



THE MISSOURI EXECUTIVE PARTNERSHIP PROGRAM
State of Missouri Leadership Academy
Capstone Project, Team C

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STATE AND LOCAL GOVERNMENT

PROGRAM/SOURCE: California – Capital Fellows Programs

- <https://www.csus.edu/center/center-california-studies/capital-fellows.html/>

DESCRIPTION: Rooted in experiential learning and public service, Capital Fellows spend 10-11 months as part of a cohort working in Legislative, Executive or Judicial Branch office. Fellows receive a monthly stipend of \$2,698, as well as medical, dental and vision benefits; and upon successful completion of the fellowship, a Graduate Certificate in Applied Policy and Government.

KEY TAKEAWAYS:

- Consists of four distinct individual programs, each with a separate application process unique to the branch of government it serves.
 - A bachelor's degree with minimum GPA of 2.5 is required. No preference is given to type of major or how recently the applicant has graduated. Individuals with advanced degrees and those in mid-career are encouraged to apply.
 - Fellows are matched to placements that best utilize their education and skills.
 - Capital Fellows are placed at some of the highest levels of California state government and assist state legislators, senior-level executive staff, and court administrators with a broad range of public policy issues and projects and are typically given assignments with a significant amount of responsibility and challenges
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PROGRAM/SOURCE: Cleveland, Ohio – Mayor's Operation Volunteer Effort

- Excerpt from book— *Empowering the Public-Private Partnership: The Future of America's Local Government* by George V. Voinovich (54th Mayor of Cleveland, 1980-1989; and 65th Governor of Ohio, 1991-1998).

DESCRIPTION: The Mayor's Operation Volunteer Effort (MOVE) in Cleveland, Ohio had two main components which are described below. The program also had a coordinator who had experience serving on the boards of several nonprofit organizations.

- 1) The Loaned Executive Committee, chaired by Jack Dwyer of Oglebay Norton and composed of executives recruited by city administrators to solve specific problems. Most often, they provided part-time rather than full-time service;
- 2) The second committee oversaw a citizen volunteer group made up of people who wanted to donate their time and talent to the city's cause. This committee was chaired by Jim Delaney of Deloitte.

At first, Cleveland corporations and foundations covered all expenses for Project MOVE; eventually the city took on day-to-day operating costs. However, an industrial foundation continued to fund the annual volunteer recognition event and other special projects.

The coordinator worked with city managers to develop project requests which were then taken to the Loaned Executive Committee. Committee members either volunteered the services of executives from their respective companies or recruited an executive from another company. The coordinator tracked progress on the project and provided regular updates to the committee. They completed 25 projects in the first year. Some examples:

- A Stouffer's executive worked for six months with the city's data center to develop procedures for security, disaster protection, and user communication;
- A former regional manager of Sears met monthly with the Mayor's Press Secretary to review requests for projects from city directors;



- Creating a marketing plan for Cleveland Public Power;
- Updating communications materials for various departments; etc.

KEY TAKEAWAYS:

- This project demonstrated the willingness of multiple executives from local corporations to participate in projects to benefit their community.
 - The program was able to be leveraged to complete a wide-range of projects and issues.
-

PROGRAM/SOURCE: Georgia – Honors Fellowship Program(AG’s Office)

- <https://law.georgia.gov/honors-fellowship-program/>

DESCRIPTION: This program is for third-year, graduating law students; or recent grads completing full-time judicial clerkships or full-time government, academic, or public-interest fellowships. The fellow is allowed to choose to work in one or two AG departments for their two-year term (i.e. Regulated Industries & Professions, Criminal Justice, etc.)

KEY TAKEAWAYS:

- Program focuses on young, not mid-career, professionals.
 - Honors fellows receive specialized training and programming as a part of their experience.
-

PROGRAM/SOURCE: Houston, Texas – Loaned Executive Program

- <https://www.houstontx.gov/mayor/press/loaned-executive-program.html/>

DESCRIPTION: In 2016, the City of Houston launched a loaned executive program to provide the city senior-level private sector expertise at no cost to the city. CenterPoint Energy loaned Vice President of Public Affairs and Communications Floyd LeBlanc who has more than 30 years of leadership, operational and crisis communications experience. LeBlanc was assigned to the Houston Department of Public Works and Engineering to serve as the City’s Community Planning and Emergency Preparedness Advisor. LeBlanc was expected to assist with the development of processes that improve customer service for business and residential customers and work to improve public/private coordination for work in public rights of way.

KEY TAKEAWAYS:

- There is precedence for companies to loan a senior-level executive at no cost to the receiving entity. CenterPoint continued to pay his compensation and benefits, including health insurance, salary and incentive pay. The agreement was for one year with the option of extending for an additional year.
 - The company’s CEO issued a statement in support of the partnership.
 - Expectations of the loaned executive were clearly delineated.
 - “The city was granted the unique perspective and skills of a seasoned professional without the added cost of salary or fees that usually accompany a consulting arrangement” – Mayor Sylvester Turner.
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PROGRAM/SOURCE: Illinois – James H. Dunn Memorial Fellowship Program

- Interview with Jasmine Hooks, Director of Operations (May 20, 2019)
- <https://www2.illinois.gov/sites/gov/about/opportunities/pages/application-dunn.aspx/>



DESCRIPTION: The James H. Dunn Memorial Fellowship Program, often referred to as the Dunn Fellow Program or the Dunn Fellowship, is a year-long governmental honors fellowship program in Illinois. The fellowship affords recent college graduates from every state the opportunity to experience and gain first-hand knowledge of Illinois State government and general governmental structure at the executive level. Successful candidates are offered fellowships with the Illinois Office of the Governor in both Chicago and Springfield, Illinois and in Washington, D.C. Dunn Fellows work directly with management staff in the Office of the Governor and generally gain a broad perspective of the operation of state government. Fellows spend up to one week of August receiving an orientation to state government including tours, policy discussions, a panel of program alumni and a brown bag lunch with senior staff among other activities. After the orientation period, fellows return to their home office to work under the direction of their supervisor. Dunn Fellows are paid \$31,332 annually and receive full state benefits.

KEY TAKEAWAYS:

- Ensure that the fellowship application is widely available (college boards, job sites). Try to recruit/access a diverse group of applicants from various backgrounds. For example, they post to the Illinois Latino Family Commission Facebook.
 - Have flexibility on who can apply (some students take a year off after graduation). In the current scoring process, applicants are given a zero if they graduated more than 12-18 months ago—would like to adjust the scoring system to allow points for life experiences.
 - Fellows absorb a lot of knowledge and skills that can be used in a permanent position, however, one year is often not long enough for fellows to apply the knowledge. Consider extending the program to two years.
 - Provide applicants with a list of departments within the Governor's Office along with a general description of the scope. Allow applicants to choose their placement based on interests.
 - Establish a methodology to evaluate the performance of the fellow.
 - Develop a Speaker series with governor and deputy governor covering topics such as career progression, and public policy. Connect fellows with alumni.
-

PROGRAM/SOURCE: Indiana – Governor's Fellowship Program

- <https://www.in.gov/gov/fellowship.htm/>

DESCRIPTION: Recruitment of talent from across the state who have been out of college for less than a year and will serve in various State agencies on a rotating basis over the course of a year. Fellows are full-time and paid approximately \$ 25,000 plus full fringe benefits during fellowship year. (The year of service corresponds with the State fiscal year.

KEY TAKEAWAYS:

- Fellow participates in the daily activities of State Government, complete special projects, and experience firsthand how policies are made
 - The program is open to graduates who have received their bachelor's degree in the fall of previous year or spring of current year
 - Special consideration is given to applicants from Indiana and 3.0 Grade point average
-

PROGRAM/SOURCE: Missouri – COO's Task Force on Fleet Management

- <https://oa.mo.gov/commissioners-office/news/coo%E2%80%99s-task-force-fleet-management-identifies-more-2-million-potential-cost/>
- <https://www.hawthornfoundation.org/fleet-management/>



DESCRIPTION: The COO’s Task Force on Fleet Management, convened under the auspices of the nonpartisan non-profit Hawthorn Foundation, brought together industry experts to share best practices with representatives of the State of Missouri. Participants then developed recommendations for cost savings, safety, and other improvements. State of Missouri participants included representatives from the Office of Administration, Department of Transportation, Department of Conservation, and Highway Patrol, as well as the University of Missouri System. Private sector experts came from Ameren, AT&T, Enterprise Holdings, Ford Motor Company, Hogan Transportation, Kansas City Power and Light, McKinsey & Company and GPS Insight. All the experts volunteered their time to the Task Force.

KEY TAKEAWAYS:

- Launched in October 2017 and released its summary report less than 3 months later.
- The State of Missouri identified over \$520,000 in potential savings and the University of Missouri System updated policies and initiated cost-cutting measures for the university’s fleet expected to generate savings of \$1.5-2 million.
- As a result, the State of Missouri and UM System have both committed to a continued collaboration on longer-term initiatives.
- “The Task Force on Fleet Management shows how business experts can help us deliver tangible impact for both Missouri state employees and the taxpayers” *COO Drew Erdmann*
- “this will allow us to continue to invest further in the success of our students, faculty and staff and bring value to the citizens of Missouri through community and economic development.” *UM System President Mun Choi*
- “Participating in the Fleet Management Task Force has been very worthwhile, allowing participants to forge ongoing alliances and compare best practices within our own fleets” *Sherry Montgomery, AT&T Fleet Operations*

PROGRAM/SOURCE: New York – Empire State Fellows Program

- Interview with Kara Pangburn – Director of Recruitment & Appointments, NYS Center for Recruitment and Public Service (April 25th, 2019)
- https://www.dos.ny.gov/newnyleaders/fellows_app.html/

DESCRIPTION: Developed by the Governor and intended to “bring in and retain smart people” for the sake of succession planning, Empire Fellows work for two years on strategic initiatives developed by the Governor’s Office, Department of State, and the agency best-able to accommodate the fellow’s skills and interests. Fellows receive an annual salary of \$72,765 and benefits. Upon completion of the two year term, the fellow’s job performance is evaluated and they are considered for a permanent position. Insert Description

KEY TAKEAWAYS:

- Fellows are matched to placements that best utilize their education and skills. The cohort is actually now selected first (priority number one is to bring in intelligent/capable people), then strategic projects are developed to best suit the fellow.
- Kara stressed the importance of solidifying the exact purpose/goal of Missouri’s program and choosing the model to best accommodate our aim.
- Fellows out of graduate school or who otherwise have minimal job experience have a difficult time adapting to the fast-paced, “always putting out fires” nature of state government. Such individuals require extensive



training, educational and leadership development programs to onboard and adapt to their new work environment.

- Engagement of the chief executive helps to solidify the program's standing and add prestige.
-

PROGRAM/SOURCE: New York – Excelsior Service Fellowship Program

- <https://www.ny.gov/new-york-state-fellowship-programs/excelsior-service-fellowship-program/>

DESCRIPTION: This program is targeted towards recent graduates of New York State law, professional and graduate schools. This fellowship offers is a two-year, full-time program with generous salary and benefit packages. There is a two tier salary structure: Excelsior Fellows with less than three years of post-collegiate work experience are paid \$55,000 annually, and Excelsior Fellows with three or more years of post-collegiate work experience are paid \$60,000 annually.

KEY TAKEAWAYS:

- Candidates must be nominated for the program on an annual basis through their law, professional, or graduate school's Career Services Office or Fellowship liaison. There is no direct application process for the Excelsior Service Fellowship
 - Candidates must have received their graduate degree (i.e. MPA, MA, MBA) or advanced degree (i.e. JD, PhD) from one of the Fellowship program's partner schools in the academic year prior to starting the Fellowship
 - Excelsior Fellows generally work on the operational or legal aspects of important policy initiatives, reporting to directors of specific departments or managers of projects
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PROGRAM/SOURCE: Ohio Business Roundtable

- Excerpt from book— *Empowering the Public-Private Partnership: The Future of America's Local Government* by George V. Voinovich (54th Mayor of Cleveland, 1980-1989; and 65th Governor of Ohio, 1991-1998).
- <https://www.ohiobrt.com/>

DESCRIPTION: The Ohio Business Roundtable is a nonpartisan, nonprofit organization comprised of the chief executive officers of many of Ohio's largest, most successful companies. The roundtable was formed after realizing the Mayor's Operation Volunteer Effort (MOVE) model worked at the local level (described above). This effort was undertaken in conjunction with Ohio's major corporations, Ohio Manufacturer's Association, and the Ohio Chamber of Commerce. The first group included Tim Timken of Timken Company; Tim Smucker of Smucker's; Western & Southern's John Barrett; Mead's Burnell Roberts; and BF Goodrich's John Ong. These five individuals then recruited 50 of their peers to join the roundtable. This effort seemed to be more focused on the shaping of public policy. Projects mentioned include improving the worker's compensation system and K-12 education system reform.

KEY TAKEAWAYS:

- This project demonstrated the willingness of multiple executives from local corporations to participate in projects to benefit their community.
 - The program was able to be leveraged to complete a wide-range of projects and issues.
-

PROGRAM/SOURCE: Pennsylvania – William Penn Fellowship

- Interview with Rachel Goss, William Penn Fellow (May 20th, 2019)
- Interview with Nicholas Soccio, Staff Secretary for Governor Tom Wolf (June 3rd, 2019)



DESCRIPTION: This program was the idea and priority of Governor Tom Wolf and the First Lady which was intended to mimic the Peace Corps. Applicants must have completed a graduate degree within the last four years, military service, or service in the Peace Corps. The program is designed to recruit highly talented individuals; and to meet the Governor's strategic priorities. Such priorities are co-developed by the Governor's Office and agency policy offices. Fellows are evaluated every six months by the agency they're assigned to and meet with the GO Staff Secretary on a quarterly basis. The annual salary ranges from \$65,000 to \$75,000 with benefits.

KEY TAKEAWAYS:

- Although fellows are not promised a position at the end of their two-year term; the state is inclined to attempt to retain them in permanent positions upon the completion of their fellowship.
 - Fellows out of graduate school or who otherwise have minimal job experience require extensive training, educational and leadership development programs to onboard and adapt to their new work environment.
 - Engagement of the chief executive helps to solidify the program's standing and add prestige.
 - By requiring dual-reporting to both the GO and agency policy office, fellows are imbued a "status-boost" to prevent them being confused for interns. Access to higher-level officials helps avoid this confusion.
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PROGRAM/SOURCE: Tennessee – Governor's Management Fellowship

- Interview with Adam Jarvis, Senior Management Consultant in the Office of Customer Focused Government (May 24, 2019)
- <https://www.tn.gov/governor/contact-us/fellowship-program/governor-s-management-fellowship.html/>

DESCRIPTION: Established in 2014 by executive order, a new class of five fellows is selected every two years. Following a six-month orientation during which fellows work in the Governor's Office on statewide projects, each fellow is placed in one of the 23 state departments to work on specific projects. The fellowship focuses on improving operational efficiency and effectiveness in state government. The fellowship's mission is to recruit exceptional leaders into Tennessee's executive branch; about half of the program fellows have continued working for Tennessee state government after the program concluded.

