Lessons from Lived Experience
From fresh insights to effective action

Center for Collaborative Leadership
Emerging Leaders Program
Team Project Presentation
June 4, 2014

2014 Project Sponsors
Massachusetts Business Roundtable
Center for Social Policy, UMass Boston
Hospitality Homes
Commonwealth Diversity Fellows Program
Emerging Leaders Program
Center for Collaborative Leadership
Emerging Leaders Program Class of 2014

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Massachusetts on the Move: The Intersection of Talent, Transportation, and Housing

Team Sponsor: JD Chesloff, Executive Director & Chris Kealey, Deputy Director, Massachusetts Business Roundtable

Presenter: Richard Boyajian, Citizens Bank, N.A.

Team Members:
- Juleen Freitas, BNY Mellon
- David Mahoney, Blue Cross Blue Shield of Massachusetts
- Karen Ng, Santander Bank, N.A.
- Robert Woods, State Street Corporation
Project Sponsor

MBR's mission is to strengthen the state's economic vitality, with the goal of making Massachusetts a highly-desirable place to do business.

MBR's agenda is driven by the membership working together on issues that have broad impact on the social and economic well-being of the Commonwealth.

Strategic Plan identifies Talent and Quality of Life as necessary investments for a long term competitiveness strategy.

Workforce Development, Transportation and Housing is a priority in the 2013-14 legislative session.

The Project Ask

Massachusetts Business Roundtable members have increasingly noticed the linkage among the three corners of the vital intersection and have made it an important policy priority for MBR in 2013-2014.

This project is focused on how this important intersection impacts Massachusetts.

Project Approach

- Interviewed high level leaders from a broad mix of public and corporate entities
- Obtained statewide cross-section of opinions, not just Boston metro area
  - Went beyond MBR list of contacts
- Summarized interview results to find common themes and / or differences in opinion
- Gathered data on state policies and corporate initiatives covering this vital intersection
Project Findings

Key Drivers – Viable public transportation and affordable housing inevitably results in higher rates of talent retention.

Balance – The right balance between jobs, affordable housing and investments in transportation infrastructure will ensure that talent stays, businesses reduce costs / maximize profitability and the towns and cities of the Commonwealth will thrive.

Collaboration – By collaborating, business and government can help to influence job creation, talent retention, affordable housing and improved transportation in the Commonwealth.

Project Recommendations

• Enhance Existing Transit Services
• Continue to Create Affordable and Moderate Income Housing
• Leverage Talent Retention Programs
• Increase Awareness of Existing State and Local Programs

A Success Story...

Littleton, MA
“The Point” Project

The private development project, ‘The Point,’ in Littleton, MA illustrates the intersection and shows the success that comes from collaboration between the private and public sectors.
Lessons Learned about Collaborative Leadership

Operated in times of both personal and professional ambiguity

Leveraged our individual strengths and skills in approaching various stages of the project and placed trust in each other’s ability to complete agreed upon tasks

Communicated frequently in person, by phone, email and online to ensure that everyone had the opportunity to create, review, and offer feedback on the project’s content

Merging Knowledge: Working Together Toward a World Without Discrimination

Project Sponsor: Donna Haig Friedman, Center for Social Policy and the ATD Fourth World Movement
Team Presenter: Jessica Desrosiers, Partners Community Healthcare

Team Members:
Amanda Frank Cambridge Health Alliance
Annah Litzenberger Santander Bank, N.A.
Lori Prew School on Wheels – Massachusetts
Richard Testa South Shore Bank
Christopher West Massachusetts Convention Center Authority

Project Sponsor: Center for Social Policy, UMass Boston

• Founded in 1992; directed by Donna Haig Friedman
• Committed to reducing and eliminating social and economic inequities through:
  • Policy analysis, research, addressing root causes of poverty and working with communities to formulate solutions.
  • “Merging Knowledge”
• Includes a Constituent Advisory Group consisting of individuals with lived experiences committed to building knowledge from the ground up.
  • Their goal is to inform and drive social change by illuminating the realities faced by those living in poverty.
• Partnered with the International Movement ATD (All Together in Dignity) Fourth World:
  • Non-governmental, grassroots agency that engages with individuals and institutions to find solutions to eradicate extreme poverty
Project Ask: Experience Merging Knowledge

“MERGING, in this sense, means exposing oneself to the knowledge and experiences of others in order to build KNOWLEDGE that is more complete and greater than the sum of its parts” – Reference ATD 4th World

Merging Knowledge Process

Phase 1

Phase 2

Phase 3

Project Approach: ELP’s immerse themselves into Merging Knowledge

9/27/13
10/17/13
10/28/13
2/28/14

International Day for the Eradication of Poverty
United Nations, New York

Looking Forward to Journey’s End: 30 Years of Family Homelessness in Massachusetts
UMass, Boston

Share and Poverty: On the Occasion of the 50th anniversary of the US War on Poverty
UMass Club, Boston

Shame and Poverty: “On the Occasion of the 50th anniversary of the US War on Poverty, We Look Ahead and Learn for Change”
UMass Club, Boston
Project Findings & Recommendations

Accomplishments with the CSP and the Merging Knowledge Project:

• Stepped outside our everyday lives and engaged in a social movement; contributed to making the world a better place.
• Drew upon personal connections to homelessness, poverty, and issues of shame and exclusion.

