

Kristin Lupfer on Balancing Life and Leadership

Conversations on Leadership

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Overview

Conversations on Leadership is a series highlighting the leaders within Policy Research. In this series, guests share their thoughts on Policy Research's work and culture and highlight how they are using the firm's strategic plan to guide their work and advance the field.

In this episode, Kristin Lupfer, Vice President for Housing and Income Supports at Policy Research discusses her tenure at Policy Research, her path as a remote employee, and her approach to leadership.

Elianne Paley:

Welcome to *Conversations on Leadership* by Policy Research. This series highlights the firm's leaders, our strategic goals and our approach to our work. I'm Elianne Paley, a communication specialist at Policy Research. In this episode, I'm talking with Kristin Lupfer, Vice President for Housing and Income Supports at Policy Research. We'll discuss her tenure at Policy Research, her path as a remote employee, and her approach to leadership. As vice president, Kristin contributes to Policy Research's strategic planning and leadership activities and manages personnel, budget, task timelines, and all projects within the housing and income supports program area. Kristin is also the project director for SAMHSA's SSI/SSDI Outreach Access and Recovery, or SOAR Technical Assistance Center, where she oversees all technical assistance delivery, SOAR online course development, staff supervision, new materials development and technical assistance to SOAR states. She also happens to be one of the very first remote staff members at Policy Research, which I am very excited to hear more about. Kristin, it's great to have you here.

Kristin Lupfer:

It's really great to be here. I feel like I am in the company of giants and I'm honored to join these conversations.

Elianne Paley:

So before we get started, I've started to ask our guests a more open-ended question to set the stage. Do you have a personal mantra or philosophy that guides you in leading your team?

Kristin Lupfer:

Wow. It's difficult to identify just one philosophy that guides my leadership. But I have to say that it comes down to we are all humans first. We bring our whole selves to work, our struggles, our strengths, our pasts, our hopes for the future. When it helps me to give grace and space where people need it, where I need it. It lets me be myself, reminds me that how we're doing personally impacts how we're able to do

our work. And so if we take better care of ourselves and our employees, we do better work and make a greater impact. I care deeply about the people I work with and the people that we are doing the work for. And so it's that humanness that connects us that really grounds me in my work and my leadership.

Elianne Paley:

Thanks for sharing that, Kristin. I feel like the love and care for your team and for yourself really come through in your leadership. It's a great perspective to remember as we move deeper into our conversation. And so I mentioned earlier that you were one of Policy Research's first remote employees. There was actually a point where you were the only remote employee outside of New York. What was that like?

Kristin Lupfer:

Honestly, it was really tough at first. The technology wasn't there. This is 15 years ago. So there were times when I felt really disconnected, both figuratively and literally. I spent a lot of time traveling in those first few years and so I'd made connections with team members and community members. But there was an element missing during the day-to-day. Policy Research worked really hard to adopt new technologies and as we hired more remote staff, we found ways to get us all connected.

Elianne Paley:

So you mentioned your frequent travel. How did you manage that while living in Atlanta and working remotely?

Kristin Lupfer:

It was a big change for me. I was used to working in an office and providing direct service. I had been doing street outreach, meeting people in shelters, in the state hospital, the local jail, on sidewalks, and encampments. I went from that to working in my living room and traveling two to four times a month on site visits and conducting trainings. When I was needing that connection, I was really proactive with email and phone calls. I took advantage of one-on-one calls. I reached out to my coworkers for check-in calls among peers.

Believe it or not, I craved meetings because it gave me a chance to gain a virtual connection that I wasn't getting in person. I laugh at that now because I revel in the chance to cancel a meeting and have some found time. But at the time, it was my way to connect. We have come so far in the way that we can connect in the present day that it's hard to remember what it was like when the only way to reach a colleague was on the phone. So the messaging and video platforms that we have now were really transformative and they've changed how we can collaborate together from anywhere in the country.

Elianne Paley:

You've started to touch on challenges a little bit with needing meetings, being remote, craving connection. What were the advantages that you experienced being remote in those early years?

Kristin Lupfer:

I was able to live where my family needed to be and as the years passed, where my family wanted to be. At the time my husband was finishing up graduate school at Georgia Tech, we couldn't move to New York when I was offered the position at Policy Research. After he graduated, we were then able to make the choice to move out to Boulder, Colorado, at the town we would end up moving to twice and where we're located now.

