

Engaging and Expanding Communities

Widening the circle of stakeholders

UMass Boston Emerging Leaders Program
Team Project Presentation
June 7, 2013



Changing the
Face of Leadership

2013 Project Sponsors

Massachusetts Business Roundtable

Girl Scouts of Eastern Massachusetts

Science from Scientists

Children's Trust Fund

Center for Social Policy, UMass Boston

Center for Collaborative Leadership

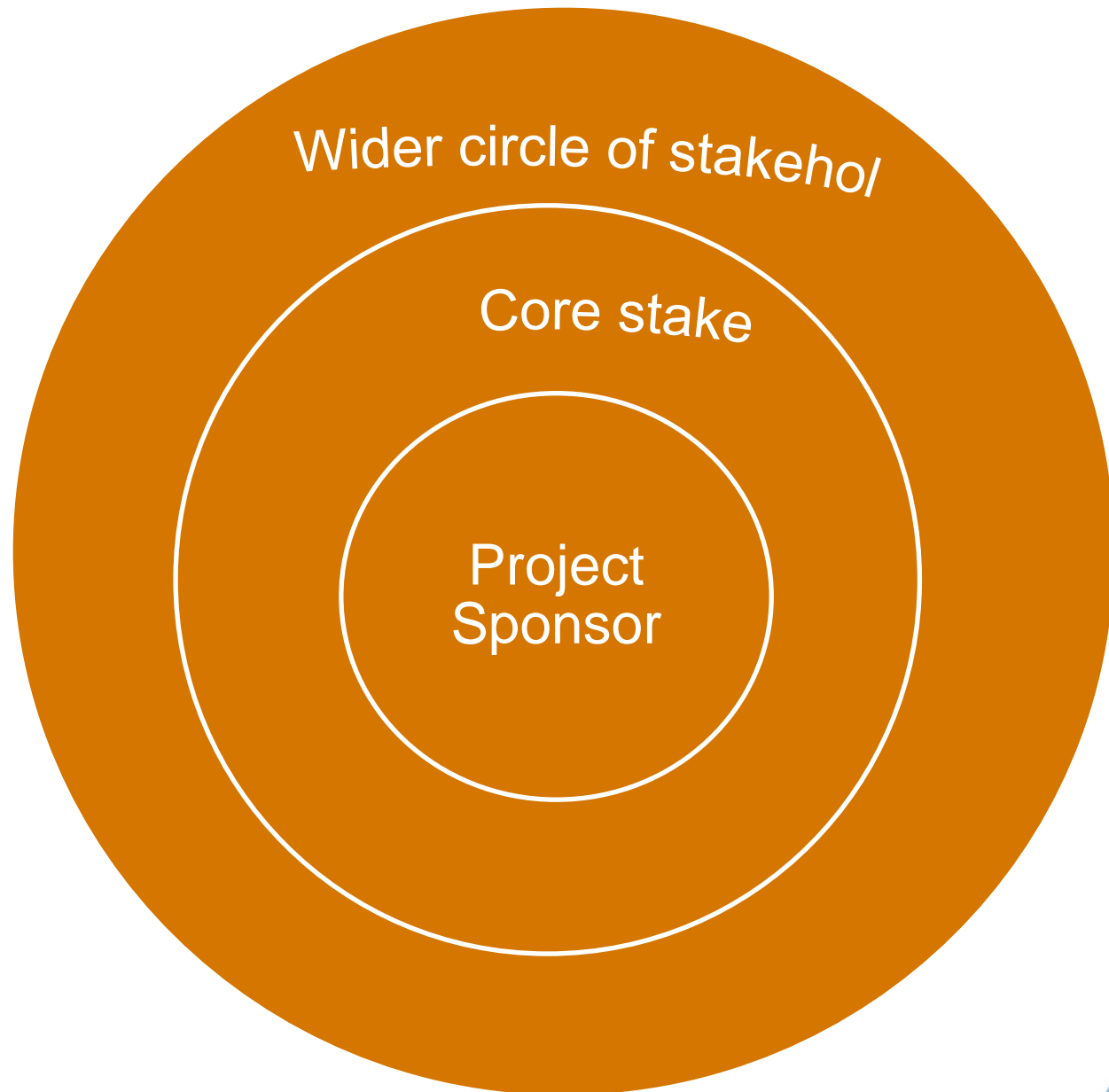
Emerging Leaders Program Class of 2013



Team Members

Presenter:	Project Sponsor	Employer:	Project:
Cristin Monaco Shields	Massachusetts Business Roundtable (MBR)	Massachusetts Eye and Ear	How large employers & small businesses are teaming up to strengthen the Massachusetts economy
Geoffrey Phillips	Girl Scouts of Eastern Massachusetts (GSEM)	Northeast Utilities	Enhancing visibility & reach to diverse target markets
Dave Christensen	Science from Scientists (SfS)	AT&T	Designing and developing a communications toolkit in support of strategic goals
Beth Creavin	Children's Trust Fund (CTF)	Harvard Pilgrim Healthcare	Benchmarking affinity group best practices
Patty Kaplinger	UMass Boston, Center for Social Policy (CSP)	Blue Cross and Blue Shield of Massachusetts	The Merging Knowledge Process: Examining Issues of Poverty in Greater Boston Communities
Katie Hauser	Center for Collaborative Leadership, Emerging Leaders Program (CCL ELP)	Massachusetts Convention Center Authority	Alumni as ELP Ambassadors

Circles of stakeholders



Widening the Circle

Project sponsor	Core	Wider circle
Mass Business Roundtable	Large corporations	Small business
Girl Scouts	Girls, troop leaders	Parents, volunteers
Science from Scientists	Schools, scientists	Other science education providers
The Children's Trust Fund	Parents, children	Young professionals
Center for Social Policy	People living in poverty	Emerging Leaders
Center for Collaborative Leadership	Center Staff	Alumni

How Large Employers and Small Businesses are Teaming Up to Strengthen the Massachusetts Economy

Team Sponsor: Christopher Kealey, Deputy Director
Massachusetts Business Roundtable

Presenter: Cristin Monaco Shields, Mass Eye and Ear

Team Members:

- David Ford EMC Corporation
- Gary Jennison Jr. Corcoran Jennison Companies
- Kate McCabe State Street Global Advisors
