How an (In)Effective Implementation Team Leads to an (In)Effective & (In)Equitable Worker Advisory Board

Citation

Rodriguez, Jocelyn. 2021. How an (In)Effective Implementation Team Leads to an (In)Effective & (In)Equitable Worker Advisory Board. Doctoral dissertation, Harvard University Graduate School of Education.

Permanent link

https://nrs.harvard.edu/URN-3:HUL.INSTREPOS:37370270

Terms of Use

Share Your Story

How an (In)Effective Implementation Team
Leads to an (In)Effective & (In)Equitable Worker Advisory Board

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by

Jocelyn Rodriguez

To the Harvard Graduate School of Education
in partial fulfillment of the requirements for the degree of
Doctor of Education Leadership.

April 2021

Dedication/*Dedicatoria*

This Captone is dedicated to my grandmothers,
Rosa Emilia Rodriguez Perez and Maria Ignacia Rivas Rodriguez.
I am your legacy.

Dedico este labor a mis abuelas,
Rosa Emilia Rodriguez Perez y Maria Ignacia Rivas Rodriguez.
Yo soy tu legado.

Acknowledgements

Thank you …

… **Mom & Dad,** everything I am is because of you. *Mis sueños son realidad porque ustedes creyeron en ellos primero. Mil gracias.* I love you.

… **Ana, Argenis, Jose, Linette, Maribel & Dennis,** thank you for believing in and encouraging me, and for giving me the best inspirations I could ask for—your children.

… **Sebastian, Isaiah, Ava, Aaron, Abigail, Lucas, Noah, Augustin, Zoë, Malakí, Ariah, Ezra & Baby P.** (and those of you to come), thank you for inspiring me and giving me hope. I am excited for a world with your footprints. I am excited for a world shaped by your hearts, your talents and your faith.

… **Familias Rodriguez y Perez,** *mi logro es su logro.* You are my greatest driving force and this accomplishment belongs to all of us.

… **Academic Advisor, Dr. Monica Higgins,** I feel incredibly fortunate for your time, your counsel, and your care throughout these last three years, and this residency and Capstone journey. Your support has been invaluable and I cannot thank you enough for the ways you have guided my success. Thank you!

… **Capstone Committee Member and Second Reader, Dr. Irvin Scott,** thank you for your powerful questions, and for being a constant reminder of joy and purpose. Working with you last year, learning from you these past three years, and now having you on my committee has been a blessing. Your questions continue to impact me. Thank you for your wisdom.

… **Capstone Committee Member & Residency Supervisor, Dr. Angela Jackson,** thank you for setting me up for success with residency and Capstone. Your leadership has been a model of courage and strength, and I am grateful that I have had the opportunity to learn from you these past months. Thank you for trusting me and for allowing me the space to learn and grow in my own leadership journey.

… **Dr. Drew Echelson, Dr. Tycie Coppett, Margarita Ruiz, Matt Rose, and Amal Kumar,** thank you for everything you do for Ed.L.D. students and faculty, and thank you for your consistent support. I am so grateful you are in my community.

… **New Profit colleagues,** thank you for being welcoming, encouraging and supportive throughout my residency. I am glad our paths have crossed.

… to **LNP, the Book Club, and Vincent Luong-Rodriguez**, you will always hold a special place in my heart. Thank you for loving my humanity and for allowing me to love yours.

… **Angelica Taveras, Jennifer Reynoso, Orquidia Cruz, Yenie Perez, Danielle Guindo, Grace Bonilla, Vanessa Tineo, Jennifer Schmidt, Yalissa Cruz,** you are more than friends—you are my village.

… to **the children, families and communities of St. Elizabeth, The Committee for Hispanic Children & Families, Inc. and Northern Manhattan Improvement Corporation,** my experiences working alongside all of you prepared me for this rewarding experience. Thank you for the privilege of learning from you.

… **the Transformers,** my favorite WPL, thank you for your authenticity and courage. You have been a big part of my healing and I am forever grateful.

… **Crystel Harris,** my peer coach and friend, you have been a lifeline throughout this journey. This is just the beginning for us and I will always be indebted to you.

… **C9 (We Shine!),** the family and community I never knew I needed. I am forever grateful for our journey and can't wait for what's to come. We are in this together. Keep shining!!!

… last but definitely not least, to **HEA,** my informal editor and so much more. Thank you for your consistent support, for your gift of humor, and most of all, for holding up a mirror when I needed to see.

Table Of Contents

Abstract

Even before the COVID-19 pandemic hit in early 2020, 5 million young adults in the United States were disconnected from stable career pathways while 7.6 million jobs went unfilled (Ross and Bateman, 2018). Today, 44 million Americans lack the skills, networks and credentials needed to earn a living wage and to support themselves and their families (Weise et al., 2019). The federal job-training and "workforce development" system is not nearly big, bold and transformative enough to meet the interlocking challenges and systemic racism we face across society. A gaping Black-White wealth gap has left people of color disproportionately exposed to the current crisis (Hanks, Solomon, & Weller, 2018); low-wage jobs are disproportionately held by women and people of color (Ross & Bateman, 2019); unemployment, underemployment, and poverty have disproportionately affected communities of color (Ajilore, 2020; Nunn, Parsons, & Shambaugh, 2019; Elliott, 2016). Moreover, systemic racism in hiring practices has been well documented. Lastly, an unfolding COVID-19 recession continues to demonstrate the worsening of racial and economic inequities in our country (Rosalsky, 2020).

New Profit is trying to be a part of the solution. New Profit's ecosystem-building approach looks to engage social entrepreneurs, policymakers, philanthropists, and other national and local stakeholders to transform how philanthropy and government (the largest funder of social services) think about collectively pursuing social change and allocating resources. The $6 million Future of Work Grand Challenge, an initiative within New Profit, looks to achieve systemic change to prepare 12 million Americans from underinvested-in communities for workforce success by 2025 (New Profit website: Future of Work Landing Page, 2021).

As a Doctoral Resident, I was charged with leading an implementation team responsible for designing and launching a Worker Advisory Board that would elevate and integrate worker voice throughout the Future of Work Grand Challenge. My work confirmed my theory of action: a shared purpose, combined with a sound structure for effective team engagement and a supportive context for working together—one of mutual trust and psychological safety that effectively bridges differences in order to work through adaptive challenges—were the necessary elements for launching a high-impact Worker Advisory Board.

Introduction

"My experience so far on the advisory Board has been a great one. Xpert Advisory Board has created a safe place to share my thoughts, feelings and experiences online. I have met new team members in other states who have the same vision as mine. My vision is to better assist my community, find the need of the community, actively listen, and make a positive impact. The board has enhanced my values to respect others beliefs, thoughts and feelings. I look forward to continuing being a valuable asset to the Xpert Advisory Board and my community."
—XPERT Worker Advisory Board Member, Cohort 1

Even before the COVID-19 pandemic hit in early 2020, 5 million young adults in the United States were disconnected from stable career pathways while 7.6 million jobs went unfilled (Ross and Bateman, 2018). Today, 44 million Americans lack the skills, networks and credentials needed to earn a living wage and to support themselves and their families (Weise et al., 2019). The federal job-training and "workforce development" system is not nearly big, bold and transformative enough to meet the interlocking challenges and systemic racism we face across our society. A gaping Black-White wealth gap has left people of color disproportionately exposed to the current crisis (Hanks, Solomon, & Weller, 2018); low-wage jobs have been disproportionately held by women and people of color (Ross & Bateman, 2019); unemployment, underemployment, and poverty have disproportionately affected communities of color (Ajilore, 2020; Nunn, Parsons, & Shambaugh, 2019; Elliott, 2016). Moreover, systemic racism in hiring practices has been well documented: since 1989, whites have received on average 36% more callbacks than African Americans, and 24% more callbacks than Latinos, for the same jobs, and studies have shown that white high school dropouts have the same chances of getting a job as Black individuals who have completed some college or earned an associate degree (Quillian, Pager, Hexel, & Midtboen, 2017; Lam, 2019). Lastly, an unfolding COVID-19 recession continues to demonstrate the worsening of racial and economic inequities in our country (Rosalsky, 2020).

It is clear the American Dream is not equally attainable for all. Some progress has been made, but historically marginalized groups are still marginalized, underinvested-in and overlooked. Now, in the midst of COVID-19, which is serving as an accelerant, we are facing the reality that as many as half of all jobs could be lost due to automation (Press, 2019). Furthermore, the jobs being lost to automation disproportionately impact those without a postsecondary credential and those experiencing low wages—many of whom, I might add, are my own family, community members and friends. As with many other systems in society, the inequity built into our workforce disproportionately impacts African American/Black, Indigenous/Native and Latina/o/x communities. The philanthropic sector has also historically been criticized for perpetuating inequities (Callahan, 2017).

New Profit is trying to be a part of the solution. New Profit is self-described as a venture philanthropy organization that backs breakthrough social entrepreneurs who are advancing equity and opportunity in America. Its staff fund and support organizations employing a variety of models and approaches—from direct service programs to movement-building efforts—to drive transformative change. Through their nonpartisan policy initiative and coalition, America Forward, they provide a platform to advance a public policy agenda that promotes innovative and effective solutions to pressing social problems (New Profit website, 2021). On their website, New Profit (2021) has defined several strategic areas of focus guiding their investments, highlighted in Figure 1:

- **Inclusive Impact:** this initiative is designed to spread commitment across the sector and to drive unprecedented capital to some of the nation's most proximate and promising Black, Indigenous, and Latinx innovators who understand the multidimensional root causes of social issues, but receive only a fraction of philanthropy's resources aimed at solving them,

- **Systemic Solutions**: building the nation's capacity to solve entrenched social problems by identifying and investing in promising systemic solutions catalyzed by innovative, nimble leaders in order to achieve more equitable and sustainable outcomes, and

- **Portfolio Investing**: doubling the size of New Profit's portfolio over the next five years by funding and delivering advisory support more effectively and efficiently to organizations working to drive innovation in many issue areas for communities across the country.

Figure 1

(New Profit website, 2021)

New Profit's ecosystem building approach engages social entrepreneurs, policymakers, philanthropists, and other national and local stakeholders to transform how government (the largest funder of social services) and philanthropy collectively pursue social change and allocate resources.

The Future of Work Grand Challenge is an initiative within New Profit's ecosystem building efforts. By identifying and funding the most promising ideas and innovations, New
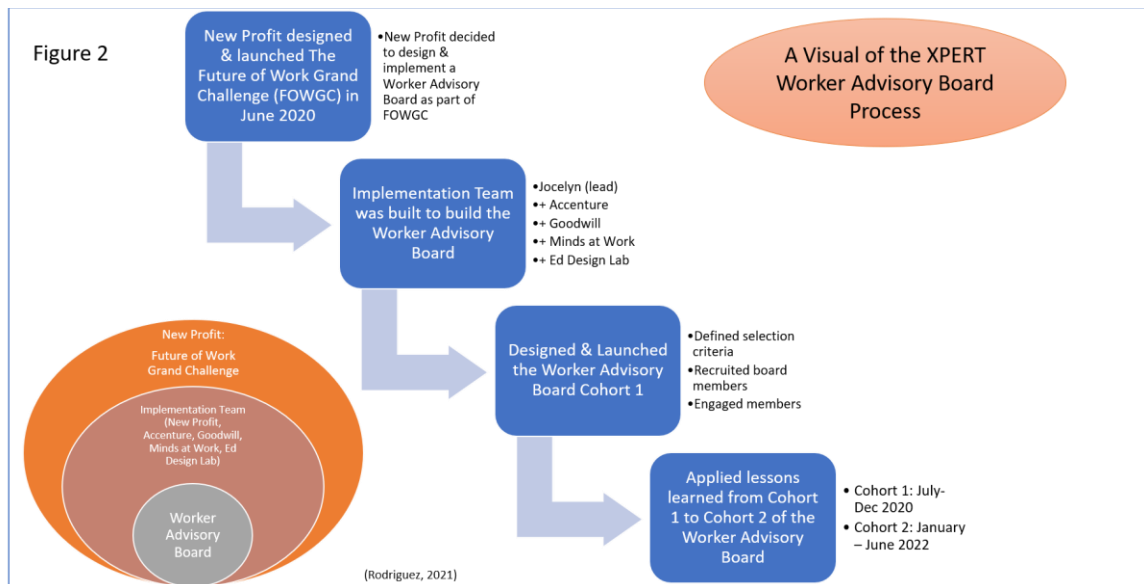
Profit's $6 million Future of Work (FOW) Grand Challenge, powered by XPRIZE, MIT Solve, and JFF, seeks to:

- Empower social entrepreneurs to pilot their solutions through workforce boards by providing $100,000 in grant funding;

- Rapidly reskill 25,000 displaced workers into living-wage jobs in the next 24 months;

- Equip influential workforce boards with vetted tools to support the wave of displaced workers within six months; and

- Achieve broader systemic change to help prepare 12 million Americans from underinvested-in communities for workforce success by 2025.

When I mention the "future of work" in this Capstone, I refer to the context in which digital economy automation, artificial intelligence, and globalization have combined to transform the world of work in ways not seen since the last industrial revolution in the nineteenth century. Even before COVID-19, the speed and scope of change had no historical precedent. Today, we face the reality that many jobs will be lost, many new jobs will be created, and almost all jobs will change in the future of work (New Profit, Future of Work Team Strategy Meeting, Dec. 2020). Despite well-established findings on the importance of customer-led, human-centered, and cooperative design (Brown & Katz, 2009; Krippendorff, 1989; Liedtka, 2011; Wilson & Daughtery, 2018), the philanthropic and social impact sectors have not yet broadly applied these strategies when designing Future of Work–related solutions (Barnes & Burton, 2017; De Aguiar, 2016; Gibson, 2018). Randell and MacDavey (2020) argue that one pillar of human-centered design is the notion that we are all designers. They suggest that, although the end-user experience has been the foundation for commercial design since

the 1950's, only in the last decade have the principles of human-centered design been adopted for use in addressing social issues.

Although people of color and women are most immediately and directly impacted by the workforce and Future of Work challenges, they are not typically included in influencer roles within major innovation initiatives (Manyika et al., 2019), which is the focus of my work. It is for this reason that New Profit made the decision to design and implement the XPERT Worker Advisory Board (WAB) as part of the Future of Work Initiative. New Profit aims to position itself at the forefront of worker-centered innovation and social impact in philanthropy, with a long-term goal of positively impacting the economic and employment opportunities of 12 million Americans for the workforce of the future, as well as contributing to outcomes-based philanthropy. In other words, the XPERT WAB is a strategy that centers equity to ensure that worker voice is integrated. My strategic project involved leading an implementation team tasked with designing and launching the second cohort of the XPERT Worker Advisory Board (WAB). Figure 2 provides a visual of the XPERT Worker Advisory Board process.

Figure 2

A Visual of the XPERT Worker Advisory Board Process

- New Profit designed & launched The Future of Work Grand Challenge (FOWGC) in June 2020
  - New Profit decided to design & implement a Worker Advisory Board as part of FOWGC
- Implementation Team was built to build the Worker Advisory Board
  - Jocelyn (lead)
  - + Accenture
  - + Goodwill
  - + Minds at Work
  - + Ed Design Lab
- Designed & Launched the Worker Advisory Board Cohort 1
  - Defined selection criteria
  - Recruited board members
  - Engaged members
- Applied lessons learned from Cohort 1 to Cohort 2 of the Worker Advisory Board
  - Cohort 1: July-Dec 2020
  - Cohort 2: January – June 2022

New Profit: Future of Work Grand Challenge

Implementation Team (New Profit, Accenture, Goodwill, Minds at Work, Ed Design Lab)

Worker Advisory Board

(Rodriguez, 2021)

New Profit Context

New Profit has built their venture philanthropy model around their role as ecosystem conveners, removing barriers to innovation while driving systems change to advance the emerging social entrepreneurship movement. New Profit aims to identify high-impact organizations across the country led by visionary social entrepreneurs deeply embedded in the communities they want to serve and see prosper. They provide funding and support, help to build community, and aim to impact policies and systems in light of these collaborations. Since 1998, they have invested over $300 million in unrestricted growth capital in 130+ organizations (New Profit website, 2021), as well as played a leading role in the development of many high-impact organizations in the social sector. Figure 3 highlights the six conditions of systems change that impact New Profit's work.

Figure 3
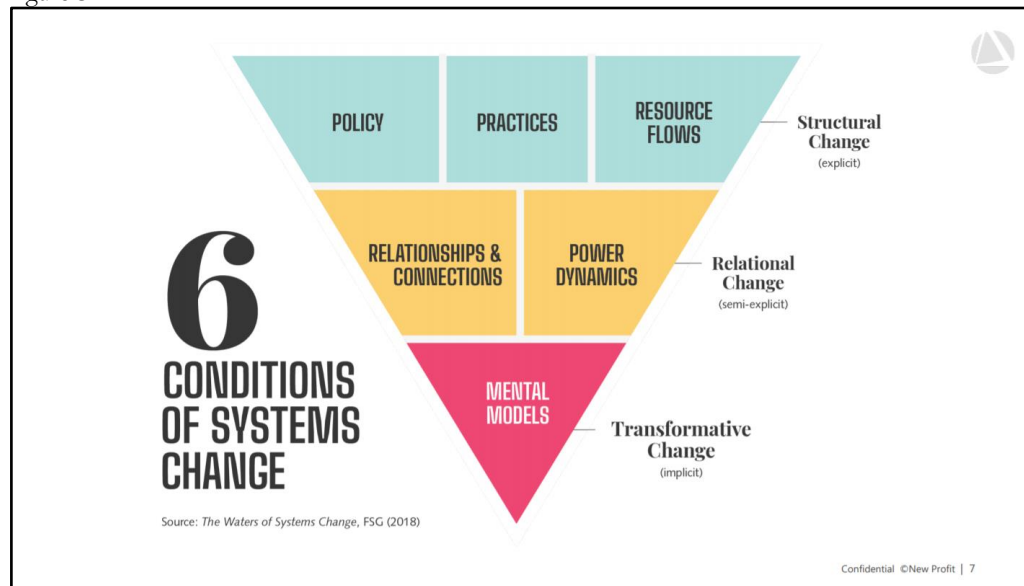
(New Profit website, 2021)

New Profit is well positioned to bring together critical partners and build cross-sector coalitions to cultivate learning communities and maximize opportunities for addressing

common problems. The Future of Work Grand Challenge was created as a means of thinking about how New Profit could leverage philanthropy to solve a complex social problem. The hypothesis was that, in exchange for a $6 million prize purse, New Profit would receive ten times the return on investment in research and design from the teams, innovators and entrepreneurs competing. My strategic project, described below, is centered at this point of innovation, since this is the first time in the organization's history that a prize competition was held, as well as the first time a Worker Advisory Board was part of the design.

