each location. Leadership recognized that existing staff were spread too thin, and without more supports for its volunteer-driven model, LIFT worried the quality of services to members would be too uneven. As a result, the organization decided to focus on fewer cities where it could invest more in professional staff (not just AmeriCorps VISTAs) who would have the training and expertise to do more to help the members they served.<sup>17</sup>

In addition to staffing up fewer regions, LIFT made changes to its message and its fundraising strategy. On the group's tenth anniversary in 2009, LIFT completed a piece of work to strengthen its brand, officially changing its name from NSP to LIFT. Lodal believed the term "lift" was more evocative. "I felt like it was such a great embodiment of who we were, the skin kind of matching the inside," Lodal explained. "This notion of how we were lifting, lifting families, lifting cities, being a lifter, became its own identity. It was an action, not an acronym." In parallel, LIFT also made key investments

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13 Day and Lodal interviews; and Cornelia Grumman, "Young Adults Take On Poverty," *Chicago Tribune*, August 5, 1999, available at <https://www.chicagotribune.com/news/ct-xpm-1999-08-05-9908050176-story.html> (accessed on January 17, 2019).

14 Day, who volunteered for LIFT as an undergraduate at Northwestern, reflected, "Kirsten created a wave of young people, myself included, who were inspired by LIFT and wanted to go out into the world to do more."

15 Blum, "Rookies With Heart."

16 Blum, "Rookies with Heart."

17 Day, personal communication by e-mail, March 1, 2019.





to build a stronger fundraising function. Notably, LIFT professionalized its executive leadership in each region and its fundraising staff. It also expanded the work of its regional Advisory Boards in its main cities; as Lodal explained, these groups had previously occupied a program advisory role but were also now expected to help with fundraising and providing strategic guidance to individual locations about how to maximize their impact. Lodal reflected, “If we were going to sustain ourselves over the long haul and go deep in the communities, we really had to have a different kind of much more expensive, professional infrastructure. We couldn’t have it both ways.”<sup>18</sup>

Beyond the support to build and grow the organization, another benefit of the partnership with New Profit was that Lodal began reflecting on and refining her leadership approach. Bill McClements, Monitor’s then COO, became her coach and helped her to think through how to embrace her natural leadership style—which emphasized being deliberative and consultative—while still projecting strength. This issue had come to the fore when LIFT pitched the New Profit team. In what Lodal felt was a “show of force,” she brought two senior staff members to help; however, as Lodal recalled, some of the funders felt that this collaborative approach reflected “that I was a weak leader who wasn’t confident enough to do this on my own.” She added, “I had to fight like hell to prove that I had the chops but also to say, ‘There are different leadership models that are out there, and I stand by my approach.’ But some of that felt pretty gendered as well.”<sup>19</sup>

*“One of the things that’s always been important to us is to be self-reflective as an organization. Nimble, willing to adapt and change. And I do think that stems from the top, and a leader’s willingness to ask hard questions, be open to feedback, and recognize their own constraints and limitations.”*

- Kirsten Lodal,  
Founder and former CEO, LIFT

Looking back, Lodal recognized that her willingness to adapt her leadership style helped to seed a dynamic capability in the organization: the ability to examine its work critically and identify opportunities for growth. Lodal summarized, “One of the things that’s always been important to us is to be self-reflective as an organization. Nimble, willing to adapt and change. And I do think that stems from the top, and a leader’s willingness to ask hard questions, be open to feedback, and recognize their own constraints and limitations.”

<sup>18</sup> Lodal interview; and Day, personal communication by e-mail, March 1, 2019.

<sup>19</sup> This built on previous work that Lodal had done to pursue her professional and personal development. This included participating in an Executive MBA program at Columbia University’s Institute for Non-Profit Management, which provided valuable training (e.g., finance and strategy classes) as well as a peer network that was also grappling with the loss of public funding. Lodal also leveraged therapy, which, as she explained, helped her to explore how “LIFT’s evolution had mapped to her own personal maturation.” The young CEO’s biggest takeaway from these experiences was the importance of authenticity. She explained, “That’s probably the greatest trick in life for all of us: how do we manage through our own insecurities and fears of how the world will perceive us and just be ourselves?”





## Growing LIFT: January 2010 – August 2014

New Profit later helped LIFT to develop a five-year strategic plan. Formally launched in July 2012, the plan introduced two significant changes to how LIFT defined and measured its outcomes and impact. First, rather than focusing on serving people in poverty *and* training the next generation of anti-poverty leaders, LIFT would prioritize helping the people that came through its doors. Second, when measuring the progress of LIFT's members, the organization would no longer focus on the volume of services rendered but instead evaluate members' holistic growth in three areas: financial security, personal well-being, and social connections.