Recommendations going forward:

• Apply the learning from our experiences to our personal and professional lives.
• Work with CSP on developing innovative and creative opportunities to engage future emerging leader teams.

Lessons Learned about Collaborative Leadership

• Built strong relationships based on trust
• Fostered a secure environment to talk about issues of shame and poverty
• Operated in periods of ambiguity
• Engaged key stakeholders
• Influenced social policy
• Demonstrated effective time management
• Anticipate continued civic involvement

Increasing Access to Boston’s Healthcare Industry through Affordable Short Term Housing with a Personal Touch

Project Sponsor: Caryl Goodman, Hospitality Homes
Presenter: Ryan Morrison, CFA, Citizens Bank, N.A.

Team Members:
- Chris Colorio, Northeast Utilities
- Martina Blanco Lopez, Santander Bank, N.A.
- Tessa Manolopoulos, BNY Mellon
- Allison McCann, The Boston Globe
- Cesar Molina, The Boston Globe
Project Sponsor

Hospitality Homes - Hospitality Homes provides free short-term housing in volunteer host homes and donated apartments for families and friends of patients seeking care at Boston-area healthcare organizations. Since 1983, this unique home-away-from-home experience has brought a compassionate response as well as emotional and financial relief to guests in need.

The Project Ask

Project Objectives –
1. Help create and execute strategy for host family recruitment
2. Re-design host brochure and marketing materials
3. Increase corporate sponsorship / awareness / funding

Project Approach

Project Research (Tag Sale, Board Meeting, Host Community Night at Spaulding Rehabilitation Center, Wine Tasting Fundraiser)

Hospitality Homes Open House Hosted by ELP Team at Brookline Library – targeting host family recruitment in specific locations around hospitals and close to public transportation

The Boston Globe Advertisements
- 13 advertisements created, 9 ads ran at various times over a 2 month period, free of cost to Hospitality Homes
- 250,000 readers in 5 states daily
- Duplicate ads on Web

Arranged and Designed IBEW Billboard
- Billboard ran for 3½ weeks during peak hours
- 250,000 cars daily, 30,000 during peak hours

Re-designed Host Family Brochure and Created Other Marketing Materials
Project Approach – Marketing Material

Project Results

• Increased organizational exposure
• Increased awareness around Brookline for Hospitality Homes
• Increased social media presence:
  • Website hits
  • Twitter / Facebook followers
• Globe advertisements - 2 new host families, 2 in application process, 2 showed interest, but were too far from Longwood Medical Area and MGH
• Open House - 7 families showed interest from the Library Event and provided contact information

Project Findings

Hospitality Homes
• No shortage of ideas, however limited resources require sustainable strategies
• Personal messaging from hosts and guests constitute the most impactful marketing

Boston
• Limited access to affordable (temporary) housing is a hurdle to Boston’s ability to provide world class healthcare to patients and families outside of Boston, both domestic and international
• Can the Boston healthcare industry compete in an increasingly global economy without the ability to accommodate demand from around the world?
Lessons Learned about Collaborative Leadership

- Served as truly a collaborative and flexible leadership experience
- Gained exposure to the not-for-profit sector and the different industries represented by the team

Pathways to Careers and Diversity in State Government: Framework for Assessing the Efficacy of the Commonwealth Diversity Fellows Program to its Key Stakeholders

Project Sponsor: Georgianna Melendez, Commonwealth Compact
Presenter: Kenechukwu E. Anadu, CFA, Federal Reserve Bank of Boston

Team Members:
- Sheri Bowles, Massachusetts Port Authority
- Claire Levesque, M.D., Tufts Health Plan
- Eugenia Rosa, Federal Reserve Bank of Boston
- Janey Tallarida, Irish International Immigration Center

Project Sponsor: Commonwealth Diversity Fellows Program (CDFP) & UMass Boston

Brief History and Objectives:
- CDFP was established in 2011 to provide a select group of exceptional and diverse students an opportunity to gain public sector experience via a semester-long internship at state government agencies.

Seeks to:
- promote diversity in state government agencies
- provide practical work experience to a diverse group of students
- promote public service and civic engagement by providing Fellows an avenue to engage in activities that may help shape the future of their communities
The Project Ask

Devise a process through which the CDFP’s efficacy to its key stakeholders can be evaluated, including:

• CDFP advisory board
• Participating government agencies
• Fellows

Project Approach

• Sought to create an evaluation methodology that could be used to assess the program in future years.
• While the initial results from the survey contain valuable information, we emphasized the process for collecting such information versus one-time results.
• Two pronged approach:
  • Create a survey for both Fellows and agencies to assess their views of the program ex post.
  • Suggest other avenues to enhance the program, thus increasing its efficacy over time.