- Andrew Pfaff Sovereign | Santander
- David Stachura RBS Citizens, N.A.

Project Sponsor

Massachusetts Business Roundtable (“MBR”)

- Non-profit public policy organization comprised of Chief Executive Officers and Senior Executives from the state’s largest companies
- Mission to strengthen state's long-term economic vitality with the goal of making Massachusetts a highly desirable place to do business.
- Engages with both public and private leaders to provide the strategic thinking of its members to develop and influence public policy that will strengthen the long term health of the Massachusetts economy.

The Project Ask

MBR sought to engage the ELP team to review the important work now occurring at the national level that demonstrates the symbiotic relationships that are emerging between small businesses and large companies.

Working with MBR member companies and the ELP team, we:

- Highlighted these relationships and their impact on our economy in Massachusetts
- Demonstrated through examples the way large employers and small businesses work together through:
 - supply-chain partnerships
 - access to distribution networks
 - financing
 - and increased sharing of research and innovation

Project Approach

To assess and then illustrate the current state of relationships between large and small employers in Massachusetts, we utilized two research methods:

- Data driven facts/figures via survey
 - Originally conducted at national level, scaled to state
 - Administered to MBR Members
 - 28% response rate

- Qualitative accounts via in-person interviews
 - With 10 small and large businesses in sectors such as:
 - Technology
 - Finance
 - Healthcare
 - Construction

Project Findings 1

Survey Results

- On average, respondents rely on 388 small/medium sized entities (SMEs) to supply their organizations with the products and services that are a crucial part of their supply chains, and total spend in 2012 was over \$230 Million
- Many respondents host mentor programs created to assist SMEs in engaging with mentor companies and other large organizations via matchmaking
- Survey uncovered many recommendations for future growth and ways to increase local spending by large employers

Project Findings 2

Qualitative Finding Example – Healthbox Boston 2012 (via BCBSMA)