The Future of Work Grand Challenge & The XPERT Worker Advisory Board

As a Doctoral Resident, I was charged with leading an implementation team responsible for designing and launching a Worker Advisory Board that would elevate and integrate worker voice throughout the Future of Work Grand Challenge. Ultimately, our job was to ensure that innovations and solutions impacting the future of work would be influenced and shaped by impacted workers. The decision to design and implement a Worker Advisory Board was made to amplify worker voice—in other words, this Worker Advisory Board ensures that impacted workers are integrated into the Future of Work Grand Challenge. New Profit hopes that integrating worker voice will help innovators and entrepreneurs create more effective (and scalable) ways of equipping the future workforce. This strategy is called the XPERT Worker Advisory Board (WAB).

The XPERT Worker Advisory Board is designed to ensure that winning solutions meet the needs of the workers they are intended to serve. The XPERT board members, known as "XPERTs," act as advisors in the Future of Work Grand Challenge by providing input on proposed innovations, contributing to research on worker-centric design, and serving on judging panels and advisory boards for the Grand Challenge. Board members are also expected

to help develop guidelines and criteria around effective worker engagement and participate in design-thinking workshops with the teams. In return, XPERTs receive career-mentoring support to build connections and networks. They will be connected to innovative training and learning programs to build in-demand skills to support their career development, and they will be apprised of growth opportunities through the creation of a learning community. The theory of action behind New Profit's Future of Work Grand Challenge posits that, with this Worker Advisory Board strategy in place, workers (i.e. current and future employees) will serve as advisors to innovators applying for the Future of Work Grand Challenge. As a result of the shared learning between innovators and workers, these entrepreneurs will develop solutions that address the needs of employers. Between July 2020–December 2022 there are expected to be five cohorts of the XPERT Worker Advisory Board. My strategic project assumes that, by building an effective implementation team, New Profit will be more effective in building a high-impact Worker Advisory Board.

Throughout this strategic project, I have attempted to effectively lead an implementation team in designing and launching an effective Worker Advisory Board (WAB) for the Future of Work. In this Capstone, I seek to codify lessons learned from the inaugural cohort (July 2020–December 2020), to implement lessons learned into the second cohort (January 2021–June 2021), and to help make the next three cohorts of the board more effective. The key questions driving this Capstone are:

- *Which structures, systems and design choices within the implementation team might make the XPERT Worker Advisory Board more effective?*

- *How might a diverse implementation team lead to an innovative and diverse Worker Advisory Board?*

- *How might an effective implementation team work through adaptive challenges in designing and launching a Worker Advisory Board?*

In the following sections, I discuss the relevant literature and best practices guiding my approach to this project. I go on to describe and analyze specific strategies implemented, highlighting the *what*, *how* and *why* of my work. I conclude with a discussion of implications for myself, New Profit, and the sector.

Review of Knowledge for Action

Which structures, systems and design choices within the implementation team might make the XPERT Worker Advisory Board more effective? To answer this question, I first conceived the implementation team designing and launching the Worker Advisory Board (WAB) as a team. The question then became how to design this kind of team for success and devise structures that support the work. Here I turn to literature on teaming, diversity, and adaptive change. In this review of knowledge for action, I:

1. Examine the six conditions for team effectiveness and the specific role that a compelling purpose, sound structure and supportive context play in cultivating an effective team;

2. Explore how diversity leads to greater innovation; and

3. Offer context and considerations for establishing and maintaining trust and psychological safety across the implementation team in order to work through adaptive challenges.

This review of knowledge for action allowed me to imagine how a well-functioning implementation team could lead to a well-designed board, which in turn could help build an inclusive and equitable future of work for the most impacted workers—particularly Black,

Latinx and Indigenous working communities. Collectively, these sources of knowledge informed my theory of action and offered a roadmap for the strategic decisions I made throughout residency.

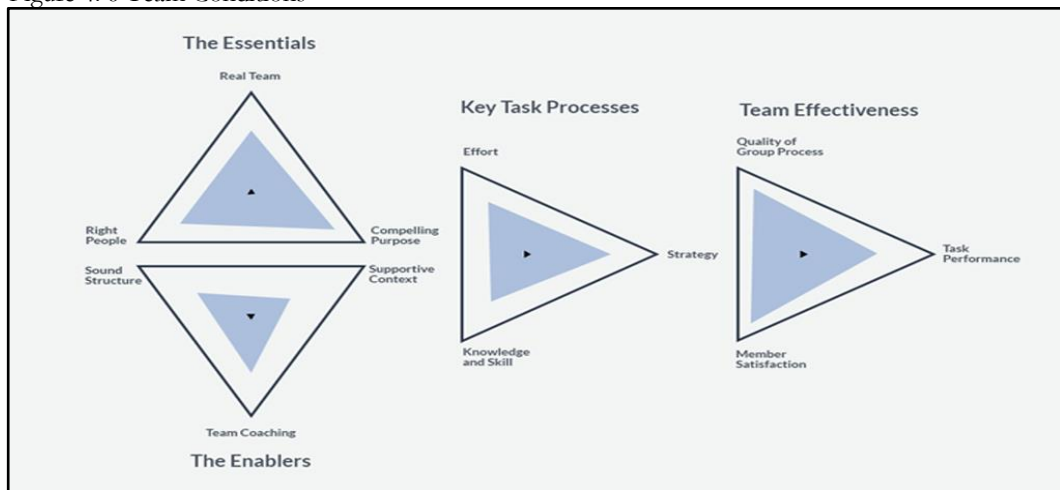**Conditions for Team Effectiveness**

The first driving question guiding my strategic project was: *Which structures, systems and design choices within the implementation team might improve the likelihood of effectiveness in the XPERT Worker Advisory Board?* According to Ruth Wageman (2012), the nature of collaboration has been changing at an accelerated pace. There are many new forms of teams, or what she refers to as "modern" collaboration (Wageman et al., 2012, p. 301). Collaboration is a "team-like behavior over time and across projects"—a definition that encompasses, but is not restricted to, what have traditionally been studied as "teams" (Wageman et al., 2012, p. 301). Modern forms of collaboration include everything from book clubs to groups of professional kitchen staff to, in my case, implementation teams.

What makes a team work well? The conditions for superior collaboration and team effectiveness, according to Wageman et al. (2008), include what the authors label three essential elements and three enablers. Essentials are defined as the building blocks of great teams; enablers are catalysts for a team's development.

The three essentials for effective teams: Right people. Real team. Compelling purpose. The *right people* refers to the diversity of perspectives and technical skills, including teaming skills, necessary for the work. A *real team* is defined as bounded, interdependent, and stable enough in membership to bring about meaningful change. Real teams have three features, in other words. First, they have clear boundaries that reliably distinguish members from nonmembers. Second, team members are interdependent in pursuit of a common goal,

producing a measurable outcome for which members are collectively responsible. Finally, real teams have a moderate stability of membership, which gives members the time and opportunity to learn how to work well together. Higgins et al. (2012) add that, for implementation teams, tying the team's interdependence, boundedness, and stability to *individuals* may be less relevant than tying the same dimensions to team members' *roles*. *Compelling purpose* speaks to a shared direction that everyone is committed to, a purpose that is challenging (energizes members), clear (orients them to their main purpose/s), and consequential (engages the full range of their talents). The authors of this framework, shown in Figure 4, suggest that, without the essentials, there is no foundation for building a team.

Figure 4: 6 Team Conditions

(6 Team Conditions, 2020)

According to Wageman et al.'s (2008) framework, the three essentials must be complemented by three enablers to increase the likelihood of effectiveness: sound structure, team coaching, and supportive context. *Sound structure* means that a well-designed task, the right number and mix of members, and explicit norms about how to work together are in place. *Team coaching* means having an expert coach who can help the team maximize its resources. *Supportive context* means that there is a reward system, information system, and

education system or structure in place to facilitate team performance. These enablers equip a team to take full advantage of members' capabilities as well as external resources.

A reward system within a supportive context provides incentive, recognition and positive consequences for excellent team performance. An information system within a supportive context is one that has all necessary data and tools for planning and executing the work. An education system within a supportive context is one that provides technical or educational assistance to the team for any aspect of the work where members lack expertise. Wageman et al.'s (2008) study of 127 senior leadership teams from around the world showed that less than 25% of the studied teams were outstanding across all six conditions. Those that were outstanding scored substantially better on the six conditions than those that were not, and together the six conditions predicted 60% of the variation in team effectiveness.

While the essentials and enablers may make for effective teams, there are nonetheless many *types* of teams. One type is an implementation team. Higgins, Weiner, and Young (2012) define an implementation team as a team charged with designing and leading the implementation of an organization-wide change strategy. They argue that, unlike traditional teams, the individuals who make up an implementation team may come and go, without the team falling apart. The team may stay intact, bounded, and interdependent in its work through the positions or roles occupied on the team. Like traditional teams, implementation teams can be more or less effective depending on their composition and the kinds of supports put in place to enable their work.

This implementation team at New Profit was formed to implement, as its change strategy, an equity initiative. The literature on teams does not cover this type of work, so I turned to diversity literature to better understand how I might make a deeper impact leading this type of implementation team.

The Value in Diversity Hypothesis

My second driving question was: *How might a diverse implementation team lead to an innovative and diverse Worker Advisory Board?* Diversity produces benefits—at least it can, even if it doesn't always do so (Page, 2007). Empirical research looking at diversity and group performance is mixed. Some researchers have found benefits such as innovation, progress and understanding (Page, 2007; Thomas and Ely, 1996). Others have suggested that diversity can be detrimental to success and society by creating conflict, undermining cohesion, and thus decreasing productivity, as well as decreasing access to social capital and involvement in civic life (Jonas, 2007; Phillips and O'Reilly, 1998; Putnam, 2000). Page, however, makes the claim that "mixed evidence is not a reason to get rid of diversity; it's [a] reason to learn to reduce its cost" (2007, p. 326).

For the XPERT Worker Advisory Board, the objectives are innovation and progress—innovation in devising new future of work solutions that benefit society, and progress in including impacted workers in influencer roles within major innovation initiatives. New Profit wanted for the innovations being proposed for the Future of Work Grand Challenge to include the preferences and perspectives of impacted workers, and for solutions they invested in to meet the needs of those most affected by today's unjust workforce and changing economy. Research on diverse teams shows that identity diversity, cognitive diversity and experiential diversity are key to achieving innovation (Page, 2007). Therefore, I hypothesized the XPERT WAB should be diverse across all dimensions, and also, that the implementation team—as a team trying to do innovative work in designing the XPERT WAB—should be diverse as well.

According to de Anca and Aragón (2018), demographic (identity) diversity is tied to our identities of origins, for example our gender, race, or sexual orientation. Experiential

diversity refers to our affinities, hobbies, and abilities (our life experiences), and cognitive diversity describes how we approach problems and think about things. Demographic diversity, the authors suggest, is tied to characteristics we carry around our entire lives, experiential diversity determines who we spend time with, and cognitive diversity makes us look for other minds that complement our thinking. De Anca and Aragón (2018) inform us that diversity is dynamic. Each form of diversity is different and requires its own management strategy to effectively integrate people.

The Value in Diversity Hypothesis suggests that identity-diverse groups perform better than homogeneous groups (Phillips and O'Reilly, 1998), particularly when the task is primarily problem solving, when their identities translate into relevant tools, when they have little or no "preference diversity," and when their members get along (Page, 2007). Preference diversity means having different behavioral preferences, different ways of working and solving issues, and different communication styles (Saint, 2017). Page's (2007) research is clear that, when identity-diverse groups perform well, identity diversity correlates with cognitive diversity. Additional studies show cognitive diversity to have a benefit on performance and innovation (Ramarajan and Thomas, 2010; Cox et al., 1991). Edmondson (2013) adds that innovation consists in new ideas and skills, which come of bringing people together from a range of functions, professions, locations, and organizational groups. The impact of diversity on improving outcomes may be inaccurate if the task that the diverse group is given has no problem solving or prediction involved (Page, 2007), but, when the outcome is innovation, diversity is shown to be an asset.

In their research, Higgins et al. (2012) state that implementation teams with more positional diversity—defined by Yeh & Chou (2005) as heterogeneity in terms of job position—embraced their roles more readily than teams with less positional diversity. Further,

the more diverse teams in their study were more externally oriented, which meant the teams had to consider how their work might impact and be impacted by key stakeholders. These two additional diversity elements are key to the implementation team and board composition and structure.

Thomas and Ely (1996), summarizing several studies of diverse group performance, suggest that we should not think of diversity as consisting solely of external physical differences; instead, "diversity should be understood as the varied perspectives and approaches to work that members of different identity groups bring" (para. 6). This means not only tapping more people from underrepresented groups and communities, but also tapping *into* their identity-related knowledge and experiences as resources for learning how organizations can better perform their core work. Page's (2007) research also suggests that, with tasks where only a tenuous connection exists between identity diversity and cognitive diversity, there is no logical reason to suppose that identity-diverse groups will perform any better than more homogeneous groups. Identity diversity should produce benefits only when it somehow correlates with or causes cognitive diversity. I therefore concluded that, if the implementation team designing the board is more demographically, cognitively, experientially, and positionally diverse, it might lead to more diverse selection criteria for XPERT WAB membership and increase the likelihood of a more innovative board.

For diverse groups to perform well, people must feel as though their identities and contributions have been validated. When people feel no pressure to abandon their self-view in a group setting, they contribute more and the group performs better (Page, 2007). Thomas and Ely (1996) also find that expectations play an important role in how identity-diverse groups perform. If people belonging to an identity-diverse group expect diversity to generate benefits, they're more likely to realize those benefits. Research by van Knippenberg and

colleagues (2004, 2007) on diversity mindsets has suggested that groups that value diversity pay more attention to the varied perspectives of members. The value of diversity thus lies in different knowledge bases that each member uniquely holds and shares under the right conditions.

As this implementation team seeks to fulfill its mission—designing a board that lifts up the voices of impacted workers on workforce and future of work issues—I have looked to Page, Higgins, Thomas and Ely, who offer up ways of integrating many diversification strategies highly applicable to a strategic project like mine (one inclusive of the organization's goals). These distinctions of identity, cognitive, experiential and positional diversity imply a need for intentionality in board selection and recruitment. Thomas and Ely say it best: "leaders must acknowledge that increasing demographic diversity does not, by itself, increase effectiveness; what matters is how an organization harnesses diversity, and whether it's willing to reshape its power structure" (Ely & Thomas, 2020, p.117). In other words, diversity *can* lead to increased innovation, but team effectiveness *also* depends on effective structures and processes. One such process is how a team works through adaptive challenges.

The Need for Psychological Safety and Trust In Adaptive Change

My third and final driving question was: *How might an effective implementation team work through adaptive challenges in designing and launching a Worker Advisory Board?* Technical changes apply "fixes" to problems within a system whose solutions are bound by existing paradigms (Daly & Chrispeels 2008). Heifetz and Linsky (2002) explain that a technical problem's solution already lies within an organization's repertoire. By contrast, adaptive challenges require experimentation, discovery and adjustment on many fronts in the organization or

community. There are seven ways to know if you are facing an adaptive challenge, according to Heifetz (2011, p. 29):

1. If the solution requires operating differently from how you do now,

2. If the problem and the solution require learning,

3. If the solution requires shifting authority and responsibility to the people who are actually affected,

4. If the solution requires sacrifice of past ways of working or living,

5. If the solution requires experimenting before you're sure of the answer,

6. If the solution will take a long time, and

7. If the challenge connects with people's deeply held values.

These seven criteria show designing and implementing this Worker Advisory Board to be an adaptive challenge. We are all working together for the first time as an implementation team, which requires learning and operating in a new way; we are designing and launching a Worker Advisory Board during COVID-19, something no one partner has previously done before, which requires experimentation and testing; and we are aiming to elevate the voice of impacted workers in the future of work. Our *modus operandi* assumes that workers are the ones most affected and therefore hold the answers, which requires long-term solution planning (impacting the future of work sector will take time), challenging ourselves to ensure that authority remains vested in workers as we design the board, and sacrificing old ways of working (when we perhaps held all of the authority).

Heifetz and Linsky (2002) explain that solutions to adaptive challenges rely on changing people's beliefs, habits, ways of working and ways of life. For individuals to confront beliefs, habits, values and norms, they need to feel safe doing so. Psychological safety is defined

as a shared belief that the team is safe for interpersonal risk-taking (Edmondson, 1999, p. 354). Psychological safety facilitates the team's ability to take actions to accomplish its work (Edmondson et al., 2016). Thus, adaptive change requires psychological safety.

In *Teaming to Innovate,* Edmondson (2013) describes seven critical leadership behaviors for building psychological safety: be accessible, acknowledge limits, display fallibility, invite participation, frame failures as opportunities, use direct language, and set boundaries. Her research shows that teaming is most effective, especially throughout the innovation journey, when people feel safe enough to open up and share their ideas, hopes and concerns. She adds that psychological safety is also key to setting shared goals. An effective implementation team should therefore have psychological safety that effectively bridges differences in order to face adaptive challenges. Heifetz and Linsky (2002, p.22) sum it up nicely: "Adaptive change stimulates resistance because it challenges people's habits, beliefs, and values. It asks them to take a loss, experience uncertainty, and even express disloyalty to people and cultures. Because adaptive change forces people to question and perhaps redefine aspects of their identity, it also challenges their sense of competence. Loss, disloyalty, and feeling incompetent: That's a lot to ask…"

Adaptive change introduces risk, conflict, and instability because addressing the issues underlying adaptive problems may involve upending deep and entrenched norms (Heifetz & Linsky, 2002)—including individual, team and organizational norms. Adaptive change requires psychological safety (Edmondson et al., 2016), and, to create safety, you need to cultivate trust. Adaptive change thus rests on a foundation of trust. Trust, particularly with regard to respect, risk, and competence, are significant predictors of adaptive and technical leadership (Alan & Chrispeels, 2008). These researchers define trust as "the extent to which one engages a relationship and is willing to be vulnerable [willingness to risk] to another based on

communication and the confidence that the latter party will possess: (a) benevolence, (b) reliability, (c) competence, (d) integrity, (e) openness, and (f) respect" (Alan & Chrispeel, 2008, p. 33). Evans (2015) claims that trust frees people to work closely together; lack of trust inhibits them by reminding them to stay on their guard. Evans (2015) also suggests that people seldom think about the role trust plays in interactions with others until some element of risk emerges. In order for this implementation team to effectively manage adaptive challenges, then, there must be psychological safety, which is built on a foundation of trust.