Elianne Paley:

Did you find the position or did someone at the firm find you for the position?

Kristin Lupfer:

Yeah, at the time I was working in the state of Georgia. I worked for the Department of Behavioral Health and was implementing the SOAR Project for the state of Georgia. And there was no TA Center and so I wanted to reach out and I knew that PRA had developed the curriculum. And so I would email them, I would ask questions like, "This is what I'm doing. Is anyone else doing this? How can I connect with other people doing SOAR?" Because there was no connection. And I said, "I really want to meet with other people who are doing SOAR in my region and I can host this call. I can be the lead. You just give me their contact information." And so I was doing some of the work as a state lead that would be important to national level technical assistance.

And not to brag on myself, I was doing a good job. So I think that they noticed both that I had some good ideas about SOAR implementation and then also was thinking bigger picture about how we can learn from each other how can we really grow this by making those good connections. So they knew of me because of that, because of my outreach for help and my desire to take this bigger. So SAMHSA had a task order out for the SOAR TA Center and Policy Research was bidding for it. So they asked me to join the bid and then if they got it, I would be hired on for that position. And so that's how that happened.

But I told Deb at the time, "I can't move to New York. If I'm going to join the team, I have to join it from here. This is my life situation." And they were okay with that. I flew up to Albany for an interview. I'm so glad that I took that chance, took that risk because I could not be happier in my work at Policy Research where I've landed how my role here has been able to both expand in the work that we're doing and the impact that we're able to make together. But with who I work with and what we get to do to make our day-to-day work lives so much better.

Elianne Paley:

That is incredibly helpful. It provides great context for me. So after your first few years working at the company, how did your role transition when you were offered the associate director position?

Kristin Lupfer:

When I was hired at PRA, I was a senior project associate and working on a team for an incredible supervisor and leader. And she decided that it was time for her to retire and was planning for her retirement, and so had come up with a plan to help promote me into a position to eventually take over as the project director. So I flew up to Delmar for my annual review and was offered this promotion to become the associate director at the time and then eventually the project director upon her retirement in about nine months. So it was wild because little background, my husband and I were married for almost 10 years before we decided to have kids. And then it was hard for me to get pregnant. So when I found out that I was finally pregnant, I was equally thrilled and scared. And it was also just before I flew up to Albany for that annual review.

And so when my boss at the time offered me the promotion, I had not even told my family I was pregnant. But I knew that I had to be transparent about that before accepting because the timeline was going to make everything more complicated. My new parent leave was going to coincide with my boss's retirement and my taking over as the project director right after my leave ended. And that would be happening while I'm figuring out how to care for a baby. So I was incredibly lucky because the leadership at Policy Research could not have been more supportive. My supervisors were also mothers and had figured out how to navigate full-time, demanding jobs while also caring for their kids.

So I had incredible mentors and support from them, from my own family to figure it out. I like to joke that I traveled until I was 10 months pregnant. I did travel through it all, managing morning sickness while facilitating a planning forum, training all day with a huge pregnant belly. My son was huge. My supervisors and I really spent a lot of time planning and sharing and transferring knowledge so that I would be as prepared as possible for my new role. And I also spent a lot of time with my husband figuring out how we would manage childcare while we were both working and while I was traveling.

Elianne Paley:

Yeah. From what I've heard, since I don't have kids of my own, the new parent leave as it exists now is fairly fair and balanced. So it makes me happy to know that having other mothers as colleagues and supervisors has been a major influence since the beginning of your time at the company, and I imagine since the beginning of the company.

Kristin Lupfer:

Policy Research has grown a lot in the flexibility that we allow and the ways that we help people balance their life and their work, especially for parents and caregivers. It might not be parent to young

children, it might be caregiving for an elderly family member or other family member. And we are much more in tune with giving space for people to bring in that humanness. And while I can say that I felt incredibly lucky and very grateful for what I had, we've taken it even farther. We've made it even better. Our mission to do is not say, "Yeah, we're great. We're good." And leave it like this. If we can say, what else can we do? How else can we incrementally improve this for others? We can still create quality impactful work and let people be their whole selves at work.