- 12-week incubator/accelerator program to help healthcare technology and technology-enabled startups gain traction in the industry
- \$50,000 in seed capital, access to mentors through an expert network, assistance to redefine product offering with market testing and end user research, local collaborative office space, participation in “Innovation Day,” bringing together industry leaders and investors with healthcare entrepreneurs
- Examples: Uprise Medical, Smart Scheduling

Project Recommendations

- Share survey results with member companies
 - Highlight the need to encourage utilizing small businesses within supply chain
- These **robust supply chain relationships** support and **strengthen small businesses**
- Focus on **mentor opportunities** with small businesses for shared success
- **Publicize partnerships/relationships** with small businesses
- Illustrate the benefit of incubator programs such as Healthbox
 - Encourage additional member companies to participate
 - Spread awareness - increase publicity of program participation via news releases and other media outlets
 - Work toward goals of improving public perception

Enhancing Visibility and Reach to Diverse Target Markets

Project Sponsor: Barbara Fortier, Girl Scouts of Eastern Massachusetts (GSEM)

Team Presenter: Geoff Phillips, Northeast Utilities

Team Members:

- Rachna Agarwalla The Boston Globe
- Melissa Gravellese Sovereign | Santander
- Kim Miles Wells Fargo Capital Finance
- Tina Potenti BNY Mellon
- Tim Walsh Harvard Pilgrim Health Care



Project Sponsor:

Girl Scouts of Eastern Massachusetts

Girl Scouts of Eastern Massachusetts serves approximately 41,000 girls in grades K-12 and engages 17,000 adult volunteers in 178 communities in Eastern Massachusetts.

Girl Scouting builds girls of courage, confidence and character, who make the world a better place.



The Project Ask

The Girl Scouts of Eastern Massachusetts (GSEM) engaged **Cookie Monster Consulting** through the University of Massachusetts Boston Emerging Leaders Program to perform an analysis of the current GSEM website and make recommendations for improvements and redesign to GSEM Chief Operating Officer and GSEM Chief Marketing Officer in order to better meet the needs of key target audiences and ultimately support achieving Girl Scouts of Eastern Massachusetts' strategic goals.

Project Approach

- Leveraged expertise, professional contacts
- Leveraged Forrester Research findings on web site design
- Conducted primary qualitative research
 - Developed Moderator Guide
 - Conducted focus group research
- Developed quantitative survey to be administered by GSEM