The absence of trust has been demonstrated to lead to negative anxiety, estrangement, and isolation (Tschannen, 2001). There are two different types of trust, according to Evans (2015). *Interpersonal* trust, a one-to-one human relationship, and *system trust*, which is related to an impersonal structure, such as a state government or a monetary system. Figure 5 shows the two types of trust, along with the three dimensions of trust: ability, integrity and loyalty (Evans, 2015).

Figure 5
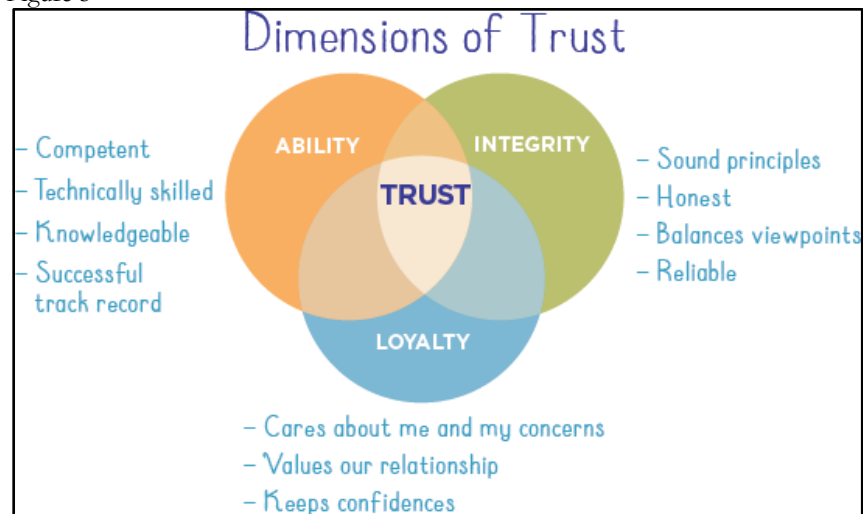
(Evans, 2015, Chapter: Dimensions of Trust)

Ability is about technical skills, competencies, and execution. *Integrity* includes shared values (e.g. principles, fairness, and character) and expectations (e.g. reliability and consistency)

between parties. *Loyalty* is rooted in truth-telling and a personal relationship between trustor and trustee.

The implementation team's job of designing and launching the XPERT Worker Advisory Board is an adaptive challenge. Relying on one another to change beliefs, habits, ways of working and ways of life will not only be tough, but will entail the loss of old ways of thinking and working and being. Therefore, the team must demonstrate and maintain psychological safety and trust for one another in order to effectively design and launch an effective board.

Theory of Action

Armed with knowledge about designing effective teams, creating value through diversity and managing adaptive change—as well as contextual knowledge about the Future of Work—I devised the following theory of action to support my strategic project with New Profit:

IF I work with the implementation team to design and launch the XPERT Worker Advisory Board by:

- Creating a compelling purpose, which includes valuing diversity and securing the implementation team's agreement on that purpose;
- Building a sound structure for effective team engagement, which includes well-designed tasks and explicit norms;
- Creating a supportive context for working together, which includes having a reward, information and learning system; and
- Establishing and maintaining trust and psychological safety in order to work through

adaptive challenges,

THEN the implementation team will have the necessary elements to launch the XPERT Worker Advisory Board successfully:

- Defined selection criteria for attracting board members with identity, cognitive, positional, and experiential diversity,

- A recruitment process for recruiting diverse board members, and

- An engagement plan for effectively engaging board members

SO THAT:

- Impacted workers from historically marginalized communities will serve as advisors to the Future of Work (FOW) Grand Challenge,

- Impacted workers' voices will be centered in FOW decisions,

- A set of emerging best practices related to worker-centricity will emerge that can help drive impact, which New Profit can use within and beyond the Future of Work,

IN ORDER TO ULTIMATELY IMPACT:

- New Profit's ability to enhance its participatory practices while maintaining authentic voice and engagement,

- New Profit and its partners' ability to ultimately ready 12 million Americans for the workforce of the future,

- New Profit's commitment to deeply integrating impacted workers across the organization,

- Philanthropic workforce funders' investments in worker-centric strategies and initiatives,

- Philanthropic organizations' inclusion of the impacted communities they want to see prosper.

Description of The Strategic Project

"…I started off my youth in the foster care system, getting involved with a gang and getting kicked out of high school…Here I am now. Sitting on the XPERT Worker Advisory Board of a $5 million prize [now $6 million] I helped to create. Never say no to an opportunity, it may be the opportunity you've been looking for."
—XPERT Worker Advisory Board Member, Cohort 1

On May 18, 2020, I started working at my residency site as a consultant until officially beginning my residnecy July 1. During my first two weeks, I met my supervisor, Dr. Angela Jackson, all of the current New Profit staff involved in the Future of Work launch, and all of the launch partners. The launch of this initiative was set to take place on June 22, 2020—the hundredth day since the start of the pandemic. United by a shared response to the national pandemic, fifteen colleagues from across multiple teams inside and outside New Profit came together for the Future of Work Grand Challenge.

New Profit originally intended to launch the Future of Work initiative in December 2020, but, given the economic, social and racial fallout of the COVID-19 pandemic, New Profit leadership decided to launch six months early. This meant all of the work was accelerated. Implementation teams composed of different implementation partner organizations, which I refer to as "partners" throughout the Capstone, were convened as main drivers of the work.

This coalition of individuals from high-profile, reputable partnering organizations gave us the capacity to move the work forward quickly. Angela, the leading Managing Partner of

this initiative at New Profit, was a key decision maker who kept the work moving forward fast (and it was moving fast) as numerous decisions needed to be made on a daily basis about what direction the work should take. Within a month of my time there, the Future of Work initiative was publicly launched; in less than two months, the first cohort of the Worker Advisory Board was designed and implemented. Figure 6 shows a high-level overview of the structure of the FOW Grand Challenge and the different core strategies of this initiative. These included convening three different implementation teams to support the three key stakeholders: innovators applying for the Grand Challenge, workforce boards piloting these innovations, and impacted workers serving as advisors. Each implementation team consisted of 7–15 individuals from different implementation partner organizations. My strategic project entailed leading the implementation team tasked with designing and launching the second cohort of the XPERT Worker Advisory Board (WAB).

Figure 6: Overview of the Future of Work Grand Challenge
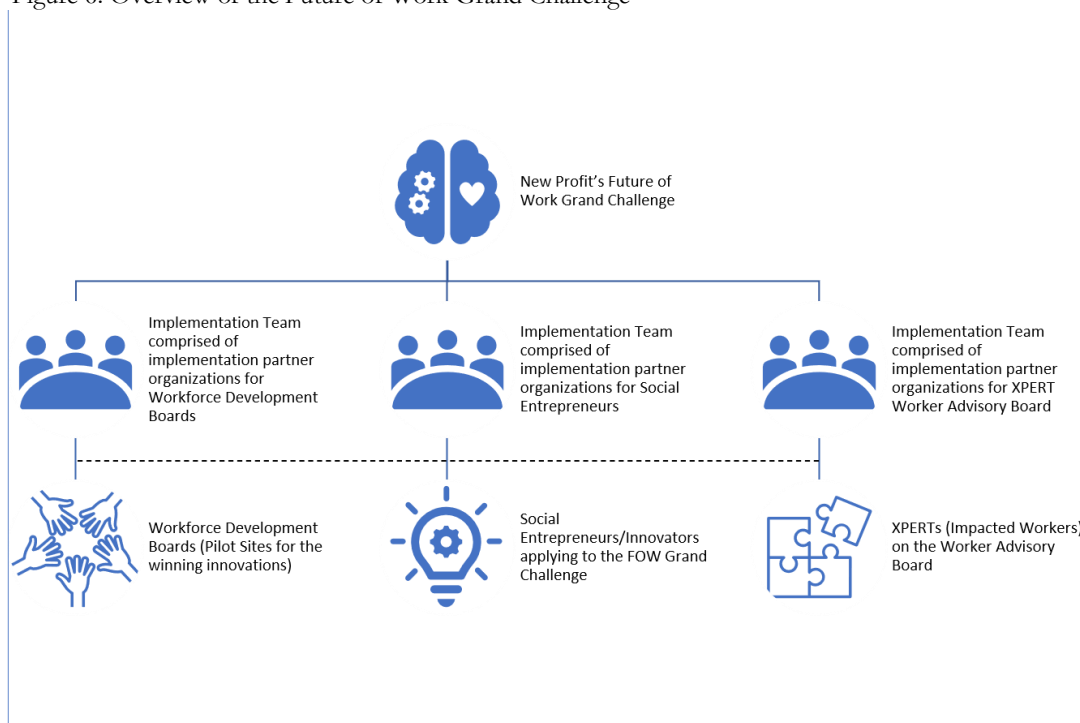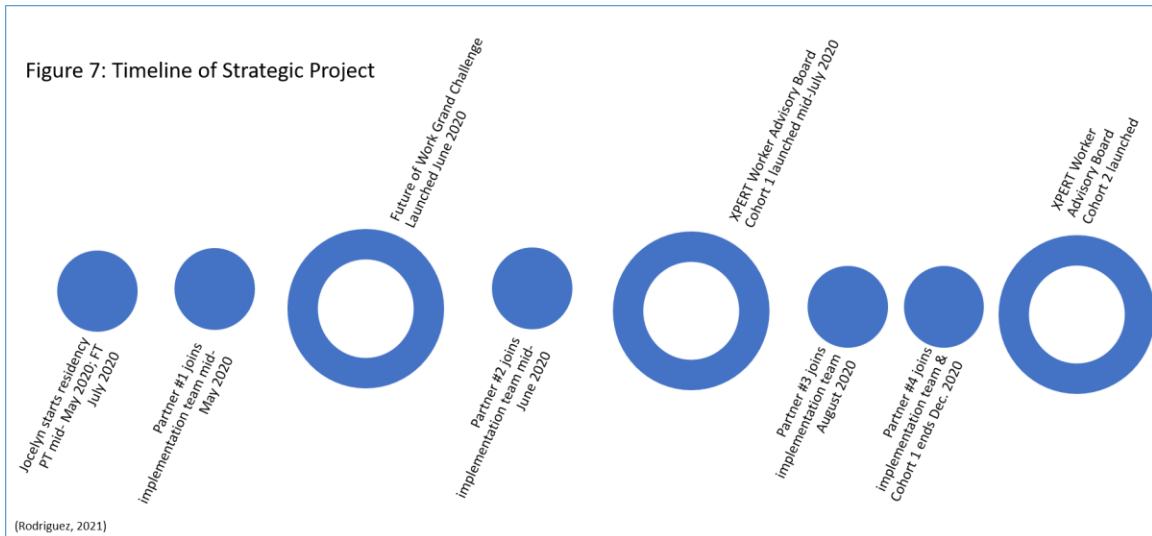

(Rodriguez, 2021)

At the public inception of the Future of Work (FOW) Grand Challenge, just one implementation partner was identified for the XPERT Worker Advisory Board. Not only was I new to the team—this was the first time these two organizations would be partnering together. My leadership role meant that I would directly shape the approach and work. I was in a good position to understand the needs of our implementation partners and New Profit and adjust the approach as necessary. I would not be working on my strategic project alone, since I would eventually work with four different organizations that would be designing the XPERT Worker Advisory Board alongside me.

COVID-19 affected not only the timeline of the launch, but also the way people worked together. New Profit went fully remote for the first time in its 23-year history. There were many other firsts: this was New Profit's first time launching a prize competition, convening a Worker Advisory Board, facing a national pandemic, and working with all of the Future of Work implementation partners, as well as their first time using multiple implementation teams to carry out the work (the work, for the purposes of this capstone, being the launch of the second cohort of the XPERT Worker Advisory Board).

My approach was characterized by several key activities, each one intended to carry out one or multiple parts of my theory of action. Table 1 includes a short list of key activities that aligned with my theory of action. The full list of activities can be found in Appendix A.

Table 1. (Short List; for the full list refer to Appendix A) Theory of Action (column headers) & Key Activities Employed			
Creating a compelling purpose and securing agreement on that purpose	Building a sound structure	Creating a supportive context	Establishing and maintaining trust and psychological safety
I started each partnership by discussing the purpose, asking for feedback and securing commitment to that purpose. The purpose was co-established by the implementation partners. I codified the co-created values and vision that all partners adopted (i.e. we all valued having workers share their stories) and encouraged the team to translate our values into our success metrics for the board. I connected partners directly to the workers on the board to further shared direction and purpose.	I facilitated regular (weekly or biweekly) working sessions with each implementation partner (agendas were co-created). I integrated rolling agendas (Meeting Wise) and shared documents via Google Drive. I led the co-creation of assets for the board: Board Engagement Plan, Selection Criteria, Recruitment Plan, a Framework on Designing for Worker Centricity, a Glossary of Terms, Communications Plan and Success Metrics for the board.	I collected feedback from XPERTs after every activity to inform next steps and inform all partners in the work *(information system)*. I organized and co-facilitated cross-partner meetings and created shared Google documents where we collectively discussed and worked on elements of the board, with worker input *(education system)*. I led the design of webinars and involved implementation partners as co-presenters to share our work, which generated good publicity *(reward system)*.	I consistently asked for feedback and input, which shaped how we worked together. I shared learnings and, as a team, we adjusted quickly. I worked alongside all partners, providing feedback and guidance and filling knowledge gaps (with some partners I was a facilitator, for other partners I was the researcher, for another partner I was the convener, etc.). Roles shifted as the work progressed.

The timeline for the implementation team to design and launch the second cohort of the Worker Advisory Board was August to December 2020, but each implementation partner joined at a different time. The more implementation partners I had to work with, the faster the work could get done. At the same time, I had to be more intentional in ensuring that each partner was set up to be as effective as possible, individually and as a whole. Figure 7 is a timeline of key events. By the time Cohort 1 was coming to an end, we were an implementation team of five partnering organizations.

Figure 7: Timeline of Strategic Project

- Jocelyn starts residency PT mid- May 2020; FT July 2020
- Partner #1 joins implementation team mid- May 2020
- Future of Work Grand Challenge Launched June 2020
- Partner #2 joins implementation team mid- June 2020
- XPERT Worker Advisory Board Cohort 1 launched mid-July 2020
- Partner #3 joins implementation team August 2020
- Partner #4 joins implementation team & Cohort 1 ends Dec. 2020
- XPERT Worker Advisory Board Cohort 2 launched

(Rodriguez, 2021)

The activities I devised were ongoing and did not fall neatly into a timeline because they happened throughout the several months I worked with the implementation team. Although this work was not done in isolation, for the purposes of this Capstone I focus largely on the activities that I led and the actions that I drove. These activities generally fell into three buckets of work: Learning, Executing, and Adjusting. During *learning*, I focused on understanding as much as possible the history and context of the project, the needs and wants of all of the stakeholders, and the vision of New Profit and its partners. During *execution*, I was operationalizing plans and implementing key activities. Throughout the *adjustment* period I synthesized the learnings for partners, for New Profit, and for the workers on the board. I thus ensured that the learning was being operationalized. The activities highlighted in Table 1 (above) fell under all three buckets.

Learning

During the learning periods, I met with Angela several times a week, held introductory calls almost daily with different colleagues and partners, and met with my assigned mentor and

"buddy" from New Profit. In addition to weekly supervision meetings with Angela, I met monthly with my mentor, another senior-level staff member who had been with the organization for many years, to discuss the history of the organization and its systems and structures. I met with my "buddy" for half an hour each week for the first few months, which gave me the space to ask pressing questions so I could understand the organization and its culture better. Early on in my residency, I learned that Future of Work had only one full-time equivalent and a few other colleagues who worked part-time (less than 15 hours a week). I learned that New Profit was about to enter the third year of its five-year strategic plan, that a new Chief People's Officer had just joined, and that, in light of COVID-19 and the death of George Floyd, difficult conversations around diversity, equity and inclusion were taking place internally in many common (virtual) spaces, such as staff meetings. I learned that many staff members knew Future of Work by name but did not understand what the initiative was really about and did not know that we would be designing and implementing a Worker Advisory Board as part of the work.

As soon as I started at New Profit, I scheduled working sessions twice a week with our first implementation partner. At that time, they were our only implementation partner for the Worker Advisory Board. They provided pro bono services through a team of three full-time consultants, along with a $150,000 grant to support the Worker Advisory Board. The grant funding allowed us to provide stipends to the XPERTs for their time. I implemented rolling agendas through Meeting Wise (Boudett & City, 2014) to centralize information and created a shared document for storing decisions and capturing discussions. We spent our first meeting talking about what we needed in order to have a successful partnership, what our norms for communication would be, as well as sharing our current understanding of the work and discussing timelines and deliverables. We captured our notes, thoughts and questions on

the rolling agenda; all agreed that this structured meeting was a great strength of our time together.

I also met with other stakeholders, such as workforce boards and funders, to listen to their insights about the board and their perspectives on integrating impacted workers in the FOW Grand Challenge. All of these spaces helped me understand the context of the work, manage expectations, and establish credibility with colleagues and peers.

Executing

Although I was charged with leading this strategic project, I was also involved in supporting the launch event for the FOW Grand Challenge, which entailed streamlining internal team efforts and developing trackers and shared folders to ensure that internal communication and work streams were aligned. As I became the second full-time equivalent on the Future of Work team, it became apparent that one implementation partner was not going to be enough. Angela knew that, with the initiative being launched quickly, we needed to identify more implementation partner organizations just as quickly. By the midpoint of Cohort 1, we went from one to three implementation partners: Accenture, Goodwill Industries International, and Minds at Work. By December 2020, we had a fourth implementation partner, Education Design Lab. Although Angela identified these partners, I led the development of their tasks and scope of work, and I was responsible for ensuring we collaborated effectively.

At the outset, one implementation partner was tasked with completing a landscape assessment to identify possible opportunities and threats within the future of work sector that would inform the design of the Worker Advisory Board. Through this landscape assessment, which synthesized interviews with more than seventy workers, employers and funders about

the future of work, we identified four interconnected elements to include in the design of the
Worker Advisory Board to best meet the needs of workers joining the cohort: research,
advising, technical skill building, and professional support services. Figure 8 highlights the four
key elements of the board, along with the implementation partner largely responsible for
designing that specific element.