Elianne Paley:

Absolutely. Yeah, with your position in leadership, it's great to hear that it's this incredibly conscious thing. I mean, of course it is, but it's definitely one of those things where I started at the company and at the time had thought this company is amazing, it's so generous. And it's wonderful to hear that leadership does get together and think, how can we make this even better? Because over the years, there are things I would've never thought of that really do make the experience here as an employee so much better. You began to touch on this already a bit in terms of your strategies for balancing your role as a parent and also your leadership role. Were there any particular strategies that you employed to balance your new leadership role and being a new parent?

Kristin Lupfer:

Yeah, definitely. In the early days, I realized quickly that I was going to need to advocate for myself to have more predictability to my travel. I had to adjust my own thinking that I always had to say yes. So I protected every other week to be home. I put in the boundaries that my family needed in order to make sure that we were all cared for, that I was cared for, that my new son was cared for, that we all could navigate this change together, both my responsibility at work and my responsibility at home. Simultaneously, I supported and trained my team members to help with the workload. I didn't need to take the lead on every conference presentation or attend all of the planning meetings. I encouraged others to share their expertise. They were better able to learn and grow with the opportunity to present and lead and represent SOAR and Policy Research at conferences and events. I worked on ways to delegate tasks and to tap into the incredible experts and team that I had all around me.

Elianne Paley:

So it's clear from this conversation that you and the SOAR team were pioneers in the remote workspace even prior to COVID. But with your experience working from home, how did you adjust your leadership style as more members of your team transitioned into working from home during the pandemic?

Kristin Lupfer:

One of the things that was really key to keeping everyone connected and grounded, especially when it felt like the world around us was falling apart, is making sure that we had opportunities to connect with each other. So scheduling time for sharing or discussing specific topics, having co-working time, we're all working on a specific task and have each other connected in a Teams call. But we're chatting

casually, we work on things, we're just working in space together and it gives us this connection together. Sometimes someone will put on music, sometimes someone will drop off because they're distracted and they're like, "Oh, I've got to get this work done. I'm going to go be in a quiet space." Something we started doing was starting all of our team meetings with gratitude sharing or what you might be bringing into the meeting. And we allow space in the meeting for everyone to share if they want to and no one to share if they don't.

And we take that time and sometimes it takes longer in the meeting than we expect and maybe some of those agenda items get bumped to another day. But this is such an important space to hear about each other's lives, to share in happiness, to offer support when there's challenges. And I know that it helps us do better work because we can see the human in each other more clearly. And we can then step up or step in when someone else needs us to and they do the same for us. So I think building that strong team connection helped to make sure that we could support each other during the pandemic, during political turmoil, during racial reckoning, and really help to support staff who were struggling with what's happening in our world and figuring out how they can still be present at work or not be present when they needed to not be. And building a place where people felt like they could say that and share that was really important to me.

Elianne Paley:

So during and since the COVID pandemic, how do you think that the process that you're describing went? And how do you think it set up your team and really the rest of Policy Research for success?

Kristin Lupfer:

I think that it went really well because so much of my team was remote before the pandemic. We could really share what worked well for us. What are some things you should think about when you're setting up your home office? How can you make sure that you feel like you have a separation between your home and your work and that you can actually leave work even though you're still in your home? Things like that were really important. So our ability to connect with others and share what we had learned over the years.

And then also I think what really helped all of us who were remote-first, now that we're a remote-first company, was that everyone could see a little bit of what it was like for us. And they're like, "Oh yeah, that's why it's so important that we make sure that we're really inclusive in our meetings and we make sure that everyone can be heard and everyone can be seen." And so I think that that also opened up the eyes to what else can we do at Policy Research to keep everyone connected. Not knowing at the time that the staff that had been in the office wouldn't go back to the office. We didn't know that at first, but we already started making changes to increase the connectivity and collaborative ways we could work together in virtual space. And then when we ended up being a fully remote-first company, we were all better positioned.

Elianne Paley:

So you mentioned gratitude check-ins and co-working, playing music. Can you discuss any specific strategies that you implemented to foster a better team dynamic in a virtual space?