Project Findings

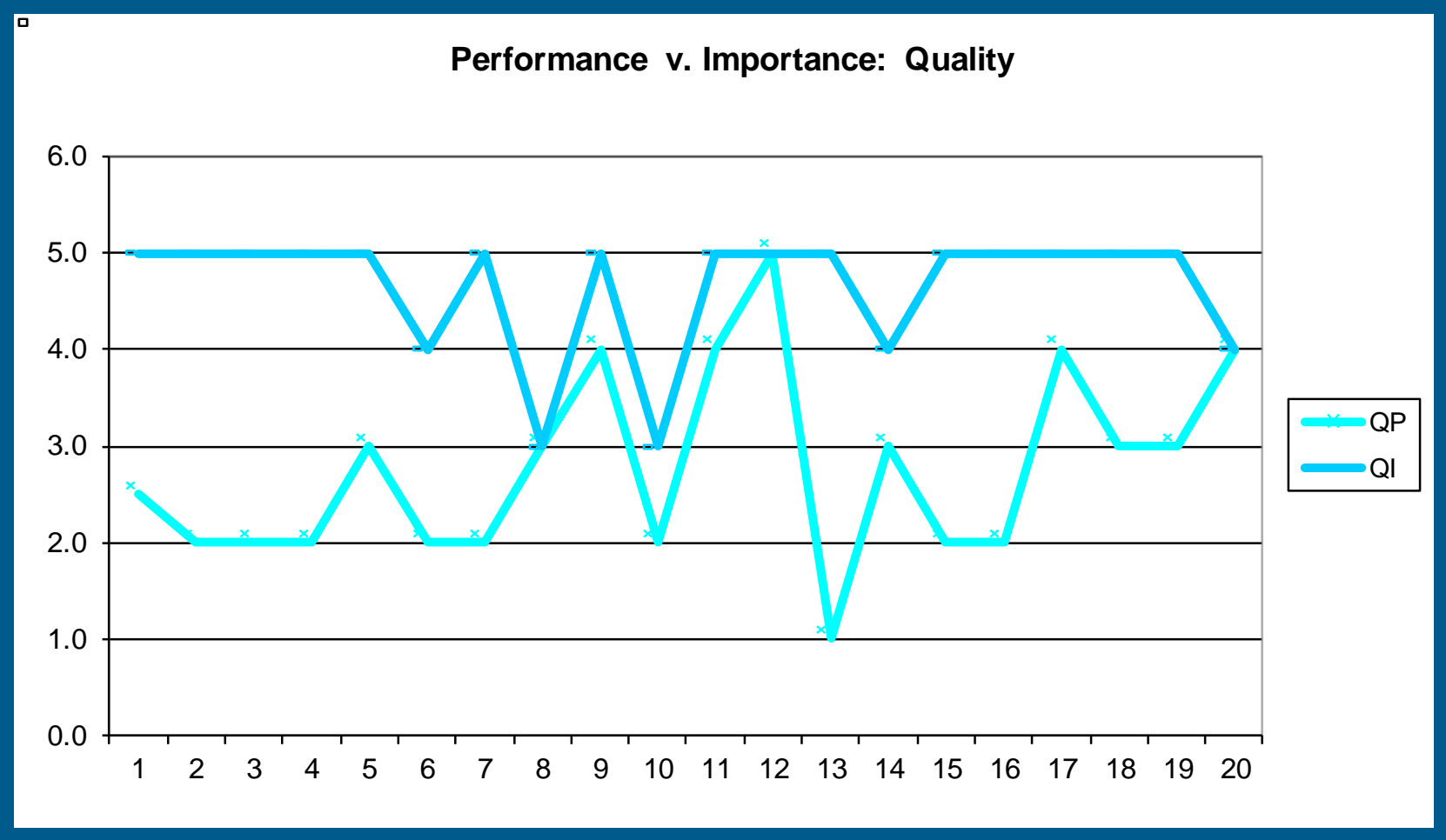
- All constituents found that the information on the site, once accessed, was valuable and the quality of the content was relatively highly rated
- All groups expressed frustration with the current site: Search and navigation. Challenges with finding content once on the site. Lacking easy-to-use functionality related to camp registration etc.

Feedback included:

“There are no drop down menus. Why? This makes it really hard to find content.”

“Everything is organized as PDFs. Makes it really difficult to search on content.”

Sample Output



Project Recommendations

- GSEM should focus on making navigation and design improvements to their site first
- Also, identifying a single point of contact for content will enable staff to update the site in a timely manner
- Future considerations include:
 - Tailoring the website to the user
 - Making the site mobile friendly
 - Leveraging Facebook and other social media to reach a larger audience
- Focus group demographics did not match the future target audience of GSEM, therefore they should gather additional data from their target demographic segment

Design and Develop a Communications Toolkit in Support of Strategic Goals

Project Sponsor: Erika Ebbel Angle, Founder and Chairman
Science from Scientists

Presenter: Dave Christensen, AT&T

Team Members:

- Christy Egun MGH Center for Community Health Improvement
- Tim Eisenstadt Copyright Clearance Center
- Darlene Ellis-Donahue Eastern Bank
- Sean Kingsley Vitasoy USA Inc.

Project Sponsor

Science from Scientists

Science from Scientists is a Boston-based non-profit that strives to improve science and technology awareness in local middle school and late elementary students; specifically targeting 4th–8th grade students.

Science from Scientists typically works with more than two dozen schools, roughly 2000 students annually, to instruct children with their STEM curriculum.