KEY TAKEAWAYS:

- The program is run by the Office of Customer Focused Government, the state's internal consulting office that drives enterprise-wide innovation and operational efficiency to benefit Tennesseans. The Fellows Executive Committee is a bipartisan commission composed of Tennessee's most prominent public and private sector leaders that is responsible for interviewing finalists and recommending the individuals it deems most qualified. The state COO services as the Committee chair.
- Fellows work on specific projects, which are submitted by departments through a formal proposal process; initially, departments were not required to submit detailed project proposals, so some departments were not intentional about how the fellows spent their time. Fellows also take part in an accelerated 18-month leadership program, complete a capstone project and tour all state departments to get hands-on experience with frontline staff.
- One of the challenges has been managing the program through the transition period that comes with a new administration. Having a strong champion who is close to the Governor's Office has proven to be very important. Without someone like the COO, who is intimately aware of the program and can be an advocate for it, there would not have been as many doors open for the program and the fellows.
- The nonpartisan program is open to recent graduates or those who have completed a public service opportunity (i.e., military service, Teach for America, etc.) and who have demonstrated outstanding



Appendix A

Interviews & Research

academic achievement, a genuine passion for serving their community and remarkable character and leadership abilities.

- Fellows are full-time, paid state employees. They receive a base salary of \$50K plus benefits. Fellows are eligible for pay for performance at the end of their first year.
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FEDERAL GOVERNMENT

PROGRAM/SOURCE: Business Civic Leadership Center (BCLC) – U.S. Chamber of Commerce Foundation

- <https://www.uschamberfoundation.org/sites/default/files/publication/ccf/disasterrecoveryreport0708.pdf/>

DESCRIPTION: A leading resource and conduit for business and corporate involvement on initiatives that make a difference, one area of focus is disaster response and preparedness. The BCLC is mobilized to assist disaster stricken areas of the United States and provides leadership and marshalling the corporate response for aid, volunteers, and donations post the crisis. In addition, the BCLC has begun to release findings on practices that will assist in sustainability, mobilization, and response before, during, and after a natural disaster. Post Katrina and Harvey saw many corporations will to loan key executives to help with disaster response.

KEY TAKEAWAYS:

- Global companies are willing to assist in crisis, they just need direction of what might be needed to help in the effort.
 - Shell Oil Company is a regular provider of corporate leadership, to efforts in Katrina and Harvey. Harvey scenario a Shell top executive was one of the top leaders in the recovery efforts in Houston.
 - Most of the executives provided by corporations have been seasoned executives, they are more likely to quickly learn the need, takes leadership, and begins to achieve the desired outcome.
 - Interviewer indicated in other global efforts, seeing more sabbatical type efforts of companies offering 6 to 12 months off to volunteer with the global charity the company supports.
 - Advice for the project team, really think through the on-boarding and debriefing pre and post the project period. Do as much as you can to assimilate, but spend some time debriefing when the loaned executive is complete. Their time and knowledge is invaluable.
 - Don't be afraid to ask consulting firms, they are also seeking ways to give back to their communities.
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PROGRAM/SOURCE: U.S. Department of Homeland Security – Loaned Executive Program

- <https://www.dhs.gov/loaned-executive-program/>

DESCRIPTION: The Loaned Executive Program is a special opportunity (unpaid) for executive-level private sector talent to share their expertise with DHS. Through the program, DHS works with the nation's top private sector executives and industry experts on innovative solutions to homeland security challenges. Salaries and expenses are paid by the private sector employers. The loaned executive reports to the office of their respective DHS component.

KEY TAKEAWAYS:

- Candidates must be a U.S. citizen; serve in a current senior-level operational management or related position, with a track record of building support for and influencing policy decisions as well as deploying sustainable risk, mitigation and resiliency capabilities; have extensive private sector leadership experience in identifying and screening personnel in functional areas related to risk assessment, mitigation/preparedness and incident response; undergo and successfully complete a background investigation for determination of suitability for federal employment. Each position description will identify the requisite clearance level; and submit a Confidential Financial Disclosure Report (OGE Form 450).



- Initial appointments are made for a period of at least three months and no more than one year. The loaned executive may be reappointed for additional periods with the total appointment not to exceed two years. Candidates will complete an orientation and training program before their assignment begins.
 - Executives serve as a subject matter expert and senior advisor to DHS leadership; evaluate and provide assessments on existing policies, procedures, and training; and provide guidance on the public-private partnership model and implementation of strategies designed to improve private sector engagement.
 - Through national press releases, published by both DHS and the private sector employer, combined stakeholders are made aware of private sector contributions to DHS.
 - Participants help refine the program for future experts based on their identification of homeland security challenges and individual experience during their program tenure.
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PROGRAM/SOURCE: U.S. Presidential Management Fellows Program(PMF)

- Interview with Arianne Jolene Gallagher, Director – Presidential Management Fellows Program, OPM’s Center for Leadership Development, Federal Executive Institute (May 17th, 2019)
- <https://www.pmf.gov/>

DESCRIPTION: Since 1977 the PMF Program has matched outstanding graduate students with exciting Federal opportunities. Bearing the Presidential moniker, the PMF Program is a flagship leadership development program at the entry level for advanced degree candidates. It was created more than three decades ago by Executive Order and has gone through many changes over the years. The Program attracts and selects the best candidates possible, but is really designed with a more narrow focus - developing a cadre of potential government leaders. It provides some sustenance during the first years of employment and encourages development of leadership capabilities. The PMF Program inculcates a lasting bond as well as a spirit of public service, ultimately encouraging and leading to a career in the government. PMF utilizes a selection process with an open application. It is a two year federal fellowship with salary, benefits, and possible loan repayment. Salary range: \$43,857-\$82,680 base salaries. \$56,233-103,294 DC salaries.

KEY TAKEAWAYS:

- Fellows apply for positions that interests them and work to fulfill the duties of that position. Each fellow has a mentor throughout the duration of the fellowship.
 - While serving as a PMF, fellows receive: 160 hours of formal interactive training (on leadership, management, policy and other topics); Challenging work assignments; at least one 4 to 6 month developmental assignment and potential for promotions and access to career ladders.
 - When offering advice to implement a Fellows Program, Ms. Gallagher stated: Start small. Test things out. Figure out what need/problem having a fellowship program will address. Don’t boil the ocean. Bring in students, private sector, managers, and employees together to obtain a variety of perspectives. Try to obtain a firm funding commitment.
 - The most challenging part of operating a fellowship program is meeting the developmental and training needs for such a large/vast number of fellows.
 - Secure a combination of appropriated and non-appropriated funds to allow more federal agencies the opportunity to participate and to give fellows more placement options.
 - Create a clear pathway to leadership positions/advancement.
 - [Insert Key Takeaways]
-

PROGRAM/SOURCE: White House Fellows Program

- Interview with David Moore, Executive Director of White House Fellows Foundation and Association (May 30, 2019)



- <https://www.whitehouse.gov/get-involved/fellows/>

DESCRIPTION: Founded in 1964 by Lyndon B. Johnson, the White House Fellows program is one of America's most prestigious programs for leadership and public service. White House Fellowships offer exceptional young men and women first-hand experience working at the highest levels of the federal government. Selected individuals typically spend a year working as a full-time, paid Fellow to senior White House Staff, Cabinet Secretaries and other top-ranking government officials.

KEY TAKEAWAYS:

- In addition to their work placements, fellows participate in an education program consisting of roundtable discussions with leaders from the private and public sectors and trips to study U.S. policy in action both domestically and internationally.
 - While some fellows stay on in government service after their program, most return to their former jobs or hometowns. This is in keeping with the program's original mission to return fellows to their communities or occupations more experienced in public policy decision-making and better prepared to contribute to national affairs.
 - The bipartisan nature of the program is critical; it would not endure if it was a partisan entity.
 - There are generally between 11-19 fellows in each class. There is no age restriction to apply, but the program tends to emphasize selecting those who are earlier on in their career. The average age is 34. Fellows' salaries are funded by the agencies they work for.
 - There are three "governing" bodies involved in the program.
 - The President's Commission conducts final round interviews and selects the fellows. These individuals are appointed by POTUS. Most will change with a new administration, but a few tend to stay on.
 - Six full-time government employees support the Commission and administer the program for the current class. They manage the selection process for the fellows and getting fellows placed in the executive branch. The whole staff tends to change over each time a new administration comes in.
 - The White House Fellows Foundation and Association provides mentors for the currently class of fellows, supports the program financially, and organizes panels discussions and meetings for the class. This entity provides an element of continuity through changes in administration. There are approximately 745 WHF alumni and about 200 live in the DC Metro area. Alumni serve as mentors.
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ACADEMIC SECTOR

PROGRAM/SOURCE: Missouri Department of Higher Education

- Interview with Erik Anderson, Director of Academic Research (April 24, 2019)

DESCRIPTION: Informal meeting to discuss program development as it relates to the Missouri academic community.

KEY TAKEAWAYS:

- Consider creating a portal that keeps a catalog of active fellows with access at the department level. This will need to be designed with the assistance of ITSD.
-

PROGRAM/SOURCE: Missouri Department of Higher Education

- Interview with Jeremy Kintzel, Director of Data and Research (April 25, 2019)

DESCRIPTION: Informal meeting to discuss program development as it relates to the Missouri academic community.

KEY TAKEAWAYS:

- Ending a few years ago, the MDHE had a data research fellowship program where MU would send an enrolled graduate student in data, data analytics, or other data related majors to work part-time doing the “behind the scenes” research that current staff didn’t have the time to do. Costs were split between MU and the department, making it cost effective for the department and institution. The fellowship would last a full year.
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PROGRAM/SOURCE: Missouri Department of Higher Education

- Interview with Rusty Monhollon, Assistant Commissioner of Academic Affairs (May 1, 2019)

DESCRIPTION: Informal meeting to discuss program development as it relates to the Missouri academic community.

KEY TAKEAWAYS:

- Sabbatical may be the best opportunity, however, departments would have to understand that pay would equate to replacement of salary. The financial benefits would have to meet or exceed their current level of pay. Application process should begin before the summer to avoid conflict with grants and fellowship applications that may be due in early fall.
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CORPORATE SECTOR

PROGRAM/SOURCE: 2016 Deloitte Impact Survey: Building Leadership skills through volunteerism

- <https://www2.deloitte.com/content/dam/Deloitte/us/Documents/us-deloitte-impact-survey.pdf/>

DESCRIPTION: The 2016 Deloitte Impact Survey included interviews with 2,506 respondents in 13 major metropolitan areas across the United States. The survey targeted individuals who are currently employed and have that ability to either directly influence hiring or indirectly influence the person making the hiring decision.

KEY TAKEAWAYS:

- Volunteering has drifted to a 10-year low while research increasingly shows that corporate philanthropy and volunteerism help businesses attract, develop and retain talent.
 - "Skills-based volunteering" is defined as volunteering where people use their professional skills or unique talents to strengthen their communities; requires some form of professional training; practice area, or talent, e.g., a lawyer taking a pro bono case.
 - Respondents reported that they see volunteer experience listed on only 30 percent of the resumes they receive; 82 percent said they would be more likely to choose a candidate with volunteer experience on their resume;
 - Respondents preferred skills-based volunteering for building skills that respondents see as "must haves" for leaders.
 - 85 percent found skills-based volunteering to help talent advance their communication skills.
 - 88 percent found skills-based volunteering to play a key role in developing strong character traits.
 - 85 percent believe that it helps employees demonstrate accountability and commitment;
 - 92 percent agree that volunteering improves employees' broader professional skill sets;
 - 92 percent agree that volunteering is an effective way to improve leadership skills;
 - 80 percent said that active volunteers move more easily into leadership roles;
 - Despite these results indicating that volunteerism is a valuable tool for developing talent, 47 percent said their workplace does not offer a volunteer program; 66 percent of respondents who reported their employer does not offer a workplace volunteer program would like their company to offer one;
 - The study notes that since there is a strong interest in candidates with volunteering experience, businesses may need to do more to communicate to potential talent how much they value the critical professional skills developed through volunteer activities. Although the survey does not note this, role-modeling by senior executives may be one way to promote this value publicly.
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PROGRAM/SOURCE: St. Louis Regional Economic Development Alliance (AllianceSTL)

- Informal meeting with Steve Johnson, Chief Executive Officer (June 2, 2019)
- <https://alliancestl.com/>

DESCRIPTION: Steve Johnson has led business recruitment efforts in local, regional and statewide organizations for more than three decades. As the leader of AllianceSTL, he loves seeing the surprise on people's faces when they begin to realize what makes the St. Louis region special. He counts the easy accessibility of urban amenities as perhaps its biggest draw. "Within 30 minutes of leaving my house, I can be riding my bike alongside the Missouri River on the Katy Trail or parking my car to go to a Cardinals game," he marvels. "It doesn't get much better than that." As the AllianceSTL team earns success, he says, "Many people throughout St. Louis will have a



better life. A good job – or a better job than the one you have now – changes everything, and it’s a change that ripples through multiple generations.”

KEY TAKEAWAYS:

- Before reaching out to the business community, projects need to be clearly defined. Steve believes the Regional Business Council would be the best target, but also discussed the Regional Chamber and Civic Progress.
 - State of Missouri will be hard pressed to generate interest in loaned executives for projects much longer than 6 months.
 - There could be real opportunity from recently retired executives looking to take on a new retirement “legacy” project once the word is out on specific needs.
 - Projects need to be big and transformative across the state.
 - The ask needs to come from the Governor and should be presented in a manner that falls into a larger plan of moving Missouri forward.(ie: “We need you to come alongside us to move Missouri Forward”)
 - Steve was a bit confused with the framework being described as a fellowship program. He understands fellowships and loaned executives as two distinctly different opportunities under one talent/project management umbrella.
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NONPROFIT SECTOR

PROGRAM/SOURCE: Code for America – Community Fellowship Program

- Interview with Hashim Mteuzi, Senior Manager, Network Talent Initiative (July 11th, 2019)
- <https://www.codeforamerica.org/>
- <http://skoll.org/organization/code-for-america/>

DESCRIPTION: Code for America instruments government systems to uncover the impact of technology, operations, and policies on the public. Its program areas are threefold: health, criminal justice, and workforce development. Its process is user-centered, iterative, and data-driven. First, Code for America helps users navigate the systems; then it works with governments to improve those systems and get better outcomes for both users and taxpayers. Code for America has built multiple pathways to scale. It builds easy-to-use, open source digital services that improve government program delivery, then uses data gleaned from these services to work with government partners to fix operations. Code for America promotes policy change that actually works by centering it in real-world data.