Kristin Lupfer:

I established lines of really flexible communication. So my team can email me, call me, schedule a meeting, send me a chat, and I'll respond in all of those areas, but also shared my preferences for different types of communication. So if you need something reviewed, it's best to email me so that the chat doesn't disappear and I lose it. If you have a quick question, send me a chat and I can fit in the answer between calls and tasks. And if we need a discussion, let's schedule a meeting so we can dig in or have a screen share. One thing that I decided that I had to do, especially as more of us were becoming remote, that all supervision was happening remotely, that there was no one in the office who could give feedback about what seems to be going on for folks who are in person.

I decided that I would have to absolutely trust people. I can't know that you're at your desk like I would if we were in an office together. But I know that if you are productive, if you're getting your work done, if you're communicating with me, with our team, with our partners, I know that you are working. And I just trust that you are doing and showing up where you are supposed to be and where you need to be. And when you're not, that that's okay because that's where life is coming in and that's where our flexibility is coming in and it's all about communication. It's all right, tell me, "Actually, I've got to leave. I've got to draft everything. Something has happened and I need to go. And I will be back on later or I will make it up tomorrow or next week, but this is what my life needs at the time."

And I think building in that trust, building in that ability for flexibility makes it easier to know that you're all putting in that effort, you're doing that work. I think my team makes it easier on me because we are a very passionate group of people. We care so much about our work and not wanting to let people down, not wanting to not be as responsive as we can be. We want to maintain our reputation. Policy Research has an incredible reputation in the field of not only being experts but of being responsive and on top of our work, producing quality work in a timely way. So we're all really in tune to that too. So I think that that also helps a supervisor when everybody is on the same page about how important our work is and our reputation in the field.

Elianne Paley:

You clearly make yourself very available to your team, I would say. So what strategies do you use to integrate life and work for yourself, especially as an experienced remote employee but also as a leader?

Kristin Lupfer:

Yeah. I try to be an example. And so I am communicative about when I need to flex, when I need to be out and how I need to prioritize my life over what's happening at work that day. So I flex my schedule

around school days, I pick up my kids from school. And so I'm gone for an hour in the afternoon, but I come home and we get home and I can get back to work. And so I don't have a continuous eight-hour day, but I get all of my work done in this flexible schedule. And when there's something that pops up in the middle of a school day, I'm able to go to the picnic at school or I'm able to go to the art show or take the kids to soccer practice and still get all of my work done, get all of my hours in in the time that works best for me and my family.

And sometimes I can plan that really well and I know exactly how I'm going to flex my schedule that week and it's all written out and something blows up or something happens unexpected and you're like, "All right, so let's find another time." And maybe there's downtime at home where I can fit back in the document that I need to review or get to that email that I have drafted and saved and didn't get to send when I needed it to. So it's giving myself that flexibility and then offering that to the team as well and letting them know that, this is okay so long as we're communicating about it and you let me know what it is you need and when you're working and when you're not. And we can make sure that everything that we need to get done gets done when it needs to get done.

One thing I think is really important is that when we do allow this flexible scheduling, we also acknowledge that we don't expect people to work outside of their regular hours because we are. That my working some at night after my kids have gone to bed because that's the best quiet time for me, doesn't mean that you ever need to work at night. If you can have a schedule during the day where you get it all done and you're like, "Peace out. I will see you tomorrow at 8:30." Perfect. So my doing work in the hours that work best for me doesn't transfer to anyone else. Something else that I do and that I love about Policy Research's approach to time during the workday is we have a strategic renewal, which is a half an hour of time that is given to us each day that we can use how we want.

If it's our lunch break, perfect. If it's a run outside, awesome. If you need it to be more than 30 minutes and your strategic renewal's an hour and you're flexing the rest of that to the end of your day, fantastic. And that has made such a difference for me because I'm a person who, I eat at my desk, that's what I do. I eat while I'm doing emails or while I'm in a listen only meeting or whatever that might be. And I take my strategic renewal and I use it for walking or running or getting outside. And I use my strategic renewal for self-care and the thing that I need to fill my cup. And I love that I can have that flexibility to do that at any point in the day. Maybe it's like, "It's going to be 95 degrees today, I'm going to take my strategic renewal at 8:30 this morning before it gets too hot and I'm going to eat lunch later." And that's great.