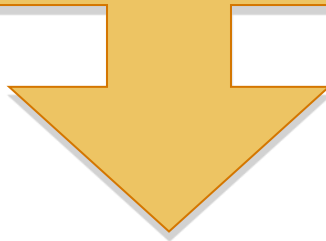
The Project Ask

Design and develop a communications toolkit in support of Science from Scientists strategic goals:

- Clarify vision
- Define brand
- Identify key messaging

Project Approach

- Conducted roundtable with SfS leaders
- Interviewed existing funders
- Collected data on:
 - 20+ potential funders
 - 15+ competitive nonprofits
- Researched SfS's online footprint



Output: a report on the SfS organization

Project Findings

- Erika IS the brand today
- Tremendous competition for funding for science education
- Science from Scientists is truly unique
- Fundraising efforts should be more strategic to tap into this uniqueness
- Communication with donors needs more structure
- Social Media tools need to be leveraged

Project Recommendations

- Create an internal culture and process focused on fundraising
- Increase brand equity with fundraisers
- Understand the broader nonprofit domain in which Science from Scientists competes and collaborates for resources
- Focus on being successful in a competitive nonprofit industry
- Build a 3-year strategic plan with a heavy focus on the above recommendations

Affinity Group Best Practices

Project Sponsor: Bryant Ayles, Deputy Director
Children's Trust Fund

Presenter: Beth Creavin, Harvard Pilgrim Health Care

Team Members:

William Alberghene

Greg Michael

Karen Bogard

Partners Community HealthCare Inc.

Comcast

Newton Wellesley Hospital

Project Sponsor

Children's Trust Fund

- Leads statewide efforts to strengthen families
- Funds over 100 family support and education programs through Massachusetts
- The framework focuses on 5 protective factors:
 - Parental resilience
 - Social connections
 - Knowledge of parent and childhood development
 - Concrete support in times of need
 - Children's social and emotional development
- Programs include shaken baby syndrome prevention, helping fathers be involved in raising their children and child personal safety program

The Project Ask

The Team was asked to:

- Assist The Children's Trust Fund in performing research to determine the feasibility and best practices of a young professionals **affinity group** launch

Key Deliverables

- Prepare a research paper on best practices of successful existing affinity groups
- Deliver a presentation to management of CTF summarizing overall research and recommendations

Project Approach

- Conducted research on what affinity groups actually are and their functions
- Arranged a meeting with CTF to get an overview of their programs and how an affinity group could benefit the organization
- Clearly defined project scope and objectives and reviewed with CTF
- Developed a detailed project plan which included establishing interview questions and organizations to be interviewed and reviewed with CTF
- Aggregated results in a database which was used to develop our overall recommendations

Project Findings and Recommendations 1

Vision and Mission:

- Include steering committee members in definition of vision and mission and ensure that overall themes are consistent with the larger organization
- In the early phase of the group, keep the mission simple and focused
- Establish clear, measurable goals and report on progress at a minimum annually

Recruitment:

- Recruitment efforts should be directed by the steering committee to align to the overall short and long term objectives of the targeted group size and demographic
- Recruitment process should revolve around communicating central themes aligned to the overall mission and objectives and provide information on incentives for membership

Project Findings and Recommendations 2

Activities and Communications

Events should:

- Deliver on expectations established
- Provide a benefit to the participants (education, networking, etc.)
- Open opportunities for direct volunteer work with the organization

Sustainability:

- Clear mission and defined objectives
- Structured governance that defines clear roles and responsibilities and allows for term limits on key leadership positions
- Employed resource is critical for overall event and committee management

The Merging Knowledge Process: Examining Issues of Poverty in Greater Boston Communities

Project Sponsor: Donna Haig Friedman, Director
Center for Social Policy, UMass

Presenter: Patty Kaplinger, Blue Cross Blue Shield of
Massachusetts

Team Members:

- Michelle Gallitto Blue Cross Blue Shield of Massachusetts
- Mimi Li State Street Corporation
- Kelly Mallebranche The Boston Globe
- Derek Morris Federal Reserve Bank of Boston
- Joyce Yee Arbor Associates

Project Sponsor

Center for Social Policy (CSP), UMass Boston

- Conducts research to examine the structural causes for low wages, barriers to housing affordability, the unequal distribution of resources, and the impact they have on families, communities, and society as a whole
- Includes people with the lived experience of poverty in participatory research
- Provides expertise on policies and practices that reduce social and economic inequities

Fourth World Movement

- Partners with people in poverty to overcome the exclusion and injustice of persistent poverty
- Focuses on sharing knowledge among people of different backgrounds in an atmosphere of mutual respect and dignity
- Seeks out and creates forums where the voice and experience of those in poverty can influence public opinion and policy
- Has teams in New York, Washington, DC, Virginia, New Orleans, Boston, and outside the U.S.