COSTS

Costs of the fellowship will be shared between Code for America, local government agencies, and in some cases, local foundations or investors. Government partners are asked to cover fellow salary costs and contribute to a management fee (which helps cover fellow travel, training, and project tools), according to the government's ability to pay. To make the fellowship more accessible to different types and sizes of government agencies, fellowship project and cost structures can vary. We've provided some example cost structures below, based on a tiered ability to pay.*

- Tier 1: Full Salary Costs + Management Fee = \$96,000
 - Two full-time fellows at \$5,000 / month for 6 months = \$60,000
 - Full Management fee = \$36,000
- Tier 2: Part-Time Salary Costs + Partial Management Fee = \$55,000
 - Two part-time fellows at \$2500 / month for 6 months = \$30,000
 - Partial management fee = \$25,000 (out of \$36,000)
- Tier 3: Limited investment / limited ability to pay = \$10,000
 - Existing government employee joins as fellow= \$0 added cost / approx. \$30,000 in-kind contribution
 - Fraction management fee = \$10,000 (out of (\$36,000)

*Note that these are examples, and your actual cost structure may be different depending on the number of fellows, if fellows are full-time or part-time, new or existing employees, etc.

STRUCTURE

- Fellows can be hired as temporary government or Code for America employees
- Fellows can be full-time, or part-time. We've experienced most success with full-time fellows, however, we allow part-time fellows to accommodate a variety of fellow needs and government resource constraints
- Fellows will participate in weekly management and coaching sessions with Code for America staff, and join a mentorship program with experienced civic technologists. They will receive a weeklong onboarding training and participate in three in-person conferences
- Government partners participate in a learning cohort including 2-3 online sessions and are invited to attend Code for America Summit and Brigade Congress



TIMELINE

- March 31: Application deadline
- Late May: Fellows announced
- Early June: Fellowship Launch, Code for America Summit + Orientation*
- September - November: Site Visits*
- Mid-October: Public Interest Technology Summit
- Late October: Brigade Congress*
- Late November: Fellowship concludes
- = Government Partner invited

KEY TAKEAWAYS:

- It builds bridges for government leaders to share best practices via a nation-wide civic tech movement, with thousands of volunteers in 64 active chapters, called Brigades, which work with local governments to engage the community and improve services.
- The Community Fellowship Program pairs local Brigade talent with their local governments to address community challenges and help transform government from the inside out. Fellows spend 3-6 months collaborating with government staff, researching user needs, meeting with key stakeholders, and improving service delivery to vulnerable populations.
- The process will act as a vehicle for driving cultural and structural change inside of government — encouraging innovation, reducing risk by involving users early, and increasing capacity for serving the public.
- Fellows are highly sought-after engineers, designers, researchers, and project managers; just 5-10% of fellowship applicants were selected in past iterations of the Brigade. They are professionals who are passionate about applying user-centered, iterative, data-driven approaches to community challenges; fellows consider this a time of giving back and serving the public

PROGRAM/SOURCE: FUSE Corps – Executive Fellow Government Partnership Program

- Attended FUSE Corps national orientation reception in St. Louis at the Mayor’s Office and had notable discussions with the following individuals (April 29th, 2019)
 - Debbie Allen – FUSE Fellow, St. Louis
 - Ceantel Brathwaite – Associate Director of Recruiting, FUSE Corps
 - Numerous Incoming/Outgoing Fellows
 - Robert Hughes – CEO, Missouri Foundation for Health – FUSE Corps Foundational Funder
 - Lyda Krewson – Mayor, St. Louis
 - James Weinberg – CEO, FUSE Corps
- Interview with James Weinberg, Chief Executive Officer (May 8, 2019)
- <https://fusecorps.org/>

DESCRIPTION: FUSE is a national nonprofit that partners with local government to help urban communities thrive. FUSE works on a range of issues, including economic and workforce development, healthcare, public safety, climate change, and education. Their approach centers around an executive fellowship program. FUSE Corps works closely with government partners to co-create year-long fellowship projects based on their highest priority challenges. Fellows report to a project supervisor, a leader in the agency who directly supervises and supports the fellow with project goals. Fellows also work with an executive sponsor, a senior-level leader in the agency who communicates the fellow’s strategic role and value to key stakeholders. Fellows will also work with



other stakeholders whose responsibilities in the agency are directly related to the project. The cost of fellowships are covered through government partners or offset by philanthropic partners.

KEY TAKEAWAYS:

- Corporations don't want to lend their best talent for a year. Loaned executives are best for short-term projects and are often less committed to the work performed because they know they have their job waiting.
- Projects must have a clearly defined scope and deliverables. Fellows said this was important to them taking the position, funders said it was important in their decision to fund a specific project, and host agencies said it was important because it allowed them to track progress and measure success of the fellows.
- FUSE Corps initially targeted mid-career fellows with average experience of around 8 years, but switched their model after recognizing more experience fellows were driving greater change. They now targets executives with 15+ years of experience with an average over 20.
- Since 2012, FUSE has placed more than 140 fellows in over 80 local government agencies throughout the country. More than 50 percent of alumni have continued to work in roles in civic leadership after their fellowships, and 90 percent of our partner government agencies have returned each year with requests to host additional fellows.
- Flat fee of \$150,000 for a 12 month fellowship. Fee is paid in two installments of \$75,000 in January and July. Fellow is considered a contract employee of FUSE Corps and receives a \$90,000 stipend with no benefits.
- Spring fellowship cohort begins and ends in April, while our fall fellowship cohort begins and ends in October.

PROGRAM/SOURCE: Govern for America

- <https://www.govern4america.org/>
- <https://statescoop.com/govern-for-america-wants-to-solve-state-governments-workforce-problem/>

DESCRIPTION: Govern for America is building the next generation of public sector leaders to bridge the talent gap and bring diverse, passionate young people into government. Govern for America builds the pipeline into public service by connecting high-potential recent graduates to high-impact roles in state governments through a two-year fellowship program.

KEY TAKEAWAYS:

- Our public institutions are most effective and develop better solutions when they reflect the backgrounds and experiences of our communities.
- Unique opportunity to activate a network of civic leaders across the nation.
- Entrepreneurial leaders inside government, empowered with the right skills and mindset, can transform government to design policy around people and promote an agenda so we can better meet the needs of all residents and ensure that our leadership reflects the communities we serve.

PROGRAM/SOURCE: New Orleans – Loaned Executive Initiative

- Foundation for the Mid South. “Stepping Up: Loaned Executive Programs as a Tool to Improve Community Capacity”
- http://www.fndmidsouth.org/wp-content/uploads/2017/03/loaned_executive_final_10-1.pdf/



DESCRIPTION: “In the aftermath of Katrina and Rita, philanthropies sought ways to help communities and institutions in the Gulf, not only get back on their feet, but rebuild, maybe better than before. One innovative solution was to fund the salaries of loaned executives from business, nonprofits, and philanthropy to help with the effort. This report examines one loaned executive initiative launched in the wake of the disastrous storms of 2005. The initiative was designed to help the City of New Orleans build its capacity after the loss of nearly 30 percent of its municipal staff.”

KEY TAKEAWAYS:

- “While our joint effort focused on rebuilding a public institution in the wake of a catastrophic disaster, the model has applications in non-crisis contexts as well. Rural communities without broad human expertise and material resources; community organizations in need of seasoned perspectives and know-how to take their work to the next level; and public institutions in a position to move beyond business-as-usual could all benefit from the assistance of loaned executives.”
 - “The Foundation for the Mid South found that the Loaned Executive Program with the City of New Orleans was an effective strategy that produced tangible results. The presence of the loaned executives—with their skills, leadership, resources, and connections—helped key departments within the city to move forward with rebuilding efforts in a more timely and effective way.”
 - “For the loaned executives to be effective in any organization, clear delineation of roles and responsibilities should be established to ensure effective communicate to all parties involved.”
 - “Goals and expectation of loaned executives should be defined in the very beginning of the partnership.”
 - “New Orleans would have begun to find its way to recovery and a fresh start without loaned executives. But the city and its residents got there more quickly, with broader local input and more durable institutions and systems in place because of the talents and leadership of a cadre of loaned executives who stepped up to the task.”
-

PROGRAM/SOURCE: Results for America – Local Government Fellows

- <https://results4america.org/>

DESCRIPTION: Results for America’s Local Government Fellows program was founded in September 2014 to provide an advanced group of local government leaders in diverse and influential cities and counties across the country the knowledge and support to implement strategies that consistently use data and evidence to drive policy and budget decisions on major policy challenges. Results for America is helping decision-makers at all levels of government harness the power of evidence and data to solve our world's greatest challenges. Their mission is to make investing in what works the “new normal,” so that when policymakers make decisions, they start by seeking the best evidence and data available, then use what they find to get better results.

KEY TAKEAWAYS:

- We need to harness the power of evidence and data to solve the world’s greatest challenges.
 - Government leaders must have the will to seek out evidence and data on what works – and what doesn’t – and the courage to use what they learn. If governments invest in what works, we can dramatically improve the impact of public dollars and increase opportunities for all.
-

PROGRAM/SOURCE: Taproot Foundation

- <https://taprootfoundation.org/>



DESCRIPTION: Nonprofits often spend the majority of their funding on program delivery; therefore, there isn't always much funding left over to support critical operating functions like HR, IT, or marketing. The Taproot Foundation was established to ensure social change organizations have access to professional pro bono services by linking professionals with non-profits in need. The foundation views this as a "triple-win": nonprofits receive the support they need, companies build deeper relationships with their communities; and employees have the opportunity to apply their skills in new and meaningful ways. The foundation also notes that pro bono work can help companies meet HR objectives such as attracting, retaining, and developing their employees. The website shows a long list of partner corporations, including: American Express, Moody's, Morgan Stanley, Allstate, Prudential, Adobe, Monsanto, Hilton Worldwide, Macquarie Group, etc. In total, the Taproot Foundation has worked with 85 companies (50+ Fortune 500).

KEY TAKEAWAYS:

- While the volunteers in this instance may not be executive-level, loaning companies may value the opportunity to provide professional pro bono services as a means to engage and develop their employees.
 - "As of 2016, more than half of all companies engaged their employees in pro bono service programs".
-



SURVEY OF DEPUTY DIRECTORS

Q1

Does your department have an existing loaned executive and/or fellowship program?

Choice	Total
Yes	1
No	11

Q2

If yes, briefly explain:

Essay

Answers

Not department-wide. Limited to Children's Division (child welfare work) fellowship program. - DSS

We do have college partnerships with Wash U, Rockhurst, and St. Louis University. These provide 2 year associate degrees to our employees at no cost (inmates are also a part of this program, albeit separate classes). In addition, we have partnerships with universities to provide college credit for the Department's basic training. - DOC

Q3

Did your department spend any of its FY19 budget on consulting fees?

Multiple Choice

Choice	Total
Yes	10
No	2

Q4

If yes, what was the approximate amount?

Essay



Answers

\$475,000 - DOR

More than \$200,000. - MDC

I'm not sure of the total amount. I do know we had a larger than usual FY 2019 expenditure due to the Medicaid Transformation review. Total consulting fee expenditures for FY 2019 are at least \$3 million. Typically years or most likely between \$500,000 and \$1.0 million. This is on a budget of \$9.5 billion. - DSS

No idea, but had numerous consultants associated with grant requirements, HCBS assessment evaluation program, TCD and EMS requirements, and others. - HEALTH

\$572,935 - DMH

\$300,000 - DED

\$400,000 - DOC

\$50-60 million - MODOT

Talent for Tomorrow and Best in Midwest. - DED

Q5

If your department has used consultants in the past, how satisfied were you with the services provided?

Multiple Choice

Choice	Total
Extremely Satisfied	1
Very Satisfied	5
Moderately Satisfied	4
Slightly Satisfied	0
Not Satisfied	1

Q6



Please provide any additional comments you have as it relates to our final presentation to the Governor.

Essay

Answers

In state government (Executive Departments), staff are usually hired for specific day-to-day operational business. Using expertise from consultants who have a more broad expertise knowledge base from working with other government and/or private entities not only enhances the timeline of the project but also the successfulness of the project in most instances. - DOR

Note: numerous uses of consultancy ensures we have had both positive and negative experiences. - HEALTH

Just FYI - the consultant the DOC is utilizing is for organizational/cultural change and not related to fellowships. If the team has any questions or would like to discuss on a phone call, please feel free to call me at 526-6607. Matt Sturm, Deputy - DOC

Consultants are very useful to smooth out peaks and valleys in production or special projects. Expectations have to be clearly defined. Tough decisions are best left to those that have to own them. - MODOT



Opportunity

Missouri can improve operations by engaging the knowledge, experience, and skills of executives from across our state and nation. Other leading organizations seek external expertise to address their priorities as a matter of best practice. The State of Missouri should be no different, as our goal is to provide the best and most complete services to our citizens.

Private sector executives have shown a willingness to collaborate with public entities to take on unique leadership challenges and give back to their communities. Examples of such partnerships have occurred across the nation at the city, state, and federal levels.

FUSE Corps is an organization established to link skilled professionals with government entities to address critical projects. Organizations such as this further prove that this is a workable model and there is a willing supply of executive talent seeking to apply their skills in the public sector.

The public entity is not the only party that benefits from such partnerships:

- A Deloitte survey of private sector stakeholders shows that companies value skills-based volunteerism as an experiential professional development opportunity.¹ Given this, emerging executives may find such opportunities valuable as a leadership development experience to further their career.
- Established or recently retired executives may see an opportunity to give back to their community and enhance their legacy.

Situation

The pursuit of operational excellence is complex and diverse. Given the state's current aspirations, there are two challenges that arise:

- The specific expertise, skills, or experience may not be readily available from the state workforce or senior leadership to address such matters.
- External candidates best suited to address such issues may not be willing to alter their current career trajectory to move into permanent state service, in spite of a strong desire to give back to their community.

These challenges stall momentum and adversely impact state operations and the citizens we serve until the traditional recruitment and hiring process can fill the void.

There are several world-renowned companies headquartered in Missouri that have highly regarded expertise in areas that align with the State of Missouri's strategic priorities. Access to the insights of these companies' executives would be an invaluable resource for the state.

However, Missouri currently has no clear statewide framework to engage external executives from these companies to aid in the state's transformation into a leading organization.

¹ Source: Deloitte. "2016 Deloitte Impact Survey" June 2016, www2.deloitte.com/us/en/pages/about-deloitte/articles/citizenship-deloitte-volunteer-impact-research.html.



Recommendation

Our recommendation is to establish the Missouri Executive Partnership Program as a framework to place external executives into temporary state government service by the end of 2019.

This recommendation encapsulates efforts of various entities across all sectors that have established fellowship or loaned executive programs to address the strategic priorities of their organization. The proposed model reflects the best practices of leading programs while distinguishing itself from existing models by targeting seasoned executives within two distinct executive partnership opportunities.

These executives will lead initiatives and address our strategic priorities. Identification and scoping of projects can begin immediately, with outreach to the private sector within 90 days.