These critical shifts in strategy came as a result of a year-long process to refine LIFT's theory of change. They also dovetailed with Lodal's own experience of becoming a mother for the first time. From a strategic standpoint, the LIFT and New Profit teams focused on defining LIFT's "secret sauce"; as Day shared, "When we asked members what mattered most about their experience with LIFT, the service referrals weren't what they named. Instead, members would talk about the relationships they were building with students and the confidence that they were gaining as a result. That they felt treated with dignity and respect." And as a new mother, Lodal's own reflections of what she most needed during the first few months of parenthood brought to light not only the importance of disposable financial capital to solve problems, but also the importance of social capital – a friend to call when she was feeling isolated, or a community network to draw on when her childcare fell through. Taken together, the key insight that emerged was that "the soft stuff" matters. Not only was poverty about having material wealth, it was also about relationships, beliefs and aspirations. Yet few social service organizations were focused on naming, intentionally designing around, and measuring these vital elements of upward mobility. For LIFT, the mandate became to demonstrate the power of "the soft stuff" by developing a measurement system that could prove irrefutably that to help people exit poverty, programs could not simply focus on skills and resources to improve someone's financial condition – they needed to deliver integrated services that focused on holistic human development.

With new conviction in the key drivers of its program's impact – financial security, personal well-being, and social connections – LIFT made changes to its staffing model and evaluation system. LIFT pivoted away from student volunteers and hired more professional staff, including personnel with expertise in regional programming that could more intentionally design around improving well-being, as well as more tenured staff to support fundraising, finance, development, and communications. To capture LIFT's impact on the "soft stuff" and demonstrate the relationship between the "soft stuff" and hard financial outcomes, LIFT introduced Constituent Voice, an evaluation system that

allowed staff to ask members questions about their well-being and how it changed over time. LIFT then was able to triangulate this data to demonstrate that growth in confidence and social connections correlated with greater progress against members' financial goals.

Yet not only did Constituent Voice provide data to support LIFT's central hypothesis, Constituent Voice also allowed LIFT to gather real-time feedback from members about their satisfaction with the program, and more importantly what they would want to change. After each meeting, members were asked to complete a two-minute survey on an iPad, asking straightforward questions about well-being and LIFT's services. Using this data, LIFT was able to systematically listen to its members' feedback and then using this information, improve program design and effectiveness. Day explained, "The practice of asking our members what they want and need from LIFT, and then actually changing as a result meant that we stopped some of the things that our [team] loved doing because our members said they were actually not beneficial. But we got better results because of listening and learning."<sup>20, 21</sup>

## Organizational Culture, Diversity, and Equity

The effort to hire more professional staff and refine LIFT's evaluation system was emblematic of how the organization was becoming more sophisticated. But even as LIFT matured, Lodal paid close attention to the organization's culture. This was in part because she wanted to sustain the caring and supportive tendencies that were seen as one of the organization's strengths. For example, LIFT had an annual staff retreat that brought together the entire LIFT team from across the country to learn from and support each other. In an effort to reinforce a culture that highlighted peoples' ability to grow, LIFT also gave every person who participated in the program the title of "member," which reflected their value and belonging.

More broadly, each office had symbols and stories that highlighted the unique culture of the organization. The walls in LIFT offices were decorated with inspirational quotes and stories from empowered families about the impact that LIFT had had on them; in addition, staff members often delivered moving monologues entitled "Why I LIFT." Nancy Hernandez, a LIFT-Los Angeles member, explained, "No one here ever looks at you like you're less than."<sup>22</sup> Deidre Forbes, a Master's in Social Work candidate at the University of Southern California who completed her field work at LIFT-Los Angeles concurred, saying, "When I first got here, I was like, 'Is this real, or are they faking?' Because I've never been to an organization where I feel so supported."<sup>23</sup>

*"No one here ever looks at you like you're less than."*

- Nancy Hernandez  
LIFT-Los Angeles member

Lodal was also paying careful heed to LIFT's culture because there was a strong sense that the organization had to improve its internal commitment to diversity and racial equity. As Lodal told *The Chronicle of Philanthropy*, "I really started looking at: What's going on in terms of my leadership, the culture? Where do we need to start to get help to make sure that this organization is one where staff can feel supported and [can] thrive – and not like they are being asked to all become mini versions of me or my co-founder?"<sup>24</sup>

In 2011, LIFT hired Cook Ross, a consultancy specializing in diversity and inclusion, to conduct a cultural audit. As *The Chronicle of Philanthropy* reported, the audit unearthed several issues: "Many black respondents felt the organization's culture wasn't inclusive or culturally sensitive. Some employees also said the idea of diversity, which they felt was often framed in racial and ethnic terms, should be broadened to include sexual preference and political identity."<sup>25</sup> For an organization that prided itself on being inclusive and worked almost exclusively with racial minorities (in 2018, 99

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20 Day interview; Day, personal communication by e-mail, March 1, 2019; and "Listening Better: 10 Lessons from LIFT's Member Feedback Survey," LIFT, December 2016, obtained via a personal communication by e-mail with Michelle Rhone-Collins on March 29, 2019.