Figure 8: Engagement Pillars
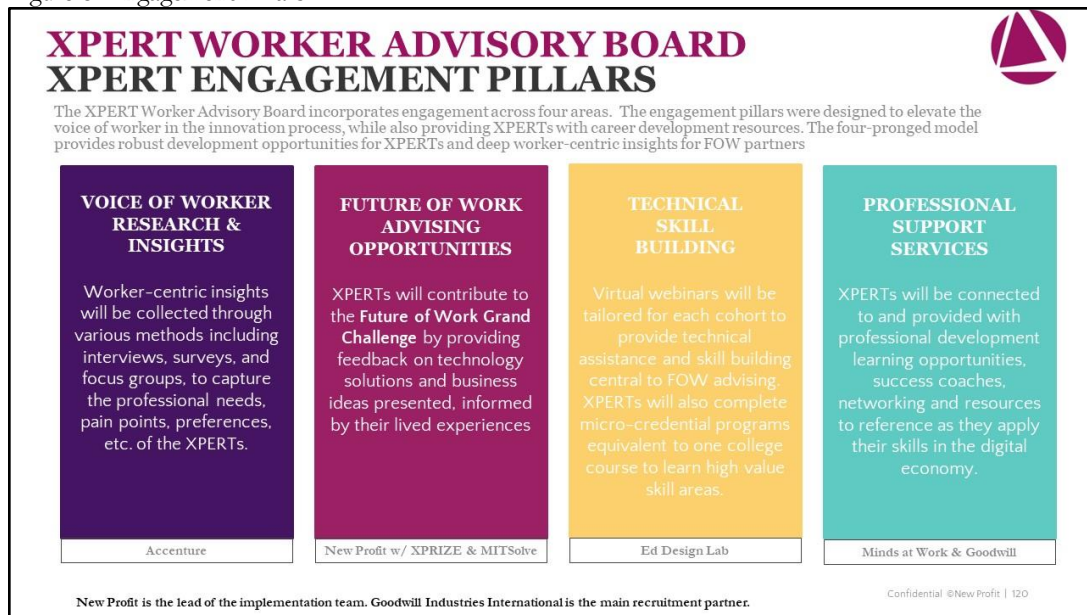
(New Profit, 2021)

Each partner had expertise in one aspect of the workforce; collectively, they gave us
a holistic picture of the needs, preferences, assets and gaps of impacted communities.
Accenture, a global professional services company with leading capabilities in digital, cloud
and security, was a trusted strategy and research partner. Goodwill Industries International, a
U.S.–based nonprofit organization that provides job training, employment placement services,
and other community-based programs for people across America who face barriers preventing
them from otherwise obtaining a job, was a trusted national recruitment partner and career
coaching support. Education Design Lab, a reputable organization known for their micro-

credentialing and badges approach which supports adult learners on their trajectory toward meaningful careers and higher earnings was a trusted technical skill-building partner. And Minds at Work, the only leadership coaching organization that trains coaches to use the Immunity to Change (ITC) Method, was a trusted partner in referring and connecting trained ITC coaches.

As the lead for this implementation team, I led us in co-creating (with one another and with workers) several important tangible assets for this board: a Cohort Board Engagement Plan, Selection Criteria, a Recruitment Plan, a Framework for Designing for Worker Centricity, a Glossary of Terms on how to refer to workers, a Communications Plan, and Success Metrics for the board. Co-creation meant that one partner would write an initial draft, which would include the purpose of the document and any relevant deadlines; they would then circulate the draft for feedback before we discussed elements that required discussion; additional drafts would be developed and circulated to all partners until a final version was approved by all.

Adjusting

The uncertainty and opportunity presented by COVID-19 placed a greater onus on us as an implementation team to share our work and raise awareness online among funders, nonprofits, and stakeholders (e.g. policy experts and researchers). We quickly realized that, due to the interdependent nature of our work, the urgency of the times, and the short timeline for designing and launching the second cohort, we needed access to the same information and to one another's insights. Thus, shared drives and shared documents became the norm. We also budgeted time for internal feedback (as an implementation team) after events and activities with the board members from Cohort 1. Doing so helped us build a shared understanding of successful strategies and identify room for improvement for the second

cohort. Furthermore, I served as the main point of contact—all communication between the board and the implementation partners flowed through me. This was one way of streamlining the work and developing inclusivity (i.e. asking for thoughts, preferences and perspectives). I also recognize that, while this setup streamlined the work, it did give me some perhaps undue power as the information broker.

Meeting and exceeding the needs of the workers on the board was crucial to adjusting. The 31 board members from Cohort 1 gave input on the structures within the board, the scheduling and time commitment, the learning opportunities, as well as feedback on all board activities and engagement, which influenced structures for Cohort 2. After every board event and activity, a feedback survey was administered asking for input. Feedback was largely collected through Google Forms, but we also held focus groups and exit interviews with Cohort 1 board members. Through surveys and interviews, for instance, board members asked for more informal opportunities to connect, share, learn and build relationships—we listened. Board members from Cohort 1 helped to establish the "learning pods" for Cohort 2. Learning pod leaders would be Cohort 1 board members who served to enhance the board experience for Cohort 2 members. They would keep their finger on the pulse of board member sub-groups, hosting informal connections and acting as intermediaries between New Profit and the Worker Advisory Board.

This work was not without challenges. Two stand out. First, no one had done this work before—least of all during a global pandemic and a period of heightened racial tensions and political uncertainty. Designing a virtual six-month experience for impacted workers during a time of so much ambiguity and constant change was a challenge, because no one really knew what to plan for. Not only was there little research on advisory boards to lean on—none of us had actually implemented this type of strategy before working together, and

we could only guess at how COVID-19 would affect the future of work and the board members. We knew having a plan was important, but having flexibility in that plan was just as important.

Second, the timeline for diagnosing, designing, acting and reflecting (in other words, for learning) was tight. All four implementation partners joined the team at different months into December, which meant constant shifs. The second cohort was set to launch in January, which meant it needed to be designed no later than December to allow time for recruitment—and we had partners joining through December. Not only that, some of the work was contingent on external partners who were not on the implementation team, such as professional career coaches and other Future of Work partners, as well as the innovators applying for the Future of Work Grand Challenge (which was the core of the advising element of the board). A structure for information-sharing and learning largely depended on my meeting with everyone individually and conveying information individually to all partner organizations. No structure for collective information-sharing and learning existed that would allow all of us to learn together quickly, which was essential to this fast-paced work.
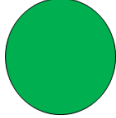
These challenges led us to consider how we might build a flexible and adaptable board to best support board members, and a flexible and adaptable collaboration to best support one another. Below I highlight a few examples of adaptations we devised to address the challenge of not having a proven model for this work and of having a quick timeline for both learning and doing. Adaptive change was essential because answers were unknown and the work was urgent and required new ways of learning. In all of these examples, we aimed to build an effective partnership, an impactful board and a commitment to outcomes-based philanthropy.
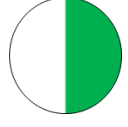
Table 2. Adaptations		
Challenge	Context	Adaptation(s)
No proven, effective model for the work	• Little to no research on worker advisory boards; • This would be the first time all implementation partners designed such an experience during an ever-changing COVID-19 global health pandemic which served as an accelerant for digital and virtual learning experiences	• We focused on research regarding the workforce, the future of work, and digital learning; • We depended on Cohort 1 board members to provide us with constant feedback; we integrated a feedback survey for every interaction and requested a quick turnaround; • I served as the main point of contact for all board members. I emailed, called and texted board members constantly to remind them of tasks, commitments, etc. This created a streamlined process for communication. • We tailored research to include feedback about the board experience (i.e. did they feel listened to on a given day by their peers and facilitators), about content (i.e. was the content relevant) and about their workforce journeys (i.e. what about this was helpful for you).
Quick timeline for both learning and doing	• All cohorts were designed as six-month experiences to provide for some stability for the work, while also accounting for the larger uncertain context of the nation; • We only gathered with members once a month; • All communication was done virtually with the expectation that members would be successfully completing all milestones; • Digital literacy was not a requirement for Cohort 1 members to join the board; • and the implementation partners work was interdependent.	• Feedback surveys were synthesized within one week and data was shared among partners • Regular working sessions were scheduled, with more added as needed (flexibility in scheduling among all partners helped) • Agendas for monthly sessions with the board were developed in advance and circulated among partners for input to ensure alignment • Partners attended monthly gatherings with the board • One partner would lead the development of an asset, but would then circulate for feedback/input (all deliverables included time for feedback) • Shared documents on Google Drive

In the next section of the Capstone, I will describe the extent to which strategic project objectives were met.

Evidence to Date

This strategic project gave me the opportunity to lead collective impact work against a backdrop of nationwide uncertainty. Throughout my residency, I collected evidence to measure the progress of the goals outlined in my strategic project and to assess which actions were needed to move us closer to the ultimate goal: assembling an effective implementation team in order to build a high-impact XPERT Worker Advisory Board. In Table 3, I summarize the actions and subsequent results that informed the progress of my strategic project in relation to the first part of my theory of action. The left column corresponds to the "if" statements of my theory of action, the middle column captures relevant outputs and outcomes connected to each action, and the right-most column shows how far each goal has been met to date, based on my own assessment of the work.

Table 3. Evidence of Theory of Action "if" Statements		
Theory of action "if" statements	Relevant outputs and outcomes	Progress
Create a compelling purpose, which includes valuing diversity, and secure the implementation team's agreement on that purpose	Scopes of work for implementation partners which outlined purpose, deliverables and important deadlines (Outcome) The co-creation of assets: framework on worker-centricity, selection criteria, board engagement plan, glossary of terms, and success metrics (Outcome)	🟢
Build a sound structure for effective team engagement, which includes having well-designed tasks and explicit norms	I leveraged each implementation partner to carry out interdependent but clear streams of work (e.g. recruitment, research, advising, technical skill building, professional support services, etc.) (Output) I engaged in regular working sessions with implementation partners to discuss the vision of the Worker Advisory Board and share ideas on the best way to design the board (Output)	🟢
Create a supportive context for working together, which includes	Communications plan that allowed partners to share learnings and also amplify one another's role in the work (Outcome)	

having a reward, information and learning system	Set of emerging best practices (framework) for worker-centricity (Outcome) Feedback from the workers on Cohort 1 of the WAB as to whether the board meets or exceeds their expectations (Output)	
Establish and maintain trust and psychological safety in order to work effectively across difference	The team experience contributed positively to the learning and well-being of individual team members (Output)	

Creating a Compelling Purpose

Throughout my residency, I had significant success in creating a compelling purpose, which includes valuing diversity, and securing the implementation team's agreement on that purpose. Once I started my residency, before any new implementation partner was officially brought on to do the work with us, I held meetings with New Profit colleagues and Angela, as well as the implementation partner, to discuss the ultimate vision of the board. I then documented a co-created scope of work with each partner that aligned with the different elements of the board. As soon as an official implementation partnership began (through finalization of an agreement with New Profit), I scheduled regular working sessions with each partner. I made sure every meeting had a clear purpose, agenda and next steps to accomplish that purpose. Those working sessions were where we could connect, learn about one another and the work, and create new ideas and shared understanding. The greatest evidence of this compelling purpose may be the co-creation of various assets fundamental in designing the board: namely, a framework on worker-centricity, board selection criteria, a board engagement plan, a recruitment process, a glossary of terms, and success metrics, which I discuss in detail below. The ultimate purpose of the implementation team was to build a high-impact board; these assets were evidence of that impact, which I explore below.

Building a Sound Structure

I also had significant success in building a sound structure for effective team engagement, as evidenced by well-designed tasks and explicit norms. Figure 9 shares a summary view of deliverables for one of the implementation partners.

Figure 9

DELIVERABLES – SUMMARY VIEW

| WORKSTREAM	DELIVERABLE	DESCRIPTION
Research	Research and interview summary (incl. support on Cohort Selection Criteria, Recruitment Posters, Strada Worker Interview Synthesis, Cohort Engagement Plan, Pre & Post Worker Surveys, Interview Guides, Virtual Workshop Facilitation Guides)	• Use virtual interviews and workshops with key stakeholders to understand perceptions, needs, gaps, challenges, and leading motivators, along with ways in which coronavirus may have shifted the experience of vulnerable workers seeking job training and placement opportunities • Capture and summarize learnings coming out of the challenge design process • Collaborate with the Client to identify themes and core issues in the Future of Work that are uncovered or highlighted throughout the duration of the Project
Impact Measurement	Summary of Future of Work Impact Measurement Recommendations, (incl. Suggestions for Judging Criteria & Judging Mechanisms)	• Develop and propose impact measurement approaches that center worker voice in Future of Work technologies (e.g. good quality jobs with opportunities for positive career pathways for vulnerable populations, especially those impacted by coronavirus) • Develop and propose challenge judging impact criteria • Identify mechanisms to test and confirm criteria for challenge judging
Sustainability	Summary of Worker Voice Engagement and Approach (incl. input on abstract content and SMEs to participate in virtual roundtables)	• Summary of worker engagement model detailing approach taken and how these learnings could be applied to other competitions/projects and support creation of future thought leadership and marketing collateral (e.g., podcast, article)

Confidential ©New Profit | 12

(New Profit, 2021)

The work streams for each partner were complex, intellectually demanding and meaningful, as evidenced by the working sessions we held and the discussions we had about each of these elements. I created or supported the creation of an agenda for all working sessions. The agenda would start with the most important issues first. We would make time to think about what lay ahead, and we would agree on what to work on during the meeting (as opposed to what to prepare beforehand) to make the most of the time. We also had agreed-upon norms that informed our work, as shown below in Figure 10. One that stands out for me is "Flexible in staying responsive to external factors and workforce development trends

and in incorporating innovative methods," particularly because of our national context and this new partnership to build an innovative board.

Figure 10
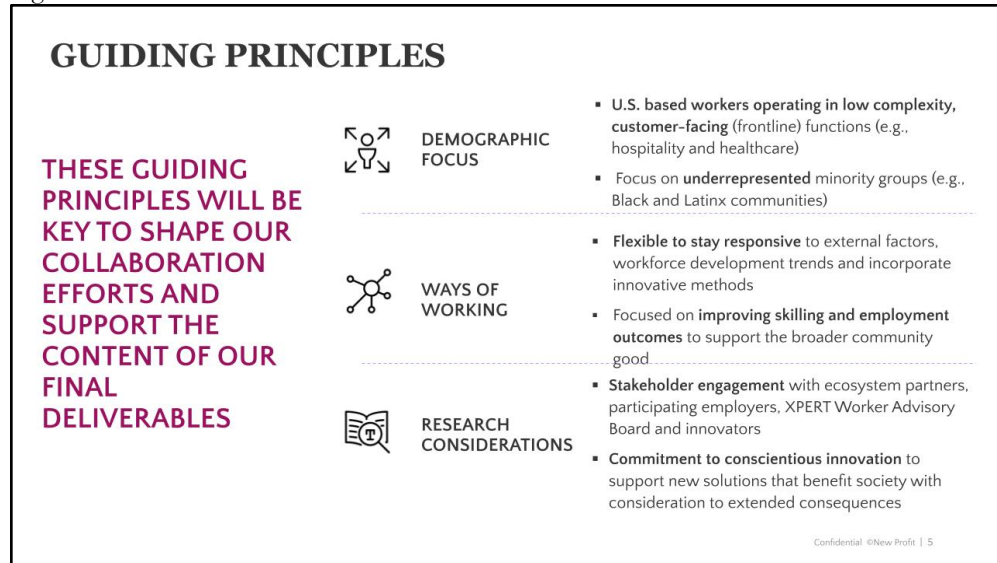
(New Profit, 2021)

Creating a Supportive Context

Overall, I had mixed success in creating a supportive context for working together. Although we developed informal reward, information and learning systems, we were unable to develop more formal structures for sharing and learning, which could have contributed to overall Future of Work research. For example, the rewards system in place was largely executed through the communications plan, which allowed partners to highlight their contribution to the team, as well as share learnings and amplify one another's role in the work. Figure 11 is a screenshot of one of our successes, which is the animation created to describe the XPERT WAB. This image is an example of communication that relates to the reward structure—being acknowledged for the collaboration.

Figure 11
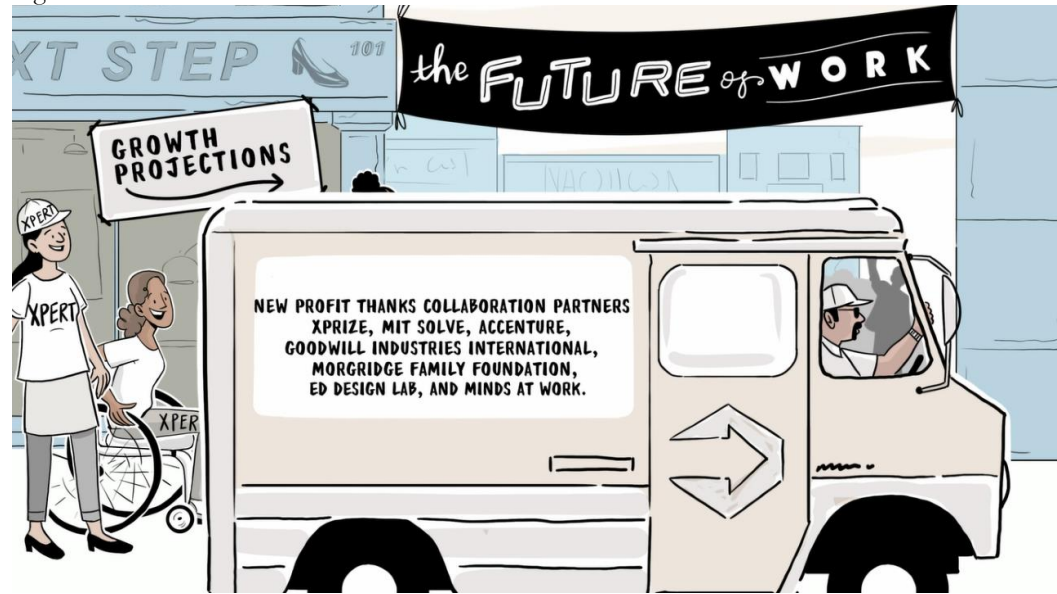
(Accenture, 2021)

However, we also saw room for improvement, as evidenced by this message from a partner: *"We love our close partnership…are proud of what we've accomplished together, and want to do more. However…it's quite hard to see [us] named anywhere in conjunction with the announcements from MIT Solve, XPrize and New Profit about the FOW Grand Challenge."*

Cohort 1 of the XPERT Worker Advisory Board was spotlighted in multiple media features and events across many platforms, for an impressive total reach of over 20,000. Nearly every feature and event included an XPERT, which meant that the program not only endorsed the concept of worker concept, but also practiced it. While the total reach was high, it varied greatly among media features and events, which suggests that the overall communications strategy moving forward could be more collaborative. By ensuring that all partners are named across all media and included across all Future of Work announcements, as well as having published pieces linked to all partners, we can strengthen our communications plan and rewards system and ultimately strengthen our supportive context.