The following tables outline the two proposed tracks, examples of other projects, and a summary of strategic priorities for the State of Missouri that our proposed framework could address:

Missouri Executive Partnership Program Framework		
Partner	Project Term	Project Examples
Loaned Executive	3-6 month projects	<ul style="list-style-type: none"> In the aftermath of Hurricane Katrina, loaned executives used their skills, leadership, resources, and connections to move forward with rebuilding efforts in New Orleans in a timely and effective way. Experts from eight private sector companies worked together on the State of Missouri Task Force on Fleet Management to identify more than \$2 million in potential savings.
FUSE Corps Fellow	1-2 year projects	<ul style="list-style-type: none"> An initial scoping call has been completed with DOLIR for a project related to data management and analytics. FUSE Corps has previously undertaken a similar project with the California Health and Human Services Agency.

State of Missouri — Strategic Priorities		
Data-Driven Management	Talent Management	Strategic Communications
<ul style="list-style-type: none"> Cross-department data strategy and roadmap Analysis of program data to improve design New performance management systems 	<ul style="list-style-type: none"> Talent recruitment practices, staffing, and structure Executive coaching and leadership development Retention strategies for high turnover positions 	<ul style="list-style-type: none"> Building effective internal communication strategies Establishing external engagement structures Enhanced marketing and social media efforts



Our department currently hosts a fellow or loaned executive, with this new program will the department have to forego its existing relationships?

No. The Capstone Team recommends that the department keep its existing program(s). More than likely the department's existing relationships are working on items of importance that assist daily operations or immediate needs within the department. The Missouri Executive Partnership Program is envisioned to accelerate two areas of need: 1) high priority areas that can assist the overall operations and effectiveness of the state, 2) an opportunity for departments to vision out five to ten years and what a 'partner' can do to help achieve that vision.

What currently exists in the State?

Our recent survey of Department Deputies revealed that two departments currently host a fellowship type of program (Department of Higher Education and Department of Social Services), and the Department of Corrections has multiple higher education relationships for associate level students to participate in department operations.

Which corporations will be approached?

The approach to corporations will be tailored and targeted based on the project. Corporations who are well-known to excel in the identified project areas are likely prospects. Corporations with a strong Missouri presence and/or headquartered are well positioned to be contributors.

Who owns this program?

Our recommendation, while the program is in its infancy, is for the program to be managed by one of the departments that have high interaction of Missouri's corporate community, like the Department of Labor and Industrial Relations, and administratively supported by the Office of Administration's Personnel Office.

I'm not sold on this new program, what value will the loaned executive or FUSE fellow provide to the state?

In both models (Loaned Executive & FUSE Corps), the program provides a unique opportunity to introduce seasoned external experts to work on high impact initiatives for both the state and for departments in a very condensed timeframe.

Who selects the projects for the partners to work on?

Loaned Executive Process: Our project team recommends the loaned executive model follow a formal selection process where a governance sub-committee is formed to debate five to seven potential projects that can have systemic change to state operations. The sub-committee submits its recommendation for the three to five projects to the Deputies Council for debate and approval; the Cabinet has final approval along with the prospective corporations to be approached by the Governor.

FUSE Corps: The model follows a different path and department driven, leaders from the departments can identify projects of significance the can accelerate overall department objectives. The program will follow an annual plan of work and cadence for FUSE Corps to organize project scopes, coordinate recruitment efforts and interviews, and ultimately select and orientate a class of FUSE Corps partners.



What is the length of time the partner will provide to the state and/or our department?

Loaned Executive Partner: 3 to 6 months, at most a year (but a rare occasion).

FUSE Corps Partner: 12 months, with an option for a second year of service (case by case).

What costs are associated with the Missouri Executive Partnership Program?

Loaned Executive Partner: The cost to host the loaned executive is sponsored by the donating Corporation who provides the executive, who underwrites the executives existing salary and benefits. The state will need to provide administrative and operational support to the executive (i.e. access to administrative staff, badge, computer, phone, office supplies).

FUSE Corps Partner: Annual cost to host the FUSE Corps Partner is \$150,000, which covers the cost of the contracted services and the corresponding administrative functions (recruitment, selection, placement, training, orientation, and on-going support during the term of the arrangement). FUSE Corps' actual cost for the program is \$190,000, but with the support of foundations and sponsors are able to offer the program at a \$40,000 discount to the host entities.

My Department is interested in hosting a FUSE Corps Partner, but we have very limited resources to dedicate to this endeavor, do we have any options?

Yes. Depending on the department and project there may be an opportunity to partner with foundations to help cover some (or most) of the FUSE Corps Partner. FUSE has a number of examples where foundations (and other partners) have assisted in underwriting their fellow. Scoping out the department's project will aid in identifying the outcome, deliverables, and potential partners who could assist.

Why would corporations loan their specialized talent to work on state issues?

The opportunities the State of Missouri can provide are issues of critical importance and need specialized expertise; the sample projects identified in the Executive Summary will appeal to Missouri's Corporations and their talent for four primary objectives:

- **Leadership Development** – Corporations spend a lot of resources on leadership and professional development opportunities for the aspiring and highly talented professionals. The Missouri Executive Partnership Program is envisioned as just that, an opportunity for the company to provide a talented leader a completely different, yet fulfilling, challenge. The experience can be utilized as an experiment to see if the leader is capable to handle more responsibility.
- **Understanding State Governance** – Multi-national companies frequently interact with the state via business development programs, regulation, labor, taxation, and various other agencies depending on the type of industry sector. Involving their executive talent within state operations for an extended period of time will allow the company to understand state processes, establish better connections throughout the state, and gain valuable insight on the direction of state operations.
- **Philanthropic purposes** – Corporations of today embrace philanthropy as part of their core mission and values, regularly challenging corporate leaders to participate and create new ways to make lasting impact. Currently many donate annually to a number of different and worthwhile causes, most of the donations provided through traditional avenues such as cash or the gifting of company products or services. This Missouri Executive Partnership Program is a premier way the corporation



can give back to the communities they serve (the State), as well as provide an opportunity to produce a legacy product for the State to implement.

- Recognition – Much of the approach to Corporations will focus on professional development and the ability to give back; Corporations do seek and appreciate the recognition to provide such a valuable service. The State of Missouri can and should provide regular and consistent recognition of such a generous donation. Such recognition helps the company build brand awareness, receive accolades from their superiors or corporate headquarters, and a sense of purpose beyond selling the product or service.

Why would executive talent from across the country want to work in Missouri state government?

Interestingly enough, seasoned executives from across the country from a wide array of industry sectors, who have successfully managed their careers and lifestyles, are in fact researching a pivot in their mid or post-career choices. Our research with FUSE Corps has revealed interesting facts:

- Average length of career of prospective candidates is 18+ years in their field
- More than 50 percent of alumni have continued to work in roles in civic leadership after their fellowships
- All the candidates see these opportunities as a way to give back, participate in a cause with significant impact, an opportunity to propel their career in a completely different direction, or provide a lasting legacy in the final phases of their working career

All of which can be accomplished through the various projects and initiatives yet to be defined by participating departments.

Will the state be required to competitively bid out the Missouri Executive Partnership Program as a contract for services?

Loaned Executive Partner: The salary and benefits for the Partner will be covered by the corporation during the project period timeframe. To ensure a successful arrangement, a memorandum of understanding will be crafted to address coverage of expenses, project scope, timeline, expectations, and deliverables. The State will be responsible to provide to the Partner the necessary administrative, technology, and travel support.

FUSE Corps Partner: Our recommendation would be to pursue a single feasible source waiver with the Office of Administration for the arrangement with FUSE Corps. The following excerpt from FUSE Corps leadership, *"This is the case in almost every one of our 22 current and recent government partners with which we work. Our prospective host agencies generally seek out a sole-source waiver, which makes the case that it is unique and not otherwise provided by any other entity. FUSE Corps service is of a proprietary nature and has the corresponding intellectual property contained in our training materials as the basis for the waiver. FUSE Corps would be happy to talk further with the procurement team if that would be helpful and if needed to explore how best to position FUSE for a waiver."*

As a courtesy, the Legal Team with the Office of Administration, is currently reviewing the FUSE Corps Master Agreement sample provided to the Capstone Team. The State of Missouri anticipates items of concern or areas of inconsistency with Missouri State Statutes will be identified and addressed within in the single-feasible source request.



What are the options if the partner the department receives is not working out?

Loaned Executive Partner: The owner of the program would arrange a conversation with the Executive to discuss ways to improve the relationship and provide redirection. If issues still exist, a direct conversation with the Corporation's point of contact would need to occur and professionally articulate a change in the Executive's participation on the project.

FUSE Corps Partner: The State's Master Agreement will clearly articulate early termination of either a single partner placement or the overall agreement within the 30 days advance notice prescribed in the document. Pro-rated reimbursements could occur depending on the timing of the notice and request to terminate. Host departments will receive clear timelines and benchmarks to effectively manage the new FUSE partner.



INSTRUCTION GUIDE ON THE DEPARTMENT OF HOMELAND SECURITY LOANED EXECUTIVE

PROGRAM

I. Purpose

- A. This Instruction implements the Department of Homeland Security (DHS) Directive 084-01, Department of Homeland Security Loaned Executive Program.
- B. DHS implements and administers this Program in accordance with Agency policy as provided by the Office of the Under Secretary for Management.

II. Scope

- A. This Instruction applies throughout DHS.
- B. The Office of the Inspector General (OIG) is exempt from this directive per 5 USCA, App. 3, § 6.

III. Reference

DHS Management Directive 3010.2, “Employment of Experts and Consultants,” dated March 22, 2004.

IV. Definitions

- A. **Loaned Executive Program (LEP)**: Mechanism by which DHS can obtain expertise from the private sector to provide critical skills that cannot be obtained through other existing hiring mechanisms.
- B. **Loaned Executive**: An unpaid, temporary Federal employee with specialized private sector expertise.
- C. **Private Sector Employer**: The employer of the Loaned Executive working in the Loaned Executive program.



V. Content and Procedures

A. Length of Appointment

Initial appointments may be made for a period of at least three months and no more than one year. The loaned executive may be reappointed for additional periods with the total appointment not to exceed two years.

B. Termination of Appointment

1. LEP appointments may be terminated by DHS at any time it is determined that the Loaned Executive:

- a. Provides services which are no longer needed;
- b. Has a conflict of interests;
- c. Violates or refuses to sign a nondisclosure agreement;
- d. Performs at an unacceptable level as outlined in the Component assignment description and Appendix [E](#) & [E](#).

2. Specific procedures will be discussed with OCHCO in advance of notifying any expert or consultant of termination.

C. Identifying Need for Loaned Executive

To initiate an assignment, the appropriate official from the proposing office must:

1. Complete the assignment description form ([Appendix A](#)) which clearly identifies the work to be performed during the assignment. The assignment description must also include:
 - a. The name and title of the proposing official. Note: This must be the most senior person in the chain of supervisors and must be at the Executive Director level or higher. This authority is not delegable.



b. The name and title of the official responsible for overseeing the assignee and for monitoring the Loaned Executive's contact with the private sector employer during the course of the assignment. The responsible official will ensure compliance with the current employment and other restrictions outlined in the assignment description. In the absence of a designated responsible official, the proposing official will also serve as the responsible official.

2. Submit the assignment description form to the Assistant Secretary of the Private Sector Office (PSO) who will circulate the assignment description form to the Office of Chief Human Capital Officer (OCHCO), Office of General Counsel (OGC)/General Law Division (GLD), Office of the Chief Procurement Officer (OCPO) and the Designated Ethics Official (DAEO).

D. Certifying Appropriate Use of LEP

1. OCHCO, OGC/GLD, OCPO, DAEO and PSO will review the assignment description form to ensure appropriate use of the LEP.

2. For additional information on alternative methods of employing temporary expertise and the limitations listed below, reference MD 3010.2 on the Employment of Experts and Consultants, MD 3020.1 on Schedule C Positions and Appointments, MD 3150.1 on Non Career and Limited Senior Executive Service Employment, MD 3030.1 on the Senior Executive Service Merit Staffing Plan and MD 3130.2 on Employee Details.

3. DHS **may not** use Title 5, U.S.C., 3109 to appoint individuals:

a. To a position requiring Presidential appointment.

b. To a position in the Senior Executive Service (SES).

c. To perform managerial or supervisory work (although an expert may act as team leader or director of the specific project for which he/she is hired), to make final decisions on substantive policies, or to otherwise function in the DHS chain of command (e.g., to approve financial transactions, personnel actions, etc.).

d. To do work performed by DHS's regular employees (with the exception of project work related to program goals and objectives where the executive may work on a team with regular DHS employees).



- e. To fill in during staff shortages.
 - f. Solely in anticipation of giving that individual a career appointment. However, subject to the conditions of this part, DHS may appoint an individual to an expert or consultant position pending Schedule C appointment or non-career appointment in the Senior Executive Service.
 - g. To do work traditionally performed by a contractor or a personal services contractor.
 - h. To do work performed pursuant to the Intergovernmental Personnel Act (IPA).
4. With the approval of the assignment description form by OCHCO, OGC/GLD, OCPO, DAEO and PSO, the solicitation of applicants may begin.

E. Soliciting Applicants

- 1. The PSO will solicit applicants in as public a manner as possible, specifically to include issuing a press release with the job description and consulting with associations whose members would be likely to have the expertise being sought.
- 2. Upon receipt of the applications, PSO will assemble them for review by the proposing Component.

F. Selecting Applicants

- 1. Selection Criteria
 - a. For both the private sector and DHS to realize the maximum benefit from this Program, private sector personnel must have a certain level of experience in the areas defined in the assignment description provided by the Component. A security clearance may be required.
 - b. To be eligible for an appointment to DHS under this Program, in addition to meeting the requirements of Title 5, CFR, Part 304, candidates must meet citizenship requirements for Federal employment in accordance with Title 5, CFR, Section 302.203, as well as any other legal limitations.
- 2. The proposing Component will review the applications and



select the candidate for the approved assignment description.

3. The proposing Component will advise PSO of its selection and the PSO will notify the selected candidates. At that point, the candidate will begin the clearance process.

G. Getting clearance information from the selected Loaned Executive

1. The proposing office will provide the selected Loaned Executive with the appropriate forms for clearance, ethics, and background checks.

2. The proposing office will complete section A of the Loaned Executive Program Clearance Sheet ([Appendix B](#)) and forward it with any applicable forms, the assignment description form, a conflict of interests form, and the selected Loaned Executive's resume to the Office of the Chief Human Capital Officer (OCHCO).

H. Clearing the selected Loaned Executive

1. OCHCO will concurrently forward the Loaned Executive package (including [Appendix A](#), [B](#), [C](#), [D](#), [E](#), & [F](#)) to the Office of the Chief Procurement Officer (OCPO), Designated Agency Ethics Official (DAEO), Office of General Counsel (OGC) / General Law Division (GLD).