21 For additional background on Constituent Voice, see Maria Peña, "The Search for the Predictive Indicator: A First Look at Results," LIFT, February 21, 2014, available at <https://www.liftcommunities.org/blog/our-work/2014/02/firstlook/> (accessed on March 27, 2019).

22 Interview with Nancy Hernandez, Member, LIFT Los Angeles, October 11, 2018.

23 Interview with Deidre Forbes, Coach, LIFT Los Angeles, October 11, 2018.

24 Timothy Sandoval, "What It Takes: How One Charity Confronted Its Lack of Diversity and Found New Strength," *The Chronicle of Philanthropy*, March 2018, pp. 2-7, available at <https://www.liftcommunities.org/content/uploads/2018/03/LIFT-Chronicle-March-2018.pdf> (accessed on January 12, 2019).

25 Ibid.



percent of LIFT's members were people of color), this was a significant problem.<sup>26</sup> Sol Anderson, the Executive Director of LIFT-Chicago, made the point bluntly: "We were a pretty white organization when I first came in. It's just what we were."<sup>27</sup>

Following the audit, LIFT made multiple changes. One was increasing diversity in its hiring. It advertised jobs across affinity groups and networks that would diversify the applicant pool and "set aside money to pay recruiting firms to do more thorough searches to find diverse applicants."<sup>28</sup> LIFT also increased support for existing staff, including providing extensive professional development for fundraising. Lodal explained, "If there's a race ceiling in any way in fundraising, then you're going to see real advancement ceilings."<sup>29, 30</sup> Finally, LIFT created an internal working group to address issues of diversity, producing a range of thought-provoking internal conversations. Said Anderson:

I've learned a lot more about who I am through those conversations. I think when you have a culture that allows you to have those kinds of conversations, it's a powerful thing as a person and as a professional. And particularly as a professional who's working to knock down barriers of many types. It just makes you want to tackle those things all that much more.

The organization's internal work surrounding diversity contributed to its taking stronger public stances. A case in point came in August 2014 after Michael Brown, an unarmed black man, was shot and killed by a white police officer in Ferguson, Missouri.<sup>31</sup> LIFT's internal working group drafted and issued a statement that read in part, "What's occurring in Ferguson is emblematic of a more common and subtle experience of racism and inequality of opportunity that is present day-to-day."<sup>32</sup> Some questioned whether LIFT—which, as Day noted, was one of the only direct-service providers to speak out after the incident—had taken a step too far, but Lodal saw it as the exact opposite. As she told *The Chronicle of Philanthropy*, "How on earth can a direct-services organization working with a vast majority people of color be silent when these things are happening?"<sup>33</sup>

In fact, the statement—and the internal work surrounding diversity that had preceded it—demonstrated that LIFT was growing in key ways. For one thing, it was taking steps into the broader advocacy space. In addition, it had enhanced the organization's culture, most notably by creating the trust that people could honestly share their views (even if meant challenging the CEO) and the recognition that the organization had to be willing to examine its blind-spots if it were to achieve its long-term goals. Lodal reflected, "Going through the crucible of the racial equity work created a deep sense of psychological safety." She added, "I'm not sure we could have made the strategic moves we made and ultimately so successfully if we hadn't in essence primed the organization to be more real and more honest with ourselves and with each other, which I entirely attribute to the hard work of figuring out how to do that around racial equity."

26 "2018 Annual Report: The Next Chapter," LIFT, available at <https://www.liftcommunities.org/annual-report-2018/> (accessed on January 12, 2019).

27 Interview with Sol Anderson, Executive Director, LIFT Chicago, by telephone, November 8, 2018. Hereafter cited as Anderson interview. Unless noted, subsequent quotations from and attributions to Anderson come from this interview.

28 Sandoval, "What It Takes: How One Charity Confronted Its Lack of Diversity and Found New Strength."

29 Ibid.

30 In separate correspondence for this case, Lodal added that she was referring to "real advancement ceilings to the C-suite."

31 "What Happened in Ferguson," *New York Times*, August 10, 2015, available at <https://www.nytimes.com/interactive/2014/08/13/us/ferguson-missouri-town-under-siege-after-police-shooting.html> (accessed on January 12, 2019).