Furthermore, as an implementation team we depended on each other to lead the

design of different elements with expertise, and we followed a norm of giving and receiving feedback and co-creating. There was also a norm of documenting meetings, decisions and materials for the board, which allowed for communication of progress and learning. However, as a team we did not pause to reflect on our internal team processes or structures, which shows room for growth. For example, we did not reflect on whether our documentation process or learning structure required shifting of any kind, even as new partners joined the team. We did not build any formal structure to gather quantitative feedback from all implementation partners, and all of the qualitative data was largely shared with me since I was the person meeting with all partners across multiple working sessions. That the implementation team experience contributed positively to the learning and well-being of individual team members (rather than frustrating, alienating, or deskilling anyone) is the result of effective leadership. However, we could have benefited from a disciplined approach and structure for capturing ongoing feedback from implementation partners about *all* aspects of the work—the process, the content and the outcomes. Our meeting agendas budgeted time for feedback; including collective partner-level data for discussion as a team could have accelerated the creation of trust and psychological safety. More formal structures (e.g. surveys, interviews) for collecting team level data could also have supported New Profit's commitment to outcomes-based philanthropy.

Trust and Psychological Safety

Lastly, I had mixed success establishing and maintaining trust and psychological safety in order to work effectively across differences and through adaptive challenges, as evidenced by the absence of relationships across partners. Although I myself was able to build relationships with all partners, I believe there was room for partners to build deeper

relationships with one another. I know that individuals on the implementation team felt positive about our work together, and I do believe there was some safety to confront norms and values, as evidenced by conversations and written messages I have received, as well as by our rolling agendas and the pivots we made throughout the work:
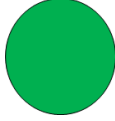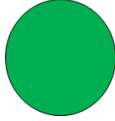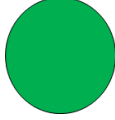
Executive: "*We love collaborating with you and making the world just a little better together*"
Implementation Partner: "*thank you for your passionate and compassionate leadership*"
Rolling agenda item: "*we request for ad hoc requests to be streamlined*"

However, I did not find evidence of partners connecting with one another without me. As the lead of the team, I had to ensure all partners had what they needed to keep the work moving, and our weekly or biweekly working sessions served as the main point of contact. However, in retrospect, I realize there were no meetings without me; partners would only come together on an ad hoc basis if I initiated the meeting. It would have been beneficial for all partners on the implementation team to come together more consistently to share, reflect and learn.

In Table 4, I summarize the actions and subsequent results that informed additional progress of my strategic project in relation to the second part of my theory of action. The left column corresponds to the "then" statements of my theory of action, the middle column captures relevant outputs and outcomes connected to each action, and the rightmost column shows how far each goal has been met to date, based on my own assessment of the work.

Table 4. Evidence of Theory of Action "then" Statements		
Theory of action "then" statements	Relevant outputs and outcomes	Progress
A defined selection criteria to attract board members with identity, cognitive, positional and experiential diversity	Board Selection Criteria (Appendix A)	🟢
A recruitment process to recruit diverse board members	Recruitment Process (Appendix B)	🟢
An engagement plan to effectively engage the board members	Board Engagement Plan (Appendix C)	🟢

Board Selection Criteria

I had significant success in developing the selection criteria with the implementation partners. The selection criteria used to select XPERTs (board members) for each cohort can be found in Appendix B. It includes considerations related to professional ambitions and work profile/experience, along with other technical and adaptive considerations. Each implementation partner, including workers and New Profit colleagues, as well as Angela, were involved in developing the selection criteria. We started by grounding ourselves in the Future of Work Grand Challenge and the purpose of the initiative. I held working meetings with each partner where we brainstormed different criteria that corresponded with each element of the board. For example, we knew research was a core element of the board, so we needed board members willing to share their thoughts and preferences with us. Following working sessions where we discussed the selection criteria, I developed a draft and circulated it among all implementation partners, who collectively contributed to the final draft through several iterations. The implementation partners also asked that we share the draft of criteria with a

few of the local recruiting partners, which we did before finalizing them. As shown in Appendix B, we ultimately decided to organize the criteria by worker profile and professional ambition (based on feedback from recruitment sites), not by types of diversity (identity, cognitive, positional and experiential). That being said, all criteria correspond with different types of diversity. For example, identity diversity is related to age, ethnicity/race, and gender, among other demographic characteristics. Experiential diversity relates to barriers to the workforce and career navigation skills. Cognitive diversity relates to development/learning preferences, mindset, and job searching preferences. Positional diversity relates to employment status. For the purposes of this Capstone, I indicate which criteria align with which types of diversity. We also agreed as an implementation team to add this disclaimer to the set of criteria as it went public: *"No individual will be excluded based on any one criterion. New Profit is looking to recruit a diverse cohort of XPERTS with a commitment to elevating worker voice in the future of work solutions."*

Board Recruitment Process

As an implementation team, we had significant success in designing a recruitment process. Although I was ultimately responsible for selecting the board members, the recruitment process for attracting diverse board members started with comparing to-date cohort demographics with internal goals and identifying gaps, then discussing the gaps with recruiting partners and alternating recruiting sites as needed. For example, we knew we wanted a board of at least 60% people of color who were not making a living wage. The implementation partner leading the recruitment efforts then tapped into local recruiting sites that served this population to help with recruitment. The recruitment process we co-developed went as follows: we held a virtual information session for the local sites and set aside two

weeks for preparing the local sites for recruitment. We developed outreach posters and materials and made ourselves available and accessible for all types of recruitment questions. The local recruiters then recommended individuals from their network using their knowledge of impacted communities, in accordance with a shared target and timeline for recruitment. Appendix C shares a high-level overview of the recruitment process.

Board Engagement Plan

I had significant success in developing the engagement plan with the implementation partners, which was designed to give an overview of the core engagement pillars for the XPERT Worker Advisory Board and outline the process for sustaining the advisory board. The engagement plan (Appendix D) summarizes the process for engagement: from recruitment of board members to selection to onboarding, through offboarding. The idea behind the engagement plan was that the board should be a mutually beneficial experience for workers and New Profit. The engagement plan rests on the belief that the voice of workers must be central to engagement, that board members would offer feedback on the innovations being proposed through the FOW Grand Challenge, and that they would take an interest in technical skill-building trainings to advance their professional development, as well as taking an interest in professional support services to connect them with learning opportunities, networking, and resources. This plan leverages assets developed to support recruitment and onboarding of XPERTs, as well as the key roles and responsibilities for effective board engagement. For example, in order for the board to run effectively, we would need an "Engagement Lead"—the XPERT primary point of contact, someone who fields questions, tracks XPERT participation across engagement pillars and schedules XPERT workshops and activities.

The board engagement plan also included feedback from the XPERTs from Cohort 1 who were on the WAB. XPERTs in Cohort 1 who completed the six-month commitment rated the experience favorably. The vast majority of XPERTs in Cohort 1 (96%) would recommend the program to others. Individual and average participation rates, however, varied across engagement areas, with research having the highest participation rate (85%). The XPERTs who did not complete the full six-month commitment (19%) could not be reached, so we could only guess as to why they could not finish their term on the board.

Analysis

The Worker Advisory Board implementation team lay at the intersection of adult development, workforce, technology and advocacy. As an implementation team, we had access to a plethora of resources across the sector simply because of the diversity of our partners. We had human resources in the form of people and time, we had information resources through each partner organization, and we had physical resources in the form of equipment and materials required to work effectively as a remote team (i.e. reliable devices and internet connection). This supportive context increased the likelihood, although it did not guarantee, that this implementation team would perform well and be effective. Team effectiveness is broadly defined by Hackman et al. (2012, p. 277) as:

1. The productive output of the team [i.e. the Worker Advisory Board] meets or exceeds the standards of quantity, quality, and timeliness of the team's clients [workers on the board].

2. The social processes the team uses in carrying out the work enhance members' capability to work together interdependently in the future.

3. The group experience contributes positively to the learning and well-being of individual team members rather than frustrating, alienating, or deskilling them.

To better understand the outcomes of my strategic project, I examine the evidence above through the lens of Edmondson's (2013) teaming research, Toldson's (2018) framework for promoting educational equity, and The Arbinger Institute's (2015) lessons on influence. This body of knowledge offers insight into why I was successful in some of my efforts, while making less progress in others.

Teaming to Innovate

The main goal of the implementation team was to design an effective and innovative Worker Advisory Board; a prerequisite to this work was an effective and innovative implementation team. Amy Edmondson's (2013) research highlights five steps as a roadmap for using teamwork to ignite innovation. The three steps that correspond with our success are:

1) **Aim High:** aspire to change something, touch minds and hearts, stretch people, create a safe environment and inquire;

2) **Team Up:** ensure diversity, cross boundaries, nurture curiosity, create a safe environment, provide process guidelines, and put conflict to good use;

3) **Fail well:** stop the blame game, distinguish among the three types of failure, motivate intelligent failures, fail at the right scale, and make it safe to do so;

As an implementation team, aiming high was demonstrated through our ability to quickly build a shared purpose for the work through the use of good data, thoughtful analysis and compassionate understanding (which I will describe below through Toldson's [2018]

framework). Starting our partnership with the shared purpose of elevating and centering worker voice encouraged us to codify our values through our success metrics. We not only committed to centering worker voice, but we ensured that our success metrics for the board reflected the values we espoused. For example, one success metric we agreed to was measuring the number of workers quoted and interviewed for XPERT WAB media. Centering workers meant they were encouraged to tell their own stories (rather than having us or others tell their stories for them). All of this demonstrates us aiming high.

As far as Team Up, we had diversity on this team across multiple markers—positionality, ethnicity, age, experience and cognitive preference (Edmondson would call these boundaries, which she suggests accelerates innovation). We had C-level and executive partners, project-level staff, and operational staff. We had national and local perspectives. We were largely a group of women who identified as Black/African American, Latinx, and White—with variance in age, socioeconomic status, and experiences (as I discovered throughout working sessions). This diversity allowed us not only to come up with new ideas and fresh ways of working—it also allowed us to develop working theories for improvement (Bryk et al., 2015, second and third principles of improvement).

Where is there room for growth in teaming? Providing process guidelines, for one, which Edmondson (2013) describes as a process discipline that reminds people to check in with each other. As the implementation lead, I was in regular communication with all implementation partners. I served as the information broker, since all information flowed through me. However, it was only on an ad hoc basis that *all* partners on the implementation team met. Aside from the documentation we efficiently kept as a team and our processes for soliciting one another's feedback during working sessions, it would have been worthwhile to create the space and make it an explicit norm for all implementation partners to more

consistently gather as a full team to share, listen, empathize, and create.

As I reflect on why we succeeded as an implementation team, another factor comes to mind: we never blamed each other for failures. Partners saw this board as a pilot and every data point as a learning experience, as evidenced by the assets we co-designed. Edmondson (2013) would agree that this attitude is a characteristic of effective teaming. For example, three implementation partners realized that note-takers (who volunteered from one of the partner organizations to support with this task during Cohort 1) had captured meeting notes differently during the monthly meetings with the XPERTs and that we couldn't draw clear insights from the notes. Nobody pointed the finger when we discussed it as a team. We discussed the advantages and disadvantages of different note-taking approaches and adjusted for future meetings accordingly. A second example regards Cohort 2 recruitment. We realized we didn't have clear targets for employment or education composition for the board. We were also missing criteria around learning styles that would help us recruit a more diverse board. But we decided to view these absences as opportunities for team growth, not as occasions for blame. Failing "intelligently," as Edmondson (2013) calls it, is reflected in our criteria for board members. (In Appendix B, I include the selection criteria for the second cohort of the board.)

As an implementation team, we were effective at creating disciplined learning among partners, which Edmondson (2013) describes as a sign of innovating effectively while managing finite resources. Disciplined learning also allowed us to fail well. We wanted to know a few things. First, did board members in Cohort 1 feel listened to and respected? Second, did they feel the activities we designed helped them professionally and, if so, what skills were most helpful for them to have learned? Lastly, did they feel prepared, supported, and engaged? Over the course of six months with the inaugural cohort, we collected feedback at ten different points (feedback surveys were co-created, and I was the main point of contact for

disseminating and collecting it from board members) that supported our learning as an implementation team. Feedback was received and quickly synthesized (usually under two weeks), and the aggregate data was shared electronically among partners.

Edmondson (2013) describes curiosity as a main driver for teaming and innovation. As an implementation team, we valued one another's perspective, as demonstrated by the co-creation of multiple assets and by our collective hunger to listen and thoughtfully analyze what board members had to share. Our feedback from Cohort 1 was collected in various forms, but largely through Google Forms. These could be easily accessed on any mobile or electronic device, which made them more accessible for workers. Some questions we incorporated into all feedback surveys were:

- I felt listened to and respected by the facilitators during this event;

- I felt listened to and respected by my fellow XPERT Worker Advisory Board members during this event;

- I felt that I was able to contribute and make a meaningful impact on the conversations during this event;

- I think I have a good understanding of what will be asked of and provided to me during the XPERT Worker Advisory Board Program;

- This event helped increase my knowledge in this skill area;

- I think I will be able to apply what I learned in this event to improve my professional future.

The XPERT Worker Advisory Board outcomes were met because, by aiming high, teaming up and failing well, we built an effective implementation team. In the next section, I analyze our success through Toldson's framework, which allowed us to create a shared

purpose for the work and so sustain our engagement.

Good Data + Thoughtful Analysis + Compassionate Understanding

Ivory Toldson (2018) argues that "bad" research uses deficit statistics, test scores, achievement gaps, graduation rates, and school ratings, without a humanistic interpretation, particularly when it comes to education equity. Based on W. E. B. Du Bois's work, Toldson proposes a framework for positioning information to produce the best educational outcomes for Black students. Toldson's framework is included below as Figure 12. Although my strategic project is not related to educational outcomes for Black students, but to reflecting on my success (or lack thereof) in leading an effective implementation team, this framework offers useful insights since, as a team, we represent organizations looking to solve the problem of impacted workers being left out of innovation design and development. According to Toldson, problem solvers (in this case, the implementation team) work to find solutions and regularly use "good" data to measure and evaluate evidence of progress.

Figure 12
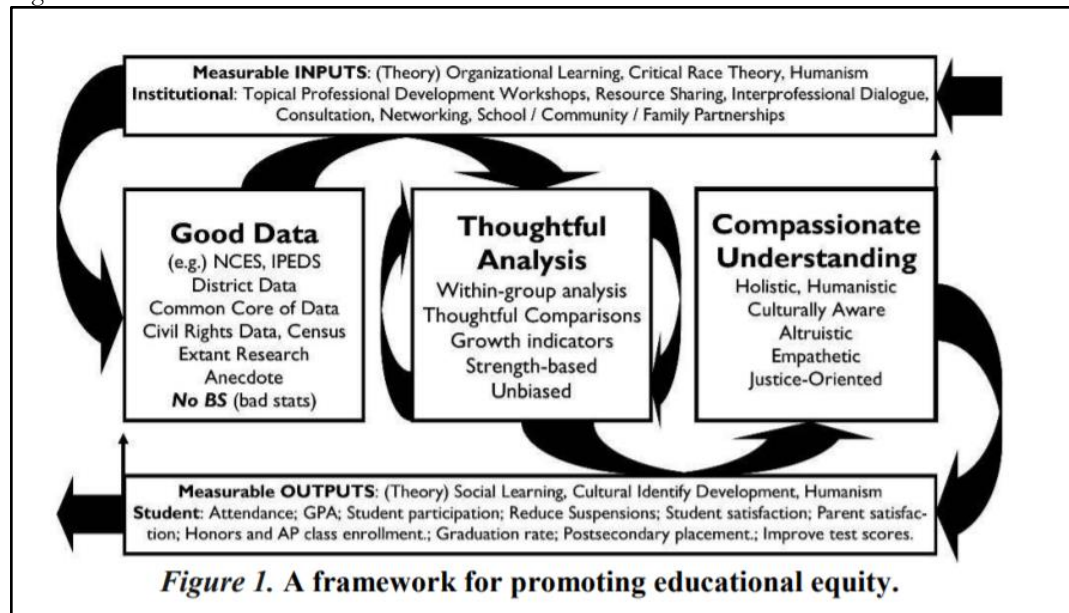
(Toldson, 2018, p. 6)

First, there is *"good data"*, which Toldson (2018) describes as comprehensive, holistic data that helps to build a complete picture of the issues one is trying to solve. "Good" data must be collected through multiple sources; Toldson stresses that it cannot be collected in isolation from the subject. He adds that "'good' data is collected in a manner that allows research participants to provide deeper information about the statistics being collected and enables the researcher to subjectively connect to the research" (Toldson, 2018, p. 194). Humanizing data can take the form of direct correspondence with subjects or supplementation of research literature with news articles, blogs, and videos that capture multiple aspects of the research subjects' lives and experiences.

When I started to work with the implementation team, the first technical task we collectively engaged in was leveraging primary and secondary research methods to understand the gaps, challenges and motivations of workers, including the impact COVID-19 on these communities. Insights from the inaugural cohort of XPERTs, collected through interviews, worker surveys and focus groups, helped us better understand their challenges and design for effective engagement on the Worker Advisory Board. This "good" data (e.g. preferences, pain points, successes and challenges of impacted workers shared with us directly *by* impacted workers) helped us establish a compelling purpose with the implementation team. Through "good" data we humanized the work we aspired to do. We were not simply building a Worker Advisory Board—we were designing and implementing a Worker Advisory Board for Sonya, Yvonne, Cedric, Dandy, Tracy, Jaimy and 250 others to come. As an implementation team, we consistently asked workers about their career aspirations and journeys as well as employment needs and successes, which Toldson would call "good" data. This led us to

develop a research structure for the board that incorporated feedback after every subsequent board activity. It was by humanizing the data that we as implementation partners could build a shared sense of value and purpose, which then translated into our success metrics for the board. For example, market research highlighted the need for wraparound services for workers to advance in their careers. Through focus groups with impacted workers, we saw more clearly that wraparound services for a single mother experiencing homelessness might look different from wraparound services for a retired elder with limited digital literacy skills looking to return to the workforce. As a result, our success metrics took these differences into account, which encouraged us to maintain more general, open language.