2. OCPO will review the package regarding the extent and nature of the business the private sector employer currently does, or intends to do with DHS.

a. OCPO will identify the nature and status of any interests that the candidate's PSE has that involve DHS,

b. If the PSE has interests that involve DHS, OCPO will work with the proposing official, the DAEO, and Component procurement and ethics officials, in investigating, evaluating, and resolving the nature and degree of any conflicts, including those addressed in 48 C.F.R. Subpart 9.5, Organizational and Consultant Conflicts of Interests. In appropriate cases, the OCPO will work with the above listed parties and the PSE to develop an Organizational Conflict of Interests Avoidance and Mitigation Plan.

c. Following any necessary coordination with the proposing official and the DAEO, the DHS Office of Procurement will sign off on the Loaned Executive Program Clearance Sheet ([Appendix B](#)) and forward the Loaned Executive Package, along with its



Procurement Determination Memorandum ([Appendix C](#)) to OCHCO.

3. The Designated Agency Ethics Official (DAEO) will review for any conflicts.

a. If there are matters that may present a conflict the DAEO will work directly with the proposing office, including their ethics officials, OCPO, and the nominee to evaluate them. (Note: in these cases, the ethics determination must include a description of the matters identified and the required remedies that would permit the assignment.) The DAEO will clear the candidate once identified conflicts have been resolved.

b. If there are irresolvable ethical conflicts, the assignment cannot be made with that particular nominee the Loaned Executive package will be returned to OCHCO. OCHCO will notify the proposing office and the PSO.

c. If there are no irresolvable ethical conflicts, the DAEO will sign off on the Loaned Executive Program Clearance Sheet ([Appendix B](#)) and forward the Loaned Executive Package, along with an Ethics Determination Memorandum ([Appendix D](#)) and the completed conflict of interests statement ([Appendix E](#)) to OCHCO.

d. Certain irresolvable ethical conflicts are listed in the federal ethics rules, which include, but are not limited to:

Where the LE candidate is unable or refuses to disqualify him or herself from any further actions on a contract or other particular matter, obtain waivers or divest financial holdings or where the disqualifications resulting from his conflicts of interests are so significant that he could not readily do his prescribed LE duties.

4. The selected Loaned Executive will be required to sign a non-disclosure agreement ([Appendix F](#)). OGC will forward its clearance to OCHCO.

I. Entering on Duty

1. After approval of the Loaned Executive, offers of appointment will be made by DHS and administered by the Office of the Chief Human Capital Officer (OCHCO) in accordance with applicable policies, laws, rules, and regulations.



2. OCHCO will make appropriate arrangements in coordination with the servicing Human Resource office (as appropriate) per existing policies and procedures for the individual's entry on duty to include the report date, new employee orientation, security badging, space and equipment needed to perform tasks outlined in the assignment description.
3. Generally, an individual is appointed to the duty location where they are expected to perform work for the agency. If the work is to be performed in Washington, D.C., the duty location must be Washington, D.C.
4. There is no authority to pay travel expenses for the Loaned Executive to return to his/her private sector employer's facilities.

J. Reporting Requirements

Title 5, CFR, 304.107 does not establish a reporting requirement regarding the use of **unpaid** experts or consultants appointed under Title 5, CFR, Part 304. However, the following internal reporting is required:

1. Consistent with the provisions of DHS Management Directive 3010.2, "Employment of Experts and Consultants," at the request of OCHCO, each DHS Component where an Loaned Executive is employed shall provide a listing of current Loaned Executive appointments.

This report will provide the nature of the appointment, the name of the individual, a statement that the Loaned Executive is unpaid, a brief statement of the purpose, and the duration of the appointment.

2. Any request for an extension of an appointment by the DHS Component, or a reappointment after a break in service, shall include a detailed description of previous appointments including the information listed above plus the number of days or hours the expert or consultant worked in the previous appointment.

VI. Questions

- A. Address any questions or concerns regarding this Instruction to the Private Sector Office, within the Office of Policy.
- B. This Instruction Guide contains six appendices to assist with the private sector loaned executive program:


[Appendix A](#) Assignment Description Form



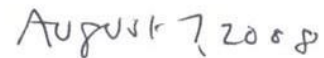
Appendix D.1

Loaned Executive – MOU

- [Appendix B](#) Loaned Executive Program Clearance Sheet
- [Appendix C](#) Procurement Determination Regarding the Appointment of Unpaid Loaned Executive to DHS
- [Appendix D](#) Ethics Determination Regarding the Appointment of an Unpaid Loaned Executive to DHS
- [Appendix E](#) Acknowledgement of Conflict-of-Interests Matters in Connection with Loaned Executive Program
- [Appendix F](#) Non-Disclosure Agreement



Stewart A. Baker
Assistant Secretary for Policy



Date

SAMPLE



APPENDIX A

DEPARTMENT OF HOMELAND SECURITY

**ASSIGNMENT DESCRIPTION FORM
LOANED EXECUTIVE PROGRAM**

(To be completed by Originating Office)

Assignment Description (1-2 paragraphs):

+Proposing Official (Name, Title, Signature and Date):

(Program assignments may be proposed only by the most senior person in the chain of supervisors and must be at the Executive Director level or higher. This authority is not delegable.)

Responsible Official (Name, Title, Signature and Date):

SAMPLE



APPENDIX B

DEPARTMENT OF HOMELAND SECURITY

LOANED EXECUTIVE PROGRAM CLEARANCE SHEET

Section A Date:

To: Chief Human Capital Officer

From (Name and Title of Proposing Official):

Proposing Office (Name and Geographic Location):

Name of Proposed Loaned Executive:

Proposing Office Contact Point (Name, phone number and email address) Private

Sector Employer Contact Point (Name, phone number and email address) Section B

Office	Clearing Official	Approve	Disapprove	Notes	Date
Chief Procurement Officer					
		Procurement Determination Memo attached			
DAEO Ethics Officer					
		Ethics Determination Memo attached, Appropriate Financial Disclosure Report , Conflict of Interests Statement			
OGC/GLD					
		Non-Disclosure agreement			
CHCO					



APPENDIX C

DEPARTMENT OF HOMELAND SECURITY

PROCUREMENT DETERMINATION REGARDING THE APPOINTMENT OF UNPAID LOANED EXECUTIVE TO DHS

MEMORANDUM FOR CHIEF PROCUREMENT OFFICER

FROM: (Insert Name and Title of Appropriate Proposing Official)

SUBJECT: Procurement Determination regarding the Loaned Executive Program

I would like to appoint **(insert name of proposed Loaned Executive)** as an unpaid, temporary Loaned Executive to the Loaned Executive Program. Attached are the proposed Loaned Executive’s resume and a description of the assignment.

The proposed Loaned Executive is a current employee of **(insert full name and address of private sector employer)**. In accordance with the policy governing the Loaned Executive Program, I am requesting a determination from your office regarding the extent and nature of the business the private sector employer does or intends to do with DHS.

Please indicate your determination below.

My office has determined that other than being the proposed assignee’s employer, the private sector employer has no interests in DHS.

My office has identified matters that must be evaluated before this assignment can take place. (Attach a description of the matters and how they involve DHS and necessary remedies, to include a draft Organizational Conflict of Interests (OCI) Avoidance & Mitigation Plan with recommendations).

Signature of Chief Procurement Officer

Date



APPENDIX D

ETHICS DETERMINATION REGARDING THE APPOINTMENT OF AN UNPAID LOANED EXECUTIVE TO DHS

MEMORANDUM FOR LEGAL ADVISOR FOR ETHICS

FROM: (Insert Name and Title of Appropriate Proposing Official)

SUBJECT: Ethics Determination Regarding the Appointment of an Unpaid Loaned Executive to DHS.

I would like to appoint **(insert name of proposed Loaned Executive)** as an unpaid, temporary Loaned Executive to the Loaned Executive Program. Attached are the proposed Loaned Executive’s resume a description of the Loaned Executive’s anticipated duties, and his or her financial disclosure report.

The proposed Loaned Executive is a current employee of **(insert full name and address of private sector employer)**. In accordance with the policy governing DHS, I am requesting a determination as to any conflict under Executive Branch Standards of Conduct that is likely to be presented by assigning this individual to these duties. If you determine that a conflict is possible, please provide information regarding what steps would need to be taken to eliminate the conflict or appropriately minimize the potential of encountering it.

Please indicate your determination below.

- My office has determined that the proposed Loaned Executive has no interests or affiliations that might conflict with the assignment.
- My office has identified matters that must be resolved before this assignment can take place. (Attach a description of the matters and the necessary remedies)
- My office has determined that there are irresolvable conflicts that would prohibit this particular Loaned Executive from serving in this assignment.

Signature of Legal Advisor for Ethics, DAEO

Date



APPENDIX E

DEPARTMENT OF HOMELAND SECURITY

**ACKNOWLEDGEMENT OF CONFLICT-OF-INTERESTS MATTERS IN
CONNECTION WITH
LOANED EXECUTIVE PROGRAM**

The employee will serve as an unpaid, temporary Loaned Executive at the Department of Homeland Security (DHS) without compensation for a period not to exceed one year. The employee's private sector employer, at its discretion, may continue paying a salary and health and retirement benefits to the employee during the employee's service at DHS as a Government employee. The employee's continued participation in any profit sharing plan will be allowed only if consistent with the conflict-of-interests requirements referenced below.

The employee, while serving at DHS, is a Federal employee and is subject to the Federal conflict-of-interests laws and regulations for employees in the Executive Branch, including the post-Government-service restrictions in 18 U.S.C. § 207, set out in Title 18, United States Code, Part I, Crimes, Chapter 11, Bribery, graft, and conflicts of interests, and Title 5, Code of Federal Regulations, Parts 2634, Executive branch financial disclosure, 2635, Standards of ethical conduct for employees of the executive branch.

DHS will not ask the employee to, nor may the employee work on matters that will have a direct and predictable economic impact on any of the employee's interests or affiliations or those imputed to him or her, specifically including the employee's private sector employer, unless a waiver is granted pursuant to Title 18, U.S.C., § 208(b)(1).

The employee will not work on procurement matters in which the private sector employer may have an interest regardless of the degree of the private sector employee's interest in procurement. Also, the private sector employer may advise DHS from time to time as to DHS matters, current or anticipated, in which the private sector employer does not want the employee to participate.

DHS will not ask the employee to work on, nor may the employee work on, matters that will have a direct and predictable economic impact on his or her financial interests or affiliations or those of persons or entities whose interests are imputed to him or her.

The employee, while serving at DHS, will be required to comply with the President's Principles of Ethical Conduct for Government Officers and Employees, Executive Order 12731, and the conflict-of-interests laws and regulations for employees in the Executive Branch, including the post-Government-service restrictions in Title 18, U.S.C., § 207.



APPENDIX E

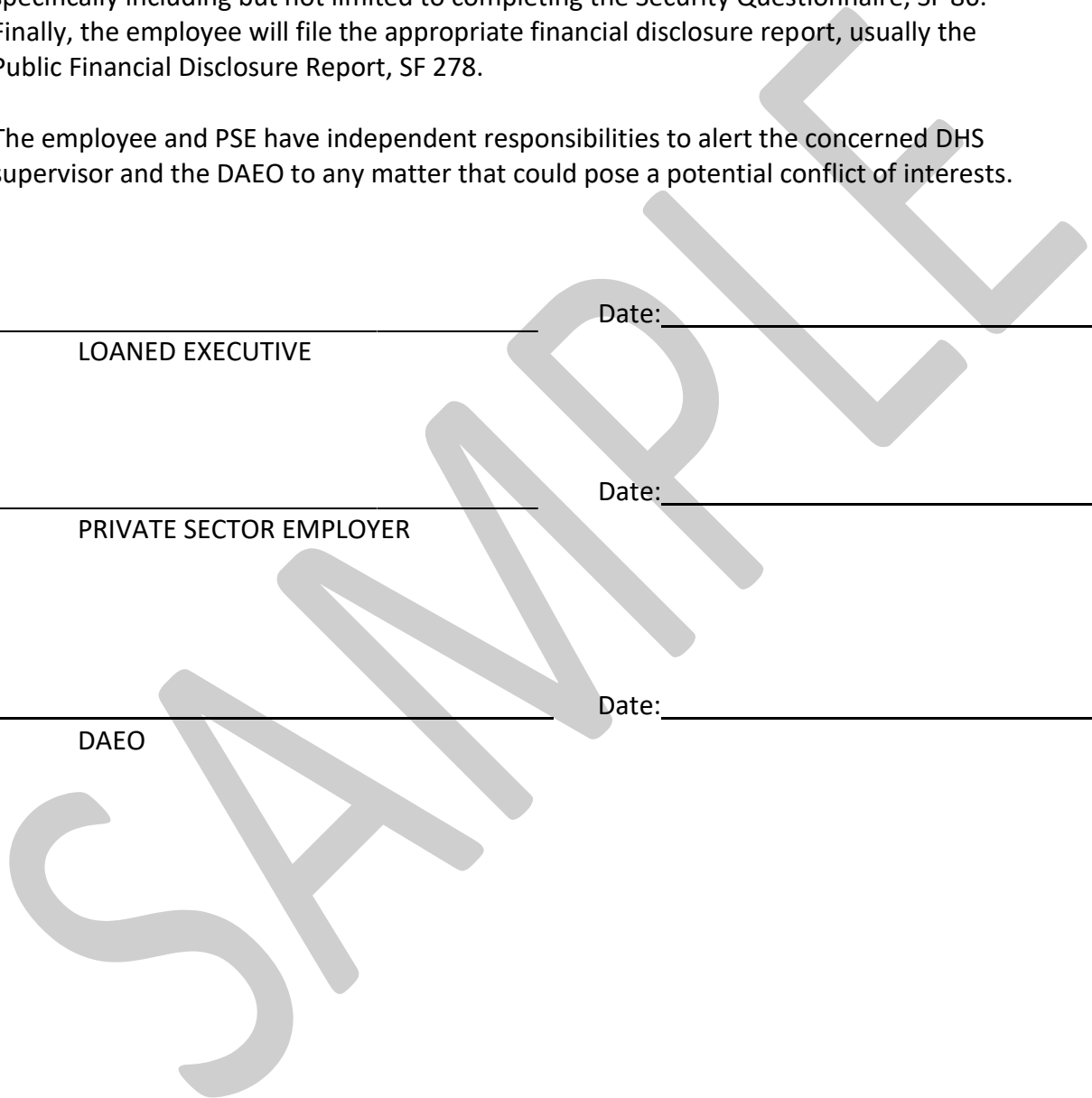
Prior to beginning working for DHS, the employee will sign a nondisclosure agreement prohibiting him or her from disclosing non-public information obtained during his or her service with DHS. Also, the employee will be required to present proof of or apply for any security clearance required to perform the duties to which he or she will be assigned, specifically including but not limited to completing the Security Questionnaire, SF 86. Finally, the employee will file the appropriate financial disclosure report, usually the Public Financial Disclosure Report, SF 278.

