



Entry Form 2017 Annual Awards for Program Excellence

Entry Deadline: Thursday, June 15, 2017, Midnight ET

Each entry must include a completed entry form. Please complete a form for each entry your HFA is submitting. The completed entry form will become the first page of your entry.

This form is a fillable PDF. Type your information into the entry form and save it as a PDF. Please do not write on or scan the entry form. **Questions: Call 202-624-7710 or email awards@ncsha.org.**

Entry Title: Enter your entry's title exactly as you wish it to be published on the NCSHA website and in the awards program.

Category:

Subcategory:

Entry Summary: A 15-word (max) summary of the program, project, or practice you are entering.

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Are you mailing to NCSHA 10 copies of any visual aids that cannot be included in your entry PDF? Yes No

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MassHousing
Line of Sight Goals
Management Innovation – Human Resources

Catherine was stumped. Working at MassHousing for close to twelve years was rewarding in numerous ways, but challenging in others. As a manager, she was caught in the middle. She had to support her team in putting out fires. She also had to upwardly manage her supervisor and their shifting expectations. The frustration she felt had been mounting over time. An outlet for sharing was lacking. The conversations in her mind regularly arrived at the same conclusion: “I love my job, but right now I can’t say I like it.” While she felt comfortable assessing the problems, she had not yet determined any proposed solutions. How could she? She felt rudderless about what to do next.

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Miguel felt winded. Both the quantity and complexity of his work had increased over time but in many ways he felt more disconnected from it. He led a division and was a member of the Senior Leadership Team (SLT) at MassHousing. The organization regularly produced record-breaking lending figures but there seemed to be a lack of clarity about what was next for the organization. In some respects, the work had become more transactional. While the organization had maneuvered well during the Great Recession, there was a toll—some benefits and raises had been suspended for several years, and people on his team still felt that sting. The spirit of working at a mission-driven organization was a steady force, but sometimes it seemed there was less passion. The challenge became how to bring that back.

It seemed clear that it had to start at the beginning. What was MassHousing about? What was its most fundamental goal and purpose? MassHousing had a mission statement. However, if you asked any staff member, they likely couldn’t tell you what it stated. That was understandable—the mission statement was untraditional in its length and only several years old. This seemed an important place to start – to reimagine and restate the MassHousing’s mission – and to do it in a way that made people feel a part of something that was bigger than themselves. To that end, and as a follow-up to a previously conducted first-of-its-kind employee survey, it was suggested that the upcoming annual SLT retreat agenda include work on authoring a new mission statement and the creation of a shared set of values.

There were some members of Senior leadership who had questions – candid ones. “Hold on, for the retreat—help me understand this—we’re going to whisk ourselves away to an ivory tower and dictate from up on high what our new mission and values should be? Without input from our teams?” one SLT member asked pointedly. Miguel, one seat over, felt the vigor in the questioner. “I agree,” Miguel added quickly, “Our staff members are adults – and more importantly – they make MassHousing what it is. This impacts them. They should help us define our mission and values,” he finished, not even realizing he’d verbalized what he was thinking. It was too late. The back-and-forth took hold, weighing the merits of input against the reality of the retreat being days away.

“Did you go to the open house?” a colleague asked Catherine a few days later, “Feels like a rush job.” Catherine agreed. “No open house for me, but I shared my thoughts on the online form,” Catherine replied, “And, I have to say, I’m really glad they asked. I feel like that means something.” The final tally came later. Over 150 people, about half of the organization, had contributed their thoughts. The request for input, while regrettably rushed, proved key for the longer term. Staff engagement had spurred not only idea generation but, more importantly, sustainable buy-in.

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Not long after, an internal survey was created to survey staff members about their views on performance management. Specifically, the Executive Team wanted to know, was the current appraisal process useful in identifying strengths and areas for improvement? The significance of this question stood out to Catherine. She recalled prior supervisors commenting on how much training and development had been provided for staff members years ago, including new and seasoned managers. Sadly, during the Great Recession and the necessity for a moratorium on pay raises that followed, performance appraisals had been suspended. If we aren’t giving

people raises, the thinking went, why should we take up their time to do reviews when their ratings aren't tied to a raise?