Current Challenge in the Community

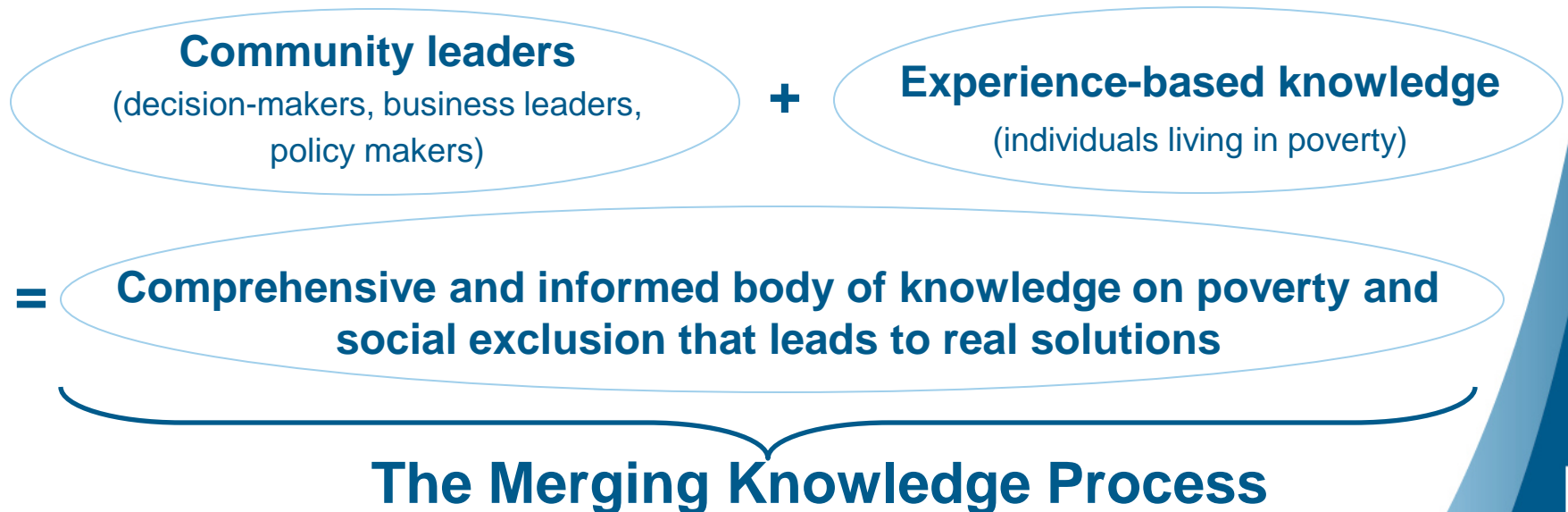
Challenge

Policies related to poverty are often informed by an incomplete knowledge that neglects the wisdom of individuals with actual experience of poverty.



- Individuals living in poverty do not contribute to solutions; solutions are imposed upon them.
- Ineffective solutions and outcomes are implemented.

Addressing the Challenge



The Project Ask

The ELP partnered with CSP and the Fourth World Movement in the first Merging Knowledge Process in Boston. The ELP was asked to fulfill two roles – that of participants as well as consultants - each with distinct goals, as outlined below.

Role	Goals
Participants	Engage with leaders of CSP, the Fourth World Movement, and individuals living in poverty (Constituent Advisors) to listen, share perspectives, and learn from one another as participants of the Merging Knowledge Process
Consultants	Document the Merging Knowledge Process in a Concept Paper to communicate the process and its value to potential donors, Merging Knowledge participants, and other interested stakeholders such that the process can be replicated, expanded, and sustained in the future Provide recommendations to refine the project model