The employee and PSE have independent responsibilities to alert the concerned DHS supervisor and the DAEO to any matter that could pose a potential conflict of interests.

LOANED EXECUTIVE Date: _____

PRIVATE SECTOR EMPLOYER Date: _____

DAEO Date: _____





APPENDIX F

DEPARTMENT OF HOMELAND SECURITY

**NON-DISCLOSURE AGREEMENT
LOANED EXECUTIVE PROGRAM**

The purpose of this agreement is to ensure that nonpublic information, which is obtained by virtue of working at the Department of Homeland Security (DHS) is not disclosed by the unpaid, temporary Loaned Executive of DHS to persons, companies, or organizations outside the Federal Government; and that such information is not used by such entities to obtain an unfair advantage.

AGREEMENT

As a DHS unpaid, temporary Loaned Executive, I, the undersigned, agree that I will not disclose to any person, company, or organizations outside the Federal Government any nonpublic information learned by me as a result of my work at DHS the disclosure of which might, directly or indirectly, afford any person, company, or organization an unfair competitive advantage or otherwise further any private interests. With respect to procurements, such information shall include, but not be limited to, information regarding discussions and plans or decisions relating to an acquisition, unless the release of the information is expressly authorized in writing by appropriate DHS officials. With respect to information that pertains to internal agency communications, such nonpublic information shall include, but not be limited to, acquisition plans, budgeting information, source selection plans, source selection evaluation memoranda or reports, technical analyses and recommendations, unless the release of the information is expressly authorized in writing by appropriate DHS officials.

I also agree that I will obtain approval from the appropriate DHS official(s) prior to the release of any official DHS information, in accordance with the DHS policies in effect at the time the disclosure is to take place. This includes, but is not limited to, information to be provided in any litigation or to Federal, Tribal, State or local legislative representatives or their staffs, speeches, editorial comments, manuscripts or other works I author, and responses to media requests.

I am aware of and will abide by the requirement of Title 18, U.S.C., § 1905, which provides: "Whoever, being an officer or employee of the United States or of any department or agency thereof, any person acting on behalf of the Office of Federal Housing Enterprise Oversight, or agent of the Department of Justice as defined in the Antitrust Civil Process Act (15 U.S.C. 1311–1314), or being an employee of a private sector organization who is or was assigned to an agency under chapter 37 of title 5, publishes,



divulges, discloses, or makes known in any manner or to any extent not authorized by law any information coming to him in the course of his employment or official duties or by reason of any examination or investigation made by, or return, report or record made to or filed with, such department or agency or officer or employee thereof, which information concerns or relates to the trade secrets, processes, operations, style of work, or apparatus, or to the identity, confidential statistical data,

SAMPLE



APPENDIX F

amount or source of any income, profits, losses, or expenditures of any person, firm, partnership, corporation, or association; or permits any income return or copy thereof or any book containing any abstract or particulars thereof to be seen or examined by any person except as provided by law; shall be fined under this title, or imprisoned not more than one year, or both; and shall be removed from office or employment.”

For the purposes of this agreement and the standards of ethical conduct in Part 2635 of Title 5, Code of Federal regulations, nonpublic information is information that the intermittent consultant gains by reason of Federal employment and that he or she knows or reasonably should know has not been made available to the general public. It includes information that he or she knows or reasonably should know:

- (1) Is routinely exempt from disclosure under the Freedom of Information Act, Title 5, U.S.C., § 552, or otherwise protected from disclosure by statute, Executive order, or regulation;
- (2) Is classified in the interests of national security under Executive Order 12958 as amended by Executive Order 13292, is protected information (Sensitive Security Information, PClI, etc.) bears the legend For Official Use Only or Controlled Unclassified Information, or is otherwise marked, denominated, or determined by the Government not to be suitable for disclosure outside of authorized official channels; or
- (3) Has not actually been disseminated to the general public and is not authorized to be made available to the public on request. See Title 5, CFR, § 2635.703(b).

I agree to immediately report to DHS any potential or possible violation of this agreement.

LOANED EXECUTIVE: _____

SIGNATURE: _____

DATE: _____



**MASTER AGREEMENT
BETWEEN THE STATE OF [_____] AND
FUSE CORPS, A CALIFORNIA, NONPROFIT CORPORATION**

THIS MASTER PLACEMENT AGREEMENT (“Agreement”) is made and entered into by and between FUSE Corps, a California nonprofit corporation (“FUSE”) and the State of [____], a [____] (the “State”).

RECITALS

WHEREAS, FUSE is a nonprofit organization that operates an executive-level fellowship program with a mission to enable local government to more effectively address the most pressing challenges facing urban communities; and

WHEREAS, FUSE recruits, supports, and places individuals (the “Fellows” and each, a “Fellow”) enrolled in the FUSE Fellowship program (the “Program”) with governmental entities for twelve-month fellowships; and

WHEREAS, in connection with the Program, the State, through its various departments, may at its discretion accept one or more Fellows during the term of this Master Agreement to participate in service opportunities with the State;

WHEREAS, it is the intent of the parties that one or more different State departments may participate in the Program by agreeing to place one or more Fellows in accordance with the terms and conditions of an Individual Placement Agreement in substantially the form attached hereto as Attachment 1 (a “Individual Placement Agreement”);

WHEREAS, the parties agree that funding commitments shall be set forth in each Placement Agreement by the State department that has requested the Fellow(s); and

WHEREAS, it is the intent of the parties that this Master Agreement shall govern the general terms and conditions between the State, including all of the participating State departments, and FUSE as it relates to the State’s participation in the Program; and

NOW, THEREFORE, in consideration of the premises and mutual terms, covenants and conditions contained herein, and for other good and valuable consideration, the receipt, adequacy and sufficiency of which are hereby acknowledged, the parties hereto hereby agree as follows:

Term and Effective Date. The Term of this Agreement shall commence as of [____, __, 201_] and expire on [____, __, 201_], unless earlier terminated by the parties in accordance with the terms of this Agreement (the “Term”). During the Term, all State departments wishing to participate in the Program must adhere to the terms of this Agreement.

Program Timetables. FUSE operates two program cycles per year:

The first program cycle (the “Fall Cohort”) includes projects that have executed Placement Agreements by May 31st of a given calendar year; that conduct recruitment and selection of



Fellows from June through August of that year; that offer a weeklong Orientation for new fellows in late September of that year; and whose projects begin during the first week in October of that year and then continue for 12 months (such twelve-month period, the “Fall Cohort Program Year”) until their conclusion in September of the following calendar year.

The second program cycle (the “Spring Cohort”) includes projects that have executed Placement Agreements by November 30th of a given calendar year; that conduct recruitment and selection of Fellows from December of that year through February of the following calendar year; that offer a weeklong Orientation for new fellows in late March; and whose projects begin during the first week in April and then continue for 12 months (such twelve-month period, “the Spring Cohort Program Year”) until their conclusion in March of the following calendar year.

As used in this Agreement, “Program Year” shall refer to either the Fall Cohort Program Year or the Spring Cohort Program Year.

Placement. Upon completion and execution by State and FUSE of a Placement Agreement for a Fellow, FUSE shall place such Fellow with the State in accordance with the Placement Agreement, and the State shall accept such placement and provide the Fellow with the requirements set forth in the Placement Agreement. Each State Department that wishes to place one or more Fellows shall submit a Placement Agreement to FUSE for such Fellow(s) no later than the deadline associated with the given program cycle, which is May 31st for the Fall Cohort and November 30th for the Spring Cohort.

Services. The services to be provided by FUSE under this agreement for each Fellow that the State agrees to place are summarized in Attachment 1, the Individual Placement Agreement.

Program Fee. During the Term, State will pay \$150,000 per Fellow to FUSE (the “Program Fee”). The Program Fee constitutes a flat-fee payment in exchange for the mutually-agreed value of the services to be provided by FUSE and is not associated with any form of a “time and materials” or “billable hours and direct costs” arrangement.

Program Fee Payment Schedule. FUSE will invoice the Program Fee of \$150,000 per Fellow in two equal installments of \$75,000 approximately six months apart. The State agrees to pay all invoices within 30 days of receipt. FUSE will invoice State in accordance with the following schedule:

For the Fall Cohort, \$75,000 of the Program Fee shall be invoiced on or before July 15 of the same calendar year as the Fellowship start-date, and the remaining \$75,000 shall be invoiced on or before January 15 of the same calendar year, all as detailed in the applicable Placement Agreement.

For the Spring Cohort, \$75,000 of the Program Fee shall be invoiced on or before January 15 of the calendar year prior to the Fellowship start-date, and the remaining \$75,000 shall be invoiced on or before July 15 of the same calendar year, all as detailed in the applicable Placement Agreement.

Stipend. FUSE shall provide for a monthly stipend to be paid to each Fellow for services rendered pursuant to the terms and conditions set forth in the applicable Placement Agreement. The State shall not be required to pay any additional stipend to the Fellow.



Fellowship. The Fellow will provide the State with the services described in the Placement Agreement for such Fellow during the Fellow’s twelve-month appointment. The State shall provide the Fellow with an overview of current project progress to date, background information, specific project targets and continuing input related to project progress, as well as guidance and resources necessary to carry out the project.

Workspace. The State agrees to provide each Fellow with a dedicated workspace, a telephone, a computer, internet access, security access as appropriate, office supplies, and any other physical resources related to performance of services provided for in the Placement Agreement for such Fellow.

Expenses. During a Fellow’s appointment, the State, at its sole discretion, may authorize and pay for all reasonable project-related expenses incurred by such Fellow in connection with the performance of services pursuant to the Placement Agreement for such Fellow including, without limitation, business expenses, travel expenses, and office supplies, all in accordance with the State’s applicable policies and procedures.

Early Termination; Reimbursement. If the State elects to terminate a project pursuant to a signed Placement Agreement for any reason, or if a Fellow is unable to begin or complete an appointment pursuant to a Placement Agreement for any reason, then, subject to any advance notice provisions in the applicable Fellowship Agreement or other independent contractor agreement, the State may terminate the appointment and may only seek reimbursement of the \$150,000 Program Fee pursuant to the following process:

If the effective date of a termination occurs after the deadline set forth in Section 46 of this Agreement for signing a Placement Agreement for either the Fall Cohort or the Spring Cohort and on or before a Fellow’s first day of work in the State, then the State may seek reimbursement of up to \$45,000 of the initial \$75,000 payment, and the State shall be released from any further payment in connection with such project. The parties acknowledge and agree that \$30,000 of the Program Fee is non-refundable, being associated, among other things, with FUSE’s various pre-fellowship services, such as project scoping, executive search, candidate screening and selection, on-boarding preparation and new fellow’s Orientation Week, etc.

If the effective date of a termination occurs after a Fellow’s first day of work at the State and prior to the agreed-upon final day of the Fellow’s appointment, as specified in the applicable Placement Agreement, then reimbursement may be sought at a pro-rated amount equivalent to up to \$10,000 per month for each month that the Fellow did not complete of his or her appointment.

Executive Advisors. In the event that the State wishes to continue a defined project beyond the 12-month term of the Individual Placement Agreement, the State and FUSE may execute a supplemental Individual Placement Agreement articulating the specific terms and conditions of an extension of the project (an “Extension”), pursuant to which the Fellow would become an Executive Advisor (“Advisor”). All terms of this Agreement applicable to Fellows apply to Advisors, except as provided in this Section 0.



Placement. Each State Department that wishes to retain an Advisor for an Extension shall submit an Advisor Placement Agreement to FUSE no later than 60 days prior to the end of the applicable Fellow's Program Year.

Term and Effective Date. The Term of the Extension shall commence the day after the Fellow's Program Year concludes and shall continue for a period to be determined by the State, with a minimum period of at least six months and a maximum period of twelve months.

Fee. The State shall pay a fee of \$12,500 per month to FUSE for each Advisor retained by the State (the "Advisor Fee"). These fees will be invoiced on a quarterly basis during the term of the Advisor's service, and paid by the State within 30 days of receipt of the invoice unless an alternative payment schedule is agreed to by the State and FUSE in writing.

Early Termination. If the State elects to terminate an Advisor's project for any reason, or if an Advisor is unable to begin or complete an appointment for any reason, then the State may, subject to any advance notice requirements in the applicable Fellowship Agreement or other independent contractor agreement, terminate the appointment and may seek reimbursement only in an amount up to \$12,500 per month for any full month following the effective date of an Advisor's termination for which the State paid a \$12,500 fee under this Agreement.

Cooperation by the State. State shall assist and cooperate with FUSE and all Fellows and Advisors in the performance of services in accordance with this Agreement and each Placement Agreement.

No Employment Relationship. At all times relevant to this Agreement, the parties, and any affiliates thereof, shall remain contractors independent of one another, and neither party (including representatives and sponsors of that party, the Fellows, or Executive Advisors) shall be deemed an employee, joint venture, or partner of the other. Neither party has the authority to bind the other and no employee, agent, sponsor, nor other representative of either party shall at any time be deemed to be under the joint control or authority of the other party, or under the joint control of both parties. Neither party shall have the right to control the other party; however, FUSE and the State mutually agree as to the objectives and the scope of the placements, as set forth in this Agreement and each applicable Attachment 1. Each party shall be solely responsible for the payment of its own federal, state, and local income taxes, as well as any Social Security ("FICA") and unemployment ("FUTA") taxes that party may owe. FUSE and the Fellow shall not be entitled to, and shall not seek any benefits made available to the State's employees, including, but not limited to: group health insurance (including dental, vision, and any other enhancements from time to time), disability insurance, group term life insurance, workers' compensation, participation in any retirement plan for the State's employees, a salary reduction plan for certain child care and medical care costs, or training programs.

Indemnity. FUSE shall indemnify, protect and hold harmless State and its officials, employees and agents (the "Indemnified Parties") up to a maximum amount of \$150,000, from and against any and all liability, claims, demands, damage, loss, obligations, causes of action, proceedings, awards, fines, judgments, penalties, costs and expenses, including attorneys' fees, arising or alleged to have arisen, in whole or in part, out of or in connection with (1) FUSE's breach or failure to comply with any



of its obligations contained in this Agreement, or (2) negligent or willful acts, errors, omissions or misrepresentations committed by FUSE, its officers, employees or agents in the performance of work or services under this Agreement (collectively “Claims” or individually “Claim”). If a court of competent jurisdiction determines that a Claim was caused by the sole negligence or willful misconduct of Indemnified Parties, FUSE Corps’ costs of defense and indemnity shall be (1) reimbursed in full if the court determines sole negligence by the Indemnified Parties, or (2) reduced by the percentage of willful misconduct attributed by the court to the Indemnified Parties. The provisions of this Section shall survive the expiration or termination of this Agreement.

Miscellaneous.

This Agreement shall be binding upon and shall inure to the benefit of the parties hereto and their respective permitted successors and assigns. Neither of the parties hereto shall assign its rights nor delegate its duties hereunder without the prior written consent of the other party.

