

DEI WORKSHOP

**USING SPONSORSHIP PROGRAMS
TO BUILD A TALENT PIPELINE**

THURSDAY, MARCH 10, 2022



— NATIONAL CAPITAL REGION —
DEI WORKSHOP



THE FREDDIE MAC LEGAL DIVISION'S SPONSORSHIP PROGRAM

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Sponsorship Program Development



- Why are we here?
- What are your goals?
- Topics of today's workshops
 - Defining roles and responsibilities
 - Customization is key
 - How to get started in building your program
- How Freddie Mac created its program

Why are we here?



- Sponsorship programs work
 - One of the most effective ways to ensure underrepresented employees are developed, supported and advanced is to create accountable and authentic relationships (Gartner Apr 2021)
 - 75% of participants agree that their sponsors have helped their professional development and growth as a leader (Gartner Feb 2021)
 - One company observed an 86% improvement in participants' leadership behaviors at the conclusion of a sponsorship program (Gartner Feb 2021)
- But most organizations don't have them yet
 - 63% of HR leaders agree that sponsorship programs are effective in advancing underrepresented talent, but only 28% actively incorporate such programs in their overall talent strategies (Gartner Feb 2021)

What are your goals?



- Before jumping in to develop a program, it is critical for all stakeholders to be aligned on the goals of the program
 - Develop a leadership pipeline?
 - Develop a diverse leadership pipeline?
 - Foster individual growth and development?
 - Enhance leadership competencies?
 - Evaluate and hold accountable future leaders?
 - Create promotion opportunities?
 - Create a leadership culture?

Breakout Session Topics



- Session 1 - Roles and responsibilities in an effective sponsorship relationship
- Session 2 - Customizing a sponsorship program for your organization
- Session 3 - Operational Considerations

Session 1: Defining Roles/Responsibilities



- Mentorship v. Sponsorship – what is the critical difference?
 - Typically, mentorship is typically a one-way relationship, sponsorship is a two-way partnership
 - Mentors provide support and guidance; sponsors provide advocacy and critical feedback

- Roles and Responsibilities in an Effective Sponsorship Relationship
 - Participant
 - Stellar performance; leads with a “yes”
 - Proactive and accountable
 - Sponsor
 - Advocates for stretch opportunities
 - Provides air cover to allow participant to take risks

Session 2: Customization is Key



- Sponsorship is not "one size fits all"
- Some things to consider
 - Organizational goals
 - Size, type, structure and needs of your organization
 - Resources
 - Support from the top
 - Organizational culture

Session 3: Operational Considerations



- When operationalizing a program, what do you need to consider?
 - What is your business case or elevator pitch?
 - Do you have a project plan for managing timelines and deliverables?
 - Do you have staff resources and a budget to support the program?
 - How will you keep participants and sponsors accountable?
 - What happens when a participant leaves voluntarily or involuntarily?
 - How will you handle applicants who are not selected?
 - How will your program be measured and improved over time?

About Freddie Mac Legal Division's Summit Program



- Formal stewardship program called “Summit”
 - Supports an overall division strategy for developing leadership skills
 - Identify and connect select high potential participants with proven leaders to foster growth in leadership competencies
 - Based on more objective and bias-blind factors than informal stewardship
 - Develop a diverse and inclusive leadership pipeline
- Executive Support
- First class in 2021
 - Six individual contributor attorneys, paired with six Division officers
 - Formal dyad relationship anticipated to last 2-3 years

Our Considerations in Program Development



- Selection methodology
 - What leadership competencies do you care about?
 - Make the process as bias-blind as possible?
 - Consider use of an objective assessment tool
 - Formal application? Essay? Client/Manager surveys? Performance reviews?
 - Past year performance vs. leadership potential
 - Workload and capacity
- How to match Participant/Steward? Should they be in the same reporting line?
- How long should the formal relationship last?

Our Considerations (continued)



- How much time away from core work can be allocated?
- Formal milestones and events
- Program curriculum and training
- Messaging and communications
- Budget for training, materials, events
- What deliverables and documentation do you need to create for the program? (e.g., Summit website)

Program Development Project Plan



- Program Development Team (include HR representative)
 - Reviews with executive champion for alignment and support
- To use our resources effectively, we separated into multiple teams
 - Participant Eligibility and Selection
 - Steward Eligibility and Selection
 - Relationship Expectations
 - Program Communications and Resources
 - Action Learning
 - Marketing and Program Documentation
- Project Plan
 - To coordinate the efforts of our volunteer workforce, we developed a project plan that identified milestones and tasks, deliverables, timeline, and dependencies

