

Developing new ways to help people

Practical and visionary, Mary Walsh Boatfield leads a trio of non-profits

By NATE DOUGHERTY

Mary Walsh Boatfield has her weekly schedule mapped out across two counties and hundreds of miles.

She serves as president and CEO of Finger Lakes United Cerebral Palsy/Happiness House, CEO of Rochester Rehabilitation Center Inc. and president of United Cerebral Palsy Association of the Rochester Area Inc., which is known as CP Rochester. Walsh Boatfield has overseen the convergence of the groups, all of which serve people with developmental disabilities and their families and have come together under various affiliations.

Facing financial hardship and spurred by a goal of becoming more efficient, CP Rochester came together with Happiness House to share resources and services while each retained its unique identity. While the arrangement has allowed the groups to save millions of dollars and better deliver services, it means logging an ever-growing number of miles for Walsh Boatfield, who splits time among offices in Geneva and Canandaigua in Ontario County and Rochester.

"It's a busy schedule," she says.

There remains much work to do in aligning the organizations, which total more than 700 employees and a total budget of greater than \$34 million, but she says it will continue to sharpen services and make them a more attractive target for state funding.

Early calling

Before she finished high school, Walsh Boatfield knew exactly what work she wanted to do.

She grew up in West Irondequoit and attended Bishop Kearney High School, and through both her church and school participated in many volunteer activities that gave her a love of service. Walsh Boatfield also was in a Girl Scout troop with two other girls who had developmental disabilities and came to work closely with them.

"I think by the time I was 14 I knew I wanted to work with people with developmental disabilities," she says.

She graduated from SUNY College at Geneseo with a bachelor's degree in speech pathology and audiology and received a master's degree from Nazareth College in education and speech pathology. After graduating, Walsh Boatfield went to work at what was then a new non-profit organization in Brockport, Lifetime Assistance Inc. It had five employees.

She remained with the organization for 23 years, working with adults with developmental disabilities and gaining experience working directly with clients and within the operations of the organization. She worked as director of day program services, which included adult services, but was also picked to serve a fundraising role.

"We were holding a campaign at Lifetime and I was selected as an employee representative on the campaign cabinet, and I was working with the employees to raise funds for the capital campaign for a new building in Brockport," she says. "Fundraising is about relation-



Photo by Kimberly McKinzie

ships, and I had those relationships with employees and families, and we ended up having a very successful campaign."

Walsh Boatfield later was named executive director of the organization's foundation, where she oversaw fundraising functions for the entire organization.

"I think my greatest effort there was bringing in Itzhak Perlman to the Eastman, which filled the theater and raised quite a bit of funding for the organization," she says.

Walsh Boatfield enjoyed the role, she says, and when a position opened for executive director 14 years ago at Happiness House in Geneva, she knew her experience would fit well there.

"The organization was in need of expanding their fundraising efforts," she says. "I like doing both, the combination of operations and development, and I think it's hard to do one exclusive of the other."

Walsh Boatfield took the helm at Happiness House and says there was a bit of a transition in moving to the new organization. Happiness House works mostly with preschool children, which called for a different approach and a greater focus on diagnostic and early intervention services.

"It was nice to see the impact of these early intervention services on children and families, how important it was in helping them start their life and continuing their educational opportunities after they left us and moved on to a kindergarten setting," she says.

Early intervention always has been a big focus at Happiness House, Walsh Boatfield says, noting they have clinicians who work with parents. The organization also has children in integrated classrooms.

"All the rooms have children of all

abilities," she says. "That's extremely important because they all learn from each other, develop friendships and ask questions about the differences, and those can be answered by the individuals and the teachers. Many of these friendships last throughout their lifetime."

Growing partnerships

Walsh Boatfield has overseen a major transformation in the local human services landscape. In 2013, CP Rochester president Brian Klafehn announced plans to retire, and his organization and Happiness House signed an executive staffing agreement that made Walsh Boatfield president and CEO of both agencies.

"It happened in a very short period of time and we learned early in the process how alike Happiness House and CP Rochester were," Walsh Boatfield says.

"We were providing a lot of the same services in the Finger Lakes region that they were in Monroe County, so it made sense that we could work together, provide high quality services and share some administrative staff and continue to expand fundraising and development efforts through the foundation."

Jeffrey Baker, who is chairman for both Happiness House and CP Rochester, says as the organizations discussed the affiliation it became clear Walsh Boatfield was the best person to lead it.

"We were so impressed with her interview, and you could see how well she had done with Happiness House and the people she had worked with," he says. "When you find someone as great as she is, it's easy to follow her."

Last December, the groups formed a

passive parent corporation: Ability Partners Inc.

The agencies worked with representatives from each board and were funded in part with a grant from the United Way of Greater Rochester Inc.'s Synergy Fund. Together CP Rochester and Happiness House realized more than \$500,000 in annual savings, Walsh Boatfield says. The organizations are more efficient as well, with a greater plan that included some staff cutbacks.