All notices hereunder shall be in writing and delivered in a manner described in this subsection. Such notices shall be deemed to have been given either: (i) when personally delivered; (ii) three (3) business days after mailing, postage prepaid, by certified mail; (iii) when delivered (and receipted for) by an overnight delivery service; or when first sent by email, telex, or other means of instantaneous communication provided such communication is promptly confirmed by personal delivery, mail or an overnight delivery service as provided above, addressed in each case to the principal place of business of the recipient. Either party may change the address for the giving of notices and communications to it by written notice to the other party in conformity with the foregoing.

The representatives of the respective parties authorized to administer this Agreement, and to whom formal notices, demands, and communications shall be given are as follows:

The representative of the State shall be, unless otherwise stated in the agreements specific to each Fellow or Advisor:

Name:
Title:
Address:
State, State. Zip:
Telephone:
Email:

The representative of FUSE shall be:

James Weinberg
Chief Executive Officer
235 Montgomery Street, Suite 1110
San Francisco, California 94104
Email: james@fusecorps.org



No failure of any party to insist on strict compliance with any provision of this Agreement shall be deemed a waiver of such provision. No waiver by any party hereto of any breach or anticipated breach of any provision hereof by any other party shall be deemed a waiver of any other contemporaneous, preceding or succeeding breach or anticipated breach, whether or not similar, on the part of the same or any other party.

This Agreement supersedes all prior discussions and agreements between the parties with respect to the subject matter hereof, and this Agreement contains the sole and entire agreement among the parties with respect to the matters covered hereby. This Agreement shall not be altered or amended except by an instrument in writing signed by the parties hereto.

The headings as to contents of particular sections or paragraphs of this Agreement are inserted for convenience of reference only and shall not be construed as a part of this Agreement.

This Agreement shall be enforced and interpreted under the laws of the State of California without regard to conflict of law principles.

In any action arising out of this Agreement, FUSE consents to personal jurisdiction, and agrees to bring all such actions, exclusively in state or federal courts located in the City and County of San Francisco, California.

If any part, term or provision of this Agreement is held void, illegal, unenforceable, or in conflict with any law of a federal, state or local government having jurisdiction over this Agreement, the validity of the remaining parts, terms or provisions of the Agreement shall not be affected thereby.

FUSE is acting hereunder as an independent contractor and not as an agent or employee of the State. FUSE shall not represent or otherwise hold out itself or any of its Fellows, directors, officers, partners, employees, or agents to be an agent or employee of the State.

FUSE represents and warrants that, to its knowledge, FUSE's performance of its obligations under this Agreement does not infringe upon any third party's intellectual property rights, including, without limitation, patents, copyrights, trademarks, trade secrets, rights of publicity and proprietary information.

Termination.

The State and FUSE may each terminate this Agreement for convenience at any time by giving thirty days written notice to the either party, provided that the provisions herein, including but not limited to Section 0, Section 0, Section 0, Section 0, Section 0 and Section 0 shall survive any such termination of this Agreement with respect to any then-serving Fellows or Executive Advisors for the duration of such appointments. In addition, the State shall pay FUSE its reasonable and allowable costs



incurred through the effective date of termination and those reasonable and necessary costs incurred by FUSE to affect such termination. All finished and unfinished documents and materials procured for or produced by a Fellow pursuant to a Placement Agreement, including all intellectual property rights thereto, shall become State property upon the date of such termination.

Except for excusable delays, if FUSE fails to perform any of the provisions of this Agreement or so fails to make progress as to endanger timely performance of this Agreement, the State may give FUSE written notice of such default. If FUSE does not cure such default or provide a plan to cure such default which is acceptable to the State within a reasonable time or as permitted by the State, then the State may terminate this Agreement due to FUSE's breach of this Agreement.

If a federal or state proceeding for relief of debtors is undertaken by or against FUSE, or if FUSE makes an assignment for the benefit of creditors, then the State may immediately terminate this Agreement.

If FUSE engages in any dishonest conduct related to the performance or administration of this Agreement or violates the State's lobbying policies, then the State may immediately terminate this Agreement.

All finished or unfinished documents and materials produced or procured under this Agreement, including all intellectual property rights thereto, shall become State property upon date of such termination. FUSE agrees to execute any documents necessary for the State to perfect, memorialize, or record the State's ownership of rights provided herein.

If, after notice of termination of this Agreement under the provisions of this section, it is determined for any reason that FUSE was not in default under the provisions of this section, or that the default was excusable under the terms of this Agreement, the rights and obligations of the parties shall be the same as if the notice of termination had been issued pursuant to (a) above.

The rights and remedies of the State provided in this section shall not be exclusive and are in addition to any other rights and remedies provided by law or under this Agreement.

Ownership and License.

Unless otherwise provided for herein, all Work Products (as defined below) originated and prepared by FUSE for the State, its Fellows, Advisors or its subcontractors under this Agreement for the State shall be and remain the exclusive property of the State. "Work Products" are all works, tangible or not, created under this Agreement including, without limitation, documents, material, data, reports, manuals, specifications, artwork, drawings, sketches, computer programs and databases, schematics, photographs, video and audiovisual recordings, sound recordings, marks, logos, graphic designs, notes, websites, domain names, inventions, processes, formulas matters and combinations thereof, and all forms of intellectual property. FUSE hereby assigns, and agrees to assign, all goodwill, copyright, trademark, patent, trade secret and all other intellectual property rights worldwide in any Work Products originated and prepared by FUSE, its Fellows, Advisors or its subcontractors for the State under this Agreement. FUSE further agrees to execute any documents reasonably necessary for the State to perfect, memorialize, or record the State's ownership of rights provided herein.



FUSE, its Fellows, and its subcontractors shall not provide or disclose any Work Product to any third party without prior written consent of the State.

Any subcontract entered into by FUSE relating to this Agreement, to the extent allowed hereunder, shall include a like provision for work to be performed under this Agreement to contractually bind or otherwise oblige its subcontractors performing work under this Agreement such that the State's ownership and license rights of all Work Products are preserved and protected as intended herein.

Insurance. During the term of this Agreement, FUSE shall provide and maintain at its own expense a program of insurance having the coverages and limits customarily carried and actually arranged by FUSE.

Americans With Disabilities Act. FUSE and the State hereby certify that each will comply with the Americans with Disabilities Act, 42 U.S.C. §§ 12101 *et seq.*, and its implementing regulations. FUSE and the State will provide reasonable accommodations to allow qualified individuals with disabilities to have access to and to participate in its programs, services and activities in accordance with the provisions of the Americans with Disabilities Act. Neither FUSE nor the State will discriminate against persons with disabilities nor against persons due to their relationship to or association with a person with a disability. Any subcontract entered into by FUSE, relating to this Agreement, to the extent allowed hereunder, shall be subject to the provisions of this paragraph.

Ratification. Due to the need for FUSE's services to be provided continuously on an ongoing basis, FUSE may have provided services prior to the execution of this Agreement. To the extent that said services were performed in accordance with the terms and conditions of this Agreement, those services are hereby ratified.

Entire Agreement.

This Agreement contains the full and complete Agreement between the parties, inclusive of this Agreement and the following attachments and exhibits hereto:

Attachment 1: Individual Placement Agreement

This Agreement may be executed in any number of counterparts, each of which shall constitute an original, and all of which taken together shall constitute one and the same instrument.

In the event of any inconsistency between the provisions in the body of this Agreement and the attachments and exhibits hereto, the provisions in this Agreement shall prevail.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed by their respective duly authorized officers as of the Effective Date.

FUSE CORPS

[STATE]



Appendix D.3

FUSE Corps – Contract

By: _____

Name: James Weinberg

Title: Chief Executive Officer

Date: _____

By: _____

Name:

Title:

Date: _____

SAMPLE



Attachment 1

FUSE CORPS
INDIVIDUAL PLACEMENT AGREEMENT

Host Agency: <State>, <State Department>
Fellow Reports to: <Fellow’s direct report>
Location of Fellowship: <Address of Agency>

General Terms and Conditions between the State and FUSE

The State department executing this Individual Placement Agreement and FUSE Corps (FUSE) acknowledge that the terms and conditions of the Master Placement Agreement, <Contract Number>, apply to the State department and FUSE as it relates to the performance of this Individual Placement Agreement. FUSE and the State department shall notify the <Office Managing the Master Contract> upon execution of this Individual Placement Agreement.

Illustrative Services Provided by FUSE

1. Prior to the start of the fellowship year:

- **Project Development:** Convene meetings with host agency officials to identify project priorities; conduct in-depth interviews with host agency officials to clarify project idea; develop a draft Project Description for review by host agency officials; and conduct rounds of edits as needed to finalize approval of the Description.
- **Recruitment:** Conduct a local and national candidate search, cultivating applicants from various job boards, associations, and networks; respond to inquiries from interested applicants seeking additional information; and manage an online application portal and a candidate management system.
- **Screening:** Review applications to determine the most appropriate next steps for each candidate; conduct an initial phone-screening interview with candidates deemed to be most promising for the role; conduct an additional follow-up video-interview with candidates deemed strong enough to reach the semi-finalist round.
- **Selection:** Select up to three finalists for each project and collect electronic references on those individuals from current and former employers and colleagues; help the State to coordinate logistics for an in-person interview for each of the three finalists with designated host agency officials.
- **On-Boarding:** Place the selected individual under agreement as an independent contractor of FUSE dedicated to the specified project; communicate with both fellow and host agency officials in the weeks leading up to the start of the program year to help prepare all parties for the fellowship.



- **Orientation:** Organize and facilitate a national, in-person orientation for new fellows that is designed to help prepare them for their year of service, introduce them to the program’s various tools and techniques, build peer-to-peer connections to help create an interactive ‘community of practice’ among all fellows and alumni; and cover the costs of travel, accommodations, meals, facilitates, speakers, and expenses for fellow to attend orientation week.

2. During the fellowship year:

- **Coaching:** Pair fellow with an executive coach who will be available to work one-on-one with the fellow during the year.
- **On-Going Support:** Organize and facilitate seminar calls hosted by staff, alumni, industry experts, and others to provide ongoing development and skill building opportunities. Host an online communication platform to allow fellows to regularly ask questions of peers and FUSE staff as they pursue project goals.
- **Project Refinement:** Schedule a call with the fellow, host agency officials, and FUSE staff within the first three months of the project to assess the extent to which any changes may be necessary to the Project Description and designated fellowship project goals.
- **Mid-Year Retreat:** Organize and facilitate a national, in-person mid-year retreat for all fellows that is designed to review progress achieved and lessons learned to date, clarify plans for increasing impact during the second half of the fellowship year, build plans for sustaining the impact of the project following the conclusion of the fellowship, and continue to foster interactive ‘community of practice’ among all current fellows and alumni; and cover the costs of travel, accommodations, meals, facilitates, speakers, and expenses for fellow to attend the mid-year retreat.
- **Status Checks:** Check-in with fellows and host agency officials periodically throughout the term of the fellowship to ensure that the fellowship is on track to achieve its stated goals; conduct a formal survey of fellows and host agency officials at both the mid-year point and at the end of the fellowship year to determine progress achieved and lessons learned to date.

Fellowship Project Description:

<Insert summary of the fellowship’s specific project and deliverables here>



Fellow Support provided by the Placement:

The <General Manager of State Department> and his/her staff will facilitate introductions and meetings with key staff within the State as well as elected officials as appropriate.

Executive Sponsor: The Executive Sponsor is a high-ranking member of the agency’s management team. He or she is the visible champion of the project within the agency and is the ultimate decision maker, with final approval on all phases, deliverables and scope changes. The Executive Sponsor will help ensure that this project achieves its full potential for impact. The designated Executive Sponsor for this project is <Name and Title>.

Project Supervisor: The Project Supervisor is the day-to-day driver of the project and will work directly with the fellow to oversee progress toward goals. He or she will introduce the fellow to key stakeholders, resolve conflicts and remove obstacles that may occur during project work, and will sign off on approvals needed to advance each phase. The designated Project Supervisor for this project is <Name and Title>.

The State agrees to provide the Fellow with a dedicated workspace, a telephone, a computer, internet access, security access as appropriate, office supplies, and any other physical resources related to performance of the fellowship.

Financial Considerations Between the State and FUSE Corps regarding the Fellow:

The <State Department> will provide no stipend to the Fellow in addition to that provided by FUSE.

During a Fellow’s appointment, the State, at its sole discretion, may authorize and pay for all reasonable project-related expenses incurred by such Fellow in connection with the performance of services pursuant to the Placement Agreement for such Fellow including, without limitation, business expenses, travel expenses, and office supplies, all in accordance with the State’s applicable policies and procedures.

The <State Department> will have no financial obligation for expenses related to duties required by FUSE, such as travel by the Fellow to FUSE trainings or events.

Financial Commitment Between the State and FUSE as it Relates to the Individual Placement for FUSE Fellow for the Period Effective <Cycle Start Date>

By executing this Individual Placement Agreement, the <State Department> notifies FUSE that the <State Department> has appropriated sufficient funds and taken all necessary steps to commit to the Placement and Funding Structure below. FUSE will submit invoices directly to the <State Department> for the two amounts listed below, the amount and timing of which are set forth for all departments in the State’s Master Contract with FUSE.



Timeline	Placement and Funding Structure
Date	Agreement between FUSE and State Department to host a fellow in the upcoming program year
Date	Payment of initial half of \$150,000 total fee is due (\$75,000)
Date	Fellows’ first official day working onsite
Date	Payment of second half of \$150,000 total fee is due (\$75,000)
Date	Final day of work for Fellow

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed by their respective duly authorized officers as of the Effective Date.