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"38% disagree vs. 27% agree. The rest are neutral. So, overall, not ideal and not where we need to be." Reviewing the internal survey results with the SLT had several nuggets of interest, but none more than how staff members viewed the usefulness of the appraisal process. The recent SLT retreat had afforded an opportunity to arrive at a consensus to create five-year business- and mission-related goals. This early read on staff members was that they identified closely with the new mission statement – an important accomplishment. This was also the first time that MassHousing had ever established a set of values as part of its corporate identity. Integrity, Excellence, Collaboration, Respect, Accountability and Service were the words that now defined how MassHousing would pursue its goals. These values would seek to guide not only MassHousing's work but also the staff's interactions internally and externally. "What we need here is alignment between our values, goals, and mission statement. We need to communicate that." Miguel offered. Miguel's colleagues chimed in and boiled their thoughts down to a common denominator: Revamp the performance appraisal process to align individual goals with the organization's goals, include a Values goal, and more actively manage the organization. The latter, of course, meant more work in some respects—monthly One-on-One meetings between supervisors and direct reports, incorporating feedback delivery in a timelier manner. One of the biggest challenges came with the point in the year that the SLT found themselves. This would all have to be implemented in the short span of three months.

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To be sure, "Line of Sight" goals were not a new organizational management phenomenon created by MassHousing. Their strength, however, derived from the sense of fulfillment they could help engender among staff members. Everyone on the MassHousing boat needed to understand that they played a role in helping to steer and power the boat in the same direction. They would need to collaborate more, hold each other accountable, and do so in a respectful manner—which also aligned with the new set of values. For a mission-driven organization, incorporating mission goals alongside business goals was of particular importance and contributed to embracing a double bottom-line approach to the fulfilling work of all involved.

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"Got a second?" Miguel said, popping his head into Catherine's office, "So...what do you think?" They knew each other well enough to know the topic. After a moment's pause, Catherine answered candidly, "This seems...like a lot to do in a small space of time. And monthly meetings? Yikes," she said. Miguel listened patiently and actively without interrupting before confessing, "I hear you. I should tell you that I contributed to that idea. The SLT feels monthly One-on-Ones would provide structure for feedback and nip issues in the bud, particularly around all the fires we're having to put out." Miguel paused for a minute to let Catherine absorb what he was saying. Then he said enthusiastically, "Let's give it a shot. Will you try it with me?" Catherine was unsure – but she was also intrigued. She couldn't remember the last time her boss had been so authentic in asking her for buy-in on something, let alone make a case to work on it together. It was refreshing.

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To say the team operated under time constraints was an understatement. Three months goes by in what seems like a lot less than three months. To accomplish its ambitious goals, the SLT needed to execute on trainings explaining the "Line of Sight". There were appraisal and goal-setting forms created from scratch and a focus group was formed to gather feedback on a draft version of the new forms. Open houses were held to answer questions on the forms and to help explain what a reasonable "Line of Sight" goal was. There were certainly elements that would require refinement in the coming years – updates to forms and such – but the SLT felt momentum was key and pressed on.

The alternative was to have done nothing that summer and lost a year of progress. The SLT had embraced a willingness to move forward – and this is what they did. What was essentially a minimally viable

prototype of a program for performance reviews was put out to the organization. The SLT knew that feedback would allow for a new iteration and improvements for the following year. However imperfect the forms and all else might have been, the true intent was to follow-up with staff members to provide that better understanding of their strengths and areas for improvement that they felt they needed.

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“I want to share this with you. Check this out,” Miguel said to Catherine the next week. “These are draft slides for the next All-Staff meeting. They have the engagement survey results from last week.” Catherine read the slides not knowing what to expect.