32 Sandoval, "What It Takes: How One Charity Confronted Its Lack of Diversity and Found New Strength."

33 Ibid.





## Reinventing LIFT: 2015-2017

Shortly after LIFT issued the Ferguson statement, Lodal started grappling with whether the organization was actually lifting people out of poverty for good, as it aspired to do, or instead if it was simply making poverty more tolerable. “I started to ask some tougher questions,” Lodal reflected, “about how consistently we were driving really meaningful transformation on the part of families versus offering great customer service and some kind of immediate needs support but not really moving the needle too much on family progress.” This line of questioning echoed a conversation that Lodal was having with Board members and other senior leaders about where LIFT hoped to be in ten years. The consensus was that they wanted to make a systems-level impact, and LIFT’s leaders knew that, to achieve these goals, they needed to refine their programming and isolate their competitive advantage. “What’s the killer innovation that we’re mainstreaming, and which systems are we going to push on?” Lodal said, summarizing the questions that she and her colleagues discussed. She added, “I felt very unsatisfied with our inability to answer that.”

Lodal therefore began a period of exploration that drew on personal reflection and field-level immersion in order to explore how LIFT might revamp its program, and quickly she grew attracted to a two-generation (2Gen) approach. This was in part because of recent discoveries in brain science showing the long-term impact of poverty on the brains of young children, and conversely, the opportunity to break the cycle of poverty at the point of transmission by changing families’ trajectories during children’s earliest years.<sup>34</sup>

LIFT also had a new office, LIFT-Los Angeles (LIFT-LA), that was already using elements of this approach with great success. Unlike other LIFT locations, which typically had standalone offices, LIFT-LA—which had opened in January 2013—was located within the Magnolia Community Initiative (MCI), joining a network of more than 75 organizations working collectively to create sustainable community improvements that will change the trajectory for young children living in a 500-block catchment area in South Los Angeles.<sup>35</sup> LIFT-LA, like all LIFT locations, was serving all members in

<sup>34</sup> Day, personal communication, by e-mail, March 1, 2019.

<sup>35</sup> “Building Strong Foundations,” LIFT 2013 Impact Report, p. 3, available at <https://view.joomag.com/lift-annual-report-2013-building-strong-foundations/0968157001383855021?short> (accessed on January 15, 2019); “Magnolia Place Community Initiative in Los Angeles, California,” Children’s Bureau, Administration for Children & Families, Department of Health and Human Services, last updated in 2017, available at <https://cantasd.acf.hhs.gov/bcbh/magnolia-community/> (accessed on January 15, 2019); “Magnolia Place Community Initiative,” available at <http://magnoliaplacela.org/#> <http://magnoliaplacela.org> (accessed on January 15, 2019); and Personal Communication with Michelle Rhone-Collins, by e-mail, March 25, 2019.

need but had also begun collaborating with other MCI organizations amongst other providers throughout LA, creating an ecosystem to help families with young children.<sup>36, 37</sup>

As Lodal reflected on this new research and the work of LIFT-LA, she came back to her own experiences working with parents with young children through the Head Start Program where she did an internship in high school – she recognized the parents she worked with as unsung superheroes, who, with the right investment in their potential, could create different futures for their children and she knew this was where LIFT should focus its efforts. Lodal therefore delivered the watershed speech at the January 2015 homecoming advocating that LIFT revamp its program.<sup>38</sup>

## Nemawashi and Structural Change

After Lodal finished her speech, LIFT staff spoke for hours, deep into the night, exploring how people felt about the proposed change. This was very intentional: Lodal was beginning a year-long listening tour during which she travelled across the country and met with every LIFT staff member and many volunteers and regional board members. She based her strategy on a Japanese process known as nemawashi, which literally translates to “laying roots.” This inclusive approach was beneficial in part because it gave her a chance to hear peoples’ ideas and integrate them into her strategy. Equally important, it was gentler and more gradual than more-western organizational change approaches (where leaders often unveil large strategies in a single presentation) and therefore more likely to succeed. As Lodal explained, “If you want to make a big change in any person who is a stakeholder in that change, he/she should feel that they were actually a part of the process and well aware of that change before it actually happens.” “To me,” Lodal added, “[this] just felt very natural and normal and true to my leadership style.”