FUSE CORPS

STATE

By: _____

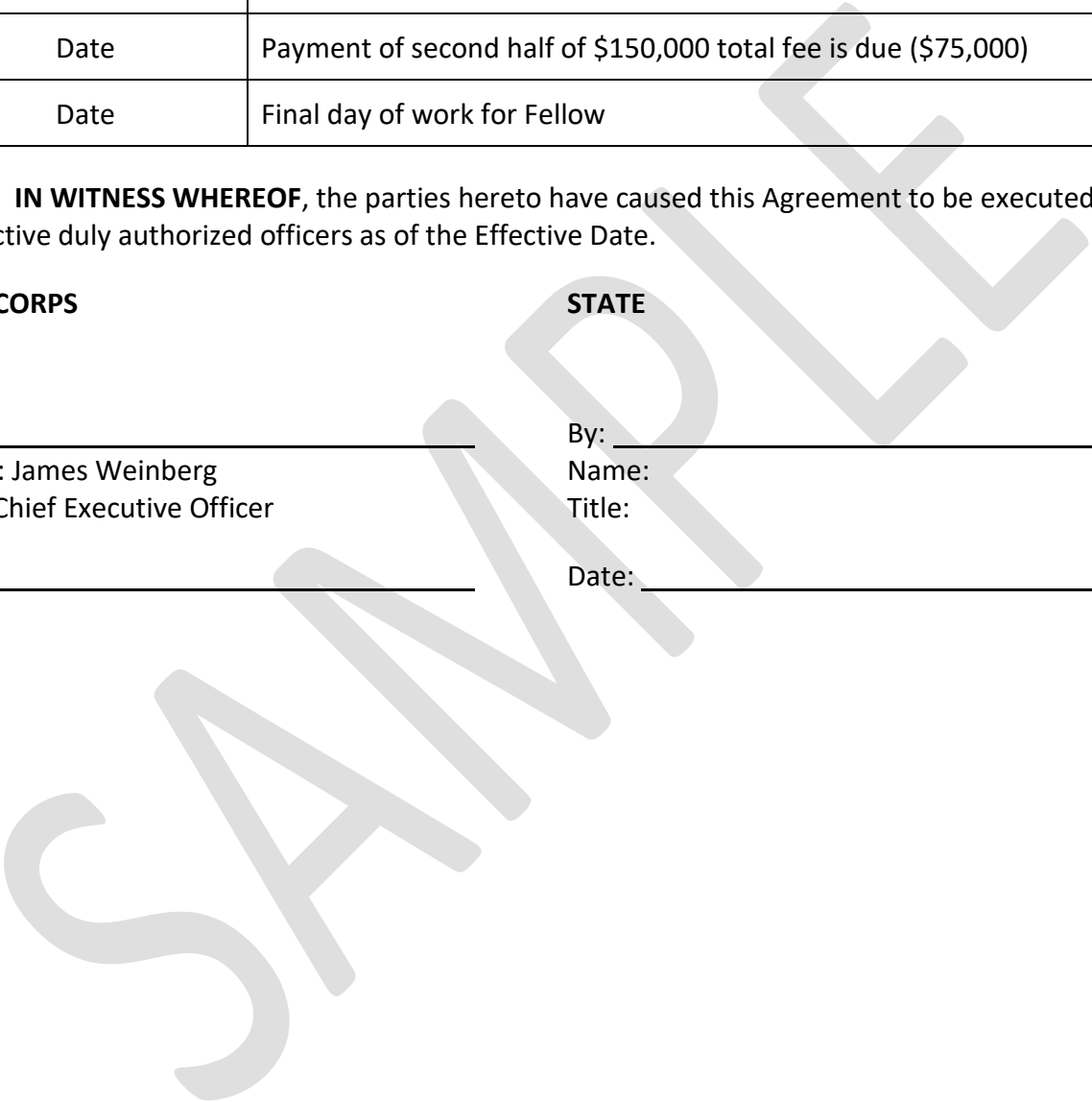
Name: James Weinberg
Title: Chief Executive Officer

Date: _____

By: _____

Name:
Title:

Date: _____





Appendix E.1

Letter of Request

July 17, 2019

Pam Nicholson, CEO
Enterprise Holdings
600 Corporate Park Drive
St. Louis, MO 63105

Dear Pam,

A little over a year ago I was humbled and honored to be sworn in as Missouri's 57th governor and immediately charted a new course to move Missouri forward. Our administration issued bold challenges to the leaders in the Cabinet, the Legislature, and our state workforce to seek new and different ways to improve workforce development, infrastructure, and government efficiency. In just one year's time we have achieved real progress, passing a state budget with identified reserves, establishing new workforce development programs while enhancing existing ones, dedicating resources for infrastructure investment, and creating new economic development tools to aid our efforts in business retention and attraction.

Under the leadership of the state's chief operating officer, Missouri has embarked upon a transformational realignment of our organizational structures and the pragmatic ways we recognize, empower, and lead our public servants. This past year alone, we implemented the following: new leadership development strategies for executive leaders in our departments; training on management principles, adapting to change, and project management for over 1,200 leaders; and the Missouri Leadership Academy, which equips aspiring leaders willing to embrace change and sustain this transformation of government service. It truly has been a transformative year.

Even with all these new endeavors, we have a long journey ahead to achieve organizational excellence for our great state. To accelerate our change efforts, we need help from Missouri's corporate community. I sincerely appreciate your time on the call the other day to discuss the Missouri Executive Partnership Program and am grateful for the opportunity to provide this follow-up communication. Enterprise Holdings is well-known globally for its talent management efforts. Therefore, on behalf of the State of Missouri, I humbly request the utilization of one of your talented executives to lead the state's new Executive Coaching Pilot Program initiative.

This is a significant request, but one I hope you will give consideration and thought. We believe an Enterprise loaned executive partner for a period of three (3) months will provide mutually beneficial opportunities for both our institutions. To assist you in the decision-making process, I am providing a complete description of the project, the expectations of the partner, and the deliverables to be provided at the end of the project period. We hope that reading the full experience will provide you



with the necessary context to identify the talented executive on your team who has the expertise and leadership capabilities to accept this challenge.

In addition to helping shape the future of Missouri state government, this opportunity could also serve as a great way to test one of your seasoned leaders with a new challenge in a completely different environment. I know the sacrifice you would be making to assist the State of Missouri, but I would not be asking if I did not firmly believe in the potential to experience mutually beneficial outcomes and conclude with some amazing results. I am eager to hear your response and welcome any questions you may have regarding my request.

Respectfully,

Michael L. Parson
Governor

SAMPLE



MESSAGE: As the State of Missouri’s pursuit for organizational excellence continues, Missouri has an opportunity to accelerate its own improvement by leveraging the skills and generosity of executive-level talent from the private sector through a new initiative—The Missouri Executive Partnership Program.

KEY POINTS:

- As a matter of best practice, all leading organizations look externally to those who excel in key operational areas as a means to facilitate their own improvement.
 - The State of Missouri should be no different if we intend to achieve the organizational excellence our citizens deserve.
 - This initiative is ultimately about making state government as reliable and responsive as any other organization citizens interact with in their daily lives. We strongly believe that public services should and can be just as good as the best consumer services.
 - The Missouri Executive Partnership Program is another mechanism to move Missouri forward by becoming more effective, efficient, and delivering better outcomes for citizens.
- The State of Missouri has benefitted from external talent in the past to get results. The COO’s Taskforce on Fleet Management drew upon experts from eight private sector companies to identify more than \$2 million in potential savings and streamline the state’s fleet management operations based on the best practices across all sectors.
 - This model clearly demonstrated the great potential of such partnerships.
 - Therefore, we will now seek to apply this model to broader statewide operational initiatives aimed at improving state government operations.
 - These operational initiatives will be in the areas of:
 - 1) Data-driven management to ensure prudent utilization of taxpayer resources;
 - 2) Talent recruitment, development and retention to ensure our citizens are served by a professional, engaged and well-trained state workforce; and
 - 3) The improvement of both internal communications and external engagement to inform and educate citizens.
- This is an opportunity for our corporate partners to shape the future of Missouri state government to the benefit of our citizens. Other potential benefits include:
 - Giving their emerging leaders an opportunity for experiential professional development;
 - Publicly giving back to the community by volunteering to improve government services for Missourians;
 - Otherwise providing a recently retired executive the chance to further his/her legacy by making a lasting, statewide impact; or
 - A view into the practices of state government which may provide perspective on ways to improve the loaning company’s internal practices.



**“Enhancing Data-Utilization to Improve Government Services”
State of Missouri, Department of Labor & Industrial Relations
Jefferson City, MO**

PROJECT CONTEXT

Over the past decade, Missouri state government has earned accolades for its approach to technology innovation within government, including receiving an “A” rating in 2016 from the Center for Digital Government. The state has set out to build a national model for a 21st Century digital government, one that blends innovation with responsiveness to the needs of all Missourians. As this approach has evolved, the State has identified better data collection, analysis, and utilization as a key focus area. Missouri believes that its ability to harness the power of data to design more effective programs and services is crucial to improving the lives of its residents.

Agencies across the state are being encouraged to strategically and responsibly share data with each other in order to advance interagency collaboration, public-private partnerships, data-driven policy making, and more holistic approaches to addressing the challenges facing residents. As one promising early example, the Department of Revenue and the Department of Labor & Industrial Relations and revenue have begun to align their datasets in ways that can be utilized by other departments working on child support services, elementary and secondary education, higher education, healthcare, senior services, corrections, and mental health. This collaboration has illuminated trends in datasets such as the various conditions that contribute to chronic unemployment, including childcare, transportation, housing, healthcare, and education, among other factors. Focusing solely on job training to help the chronically unemployed will not be as effective as working collectively to address all of the factors that might enable an individual to ultimately secure and advance in a sustainable job.

The Department of Labor & Industrial Relations has been a starting point for several such efforts because of the interconnected nature of information related to an individual’s employment status, compensation level, and career trajectory across all of the other aspects of their lives. Such efforts endeavor to see individuals and families as participants across multiple programs within an entire continuum of care, rather than merely as users of a variety of stand-alone programs that all happen to be administered by the state. Missouri is working to better understand how all of its programs and services are being accessed by users in order to gauge how successfully they are being served, what other related services they could be utilizing, and what changes in services could be made to help achieve more positive outcomes in their lives.

Despite the promise of these efforts, there are also many challenges to advancing effective data coordination throughout the state. There is, for example, no single department that has been charged with ensuring effective data alignment and comparative analysis throughout the state. Historically, the collection of data has been a decentralized process, with approaches and standards varying between departments. As a result, there is not a single comprehensive enumeration of all the data that the state possesses or how that data is being used. This also prevents the alignment of datasets in ways that would allow different agencies to compare the information available to the state about specific individuals and families. There are also significant and important sensitivities, safeguards, legislative and policy considerations with regard to the appropriate use and responsible sharing of any public data. Such restrictions must be carefully evaluated before advancing toward strategies that might better leverage public data for advancing the public good. As a result, the data necessary to gain a full picture of the state’s operations and services are often unavailable or insufficiently integrated.



To support this work, the state will partner with FUSE Corps to host an executive-level fellow for one year who will help the state's to better utilize data and analytics in order to administer more effective services for Missouri residents. The FUSE Executive Fellow will help develop the infrastructure, processes and approaches that will support the sustainable collection, use and analysis of data across departments and programs. The Fellow will help enhance systems for the creation of a more structured and uniformed approach to data collection and utilization. The Fellow will also help promote a statewide shift around the perception of data by working with department staff to develop test cases that demonstrate the ability of enhanced data utilization to improve services for clients. By building on the momentum that the Department of Labor & Industrial Relations has already initiated, it is hoped that the fellow will help advance a statewide shift in culture that will benefit the health and wellbeing of the individuals and families served by the state.

PROJECT SUMMARY & POTENTIAL DELIVERABLES

The following provides a general overview of the proposed fellowship project. This project summary and the potential deliverables that follow will be collaboratively revisited by the host agency, the fellow, and FUSE staff during the first few months of the fellowship, after which a revised scope of work will be developed and agreed upon by the FUSE Fellow and the host agency.

Starting in April 2020, and reporting to the Director of the Department of Labor & Industrial Relations, it is proposed that the FUSE Executive Fellow will begin by getting up to speed about the state's various departments, programs, operations, and leadership, as well as the current practices among the different departments for the collection, storage, and analysis of data. The Fellow will also develop an understanding of the priorities of the Governor, Cabinet Secretaries and their staff, and the State's Chief Operating Officer and Chief Information Officer with regard to data integration and utilization. With this background, the Fellow will begin to formulate plans about how to more efficiently and effectively collect and analyze data and encourage cross-departmental data collaborations. The Fellow will work to define and implement demonstration projects that show the potential for how differential uses of existing datasets can transform departments and improve program outcomes. The Fellow will also work with staff and other partners to develop plans for building internal capacity around ongoing data aggregation and analytics. Specific responsibilities of this project will be for the Fellow to:

- *Develop a baseline analysis of current status* – Create a more comprehensive index of all the major datasets being used across state agencies, the ways in which that data is being collected and stored, the types of data analyses and data utilization efforts currently being conducted, and any cross-department data sharing agreements that are already in place. Identify areas of redundancy where the same data points are being collected multiple times or where similar data sets cannot be easily aligned because of relatively minor differences in formatting (e.g. variable spellings or abbreviations among common items in drop-down lists). Examine some of the best practices being used in other states, federal agencies, and private sector companies to compare with the ways in which Missouri is currently operating in order to establish a common understanding around the nature of the current industry standard.
- *Create a plan for demonstration projects* – Starting with the Department of Labor & Industrial Relations and the various other departments with which it already has data sharing agreements in place, identify several specific opportunities to advance the alignment of existing data in order to improve services to state residents. Focus on projects that can be brought to fruition in less than one year, that will improve the public's experience of interacting with government, and that will enhance the results that state programs achieve for the public. Develop plans for implementing those projects and ensuring buy-in among all key internal and external stakeholders for those plans. Support the roll-out of these initiatives



and document the strategies used, successes achieved, areas of learning, and opportunities for improvement.

- *Communicate successes and highlight impacts* – Help create a communications strategy focusing across state departments, the legislature, and the public that will document successful projects and disseminate their achievements. Build momentum for future efforts by highlighting the return on investment in terms of dollar saved and time saved as well as improvements in program outcomes. In this way, it is hoped that the Fellow will help facilitate a shift in culture and promote a more data-driven mindset across state government.
- *Increase external resources and internal capacity* – Work through existing relationships with academic institutions and other non-governmental collaborators, while identifying new partnerships with public and private organizations that might help expand the states' capabilities. Develop plans for potentially expanding the state's internal capacity to sustain and expand on this work after the fellowship ends, potentially including the future creation of new positions, teams, or interdepartmental bodies within state government.

KEY STAKEHOLDERS

- **Drew Erdmann**, Chief Operating Officer, State of Missouri
- **Mike Cheles**, Chief Information Officer, State of Missouri
- **Anna Hui**, Director, Department of Labor & Industrial Relations, State of Missouri
- **Tammy Cavender**, Deputy Director, Department of Labor & Industrial Relations
- **Sarah Steelman**, Commissioner of the Office of Administration, State of Missouri
- Other Cabinet level appointees and staff

QUALIFICATIONS

- At least 15 years of professional experience in a relevant field, particularly with a background in data science, change management, consulting, operations and/or systems building.
- Deep understanding of data collection, analysis and utilization, with experience developing business cases for transformational projects.
- Exceptional written and verbal communication skills, including an ease with public presentations and the ability to translate and synthesize complex, technical information into clear and concise recommendations.
- Superior critical thinking and analytical skills, with the ability to develop and articulate clear strategic plans within a large and complex set of competing priorities.
- Strong record of success engaging a wide variety of cross-sector stakeholders, particularly leaders in the public sector. Ability to relate to a wide variety of diverse audiences with varying goals and motives using strong emotional intelligence and empathy to establish trust-based relationships.



- Self-motivated, goal-oriented, intrapreneurial leader who is an independent worker, resourceful in coming up with novel solutions to complex problems, persistent in obtaining information, and able to create direction and movement within ambiguous environments.
- Flexibility, adaptability, persistence, humility, inclusivity and sensitivity to cultural differences.

SAMPLE