Toldson would suggest that studies about impacted workers without the perspective of impacted workers should be considered bad stats or non-proximate data. I would add that decisions made about the implementation team without data from the implementation partners also qualify as bad stats. As the implementation team lead, I saw room for improvement in ensuring that we had "good" data at the implementation partner level to inform our work together. Qualitative data was captured through our regular working sessions and communications via video chat, phone and email, but quantitative data at the team level was largely absent. To be exact, it was not being tracked and was therefore invisible. We were an implementation team of five partnering organizations and eleven individuals. We would have benefited from implementation partner surveys and interviews about our working sessions and agendas, team priorities, values, processes, interactions with stakeholders and relationships with one another. Doing so would have more objectively and systematically highlighted our strengths and weaknesses as a team and, therefore, afforded us the opportunity to make more informed decisions about how to work together more effectively (rather than relying solely on qualitative data). Our "good" data was largely worker board– and not

implementation team–related.

According to Toldson (2018), *"thoughtful analysis"* requires a subjective connection to the data. In particular, it requires within-group, as opposed to between-group analysis, and requires viewing data and statistics as dynamic rather than static. He contends that the purpose of research is, first, to understand the living conditions that can lead to change, and, second, to interrogate data to determine the true level of confidence we should have in the statistics.

It was not enough for us to have "good" data as an implementation team; dynamic learning—learning characterized by constant change, activity, and progress—was also part of designing the board. This dynamic learning required that we, as an implementation team, be receptive to what the inaugural and second cohorts had to offer and curious about our design choices, the context, and the internal and external conditions that would impact current and future cohorts. The implementation team successfully practiced thoughtful analysis by conducting within-group analysis of the first cohort, which we did not compare to any other worker community, to inform our engagement plan. After every board activity (e.g. meetings, focus groups, advising processes, etc.) we wanted worker feedback, and our research plan reflected this thoughtful analysis. We saw all data as people and thus knew that the conditions we were creating for the board could impact their experience. We built a research structure as a core part of the engagement plan and developed success metrics anticipating that the data would tell us how confident we could be in our design choices. Our research structure provided conclusive data not so much about the impacted workers participating in the board as about the design choices *we* made as a team, as well as the *conditions* that impacted the worker experience. Toldson (2018) would suggest that these growth indicators and strengths-based analysis are all part of thoughtful analysis.

Toldson (2018) outlines one last element in his framework: *compassionate understanding.*

He explains that lack of compassion is rooted in explicit and implicit bias. Implicit biases are described as beyond our conscious awareness. Research connecting implicit bias with racist actions, according to Toldson, are inconclusive; however, the connection between explicit bias and racist actions is quite clear. Developing a compassionate understanding of data requires adopting a worldview that is culturally aware and social justice–oriented, as well as empathetic and altruistic (Toldson, 2018). As an implementation team, we and our partners described our collaboration with the Worker Advisory Board using strengths-based language. The Glossary of Terms (Appendix E) we created reflects our compassionate understanding by avoiding deficit-based language commonly used to describe impacted communities. This glossary contributed to all our work, especially our co-created framework on Worker Centricity, which was developed with social entrepreneurs and innovators applying to the Future of Work Grand Challenge in mind. The glossary ensured that our values were conveyed through our language. Above all, the framework was intended to highlight the benefits of including and integrating impacted workers in creating equitable and inclusive future of work innovations.

The Influence Pyramid

The XPERT Worker Advisory Board outcomes were achieved because we as an implementation team used and analyzed data in a humanizing way to create and sustain engagement. We did so by working as an effective team, one that built relationships based on trust and shared empathy. The Arbinger Institute (2015), in *The Anatomy of Peace,* shares an Influence Pyramid, a strategic framework for helping other people to change. The authors suggest most time and effort should be spent on the lower part of the pyramid, namely getting "out of the box" and building relationships.

Getting "out of the box" consists of four steps: first, noticing the constraints of the

box, with particular attention to when your heart is at peace or not at peace (which the authors identify as "war"); second, finding an out-of-the-box space (a dimension of ourselves uncorrupted by warring feelings); third, pondering the situation anew and seeing the person we are warring with differently; and lastly, *acting*. Getting out of the box requires action because "the humanity of others calls us not only to see them differently, but also to treat them differently—as people rather than as objects" (2015, p. 256). Although it is not often that I think in terms of having a heart at peace or at war, being a part of a team did involve influencing one another. Figure 13 is an illustration of the Influence Pyramid.

Figure 13

THE INFLUENCE PYRAMID

Correct — **Dealing with things that are going wrong**

Teach and communicate

Listen and learn

Build the relationship — **Helping things go right**

Build relationships with others who have influence

Get out of the box, obtain a heart at peace
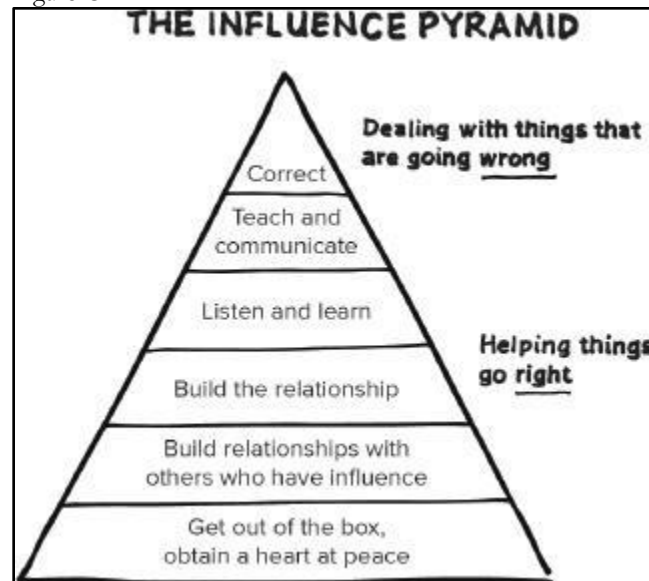
(Arbinger Institute, 2015, p. 218)

The Arbinger Institute, in addition to being explicit about implementing this pyramid from the bottom up, further suggests that the solution to a problem at one level of the pyramid lies at the lower levels of the pyramid. One's effectiveness at each level of the pyramid ultimately depends on the lowest level of the pyramid—one's way of being. The Future of Work Grand Challenge, and, by extension, the XPERT Worker Advisory Board, is committed to influencing outcomes-based philanthropy. Doing so requires clearly defined goals,

evidence-based strategies for achieving those goals, and careful monitoring of progress towards outcomes. Since the Future of Work is driving change through implementation teams, and since implementation teams comprise several partner organizations that aim to work together effectively, this work requires above all building positive working relationships among the partners.

Building relationships to work through adaptive challenges means influencing people to change. Edmondson (2013) adds that building relationships means making it clear you want to hear from others and making it safe to talk about problems, ideas, hopes and concerns. The Arbinger Institute framework adds that, where circumstances warrant a correction, we need to increase our efforts at the lower levels of the pyramid all the more (in communicating, learning, and relationship-building). As an implementation team, we learned through our process of co-creation and solidified relationships through sharing. We started every implementation partner meeting with a check-in. We knew when partners were dealing with illness, when they were moving, when they needed a break, or simply what they were excited to do over the weekend. Some of us even formed relationships outside of work, which indicates an atmosphere of trust and safety. When multiple partners were present at a meeting, we made an effort to hear from all voices in the room. We were also honest about what we knew, what we didn't know, and what we counted on one another for. As lead of this team, I, too, shared my own weekend plans and hardships. I played different roles for each partner and adjusted to technical and adaptive requests accordingly. In some meetings, I was the note-taker and timekeeper; in others, I was a facilitator or presenter. What I did *not* do was ask partners if they felt listened to and respected. I did not directly ask partners if they felt they were learning and contributing positively to the work. I surmised it by the level of co-creation and sharing we exchanged, but I never directly asked about it, which might have given the

impression it was an afterthought. By failing to ask partners directly about our relationships, I may have diminished their importance. The absence of data on this score impacts the research agenda for the Future of Work Grand Challenge, since both qualitative and quantitative data are needed in order to influence outcomes-based philanthropy.

While the implementation team–level structure needs more focus and attention, our efforts have laid a solid foundation for implementing and designing an effective Worker Advisory Board. No doubt we will contend with matters of long-term sustainability and scalability as future cohorts are launched, but the last few months indicate that our collective impact on the future of work is only just beginning.

The XPERT Worker Advisory Board outcomes were met because, as an implementation team, we managed to aim high, team up, and fail well. Our collective willingness to use good data in a humanizing and thoughtful way allowed for sustained engagement amongst ourselves and with the board, all the while preserving a foundation of relationship-building with trust and empathy.

In the following section, I share implications for myself, for New Profit and for the education and philanthropic sectors as a result of my learning.

Implications for Self

This strategic project reminded me that I enjoy being a part of a team that drives equity change, and that my commitment to learning relies on a growth mindset, as well as dignity.

I Enjoy Being on a Team That Drives Equity Change

After learning through leading an implementation team and reflecting on my own experience, I realize my energy has often come from my coworkers. I thrive working with

others who share my values and purpose, who get work done quickly while also making a point of learning and reflecting along the way. I tapped into my strengths as a relator seeking harmony and striving to achieve results, balanced with being restorative and empathetic.

I found deep joy in connecting with the implementation partners and achieving results together. I also have a natural proclivity for building consensus, which helped me establish a shared sense of purpose for the work. Since the timeline for this work was so tight, and since I was leading during a pandemic, it fed on my appetite for hard work. And, as a result of the psychological safety in the team, I was adept at addressing problems. I thrive when I can figure out what's wrong and resolve it. Lastly, my empathy allowed me to put myself in the shoes of the workers we were designing for. Besides enjoying the teaming, I enjoyed working with a diversity of individuals. Many of my most meaningful experiences came from time spent with Worker Advisory Board members. Several times a week I touched base with individual board members for various reasons—whether that was seeing how coaching was unfolding, preparing them for an upcoming panel, confirming they had received their last stipend, or asking them about their most recent feedback. I cared deeply about the stories and narratives and perspectives of all of the workers. The more I talked with the board members and heard their stories, the more I saw how powerful and indispensable their diversity in experiences and identity was to the Future of Work.

This strategic project harnessed my ability to tune into people's needs and wants (those of the implementation partners and of the workers on the board) and to find ways to fill their lives with joy. The implementation team drew on my strengths but also complemented them, which will continue to be an important consideration in future roles— particularly roles that require a shared sense of urgency around fast-paced collaborative work, work that has an immediate and direct impact on the lives of people, work that has never been done before.

In a short time, I was recognized as the person who had her finger on the pulse of workers and as the main driver behind the Worker Advisory Board. As often as I could, I used every interaction, every new partner meeting, and every new phase of the Future of Work initiative to listen and understand how each partner was approaching worker-centricity. I began to trust more in my own ability to connect with people from all walks of life; more than that, I began to trust in my ability to connect people from different walks of life to one another. Throughout this strategic project, I aimed to communicate, by my words and my actions, not only that New Profit needed a Worker Advisory Board as part of the Future of Work Initiative, but that we had the great privilege and responsibility of listening to impacted workers.

Leading Through a Pandemic Requires Dignity

Not only was I leading through a pandemic, but I was leading through a pandemic with no positional authority. In many ways, having only informal authority allowed me to approach the implementation team without fearing that I was expected to have all the answers. All the implementation team partners had informal authority (no positional, formal authority for this strategic project on the team), which helped me focus more on relationship building. It motivated me to learn the "why" of the partners on the team and influenced me to focus on building a shared purpose.

We were *all* living through this pandemic. It was not just the board members or me experiencing momentous change. All the implementation partners were going through the same ambiguity, disconnection, and the uncertainty as a result of the pandemic. Leading through COVID19 and the current racial reckoning reminded me of the importance of human dignity. Human dignity is the belief that all people hold a special value that is tied solely to their humanity. It has nothing to do with their class, race, gender, religion, abilities,

work, title or any other factor other than being human. Leading during this time of crisis, chaos and uncertainty required a centering of human dignity, so that we didn't lose sight of each other as human beings first throughout this work.

Fixed Versus Growth Mindset

Although I was able to tap into many strengths leading this implementation team, I've realized I can do better at maintaining a growth mindset, especially when it comes to learning fast. I have a tendency to share successes collectively while assuming failures as lessons for me alone. I strive to be dependable, and, as people come to depend on me, I also assume responsibility and accountability for many tasks and commitments. My striving for harmony (even with myself) can lead to learning fast, but oftentimes comes with a cost: feelings of guilt for not knowing or doing better; shame for not having anticipated the gap or need in the work. When successes I consistently embrace a growth mindset: tackling challenges head-on, persisting through setbacks, and identifying the conditions and people that contributed to that success. Yet my learning through criticism is often accompanied with difficult emotions of disappointment and discouragement—in other words, very high expectations for myself.

I realize that, when I adopted a growth mindset, I gave myself permission to take risks. I took the risk of trusting in others to lead this work with me. I risked leading a new change effort with a team of partnering organizations that I had never worked with before. I risked making decisions on behalf of New Profit, even though I was new to the organization and lacked institutional memory and deep organizational context. Giving myself permission to take risks allowed me to fail forward and learn.

What I want to continue to commit to is what The Arbinger Institute calls the heart at peace. I want to be more intentional in managing my warring emotions around failure and to

stay in a growth mindset—to give myself permission to learn through failure. Only then will I be fully open and present to the opportunities afforded me in my adaptive leadership development.

<h2 style="text-align:center; color:blue">Implications for Site</h2>

New Profit has a significant opportunity to expand its own impact and to influence the wider field of outcomes-based philanthropy beyond Future of Work. My recommendations are based on my observations and experiences over the last several months at the organization.

Maximize Implementation Teams Throughout the Organization

This strategic project was unique in that it brought together *organizations* to form a team, rather than individuals. Individuals came and went, but the organizations nevertheless held on to what Wageman et al. (2008) label the essential elements of team effectiveness: Real People. Real Team. Compelling Purpose.

This type of organizational-level partnership required that New Profit first identify what makes the *partnership* bounded, interdependent and stable—*at the organizational level.* It also requires the understanding that, as new people join and leave the team, there needs to be a consistent dynamic exchange. In other words, the team must recognize how the enabling conditions may or may not need to shift as a result.

In view of this "breathing" and dynamic way of working (organizations forming an implementation team), my recommendation for New Profit is to ensure that data at the team level is being captured. Throughout this project, we did a good job of collecting Worker Advisory Board–level data, but we missed the opportunity to do the same at the implementation team level. For example, we would have benefitted from having selection

criteria for implementation team partners, as well as a recruitment process, clear success metrics, a worker-centric framework for the implementation work, and an engagement plan for the *implementation team.*

Integrate Implementation Research Through a Lens of Equity

Through the Future of Work Grand Challenge, New Profit is contributing to outcomes-based philanthropy. Tracking the number of displaced workers trained, employed and retained in living-wage jobs is the main outcome of the initiative. However, we need to look closer at how we get there.

Implementation research promotes the use of evidence-based and -informed practices and strategies to improve outcomes. Implementation research also promotes the uptake of research findings into routine practice. While New Profit, through the Future of Work Grand Challenge, is focused on outcomes, it would also be advantageous for the organization to measure, monitor and communicate about the processes and structures it has employed to secure those outcomes—in other words, telling the story of the "how" and the "what" to inform organization-wide strategy and change.

According to the National Implementation Research Network (2020), implementation happens in four discernible stages: Exploration, Installation, Initial Implementation and Full Implementation. Installation involves building the necessary infrastructure for implementing the program or practice, in particular building practitioner and organizational capacity. As far as installation goes, I recommend that New Profit expand its research capacity. New Profit could start by capturing the identity, experiential, cognitive and positional diversity data of all teams within the organization. Additionally, they could develop criteria for attracting a more diverse staff (presumably new team members). New Profit might also consider developing

process maps and workflows for each initiative to assess context, patterns and trends across organizational initiatives and to determine the feasibility and scalability of the work.

New Profit wants to be seen as an innovative systems-building influencer with a commitment to equity and inclusion; having implementation research would provide a more holistic picture of what team compositions, strategies, and processes work best in achieving that goal. It would also clarify what types of teams, strategies and processes lead to more equitable outcomes. Implementation research will make it easier for the organization to scale strategically and sustain effective practices, as well as isolate and improve less effective processes, strategies and structures.

Research indicates that high-quality implementation is one critical factor associated with program outcomes (Durlak, 2011) and that short and long-term costs can be curtailed by knowing what works and what doesn't. Prioritizing implementation research will support New Profit's commitment to scaling and sustaining system-wide ecosystem efforts. In other words, integrating implementation research through the lens of equity will make for more effective future Worker Advisory Boards.

Apply Worker-Centric Practices

How might New Profit create lasting systems-based and ecosystems change in relation to the future of work? The answer lies in integrating worker-centric practices. As far as sustaining and scaling worker-centric design, New Profit should focus on depth, or what Dede and Coburn (2003) define as deep and consequential changes in practice, which requires evaluation and research to understand and enhance the causes of effectiveness.

This is the first time ever New Profit has launched a prize competition and implemented a Worker Advisory Board on the future of work. Consequently, having a

coherent and robust evaluation structure for recognizing depth (i.e. deep and consequential changes in practice) and identifying the preconditions for depth is a must. An expansion of research would necessitate an assessment of how sensitive each source is to its internal and external conditions and context. For example, *depth* would entail creating a paid position within the Future of Work team to ensure alignment and coherence with worker-centric practices across the entire initiative. Creating such a position would show consequential changes in practice: not only would we be inviting social entrepreneurs to center worker voice, we would be operationalizing the work internally. New Profit could really live up to its mission by hiring XPERTs from the Worker Advisory Board. Depth would also entail building current board members' capacity to run and lead the implementation team doing the work. Lastly, depth might entail partner organizations hiring XPERTs to center work voice, and XPERTs having a say in what partners New Profit chooses to work with for the Future of Work. All of these recommendations require evaluation and research.

Knowing what the sources of innovation are across the organization and their effectiveness; finding out the conditions for success; identifying the level of coherence and alignment across workstreams, especially in the current political, racial and economic climate—all will help New Profit figure out what it means for worker-centric strategies to be sustainable and scalable organization-wide. Once it's clear on the "what" and the "how," New Profit will reap the benefits of more disciplined learning across the organization.