Project Approach, continued...

The surveys sought, among other things, to:

• Assess Fellows’ and agencies’ satisfaction with the application process;
• Gauge the effectiveness of the communications among all interested parties;
• Rate the likelihood that Fellows would recommend the CDFP to their associates;
• Understand state agencies’ likelihood to hire Fellows if they have an opening.
Project Findings
The responses found, among other things, that:
• Both Fellows and state agencies were satisfied with the application process, and their overall experience with the program;
• Both Fellows and state agencies were satisfied with the communications among all interested parties;
• Further, most Fellows agreed that the CDFP supports a diverse body of students in becoming civically engaged in public service;
• Survey participants (Fellows) were split on the degree to which the program enhanced their marketability to potential employees.

Project Recommendations
• Continue using the surveys on future Fellows and state agencies to build a historical database which may be used to guide future plans to alter the program.
• Consider expanding the program to other Colleges within UMass Boston.
• Develop post-fellowship mentoring. For example, current or former ELP fellows could be engaged to mentor CDFP alumni.
• Use social media to further spread the CDFP’s mission. Created a LinkedIn page for the CDFP.

Lessons Learned about Collaborative Leadership
• Developed a healthy level of trust among teammates and leveraged one another’s strengths to complement one another’s weaknesses.
• Learned that “Active Listening” is an important skill to have in a team setting, particularly if the group members have different backgrounds, skills, and experiences.
• Engaged with key stakeholders or constituents and understood their needs and unique circumstances — important to the success of any initiative to influence policy.
Emerging Leaders Program: Impact of Team Projects on Sponsor Organizations

Project Sponsor: Lisa DeAngelis, Director
Center for Collaborative Leadership

Presenter: Laura Cullen, Comcast

Team Members:
Ivelisse Gonzalez Eastern Bank
Beth Miller Third Sector New England
Kristine Sand Blue Cross Blue Shield of Massachusetts
Jessica Snow Boston Public Library

Project Sponsor

Mission of the Emerging Leaders Program:
Identify, and then develop, future leaders for the Greater Boston region who are diverse and reflect the changing demography of our city, who practice a collaborative style of leadership and who are civically engaged.

Project Objective

Explore and Understand the Impact of the Sponsor Organizations’ Projects
**Survey of Project Sponsors**

- Interviews
- End to End Process Review
- RFP Review

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**Feedback and Findings**

- Sponsor Organization
- Flexibility
- Commitment
- Project Impact
- Commonalities
- Point of Contact
- Expectations
- ELP Alumni

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**Recommendations**

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Lessons Learned about Collaborative Leadership

- Embraced and celebrated the rich dimensions of diversity
- Built strong relationships based on respect and trust
- Operated in periods of ambiguity
- Committed to continued civic engagement
- Developed organically

Positioning The Center for Collaborative Leadership for Growth

Project Sponsor: Andrea Wight, Assistant Director, Center for Collaborative Leadership

Presenter: Stephen Record, Massachusetts Eye and Ear

Team Members:
- Joel Coffin, Blue Cross Blue Shield of Massachusetts
- Susan Fahmy, Tufts Medical Center
- Cecil Morgan, Santander Bank, N.A.
- David Nicoloro, Newton-Wellesley Hospital
- Lauren Perna, MassBio

Project Sponsor

The Center for Collaborative Leadership is part of the College of Management at UMass Boston

- Founded in 2001 by Dr. Sherry Penney, UMass Boston Chancellor from 1988-2000, with an initial grant provided by State Street Corporation.
- The Center also performs, and collects, extensive research on leadership-related topics.
The Initial Project Ask:
• Improve the website to help recruit fellows

Project Ask continued…
• Differentiation between the Center for Collaborative Leadership & the Emerging Leaders Program

Project Ask continued…
• Help the Center become the convener of thought partners on Collaborative Leadership
Evolution of Original Project Request

GOAL: Position the Center for Collaborative Leadership as a distinct and overarching brand, distinguishing the Emerging Leaders Program as its flagship program amongst other product offerings.

Project Findings & Recommendations

Findings
- Brand confusion amongst the Center and the ELP, and its relation to UMass
- Lack of stakeholder awareness of other valuable Center program offerings
- The marketing & communications material is inconsistent
- Website needs to reflect the brand architecture and distinction
- Highlight the Center’s unique place in the market

Recommendations
- Employ a parent brand with sub-brands approach
- Identify and educate brand ambassadors
- Unique social media accounts
- Revamp collateral
- Provided specific examples of how to update the website
- Value proposition and brand promise

Lessons Learned about Collaborative Leadership

- Placing ourselves in roles vs. letting our relationship take root first
- Respectful challenges based on trust
- The intrinsic value with diversity of experiences & strengths
- The value of coming together
What have you learned about yourself as a leader?

What insights about Collaborative Leadership will you be taking back to your organization / community?