Project Approach

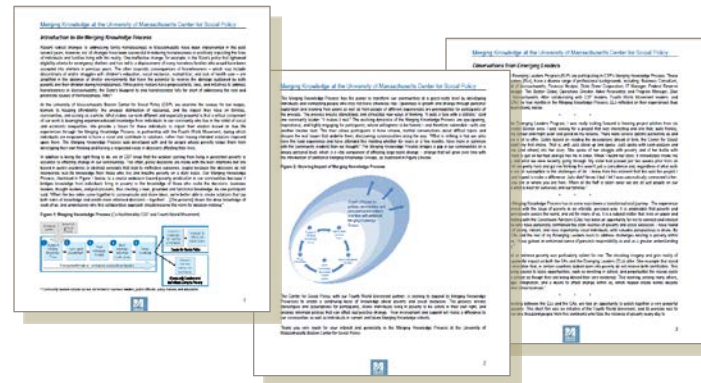
1. Meet with CSP and Fourth World Movement leaders to understand goals of the Merging Knowledge Process



2. Attend Merging Knowledge sessions as participants with Constituent Advisors



3. Develop and Document the Merging Knowledge Process in a Concept Paper



Project Findings

The following quotation, from a Constituent Advisor, provides a summary of findings from the Merging Knowledge Process.

“We do come at issues of poverty somewhat differently. [The Emerging Leaders] may not have really known why we were derailed – not the academic version but the real human version. But what they are experiencing through us is seeing that when we are included as thinkers – we think! That when we sit side by side with people you associate with street corners – we’ve got knowledge and wisdom from the lived experience! That when the two sides come together to communicate and share ideas – we’re better able to create solutions that tap both sides of knowledge and create more informed decisions together!”

Project Recommendations

- Document shared mission, vision, and desired outcomes for Merging Knowledge Process
- Create action plan to support mission, vision, and desired outcomes
- Leverage UMass for resources and future Merging Knowledge participants
- Enhance communication by sharing purpose and outcomes with Merging Knowledge participants
- Create opportunities for Community Leaders and Constituent Advisors to build meaningful, sustainable relationships by allotting additional time for integrated small group discussions
- Establish an advisory group to assist with further development and ensure sustainability of the Merging Knowledge Process

Alumni as ELP Ambassadors

Project Sponsor: Lisa DeAngelis, Director
Center for Collaborative Leadership

Presenter: Katie Hauser, Massachusetts Convention Center Authority

Team Members:

- Jorge Alfaro
 - Beth Celona
 - Enrique Larrainzar
 - Katie Simmarano
- Sovereign | Santander
Victim Rights Law Center
Sovereign | Santander
BNY Mellon

Project Sponsor

UMass Boston Center for Collaborative Leadership

Identify and then develop future leaders for the Greater Boston region who practice a collaborative style of leadership and who are civically engaged.

- Select emerging leaders who are diverse by race, gender, and profession
- Expose the emerging leaders to a variety of Boston's current leaders
- Enhance the leadership skills of the emerging leaders in communication, negotiation, teamwork, project development and completion, and knowledge of civic/city issues
- Increase the understanding and practice of inclusive and collaborative leadership

The Project Ask

Measure the impact of the Emerging Leaders Program's project team work and propose standardized tools for outreach, assessment and follow up.



Project Approach



Change in Scope: With Dr. Penney's retirement, how can the Center for Collaborative Leadership leverage the extensive Emerging Leaders Program alumni network and continue to expand the program?

Alumni as ELP Ambassadors

Develop a **web-based toolkit** with information and promotional materials for the program to **help alumni promote the program** to sponsors and future fellows

- Alumni should act as ambassadors for the program, but using a **consistent message**
- Alumni can **choose their own way to communicate** with the appropriate marketing resource
- The Center needs an **easy and engaging method** to encourage alumni to promote the program and recruit future fellows
- An online toolkit would be **easy to access, control, and update**

Project Recommendations



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Welcome! Thank you for visiting the Alumni Resources Page. Our alumni, at 500+ strong, are one of our best assets. Whether you are looking to get involved, want to share information about ELP with your personal and professional network, or want to know how to add your ELP experience to your resume, this page was designed to empower our alumni.

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"ELP provided me with the opportunity to meet and work with a network of people who pushed me to reflect on my work and my role in the city. It was important for me to be able to leave my office and my comfort zone and try this new experience. It has created a lasting impact on me. A partial scholarship consisting of donations made to the Emerging Leaders Program, coupled with financial support from Roxbury Prep made this experience possible."

Teresa Rodriguez
Roxbury Prep Charter School
ELP Fellow 2007



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