"Those resources are utilized now for programs and services to help continue developing new and innovative services and be sure the ones we currently provide are able to continue," she says. "And all the development staffs now work in the foundation, which coordinates more than 10 activities a year and the planned giving and annual appeal efforts that go on in both organizations."

The turnaround for CP Rochester, which was struggling when it started the executive staffing agreement, came quickly, says Daniel Meyers, president of the AI Sigl Community of Agencies.

"It's remarkable that CP Rochester was losing seven figures and Rochester Rehab was losing seven figures as well, and within a year of Mary's leadership they're on track to be in the black," Meyers says. "That kind of serial turnaround is really, really, really remarkable."

But such a large endeavor takes constant work to smooth the edges, Walsh Boatfield says. She holds regular sessions for employees to share their thoughts, called Meetings with Mary, which she says provide valuable feedback and keep employees up to date on the changes.

Continued on next page

Continued from previous page

"It is always a work in progress because you do want to blend the cultures," she says. "We also look closely at all of our procedures and policies to make sure we're following the best practices and that everyone is aware of those policies."

The meetings are summed up in a newsletter sent to employees unable to attend, which Walsh Boatfield says was important in keeping everyone on the same page.

"The employees are working with the families and individuals, and maybe can recognize better the potential opportunities for the organization, and we certainly try to include that," she says. "I have an open door policy and I want to hear from not only the employees but the families from every level."

While the agencies work together, the passive parent corporation allows each group to maintain its separate identity. Each organization also has its own strategic plan, and employees can participate in work groups that contribute to these plans.

In March the partnership extended further, with the organization signing an executive staffing agreement with Rochester Rehabilitation to share executives. The organization is not part of the passive parent corporation, but Walsh Boatfield says they developed a strategic plan and are working on the objectives as well as looking for ways to align programs and services.

"Our development staff is providing some resources to Rochester Rehabilitation, including assistance with grant-writing and public relations," she says.

The growing partnerships have made for a busy couple of years for Walsh Boatfield.

"Two and a half years ago, I was the CEO of just Happiness House, we had 225 employees and at that time about \$8 million budget," she says. "Now the three organizations together have almost 700 employees, serve about 5,000 individuals and have about a \$34 million budget."

Looking ahead

There is still much work to do, Walsh Boatfield says.

The organization received a state grant for more than \$500,000, providing the resources that have allowed the groups

to hire a transition coordinator to help align policies and procedures. The organization also will pursue more opportunities to serve clients, including purchasing electronic health records.

"As we continue these synergy efforts, we have plans to grow and expand," she says. "We're looking to build our second

"The state is looking for organizations to partner and collaborate, and the fact that we are naturally collaborating gives us an advantage to secure new funding."

22-unit housing apartments in Canandaigua and eight unit age-in-place on the land we own in Canandaigua, as well as a transition home in Monroe County. We are also looking to grow and expand autism services in Monroe County."

There are benefits that come with the

larger organization, Walsh Boatfield notes.

"The state is looking for organizations to partner and collaborate, and the fact that we are naturally collaborating gives us an advantage to secure new funding," she says.

Though the work can be difficult, Walsh Boatfield says it is personally rewarding.

"I really like mentoring young students and therapists, especially in the area of speech pathology," she says. "I'm very impressed that their passion and enthusiasm is as great as mine is after 37 years. We have some incredibly smart and knowledgeable people entering the field who will be working with our children and adults with disabilities."

Walsh Boatfield, who lives in Victor, Ontario County, tries to balance the

work with her home life, spending time with her two daughters and 14-month-old grandson.

Family is important, Walsh Boatfield says, not only in her own life but in shaping the future of the work she does.

"I love developing and finding new programs that help people, and so many of my ideas come from families," she says. "I'm always looking for that creative, cost-effective way to provide services that are going to endure and keep helping people through the future."

Meyers says he now has great optimism for the organizations Walsh Boatfield leads, thanks to the leadership she brings.

"Mary serves a full plate of protein every time she sits down," he says. "She's got a remarkable strategic sense that is practical and visionary, and those don't always live in the same house."

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Mary Walsh Boatfield

Position: CEO of Rochester Rehabilitation Center Inc., president and CEO of United Cerebral Palsy Association of the Rochester Area Inc., CEO of Finger Lakes United Cerebral Palsy/Happiness House

Age: Not disclosed

Education: B.S. in speech pathology and audiology, SUNY College at Geneseo; M.S. in education/speech pathology, Nazareth College, 1980

Family: Daughters, Jillian and Jenna; grandson, Giovanni

Residence: Victor, Ontario County

Activities: Spending time with family, walking

Quote: "I love developing and finding new programs that help people, and so many of my ideas come from families. I'm always looking for that creative, cost-effective way to provide services that are going to endure and keep helping people through the future."