While the nemawashi process helped to ease the pivot to a 2Gen approach, aspects of the transition proved painful. Most notably, after having an extensive internal dialogue and reviewing an organizational analysis prepared by then-Board member and future Board Chairman Steve Rotella, LIFT decided to close its Boston and Philadelphia offices. The rationale for closing two of its six regions was based on an assessment of a site’s strengths and challenges, ranging from talent to financial stability to the demographics served, but ultimately the decision to contract operations was based on the recognition that to execute against the audacious vision for impact, LIFT required a tighter organizational footprint. With this, the odds of getting it right increased, and given LIFT’s ambition – to lift families out of poverty for good – the hard choice felt prudent.<sup>39</sup>

LIFT also shut-down its Chicago office for a year so that it could move its operations from Uptown—an area in the northern portion of Chicago where LIFT’s primary member demographic was older, single adults facing chronic homelessness and significant substance abuse and mental health issues—to the South Side, an area defined more by families, but where child poverty loomed large. These transitions and the restructure that accompanied them represented an important step to synchronize LIFT’s programming.<sup>40</sup> Nonetheless, the changes were risky, both because they could alienate staff (who had grown to appreciate LIFT’s loving and supportive culture) and funders (some

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36 “Influencing the Social Determinants of Health: A Two-Generation Approach to Breaking the Cycle of Poverty,” Concept Note for the Robert Wood Johnson Foundation, p. 1, obtained via a personal communication by e-mail with Molly Day on October 17, 2018; and Greg Duncan and Katherine Magnuson, “The Long Reach of Early Childhood Poverty,” Stanford University, available at [https://inequality.stanford.edu/sites/default/files/media/\\_media/pdf/pathways/winter\\_2011/PathwaysWinter11\\_Duncan.pdf](https://inequality.stanford.edu/sites/default/files/media/_media/pdf/pathways/winter_2011/PathwaysWinter11_Duncan.pdf) (accessed on January 15, 2019).

37 LIFT LA was located at Magnolia Place, a community center in Southern Los Angeles where a number of MCI members—including a health clinic, a pre-school, and financial services organizations—were co-located to support children and their parents.

38 Lodal interview; and Day, personal communication, by e-mail, March 1, 2019.

39 Day, personal communication, by e-mail, March 1, 2019.

40 Lodal, personal communication, by e-mail, March 1, 2019.

of whom might feel attached to the current programming). Looking back, Lodal suggested that she was positioned to take these risks because of her track record. She explained:

There's no question I used a lot of my built-up founder capital to pull this off. But, in thinking about the long-term and even saying, 'I don't want to run LIFT forever; I want LIFT to be a thriving institution that's having an impact beyond me.' Part of what I have to do is to heighten the value proposition that LIFT is delivering and do it in a way that I can uniquely do.

## Piloting A New Approach

While the restructuring was a significant step in LIFT's move to a 2Gen approach, the organization also had to develop its new program and define more clearly its target population. While LIFT's core approach and values would remain intact, they had to learn how to best adapt that approach to the needs and wants of parents with young children. LIFT set out to learn just this through a series of rapid-fire pilot programs that were launched in late 2015 and 2016 across all four regions. One of the most critical pilots occurred in Chicago where Anderson and his team experimented with a coaching model that used Master's in Social Work (MSW) students to support members. The goal of coaching was to shift LIFT from a practice of helping members more efficiently access the services they needed, to a practice of naming big, ambitious goals, developing an action plan to achieve those goals and then coaching members over the long-term on behavior change in order to achieve those goals. Further, the MSWs were uniquely positioned to do this work more effectively than college volunteers because they were receiving training in appreciative, empowering approaches that focused on behavior change versus LIFT's bread and butter of referrals and navigation of the social services system.<sup>41</sup> Anderson said, "It's this social work practice...called unconditional positive regard. You just always believe in the capacity and the potential of the people that you're working with."

Meanwhile, LIFT-DC and LIFT-NY were exploring two different approaches to better respond to parents and the rhythms of their lives. In Washington, D.C., LIFT focused on a strategy to embed its services within existing early childhood centers with the express intention of improving accessibility for parents of young children. Further, these partnerships with early childhood providers would ensure that the children of LIFT parents were receiving high-quality childcare and that LIFT had the opportunity to share data in order to learn how its services impacted child-level outcomes. In New York, LIFT opened a new standalone site in the "hub" of the South Bronx and designed the space to be warm, inclusive and family-friendly – a key point of distinction from other social services agencies that forbade children inside – and they worked to partner with a collective impact effort focused on supporting parents and children ages zero to eight, with the goal of improving third grade reading scores.<sup>42</sup>

Finally, LIFT-LA was piloting financial programs and services that would be integral to LIFT's new approach. LIFT-LA pioneered a financial capabilities curriculum where staff worked with members on how to build a budget, how to create a savings strategy, and how to improve credit. They also introduced lending circles where members would join groups in which each person contributed a set monthly amount, and the sum was given to members on a rotational basis. This not only helped members in financial need but also enabled participants to boost their credit scores and social capital. "[It] was the idea that people really cared about each other without knowing each other," explained Araceli Lopez-Andrade, LIFT-LA's Program Director. "[There was a] willingness to support and accountability behind it."<sup>43</sup> Finally, LIFT-LA also experimented with crowdfunding emergency cash grants to support members who encountered a moment of crisis as they made progress against their goals. What the team had observed was that something as small as a \$400 unexpected health bill or a car repair could derail a family's progress, and without a network of social capital that had the financial means to help, there was nowhere or no program to which families could turn. Taken together, this focus

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41 Day, personal communication, by e-mail, March 1, 2019.