Project Planning - Sample Plan

Stewardship Program							SIMPLE GANTT
						Display Week:	1
REF	MILESTONES	SUB-GROUP	PROGRESS	DURATION (days)	START	END	PREDECESSOR
Preparations							
1.1	Review industry materials and vendor info	All groups	100%	14	5/4/2020	5/18/2020	
1.2	Follow up with questions on materials	All groups	100%	14	5/11/2020	5/25/2020	
1.3	Review CTI materials	All groups	100%	14	5/4/2020	5/18/2020	
1.4	Make appropriate updates to the project plan	All groups	100%	7	5/25/2020	6/1/2020	1.1, 1.2, 1.3
Participant							
2.1	Develop and apply Participant selection criteria	Participant	100%	28	6/1/2020	6/29/2020	
2.2	Develop the orientation and training materials for Participants	Participant	100%	21	6/8/2020	6/29/2020	2.1 (first bullet only)
2.3	Matching of Participants and Stewards	Participant / Steward	100%	21	6/22/2020	7/13/2020	
2.4	Success criteria of Dyads (propose 2 wks)	Participant	100%	14	6/8/2020	6/22/2020	2.1 (first bullet only)
Steward							
3.1	Identify Steward Selection Criteria	Steward	100%	14	5/4/2020	5/18/2020	
3.2	Develop Orientation and Training Materials for Stewards	Steward	100%	28	5/4/2020	6/1/2020	
3.3	Indicators of Success for Steward	Steward	100%	28	5/4/2020	6/1/2020	
3.4	Written Development Plan for Participant and Steward	Steward	100%	14	6/1/2020	6/15/2020	3.2
Relationship Expectations							
4.1	Identify Dyad relationship events	Relationship Expectations	100%	14	5/4/2020	5/18/2020	
4.2	Set baseline and development plan	Relationship Expectations	100%	42	6/1/2020	7/13/2020	
4.3	Written guidelines for Dyads	Relationship Expectations	100%	14	7/6/2020	7/20/2020	2.2, 3.2. This subgroup will 2.2 (Matching

Operations Guide

- Operations Guide as "instruction manual"
- Centralizes and memorializes key decisions and program components – what are program "rules"? How will the program operate?
- Useful for current reference and future program managers
- Suggestions
 - Limit access
 - Review/update periodically to reflect improvements and enhancements
- See Appendix --> Sample Table of Contents

What did we learn?

- Buy-in from senior leadership is crucial
- Put “pen to paper” sooner than later
- Most things take longer than you think
- Messaging is important – what sponsorship is; stewardship vs. mentorship; time commitment; diversity; messaging for those not selected; not the only opportunity for development
- Early in the dyad, more structure is better
- Be adaptable and open to feedback

SUMMIT - Home Page



What is SUMMIT?

SUMMIT is a formal stewardship program designed to identify employees in the Division who demonstrate strong potential in Key Leadership Competencies and connect them with proven leaders who will work with them to foster growth in these competencies. The program also helps to ensure that the Legal Division develops a diverse and inclusive leadership pipeline.

Who is involved?

SUMMIT is a 1-1 relationship between:

Stewards – Proven leaders within Freddie Mac who will devote time to develop leadership skills of their Participants, and who will champion their Participants throughout the enterprise

Participants -- Employees who are willing to invest a significant amount of time and energy in their own career development

Goals:

- Participants identify and expand leadership skills and develop plans for improvement and growth
- Participants invest in their leadership and career development
- Stewards engage with and provide active support to Participants
- Stewards work side-by-side with Participants to create opportunities within the enterprise for Participants to pursue and achieve career aspirations (including exposure to key players, stretch assignments, and training in leadership competencies such as executive presence and effective communications).

More than Mentorship

- Most mentorship programs are "one-way" support to the mentee in their efforts to achieve their goals.
- Stewardship under Summit is a "two-way" partnership where both the Steward and the Participant bear responsibility for the success of the relationship.

Developing Diverse Leadership

"Most in the legal profession agree that, despite some progress made to date on diversity and inclusion, we still have significant work ahead, particularly in the leadership ranks. At Freddie Mac we believe that SUMMIT provides leadership development opportunities for high-performing, high-potential talent, and the program is central to our efforts to increase diversity in the senior ranks of our profession."

Ricardo Anzaldúa, Former EVP & General Counsel

A web portal centralizes Summit program materials for applicants, participants and stewards.

- Application Requirements
- FAQs
- Key Leadership Competencies
- Program Milestones
- Resources for Participants and Stewards
- Calendar of events

SUMMIT – Participant Resources



SUMMIT - Participant Resources

Welcome Participant!

Congratulations on being selected as a Participant* in SUMMIT. Your selection is a recognition of your accomplishments and strong leadership potential.

The Legal Division aspires to be an organization known for championing talent. The goal is to create a truly diverse and inclusive environment that enables our employees to grow, contribute and perform at their highest levels across the Legal Division. While participation in this program does not guarantee a promotion or ensure a path to advancement, SUMMIT will provide opportunities for greater visibility, and help you develop the skills and relationships you need to support your professional growth.