Elianne Paley:

So in terms of your leadership approach, you've mentioned trust, you've mentioned being available, you've mentioned leading by example. How would you describe your leadership style and how has it developed over the years?

Kristin Lupfer:

I try hard to be collaborative. I love having working meetings where we use our technology to live share a document and make edits and changes together, talking through ideas, drafting emails together. Or maybe we have a discussion and then I send them on their way, draft something and then I'll come back later with comments, we'll discuss it again. I mentioned this earlier, but I really love finding people's strengths and encouraging them to explore and expand on what they're passionate about and good at. People do their best work when they care about it and can be proud of it.

Elianne Paley:

It's also clear to me how proud you are of your team. So before we wrap up our conversation, I'm also curious about what's going on in your project area. Can you discuss any recent significant initiatives or developments in the housing and income supports or SOAR program areas?

Kristin Lupfer:

Yes. Our area has really grown. With the award of the Homeless and Housing Resource Center grant, we were able to expand our work beyond income supports and reach a broader audience of homeless and housing and behavioral health professionals. For our team, it meant leadership and growth opportunities, specifically for Jen Elder to direct that project and now also the PATH Data Exchange project. So we've been able to grow our reach, grow our staff, and make even more of an impact.

Elianne Paley:

Do you envision AI integrating with the housing and income support and SOAR work?

Kristin Lupfer:

With the broadening of our work and the expansion of the amount of work that we're producing, the amount of products we're creating, the amount of content that we're developing and information that we're bringing into the field, there are a lot of exciting opportunities with AI tools to make that work more efficient and to get more information out there. I believe that there's a lot of positive that can come with the appropriate and careful use of AI. Specifically the SOAR Project is encountering the use of AI in our online courses. So we have a practice case component that requires independent writing of a five to six-page narrative that's pretty intensive. It's based on progress notes, medical records, and video recordings of a fictional person. And so some people who are taking the course have found ways to plug those materials into AI systems like ChatGPT and have it generate the text.

We are grappling with how to make sure that the trainees are learning what they need for real-life applications, while also recognizing that tools that can summarize or synthesize information might be useful when trying to process high volumes of information. So we don't have all of the answers and we're, right now, encouraging independent work without the use of generative AI for these specific purposes, for the course purposes and our evaluation of that learning. We also recognize that there's

a lot of support and improvement and things that AI can provide for us to make our work easier. We've been having some great conversation with other experts in the field. We had a SOAR expert panel meeting where we talked about how AI can be used, and folks shared about how they use AI tools for note-taking or others use it for grammar corrections. Raising my hand on that one. So there's a lot to keep exploring around how AI can be used appropriately.

Elianne Paley:

I know that you're also a member of the AI subcommittee, so what is your perspective on the development of the AI guidance document?

Kristin Lupfer:

Our emphasis on having a human on the front end and back end of anything that we use AI for will make a huge difference for our creative integrity and the accuracy and quality of the information that we share. Our guidance for staff on the use of AI will be ever evolving as the technology changes and new uses become available. At the top of this podcast, I mentioned that my mantra is really about humans first, and that follows through to AI considerations. We want to find ways to use AI as a tool, but not to replace our human creativity, logic, or critical thinking.

Elianne Paley:

Thank you so much, Kristin, for sharing so much about your journey here at Policy Research. Your insights and experience with remote work, leadership, life work integration and the evolution of the work have been incredibly valuable. And I really appreciate you sharing your experiences and strategies with me and with our listeners.

Kristin Lupfer:

Thank you for the conversation and giving me the opportunity for this reflection. It reminded me again how grateful I am for the positive work environment that we've created at Policy Research.

Elianne Paley:

I'm Elianne Paley, and you've been listening to *Conversations on Leadership*. *Conversations on Leadership* is available via Spotify, Apple Podcasts, and SoundCloud. This episode was produced, hosted and edited by Elianne Paley and engineered by Nicole Vincent-Roller. If you have questions about this episode, email us at communications@prainc.com. Learn more about us and the *Conversations on Leadership* series at prainc.com.

About

Policy Research Associates, Inc. (PRA) is a women-owned small business founded in 1987. We offer four core services: research, technical assistance, training, and policy evaluation. Through our work, we enhance systems that assist individuals with behavioral health needs on their journey to recovery.

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