42 Day, personal communication, by e-mail, March 1, 2019.

43 Interview with Araceli Lopez-Andrade, Program Director, LIFT-Los Angeles, October 10, 2018.





on financial strength, coupled with LIFT's commitment to well-being and social capital, began to take hold and result in better outcomes for the families LIFT-LA was serving.<sup>44</sup>

While LIFT-LA was very successful at launching new programs and building strong partnerships, it nonetheless encountered significant challenges, especially as it related to the transition in the organization's target population. Like all LIFT locations, LIFT-LA had previously been open to all community members in need. However, as it honed a 2Gen approach and began to better understand who could most benefit from that approach, it narrowed its population to members who met three criteria. The first was that they were parents of children between the ages of zero and eight. The second was that the members had stable housing for at least six months, which was integral because not having housing would interfere with progress in other realms (e.g., job placement and financial services). Finally, they required that each member have some education or work experience, which made it more likely that the organization's career services would be impactful.

While all regions had to grapple with the transition to a new target population, turning away and exiting members it had long served was even more difficult for LIFT-LA. The organization worked in a high-need area, with 65 percent of people falling below the poverty line and a large population of undocumented immigrants, and many of LIFT's partners had come to depend on being able to refer a wide range of people to them.<sup>45</sup> What's more, some staff and volunteers were deeply devoted to the mission of serving anyone who came through their doors, leading some team members to transition out of the organization. "It was definitely a challenge," said Frank Curiel, LIFT-LA's Program Manager for Careers, who helped to refer members who no longer fit the organization's criteria to other services. "But what made it easier was that we had purpose." Fortunately, the reasoning behind the transition—which LIFT-LA explained in detail to all stakeholders—helped to assuage the concerns of some members. Explained LIFT-LA member Nancy Hernandez:

The change was scary for everybody. When we first heard about everything that was going on, I remember we were sitting on a table, and the parents said, 'Well, that's not what I'd known before. LIFT is this, LIFT is that.' Just trying to understand because your wall goes up and you're just like, 'Oh my God, this is going to turn into every other agency that I've been to.' But I think just thinking a little bit through it and taking the time, we started to just talk. I was like, 'You know what? I know it's hard, it's scary, but in order for there to be growth, there needs to be change.'

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<sup>44</sup> Day, personal communication by e-mail, March 1, 2019.

<sup>45</sup> Interview with Sam Joo, Director, Magnolia Community Initiative, October 10, 2018; "Magnolia Community Initiative," available at <http://magnoliaplacela.org> (accessed on January 15, 2019); and Katharine Gammon, "In Some of Los Angeles' Poorest Neighborhoods, A Rich Cluster of Services Targets Underserved Kids," *Center for Health Journalism*, July 20, 2017, available at <https://www.centerforhealthjournalism.org/2017/07/20/some-los-angeles-poorest-neighborhoods-rich-cluster-services-targets-underserved-kids-and> (accessed on January 15, 2019).



## Looking to the Future: 2018-2019

By mid-July 2017, the organization had finalized a new strategic plan that reflected the lessons LIFT had learned during its 18-month pilot process and identified the most important priorities and next steps. The primary goals were to 1) work directly with 25,000 parents and children, 2) help two-thirds of those families get and stay out of poverty, and 3) influence 500,000 additional families. They would accomplish the direct-service objectives by partnering with early childhood centers to connect with families with children ages zero to eight and then engage them in a two-year relationship focused on financial and career coaching.<sup>46</sup> Meanwhile, they would develop strategies to touch the additional 500,000 families, with an eye toward (eventually) being in a position in the next ten years to make a systems-level impact on the six million American families with young children living in poverty.<sup>47</sup>

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<sup>46</sup> Day, personal communication by e-mail, March 1, 2019; and Strategic Plan Summary FY18-FY21 (July 1, 2017 – June 30, 2021), LIFT, June 2017, created in partnership with Wellspring Consulting, obtained via a personal communication by e-mail with Michelle Rhone-Collins on March 27, 2019. Hereafter cited as Strategic Plan Summary FY18-FY21.

<sup>47</sup> Strategic Plan Summary FY18-FY21; and Lodal and Day interviews.