Build Systems and Structures for Disciplined Organizational Learning

One of the challenges I reflected on in this Capstone was the tight timeline for both learning and doing. In some ways, this is a microcosm of New Profit's larger organizational culture. The Future of Work was launched in June 2020, and even today the majority of New

Profit implementation staff (primarily personnel outside New Profit's Operating Council and Board) are asking what we do, how we do it, and what we are trying to accomplish. This reality highlights an internal communications challenge, as well as the need for more disciplined systems of learning—what Edmondson (2013) calls organizing to learn. Organizing to learn is a way of thinking and acting which accepts that change is a constant. It acknowledges that the answers of today won't be the answers of tomorrow, and it depends on an organization's ability to reflect, diagnose, design, experiment and act fast. Organizing to learn would mean everyone across the organization leading proximate strategies. For instance, the XPERT Worker Advisory Board, Inclusive Impact Action Tank, Catalyze Advocacy Council and Parent Advisory Council might come together monthly to share insights and trade lessons. Quarterly strategy meetings between the Future of Work team and the Finance, Investment Relations, Policy, Operations and Communications teams would further align strategy and a shared understanding of challenges and solutions. Organizational learning would also become a part of performance evaluations, promotion considerations, job descriptions, board and annual reports, and impact measurement across the organization. Given the time constraints for both learning and doing, this type of organizational learning would require a deliberate process, so that the right people are together learning the right things in community (trust and relationship-building required). If done successfully, such a process could accelerate learning (reducing individual time devoted to research) and improvements across the organization.

There are many barriers to learning, chief among them resistance to the productive potential of failure. An organizational mindset that learning from failure is the *hallmark* of innovation, and that organizations can learn from failure through thoughtful analysis and discussion, would be especially beneficial for New Profit. The organization's psychological safety (as evidenced by the safety in the Future of Work team) can accelerate organizational

learning, but only if formal processes and forums are in place to discuss, analyze, and apply lessons of failure at the team- and organizational-level. New Profit might consider requiring After Action Reviews (AAR) as part of the work. Darling et al. (2005) suggests four steps for crafting effective AARs: 1) Lessons must first and foremost benefit the team that extracts them. 2) The AAR process must start at the beginning of the activity. 3) Lessons must link explicitly to future actions. 4) And leaders must hold everyone, especially themselves, accountable for learning. New Profit might also consider making funding for partners and social entrepreneurs contingent upon thorough, ongoing feedback to the organization on its internal processes, leadership, structures and systems (and potentially creating a Growth Diagnostic tool to be used for internal growth purposes).

Dweck (2016) suggests that organizations as a whole can hold a fixed or growth mindset, a fixed mindset being the belief that intelligence is static and qualities unchangeable, a growth mindset being the belief that intelligence can be developed and that growth is always possible. Her research finds that employees who work in growth-mindset organizations have far more trust in their company and a much greater sense of empowerment, ownership, and commitment. Employees in growth-mindset companies also feel that their organizations support innovation and creativity. I do not have sufficient evidence to say whether New Profit has a growth or fixed mindset as an organization, but I would venture a correlation between learning and mindset worth exploring further. New Profit has started to distribute various employee satisfaction surveys, a practice I encourage them to continue. At the same time, doing a deep dive into team-level policies, procedures and practices could help with assessing the organization's mindset. In my view, organizational mindset reveals the true beliefs, values and assumptions behind organizational learning. Equipped with this insight, New Profit will do a better job determining whether the solution to organizational learning is a technical or an

adaptive one (or some combination of both). This knowledge would also help them determine whether the change requires technical or adaptive leadership (or some aspects of both).

Implications for Sector

The lack of equity-minded implementation research and of organizational learning not only limits New Profit from strategic growth—it also speaks to systemic issues. My strategic project demonstrated that, in spite of some challenges, much is to be gained from building structures that elevate the voice of impacted communities. The considerations I offer to both the philanthropic and education sectors are as follows:

Share Best Practices on Implementation Teams

Bryk et al.'s (2015) question—"what works, for whom, under what conditions"—is an important one. It would behoove both the philanthropic and education sectors to continue sharing data on effective implementation teams, the composition of those teams, and the conditions, structures and context that set them up for greater impact. This type of research could inform strategies of scale and sustainable impact. These insights are not new, but they're worth reiterating. Outcomes alone will not make us more effective. Especially in light of COVID-19 and the country's current political, economic and racial climate, we would all benefit from knowing not just the outcomes of programs and initiatives and organizations, but ways of effectively collaborating to effect system-wide change.

The two questions I pose to both sectors for consideration are: How can diverse, effective implementation teams benefit ecosystem efforts, particularly teams looking at leading equity-related change? How might we build a cross-sector communications strategy to facilitate cross-sector learning?

Value Diversity

The value of diversity in driving innovation should not be overlooked. Research included in my *Review of Knowledge for Action* section highlights the importance of cognitive, experiential, identity and positional diversity to new ideas and fresh ways of thinking. As both sectors grapple with questions of impact, they should strategically assemble diverse implementation teams that create structures for driving innovative solutions to today's most pressing problems. Doing so means assessing team diversity *before* collaborating and seeking diversity across all indicators. It means recruiting diverse talent. And it means setting clear goals for the diversity of teams.

The questions I would pose to the philanthropic and education sectors for consideration are: How do we ensure identity, experiential, cognitive and positional diversity across implementation teams? What resources are necessary in order to intentionally design for all types of diversity on teams? What are the unintended consequences of *not* planning for all types of diversity on implementation teams?

Become Inclusive of the Impacted Communities You Want to See Prosper

Toldson (2018) explains that good data must be collected through multiple avenues and cannot be collected in isolation from the subject. As the education and philanthropic sectors look at gaps in adult education and the workforce, investment in worker-centric strategies will be central to creating an equitable, inclusive future of work. Good data means giving impacted communities a seat at the decision-making table. It means integrating impacted communities into strategy planning and advisory boards. It means soliciting ongoing feedback from those impacted communities and creating feedback loops which encourage dialogue with these communities. And it means taking measurements (inputs, outputs and

outcomes) that are specifically tied to feedback from impacted communities.

The questions I would pose to both sectors for consideration are: What is gained—and what is lost—by diagnosing, designing, acting and reflecting in tandem with impacted communities? How do we ensure that we are designing and implementing system-wide change based on "good data"?

Conclusion

When I began my residency, I had two goals. First, I wanted to effectively lead an implementation team. Second, in partnership with committed implementation partners, I wanted us to design and implement a high-impact Worker Advisory Board. Through my strategic project, both goals were achieved.

My work confirmed my hypothesis: that, if I worked with the implementation team by creating a compelling purpose, securing the implementation team's agreement on that purpose, building a sound structure for effective team engagement, creating a supportive context for working together, and establishing and maintaining trust and psychological safety in order to work through adaptive challenges, then the implementation team would have the necessary elements for launching a high-impact XPERT Worker Advisory Board. Our work allowed us to define selection criteria for attracting board members with identity, cognitive, positional, and experiential diversity, a recruitment process to recruit diverse board members, and an engagement plan for effectively engaging the board members. Our work drove significant impact for the organization, for funders and partners, and for impacted workers—and this work furthered my desire to create positive change with a focus on equity. In partnership with the competent implementation partners, I believe we have offered New Profit fresh insight into creating change for the future of work.

Reflecting on the good data, thoughtful analysis, compassionate understanding, and elements of teaming and influence which enabled me to fully realize my theory of action, I have renewed hope. I have faith in my ability to do some work in answer to those questions in the future. We asked board members from Cohort 1 to describe their experience on the XPERT Worker Advisory Board to the second cohort. The following is a summary of their responses:

> *"The XPERT Worker Advisory Board was a* **great, positive experience** *which allows you to* **make an impact**. *During your time on board, you will learn and gain many* **new experiences**. *Be prepared to set aside time for the board activities where you'll have the opportunity to* **listen and interact with a diverse group and share your own experiences and thoughts**. *You should come to the experience ready to* **challenge yourself** *and be open minded. Your time on the XPERT Worker Advisory Board will be a time of* **immense personal growth** *as you grow your* **professional development, skills, and leadership abilities,** *while also learning about and* **setting goals** *for yourself."*

Ultimately, one implementation team working collectively for eight months may not have been enough to determine the best future of work strategy, particularly given COVID-19 and the changing workforce. However, I believe that our work has laid a strong foundation for New Profit and the Future of Work initiative to drive change and center the communities they want to see prosper. Ultimately, we have driven better outcomes for a more equitable and inclusive future of work.

Bibliography

6 Team Conditions [Digital image]. (2020). Retrieved from https://6teamconditions.com/6-team-conditions/

Accenture & Innovation Arts (2020). Elevating the Voice of Workers in Future of Work Innovation [Digital Image]. Reproduced courtesy of New Profit & Accenture.

Ajilore, O. (2020, February 24). On the Persistence of the Black-White Unemployment Gap. Retrieved December 02, 2020, from https://www.americanprogress.org/issues/economy/reports/2020/02/24/480743/persistence-black-white-unemployment-gap/

Arbinger Institute. (2015). *The anatomy of peace: Resolving the heart of conflict* (Second ed.). Oakland, CA: Berrett-Koehler, a BK Life book.

Arbinger Institute (2015). The Influence Pyramid [Digital Image] Retrieved from https://learning-oreilly-com.ezp-prod1.hul.harvard.edu/library/view/the-anatomy-of/9781626564312/xhtml/ch010.html

Barnes, B. C. B., and Burton, D. O. (2017, January 3). Shifting philanthropy from charity to justice. *Stanford Social Innovation Review*. Retrieved January 30, 2021 from https://ssir.org/articles/entry/shifting_philanthropy_from_charity_to_justice

Boudett, K., & City, E. (2014). Meeting wise : Making the most of collaborative time for educators. Cambridge, Massachusetts: Harvard Education Press.

Brown, T., & Katz, B. (2009). *Change by design: How design thinking transforms organizations and inspires innovation* (1st ed.). New York: Harper Business.

Bryk, A., Gomez, L., Grunow, A., & LeMahieu, P. (2015). *Learning to improve: How America's schools can get better at getting better.* Cambridge, MA: Harvard Education Press.

Bryk, A. S., & Schneider, B. (2002). *Trust in schools: A core resource for school improvement.* New York: Russell Sage Foundation.

Callahan, D. (2017). *The givers: Wealth, power, and philanthropy in a new gilded age* (First ed.). New York: Alfred A. Knopf.

Cox, T. H., Lobel, S. A., & McLeod, P. L. (1991). Effects of ethnic group cultural differences on cooperative. (1991). *Academy of Management Journal*, 34(4), 827. Retrieved from http://search.proquest.com.ezp-prod1.hul.harvard.edu/docview/199805037?accountid=11311.

Daly, Alan J, & Chrispeels, Janet. (2008). A question of trust. *Leadership and Policy in Schools*, 7(1), 30–63.

Darling, M., Parry, C., & Moore, J. (2005, July). Learning in the Thick of It. Retrieved February 18, 2021, from https://hbr.org/2005/07/learning-in-the-thick-of-it

De Aguiar, M. (2016). Design thinking for better philanthropy. Miami, FL: Knight Foundation. Retrieved January 30, 2021 from http://knightfoundation.org/articles/design-thinking-better-philanthropy

de Anca, C. ; Aragón, S. (2018, May 24). The 3 Types of Diversity That Shape Our Identities. Retrieved February 18, 2021, from https://hbr.org/2018/05/the-3-types-of-diversity-that-shape-our-identities

Durlak, J. A. (2011). The Importance of implementation for research, practice, and policy. Child Trends research brief. Washington, DC: Child Trends. Retrieved on February 5, 2021 from http://www.childtrends.org/wp-content/uploads/2013/05/2011-34DurlakImportanceofImplementation.pdf.

Dweck, C. (2016). *Mindset: The new psychology of success* (Updated ed.). New York: Ballantine Books.

Edmondson A. (1999). Psychological safety and learning behavior in work teams. Administrative Science Quarterly, 44, 350–383. Retrieved February 18, 2021, from http://dx.doi.org/10.2307/2666999

Edmondson, A. C. (2013). Teaming to innovate (1st ed., J-B Short Format Series). New York: Wiley.

Edmondson, A. C., Higgins, M., Singer, S., & Weiner, J. (2016). Understanding Psychological Safety in Health Care and Education Organizations: A Comparative Perspective. *Research in Human Development*, 13(1), 65–83.

Elliott, D. (2016, August 11). Two American experiences: The racial divide of poverty. Retrieved December 02, 2020, from https://www.urban.org/urban-wire/two-american-experiences-racial-divide-poverty

Ely, Robin J, & Thomas, David A. (2020). Getting Serious About Diversity: Enough Already with the Business Case. *Harvard Business Review*, 1. Retrieved November 02, 2020, from https://hbr.org/2020/11/getting-serious-about-diversity-enough-already-with-the-business-case.

Evans, C. (2015). Leadership trust: Build it, keep it (1st ed., Ideas Into Action Series). Greensboro, North Carolina]: Center for Creative Leadership. Retrieved January 30, 2021 from https://hollis.harvard.edu/primo-explore/fulldisplay?docid=01HVD_ALMA512319851790003941&context=L&vid=HVD2&search_scope=default_scope&tab=books&lang=en_US

Evans, C. (2015). Dimensions of Trust [Digital image]. Retrieved from https://hollis.harvard.edu/primo-

explore/fulldisplay?docid=01HVD_ALMA512319851790003941&context=L&vid=HVD2
&search_scope=default_scope&tab=books&lang=en_US

Gibson, C. (2018). Deciding together: Shifting power and resources through participatory grantmaking. New York, NY: GrantCraft. Retrieved January 30, 2021 from http://grantcraft.org/wp-content/uploads/sites/2/2018/12/DecidingTogether_Final_20181002.pdf

Hackman, J. Richard, & Wageman, Ruth. (2012). Foster Team Effectiveness by Fulfilling Key Leadership Functions. In Handbook of Principles of Organizational Behavior (pp. 273–293).
Hoboken, NJ, USA: John Wiley & Sons. Retrieved January 30, 2021 from https://hdl.handle.net/2027/pst.000067178483

Hanks, A., Solomon, D., & Weller, C. E. (2018, February 21). Systematic Inequality. Retrieved December 02, 2020, from https://www.americanprogress.org/issues/race/reports/2018/02/21/447051/systematic-inequality/

Heifetz, R. (2011). Becoming an Adaptive Leader. *Lifelong Faith Journal, Spring*(5.1), 26–33. doi: https://www.lifelongfaith.com/uploads/5/1/6/4/5164069/becoming_an_adaptive_leader.pdf

Heifetz, Ronald A., et al. *The Practice of Adaptive Leadership : Tools and Tactics for Changing Your Organization and the World*, Harvard Business Review Press, 2009. Retrieved February 18, 2021 from http://ebookcentral.proquest.com/lib/harvard-ebooks/detail.action?docID=5181819

Heifetz, R., & Linsky, M. (2002). *Leadership on the line: Staying alive through the dangers of leading.* Boston, Mass.: Harvard Business School Press.

Higgins, M.C., Weiner, J., & Young, L.A. (2012). Implementation teams: A new lever for organizational change. [Special Issue: The Changing Ecology of Teams], *Journal of Organizational Behavior*, 33(3): 366–388., (2012)

Hoy, W. K. & Tschannen-Moran, M. (2003). The conceptualization and measurement of faculty trust in schools: The omnibus T-Scale. In W. K. Hoy & C. G. Miskel, Studies in leading and organizing schools (pp. 181–208). Greenwich, CT: Information Age Publishing.

Jonas, M. (2007, August 05). The downside of diversity. Retrieved November 29, 2020, from https://www.nytimes.com/2007/08/05/world/americas/05iht-diversity.1.6986248.html

Krippendorff, K. (1989). On the Essential Contexts of Artifacts or on the Proposition That "Design Is Making Sense (Of Things)." *Design Issues*, 5(2). Retrieved January 30, 2021, from https://doi-org.ezp-prod1.hul.harvard.edu/10.2307/1511512

Lam, L. (2019, October 16). A Design for Workforce Equity. Retrieved December 02, 2020, from

https://www.americanprogress.org/issues/economy/reports/2019/10/16/475875/design-workforce-equity/

Liedtka, J. (2011). Learning to use design thinking tools for successful innovation. *Strategy & Leadership*, 39(5), 13-19. Retrieved January 30, 2021 from doi:http://dx.doi.org.ezp-prod1.hul.harvard.edu/10.1108/10878571111161480

Manyika, J., Lund, S., Chui, M., Bughin, J., Woetzel, J., Batra, P., Sanghvi, S. (2019, May 11). Jobs lost, jobs gained: What the future of work will mean for jobs, skills, and wages. Retrieved December 02, 2020, from https://www.mckinsey.com/featured-insights/future-of-work/jobs-lost-jobs-gained-what-the-future-of-work-will-mean-for-jobs-skills-and-wages

National Implementation Research Network (2020). Implementation Stages Planning Tool. Chapel Hill, NC: National Implementation Research Network, FPG Child Development Institute, University of North Carolina at Chapel Hill. Retrieved on February 5, 20201 from http://implementation.fpg.unc.edu/module-4

New Profit's Strategic Priorities [Digital image]. (2021). Retrieved from https://www.newprofit.org/

New Profit's 6 Conditions of Systems Change [Digital image]. (2021). Retrieved from https://www.newprofit.org/

Nunn, R., Parsons, J., & Shambaugh, J. (2019, August 27). Race and underemployment in the US labor market. Retrieved December 02, 2020, from https://www.brookings.edu/blog/up-front/2019/08/01/race-and-underemployment-in-the-u-s-labor-market/

Page, S.E. (2007). *The Difference: How the Power of Diversity Creates Better Groups, Firms, Schools, and Societies—New Edition*. Princeton: Princeton University Press.

Phillips, Katherine & O'Reilly, Charles. (1998). Demography and Diversity in Organizations: A Review of 40 Years of Research. Retrieved November 29, 2020 from https://www.researchgate.net/publication/234022034_Demography_and_Diversity_in_Organizations_A_Review_of_40_Years_of_Research

Press, G. (2019, July 15). Is AI Going To Be A Jobs Killer? New Reports About The Future Of Work. Retrieved February 18, 2021, from https://www.forbes.com/sites/gilpress/2019/07/15/is-ai-going-to-be-a-jobs-killer-new-reports-about-the-future-of-work/?sh=16be04c1afb2

Putnam, R. (2000). *Bowling alone : The collapse and revival of American community*. New York: Simon & Schuster.