- 90% of staff members were familiar with the new mission statement;
- 84% of staff members had Mission, Organization-wide, or Division Goals influence their Individual “Line of Sight” Goals for the coming year;
- 93% of staff members successfully determined and included a Value Goal for the coming year;
- When considering whether the new performance management system was effective for identifying their personal strengths and areas for improvement:
  - 51% agreed and 7% disagreed (+44%)
    - Compared to 27% agreeing and 38% disagreeing the year prior
  - Improved 55% (from -11% to +44%) in one year

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Tim, the Executive Director, was presenting the following week at an All-Staff meeting. “You all know I love data, especially from the folks at Gallup,” he said. In sharing from the Chairman’s Blog on the Gallup site, Tim demonstrated that there was validation for what MassHousing had set out to implement. This new effort focused on coaching staff members throughout the year rather than merely sitting for an annual review, using values to guide professional conduct in the workplace, choosing to develop staff members throughout the organization instead of enforcing a top-down disposition, and embracing the mistakes and failures bound to occur when trying something new. It was less about being a departure from how MassHousing had operated. The importance derived from an acknowledgement that, first, perhaps this is how MassHousing should have been operating and, second, a level of quiet excitement that these actions would fully unleash the potential of the organization as it navigated the future. The internal survey data certainly pointed in that direction.

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By no means has perfection been achieved at MassHousing. We are, as always, a work in progress. Yet, improvements continue. The forms from the year prior have been replaced with a more user-friendly version based on further staff member feedback. The entire upcoming fiscal year goal development process began earlier. A performance appraisal process calendar has been provided much earlier than the year prior. Perhaps most importantly, individual contributors and managers have a shared understanding on expectations having built off their experiences over the last year.

By seeking to more actively provide, and pushing staff members to ask for, timely feedback, to promoting alignment between business and mission goals throughout the organization to our individual staff members, MassHousing has been not only focusing on our internal functions, but also what we can control. The marketplace has changed around us—there is more competition for the financing we offer, housing supply is constrained by various preventable factors, and the Boston area has steadily become a tighter labor market. Rather than wait for further outside factors to infringe on us, MassHousing has chosen to compete. Revamping how we operate has been a necessary joint investment by leadership and staff members to fulfill our mission to confront the housing challenges we face together in Massachusetts.

## Our Mission

# MassHousing will confront the housing challenges facing the Commonwealth to improve the lives of its people.

MassHousing will achieve its mission and its business goals through:

**Investment in staff**  
development and continuous organizational improvement;

**Innovation and agility** in the delivery of responsible lending products, housing opportunities and services;

**An intense focus** on the needs of our customers and the people and communities we serve.



# MassHousing Cares

## Integrity

Provide clear, accurate information in all our work and communications • Be honest and realistic when setting goals and expectations

- Do what we say and say what we mean
- Acknowledge our shortcomings and avoid unconstructive blame
- Build each other up and not undermine our colleagues or partners
- Our behaviors should match our high level of commitment to public service

## Excellence

Set expectations high for ourselves and our colleagues for the work we do together • We are always striving for continuous improvement, learning and growth

- Be persistent and creative when faced with setbacks or obstacles
- Make informed decisions and reward success through the use of data and analysis
- Seek opportunities to inspire others to excellence

## Collaboration

Create solutions with others and demonstrate an authentic willingness to embrace change through encouragement, tolerance, support, recognition and good humor

- Welcome and offer constructive input
- Communicate useful information broadly and consistently
- Actively foster a safe environment for creative interaction and diverse approaches or perspectives
- See a colleague's problem or priority as our own

## Respect

Speak to others in our normal volume and professional tone of voice, without harsh criticism

- Be fair by balancing the need to get things done with patience and respect for all opinions
- Speak directly to others to resolve problems, and to provide and receive constructive feedback
- Be an active listener, focused on hearing the intended message
- Seek to accomplish goals in a manner that respects personal needs

## Accountability

Hold ourselves and others to our agreed-upon values and behaviors

- Set clear goals and measure progress against them
- Keep commitments and help our team members meet theirs
- Provide direct and accept constructive feedback to and from colleagues
- Follow-up on a timely basis to each other and our external stakeholders

## Service

Continue to dedicate ourselves and serve as stewards of the public trust; be aware that every aspect of our work connects to: The public service we perform for the people of Massachusetts—

Living and furthering the mission of MassHousing—

Faithfully managing and optimizing the use of all of our resources

- Seek to deepen our commitments and relationships with residents and communities.