## A Pair of Leadership Transitions and Governance

With a firmer grasp on the program, the organization shifted its focus to a momentous upcoming leadership transition. When LIFT had begun the new strategic planning process, Lodal had informed a small circle of senior leaders—including Board Chair Steve Rotella—that she intended to transition out of her position as CEO on the organization's 20<sup>th</sup> anniversary in 2019. This led to a discussion about how best to choose a successor. While Lodal had a strong internal candidate in mind (Michelle Rhone-Collins, the Founding-Executive Director of LIFT-LA, who had joined LIFT's national leadership team as the Chief Cities Officer in 2017), she, Rotella, and a handful of close advisors agreed that the selection of the next CEO merited a rigorous and formal search process. Rotella explained:

As we started to talk to a very small group about this, it became quite clear that, given where LIFT is and the kind of organization it is, and to do the right thing from a fiduciary standpoint, we needed to put a process in place to make sure we did this the right way and make it an open, free competition.<sup>48</sup>

As a result, the Board formed a search committee and partnered with a search firm, On Ramps, to launch a nationwide CEO search. This decision was emblematic of the broader evolution and formalization of LIFT's governance, infrastructure, and personnel management systems. Dating to December 2015, when he had been elected Chairman of the Board, Rotella—who had an extensive background in organizational change—had helped LIFT to develop more rigorous performance management systems; expand and diversify the board and increase board members' engagement; and strengthened the organization's financial controls. (As Rotella recalled, there had been spirited debates at Board meetings about the strategic shifts in the organization's direction.) From Rotella's and Lodal's perspective, their work together to add rigor to LIFT had been effective because they complemented each other so well. Rotella explained:

Kirsten and I would have not have had a good partnership and not done a good job if we had pushed the organization too far towards a more performance-oriented business-focused organization and lost the culture and the passion and

<sup>48</sup> Interview with Steve Rotella, Chairman, Board of Directors, LIFT, by telephone, November 15, 2018. Subsequent quotations from and attributions to Rotella come from this interview.



all of the wonderful things that makes LIFT so important to so many people's lives. And at the same time, you can't be on the other side of that equation and not have an organization that isn't thinking about using every dollar as efficiently as possible.

Lodal concurred, although she made the point more colorfully. "Rotella," she said, "is a loving hard-ass."

Ultimately, Rhone-Collins emerged from a field of 377 candidates as the top choice of both the search firm and the Board and succeeded Lodol—who would stay on for several months as a senior advisor—as LIFT's CEO in January 2019. Rhone-Collins stood out in part because of her extensive experience with LIFT. In particular, she had had an enormously positive impact as the Executive Director of LIFT-LA, where she had played an integral role in creating programmatic innovation, developing a strong fundraising base, helping to create a loving culture, and strengthening partnerships with other organizations in the ecosystem at Magnolia Place. She also had the ability to communicate simply and effectively, an important consideration for translating and marketing LIFT's brand; Rhone-Collins, in fact, coined the term "hope, money and love" to explain LIFT's focus on improving members' financial, personal and social capital.<sup>49</sup> Finally, Rhone-Collins was also highly regarded for her ability to navigate complexity. "There's definitely ambiguity about what the future and what growth looks like," said Board member Gina Coburn. "And so it was trying to find a leader who we felt could successfully lead that going forward." As a bonus, or as Rotella shared, an "exclamation point," Rhone-Collins is an African American woman; for an organization serving primarily low-income women of color to be led by a powerful leader of color at a time when the majority of nonprofits were still led by white men, was particularly meaningful to members and to LIFT staff, many of whom were themselves people of color. For her part, Rhone-Collins expressed enthusiasm about leading LIFT into its next chapter. She said, "After 20 years, we are clear on the insights LIFT has to share with the world, so I don't want us to wait too long before we focus in on what our system change efforts are going to be so that we can get closer to reaching the 6 million families with young kids living in poverty. I'm ready for LIFT to be bold and unapologetic."<sup>50</sup>

*"After 20 years, we are clear on the insights LIFT has to share with the world, so I don't want us to wait too long before we focus in on what our system change efforts are going to be so that we can get closer to reaching the 6 million families with young kids living in poverty. I'm ready for LIFT to be bold and unapologetic."*

- Michelle Rhone-Collins,  
CEO, LIFT

In parallel to the CEO transition, Rotella made the decision not to seek renewal at the end of his three-year term as Board Chair. From Rotella's perspective, it was important to make this move to ensure that the organization was being led by someone with fresh ideas. He explained, "I think no matter how thoughtful you are, you can get stale, and I think it's just good governance." He and Lodol also felt that it was imperative to identify a successor who could continue their work strengthening the organization's governance, which had included diversifying the Board (the three Board members added in 2018 were African American) and involving board members in the strategic planning process. They soon settled on Coburn as the logical successor because she had helped to lead the most recent strategic planning process. Rotella concluded:

She's a phenomenal talent from a business strategy standpoint and a phenomenal human being, and it's not lost on me as well that having my successor be the first woman who's ever chaired the Board in LIFT's history isn't a bad thing either at the time that we've got an African American woman taking the helm as CEO.