Your success in SUMMIT requires you to "own" your relationship with your Steward. While they will work with you to promote empowerment, emphasize diversity and inclusion, and cultivate an environment focused on talent, you must capitalize on this opportunity by taking the time to actively participate, solicit feedback, and learn. Your success in SUMMIT will depend on your proactive curiosity, your passion for personal growth and development, and your drive to become a leader.

**Participants will receive training to prepare them for the SUMMIT program.*

More SUMMIT Resources

SUMMIT Home

Steward Resources



Participant Resources

Guiding Principles and Keys to Success

Getting to Know Your Steward

Creating a Development Plan

Sharing Your Progress

Improve your Leadership Skills

Improve your Communication Skills

Build your Executive Presence

For a comprehensive set of Participant Resources, click [here](#).

Curated Playlist of trainings for Participants

Participant Resource Topics:

- ✓ Guiding Principles
- ✓ Getting to Know Your Steward
- ✓ Creating a Development Plan
- ✓ Sharing Your Progress
- ✓ Improve Your Leadership Skills
- ✓ Improve Your Communications Skills
- ✓ Build Your Executive Presence

SUMMIT Steward Resources

SUMMIT - Steward Resources

Welcome Steward!

Thank you for serving as a Steward* with SUMMIT. Your willingness to devote the necessary time and effort to our leadership development will contribute to a more effective Legal Division and a more successful enterprise.

Leaders at Freddie Mac are generally responsible to develop the talent of all the employees on their team – that is part of their job, and you are undoubtedly providing that even now for your junior colleagues on an informal basis. None of that is changing.

At the same time, your involvement in SUMMIT creates an intentional framework for you to connect with someone outside of your everyday orbit and who has demonstrated strong leadership potential. Together you and your Participant will forge a relationship through which you can empower your Participant, develop their leadership competencies, create opportunities for their growth and advocate for them within the enterprise. Through SUMMIT, you will use your influence and advocacy to help your Participant obtain high-visibility assignments and leadership development opportunities, all of which will help to prepare them for possible future career opportunities. This, in turn, will help Freddie Mac develop and maintain well-qualified, strong and diverse leadership at all levels throughout the organization.

**Stewards will receive training to prepare them for the SUMMIT program.*

More SUMMIT Resources

[SUMMIT Home](#)

[Participant Resources](#)



Steward Resources

[Guiding Principles and Keys to Success](#)

[Getting to Know Your Participant](#)

[Creating Your Participant's Development Plan](#)

[Sharing Your Participant's Story](#)

For a comprehensive set of Steward Resources, click [here](#).

Steward Resource Topics:

- ✓ Guiding Principles
- ✓ Getting to Know Your Participant
- ✓ Creating Your Participant's Development Plan
- ✓ Sharing Your Participant's Story

Questions?



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APPENDIX

Common Steps

Designing and Implementing A Program



1. Pre-Planning

- Decide on program goals
- Develop business case for funding and support
- Secure support and executive sponsorship

2. Create a Project Plan (resources, funding, timelines, dependencies and deliverables)

3. Design Program

- Identify desired leadership competencies
- Develop program eligibility, selection and matching processes
- Develop program rules and parameters, e.g., program length, size of cohort, exit rules, managers' roles, metrics, relationship milestones, identify program administrator(s), etc.
- Create communication strategy, e.g., marketing, socialization, messaging, brown bags, etc.
- Identify appropriate training, including identifying internal resources and/or outside vendors such as Sponsor and Participant best practices, training on competencies, etc.
- Develop program materials: application, participant and sponsor guides, development plan templates, FAQs, communication templates, operations guide, etc.

4. Announce and Promote the Program

5. Selection and Matching

6. Establish, Support and Monitor Sponsorship and Participant Relationships

- Development plans, program milestones, program events
- Training and coaching
- Develop and implement Action Learning project(s)

7. Program Evaluation, Metrics, Enhancement and Change Management including participant replacements

Sample Table of Contents for Operations Guide

Table of Contents – Overview

- I. Key Leadership Competencies
- II. Eligibility, Application and Participant Selection Process
 - A. Eligibility
 - B. Application
 - C. Participant Selection Process
- III. Stewards and the Steward-Participant Relationship
 - A. Matching of Participants and Stewards
 - B. Training

- III. Stewards and the Steward-Participant Relationship (cont.)
 - C. Steward-Participant Relationship
 - D. Relationship Events and Milestones
 - E. Exit Before Program Completion
- IV. Action Learning
 - A. Objective and Expectations
 - B. Structure
 - C. Other Action Learning Items

- V. Program Operations
 - A. Facilitating the Dyad relationship
 - B. Operational Questions
 - C. Program Assessment/Revision
- Appendices [Sample forms and templates, etc.]

Vendors



- Vendors used in Summit - more information available upon request
 - Best Practices training for stewards and participants
 - Assessment tools for leadership potential
 - Executive Presence training