Quillian, L., Pager, D., Hexel, O., & Midtboen, A. H. (2017, September 12). Meta-analysis of field experiments shows no change in racial discrimination in hiring over time. Retrieved December 02, 2020, from https://www-pnas-org.ezp-prod1.hul.harvard.edu/content/early/2017/09/11/1706255114.full

Ramarajan, L. and Thomas, D. (2010) *A Positive Approach to Studying Diversity in Organizations*. Working Paper 11-024. *Harvard Business Review*. Retrieved November 29, 2020 from https://www.hbs.edu/faculty/Publication%20Files/11-024_bc.pdf

Randell, Nicholas G, & MacDavey, Megan. (2020). Human-Centered Design and Foundation Staff: A Case Study in Engaging Grant Beneficiaries. *The Foundation Review*, 12(1), 17-97. Retrieved January 30, 2021 from https://scholarworks.gvsu.edu/cgi/viewcontent.cgi?article=1504&context=tfr

Rosalsky, G. (2020, May 26). How The Crisis Is Making Racial Inequality Worse. Retrieved December 01, 2020, from https://www.npr.org/sections/money/2020/05/26/860913793/how-the-crisis-is-making-racial-inequality-worse

Ross, M., & Bateman, N. (2018, January 31). Millions of young adults have entered the workforce with no more than a high school diploma. Retrieved December 02, 2020, from https://www.brookings.edu/blog/the-avenue/2018/01/31/millions-of-young-adults-have-entered-the-workforce-with-no-more-than-a-high-school-diploma/

Ross, M., & Bateman, N. (2019, November 07). Meet the low-wage workforce. Retrieved December 02, 2020, from https://www.brookings.edu/research/meet-the-low-wage-workforce/

Saint, D. (2017, December 5). 'Preference Diversity': The Essential Team Ingredient. Retrieved February 18, 2021, from https://actionplanning.co.uk/insights/preference-diversity-the-essential-team-ingredient#:~:text=Preference%20diversity%20occurs%20when%20a,leading%20to%20more%20successful%20outcomes.

Thomas, D. A., & Ely, R. J. (1996, September). Making Differences Matter: A New Paradigm for Managing Diversity. Retrieved November 2, 2020, from https://hbr.org/1996/09/making-differences-matter-a-new-paradigm-for-managing-diversity?registration=success

Toldson, Ivory (2018). No BS (Bad Stats): Deconstructing the Black-White Achievement Gap using a DuBoisian Framework (Editor's Commentary). *The Journal of Negro Education*, 87(3), 191–199. Retrieved on February 4, 2021 from doi:10.7709/jnegroeducation.87.3.0191

Toldson, I. (2018). A Framework for Promoting Educational Equity [Digital Image] Retrieved from doi:10.7709/jnegroeducation.87.3.0191

Tschannen-Moran, M. (2001). Collaboration and the need for trust. *Journal of Educational Administration*, 39(4), 308–331.

van Knippenberg, D., De Dreu, C.K.W., & Homan, A.C. (2004). Work group diversity and group performance: An integrative model and research agenda. *Journal of Applied Psychology*, 89, 1008-1022.

van Knippenberg, D., Haslam, S., & Platow, M. (2007). Unity through diversity: Value-in diversity beliefs, work group diversity, and group identification. *Group Dynamics: Theory, Research, and Practice*, 11(3), 207–222.

van Knippenberg, D. & Schippers, M.C. (2007). Work group diversity. *Annual Review of Psychology*, 58, 515–541.

Wageman, Ruth, Gardner, Heidi, & Mortensen, Mark. (2012). The changing ecology of teams: New directions for teams research. *Journal of Organizational Behavior, 33*(3), 301–315.

Wageman, R., Hackman, J.R., & Lehman, E. (2005). Team Diagnostic Survey: Development of an Instrument. *The Journal of Applied Behavioral Science*, 41, 4, 373–398.

Wageman, R., Nunes, D.A, Burruss, J. A., & Hackman, J. R. (2008). Senior Leadership Teams (Leadership for the common good). Boston, Mass: Harvard Business School Press.

Weise, M. R., Hanson, A., Salisbury, A., & Qu, K. (2019, August 21). On-ramps to Good Jobs. Retrieved December 02, 2020, from https://www.stradaeducation.org/report/on-ramps-to-good-jobs/

Wilson, H. J., & Daugherty, P. R. (2018). Collaborative Intelligence: Humans and AI Are Joining Forces. *Harvard Business Review*, 96(4), 114–123. Retrieved January 30, 2021 from https://hollis.harvard.edu/primo-explore/fulldisplay?docid=TN_cdi_proquest_miscellaneous_2062971991&context=PC&vid=HVD2&search_scope=everything&tab=everything&lang=en_US

Yeh, Ying-Jung, & Chou, Huey-Wen. (2005). Team Composition and Learning Behaviors in Cross-Functional Teams. *Social Behavior and Personality*, 33(4), 391–402.

Appendix A: Theory of Action & Key Activities (Full List)

Table 1. Theory of Action (column headers) & Key Activities Employed			
Creating a compelling purpose and securing agreement on that purpose	**Building a sound structure**	**Creating a supportive context**	**Establishing and maintaining trust and psychological safety**
I started each partnership by discussing the purpose, asking for feedback and securing commitment to that purpose. The purpose was co-established by the implementation partners. I codified the co-created values and vision that all partners adopted (e.g. we all valued having workers share their stories) and encouraged the team to convert our values into our success metrics for the board. I connected partners directly to the workers on the board to further shared direction and purpose.	I facilitated regular (weekly or biweekly) working sessions with each implementation partner with clear follow-up tasks and deadlines (agendas were co-created). I integrated rolling agendas (Meeting Wise) and shared documents via Google Drive. I served as the main point of contact for all partners and held each partner accountable for agreed-upon tasks, including the task of integrating feedback from workers and other partners. I documented co-established norms on how we would work together (e.g. communication, workflow, check-ins, etc.). I led the co-creation of assets for the board: Board Engagement Plan, Selection Criteria,	I updated funders monthly on XPERT WAB progress, including the role of our partners (Information system). I collected feedback from XPERTs after every activity to inform next steps and keep all partners in the loop (information system). I held monthly checkpoints with executive leadership at some partnering organizations, which served as a sounding board for the work (education system). I presented at funders and staff meetings to share the work and gather feedback from these stakeholders, along with sharing those insights with partners (education system). I organized and co-facilitated cross-	I started every working session/meeting with check-ins. I followed up on matters important to partners that were outside the scope of our work (e.g. when partners were moving to a new place I asked about the move; when they were excited to cook a new dish, I would follow up and ask how it went, etc.). I scheduled meetings with advance time and, if a meeting needed to be shifted, I rescheduled with advanced time. I added more working sessions as needed. I shared my email and cell phone number and was accessible to partners via phone, call or text—particularly around time-sensitive deadlines/deliverables. I consistently asked for feedback and input, which shaped how we worked together.

	Recruitment Plan, a Framework on Designing for Worker Centricity, a Glossary of Terms, Communications Plan and Success Metrics for the board.	partner meetings and created shared Google documents where we collectively discussed and worked on elements of the board, with worker input (education system). I documented reflections from partners in our meetings and shared them across each workstream as appropriate (education system). I led the design of webinars and involved implementation partners as co-presenters to share our work, which served as a source of good publicity (reward system). I made sure all implementation partners were named in all XPERT WAB press (reward system). I thanked all of the partners throughout our work together (celebrated small wins). I shared success stories and publicly acknowledged their roles—including to their executives or colleagues when appropriate (reward system).	I was honest about what I knew and didn't know and what I was dependent on the partners for. I followed through on commitments. I shared learnings and, as a team, we adjusted quickly. I worked alongside all partners, providing feedback and guidance and filling whatever gap was known (with some partners I was a facilitator, for other partners I was the researcher, for another partner I was the convener, etc.). Roles shifted as the work progressed. I established parameters for each partner; we knew what we had to work on; who was responsible for what; and had a living (relevant and ambidextrous), clear scope of work.

	I served as a reference for a partner to other organizations (reward system).	

Appendix B: Board Selection Criteria

	CRITERIA FOR COHORT 2 OF THE WORKER ADVISORY BOARD To be determined by applicant in partnership with the recruitment site
Time Commitment & Accessibility	**TIME COMMITMENT: About 20–26 hours a month total** (~5 hours per week) which includes time for: 1. Advising & research: 4–6 hours a month 2. Online training: 15–20 hours a month (scheduling is very flexible) 3. Coaching: 1 hour per month
	ACCESSIBILITY: Willing to be responsive and accessible via phone AND email for the duration of the board (6 months)
Worker Profile (identify, experiential & cognitive diversity)	**AGE:** 18 years or older with a broad distribution of ages ❏ 18–34 ❏ 35–50 ❏ 51–69 ❏ 70–87
	GENDER: All gender identities will be considered (note: the target for the final cohort will be 48% male, 48% female, 4% LGBTQ or non-binary) ❏ Female ❏ Male ❏ Non-binary
	GEOGRAPHY: Population density (rural, suburban, exurban, urban) ❏ Exurban ❏ Rural ❏ Suburban ❏ Urban
	ETHNICITY: All ethnicities will be considered (note: target of at least 60% African American, Indigenous and/or Latinx participants)
	EDUCATION: (Note: target of 33% with less than HS Diploma, 33% HS or GED, 33% with post-secondary credential) ❏ No post-secondary education or industry certification(s); OR Some education:

	❑ High School Diploma ❑ GED ❑ Industry certification ❑ Some college (no degree) ❑ Associate's Degree ❑ Bachelor's Degree ❑ Other Degree: _____
	COMMUNICATION: ❑ Willing to share their story (in articles, different types of press or serving as a speaker in different events), AND ❑ Willing to give input on proposed innovations and solutions (input can mean interviews, surveys, working directly with a team, reviewing applications from those submitting new ideas, etc.)
Professional Ambitions (experiential, cognitive & positional diversity)	**WORK EXPERIENCE:** 1 year minimum work experience
	EMPLOYMENT STATUS: All employment statuses will be considered (note: the target for the final cohort will be 66% un/underemployed) ❑ Underemployed ❑ Unemployed *Definition: Persons employed part time for economic reasons (U-6 measure) are those working less than 35 hours per week who want to work full time, are available to do so, and gave an economic reason (their hours had been cut back or they were unable to find a full-time job) for working part time. These individuals are sometimes referred to as involuntary part-time workers. https://www.bls.gov/lau/stalt.htm*
	SALARY: Salary in current or previous role is less than living wage for the relevant metropolitan statistical area (MSA) as determined by MIT's Living Wage Calculator: https://livingwage.mit.edu/
	PROFESSIONAL PREFERENCES: ❑ Interested in training and employment opportunities for medium/high-skilled work such as promotion in current industry or transition requiring credentials, OR ❑ Individuals advanced in their career looking to share their lessons learned, or looking for employment
	LEARNING/SKILL BUILDING: ❑ Love for learning ❑ A desire to learn through online platforms (digital learning) ❑ Desire to obtain certificates/micro-credentials on: collaboration, creative problem solving and resilience (soft skills) ❑ **Must be willing and interested in completing three online micro-**

	credential trainings (valued at $500)
	DIVERSE INTERESTS: Someone with diverse interests, willing to explore a variety of interests and willing to participate in the proposed solutions
	CAREER NAVIGATION: ❏ Individuals with self agency, AND ❏ Individuals that have demonstrated the ability to leverage various resources or services to achieve their goals
	OPEN TO COACHING: ❏ Must be willing and interested in participating in monthly life coaching which uses the Immunity to Change model (valued at $350 per hour)
Additional Criteria (experiential & cognitive diversity)	**TECHNOLOGY ACCESS:** Computer/laptop/ tablet or reliable access to a computer/laptop or tablet for purposes of this board
	INTERNET ACCESS: Access to reliable internet
	NORTHSTAR: Must be willing to complete two Northstar assessments: 1) Basic Computer Skills 2) Internet Basics as part of the application to determine digital literacy. *(DIGITAL LITERACY: Basic understanding of technology and access to reliable internet.)* Scoring on the assessment: ● Over 70% = eligible ● 50–70% = will require a follow-up phone interview ● Under 50% = not eligible at this time, but we will share free resources to support you on your digital literacy journey so you can join us in future cohorts!!
	AVAILABILITY: Ability to participate in virtual events (and in-person as necessary over time). Willing and able to commit at least **20** hours a month to this board
	WORK AUTHORIZATION: U.S. Citizen or noncitizen authorized to work in the U.S.
	TAX CONSIDERATION: Agrees to complete a W-9 (According to tax law, New Profit is required to report stipends over $600; New Profit does not provide tax preparation services or support)
	SYSTEMS CHANGE: Does the individual frame career solutions around addressing systems problems and not only around blame for individuals or individual companies?
	ENTREPRENEURIAL: Individuals who are entrepreneurial and introspective, or possibly operate a small business on the side

Optional Criteria **(experiential diversity)** *Applicant may choose not to answer*	**BARRIERS TO OVERCOME:** Individuals facing one or more of these barriers to the workforce:
	❏ Disability
	❏ Re-entry
	❏ Asset-limited
	❏ Income-constrained
	❏ Employed (ALICE: Asset Limited, Income Constrained & Employed) those that earn above the Federal Poverty Level, but not enough to afford a bare-bones household budget

Disclaimer: No individual will be excluded based on any one criteria. New Profit is looking to recruit a diverse cohort of XPERTS with a commitment to elevating worker voice in the future of work solutions.

Appendix C: Board Recruitment Plan

(New Profit, 2021)

Accenture describes itself as follows:
"Accenture is a global professional services company with leading digital, cloud, and security capabilities. Combining unmatched experience and specialized skills across 40+ industries, we offer Strategy and Consulting, Interactive, Technology and Operations services. Serving clients in over 120 countries, our people deliver on the promise of technology and human ingenuity."

Appendix D: Board Engagement Plan
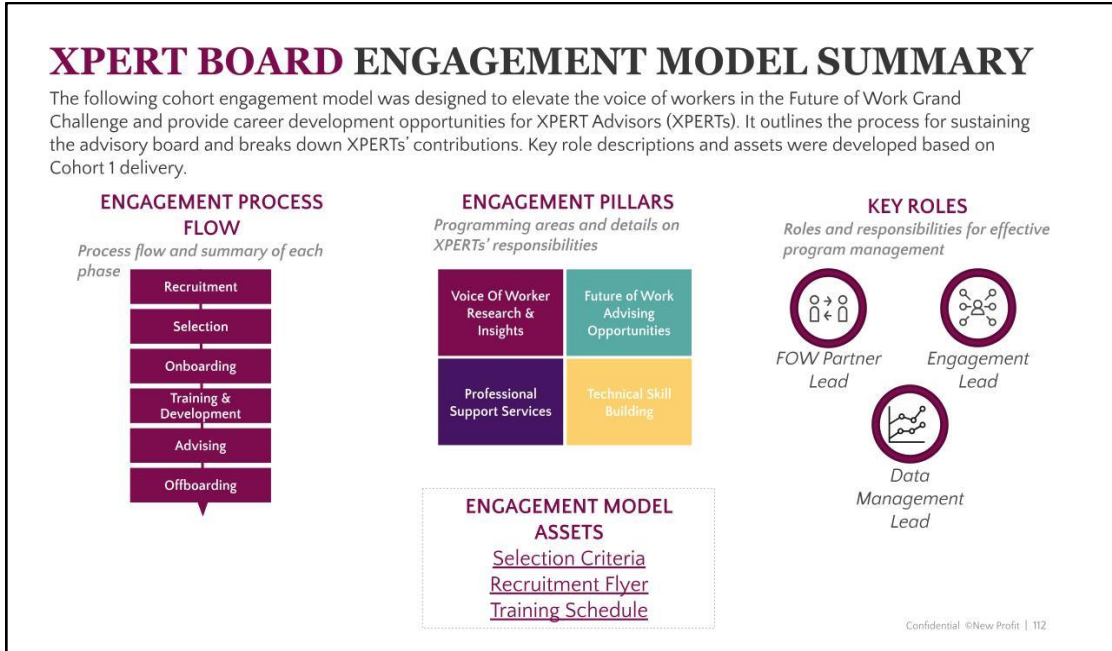
(New Profit, 2021)

Glossary of Terms When Referring to The Workforce

New Profit's approach to making an impact is based on the belief that sustained, large-scale change demands collaboration across organizations and sectors, and deep integration of the communities most impacted by the change. We have designed the **Future of Work Grand Challenge,** in partnership with XPRIZE and MTISolve to unmask and build upon the strengths of social entrepreneurs, policymakers, philanthropists, employers and the workforce. While we do not wish to assume that we know the needs of the future workforce, that their needs are all the same, or that we know how to meet them all, we do know that every partner, including frontline workers has a unique and important contribution to make in the future of work. Without all of these voices, we can not succeed.

To ensure that the proposed innovations and solutions for the **Future of Work Grand Challenge** effectively address the needs of disinvested and underserved workers, we are convening a cohort of **XPERTS**, a collaboration with Accenture and Goodwill Industries to elevate the voices of these frontline workers to unlock solutions that can change the future of work for the better.

This is who we are and what we do, and we want our language to convey it. Thus, we have developed a short list of suggested language, which we will use to describe our work, and we invite all of our partners to do the same.

Asset-Based Language

Career Advancers
Entrepreneurial talent
Essential workers
Frontline workers
STARs (Skilled Through Alternative Routes)[1]

Explicit Language To Describing Barriers

At-risk of job displacement from automation
Community underserved by …
Disinvested communities
Individuals disconnected from the economic mainstream
Individuals facing an opportunity gap
Overlooked talent
Underestimated workers
Workers experiencing barriers to the Workforce
Workers experiencing low wages
Workers experiencing poverty

Deficit-Based & Vague Language to Avoid

At-risk youth/workers/communities
Individuals with a skills gap
Low-income communities
Low-skilled workers
Low-wage workers
Neediest of workers
Opportunity youth/workers
Poor communities
Underskilled workers
Undervalued talent
Under-resourced workers/communities
Underserved workers/communities
Vulnerable communities/workers
Workers in need of upskilling

If you would like to contribute to this list, please email: Jocelyn_Rodriguez@newprofit.org

---

[1] Working adults who do not have 4-year degrees, and who are "Skilled Through Alternative Routes" (STARs), Reach for the STARs: The Potential of America's Hidden Talent Pool." Published by Opportunity@Work and Accenture, March 2020

NEWPROFIT