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49 Day, personal communication by e-mail, March 1, 2019.

50 Interview with Michelle Rhone-Collins, CEO, LIFT, by telephone, November 8, 2018.



## Next Steps and Impact

As Rhone-Collins succeeded Lodal in January 2019, she and her colleagues were preparing to address a number of challenging questions. One was how to bring LIFT's work to scale and play a greater role in policy and advocacy initiatives. Another was how to leverage technology. As Coburn noted, the organization did not want to give up its brick-and-mortar presence and the face-to-face relationships that those sites facilitated. Nonetheless, some wondered if employing communications and transportation technology could help the organization extend its reach. Yet another question was where the organization should expand. For example, some were wondering whether promoting racial equity and social and economic mobility also required going into poor white communities, including in red states in the Deep South. In short, as the organization celebrated its 20<sup>th</sup> anniversary, it was grappling with serious questions about where it would go in the next 20 years.

Even so, there was an enormous sense of pride about the extraordinary impact LIFT had already made. The benefits were in part financial: in 2018, members who committed to LIFT's program for at least three months were seeing an average savings increase of \$1,100 and a debt decrease of \$2,000, and for members who saw an increase in income, the average annual boost was more than \$9,000. Members also grew from the standpoint of their social connections and personal well-being: according to LIFT's 2018 annual report, "58% of members with low levels of hope increased their hope and confidence," "69% of members with high levels of stress decreased their feelings of stress," and "71% of members with low social support increased their social supports."<sup>51</sup> What's more, the organization was participating in several studies—including a Randomized Controlled Trial with the U.S. Department of Health and Human Services—that would shed further light on the effectiveness of LIFT's approach.<sup>52</sup> Simply put, LIFT had become one of the leading organizations in the country when it came to the fight against intergenerational poverty.

Undergirding all of this was an organization that had developed the internal muscles to do the difficult work of growing. This began with being self-critical. Allie Olson, the Executive Director of LIFT-LA, emphasized, "The organization is not scared just to look inward and be willing to change and take risks, which is really important."<sup>53</sup> It also depended, as Lodal emphasized, on always doing what is in the best interest of their members and "asking the toughest questions."

*"The organization is not scared just to look inward and be willing to change and take risks, which is really important."*

- Allie Olson  
Executive Director, LIFT-LA

51 "2018 Annual Report: The Next Chapter," LIFT.

52 LIFT-LA had also participated in a Randomized Controlled Trial conducted by Dr. Adam Schickedanz, a Research Fellow at UCLA. The data showed that LIFT-LA's financial coaching produced far-reaching benefits for members, not only as it related to their financial security but also their "physical and mental health." Dr. Adam Schickedanz et. al., "Financial Coaching Plus Social Needs Navigation Leads to Improved Health Related Quality of Life in Low-Income Parents: A Community Partnered Randomized Controlled Trial," Pediatric Societies Meeting Abstract, obtained via personal communication by e-mail with Laura Presse, Senior Development Manager, LIFT-Los Angeles, on January 17, 2019.

53 Interview with Allie Olson, Executive Director, LIFT-Los Angeles, October 11, 2018.



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# LIFT Case Discussion Questions

- 1) How did LIFT come to the conclusion that it needed to transform its programs to create new outcomes and drive the impact that it sought to achieve? What were the tradeoffs involved in shifting their focus to these new outcomes and impacts? In particular, please consider these changes in the context of LIFT's efforts to increase social and economic mobility.  

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- 2) In the midst of designing a new programmatic model, how did LIFT identify partners at the local and national level to create and lead an ecosystem that would deliver the services and solutions that would actually position LIFT to achieve the outcomes and impact it desired?  

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- 3) How has LIFT sustained a caring culture even while professionalizing, transforming, and restructuring and downsizing its staff?  

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- 4) How has LIFT developed an evaluation system that blends insights and evidence from the local and national level to tell a story and gauge impact across a nation-wide organization?  

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- 5) How has LIFT redesigned its programs, staff, and board to advance racial equity?  

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- 6) What changes to governance did LIFT make to prepare itself for the future, and what elements of personal leadership and growth and development were necessary for LIFT's organizational transformation?  

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- 7) What advice would you give to LIFT's leaders as they make a highly significant set of transitions, while working to sustain and continue to scale the organization's success?  

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