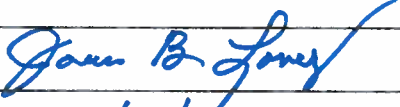


**DISCLOSURE BY ELECTED PUBLIC EMPLOYEE  
OF TRAVEL EXPENSES SERVING A LEGITIMATE PUBLIC PURPOSE  
AS REQUIRED BY 930 CMR 5.08(2)(d)2.**

RECEIVED  
STATE ETHICS COMMISSION

2015 SEP 3 PM 4:21

|                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                             | <b>ELECTED PUBLIC EMPLOYEE INFORMATION</b>                                                                                                                                                                                                                                                                                                                                                                                                        |
| Name of elected public employee:                                                                            | Joan B. Lovely                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Title/ Position                                                                                             | State Senator                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Agency/ Department                                                                                          | Massachusetts State Senate                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Agency address:                                                                                             | State House, Room 413A                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Office phone:                                                                                               | 617-722-1410                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Office e-mail:                                                                                              | Joan.lovely@masenate.gov                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Write an X to confirm each statement.</b>                                                                | <p>I am filing this disclosure because:</p> <p><input checked="" type="checkbox"/> I am going to engage in an activity that serves a legitimate public purpose, i.e., it is intended to promote the interests of the Commonwealth, a county or a municipality; and</p> <p><input checked="" type="checkbox"/> A non-public entity (but not a lobbyist) has offered to reimburse, waive or pay travel expenses and costs worth more than \$50.</p> |
|                                                                                                             | <b>ACTIVITY THAT SERVES A LEGITIMATE PUBLIC PURPOSE</b>                                                                                                                                                                                                                                                                                                                                                                                           |
| Describe the activity which is the reason for traveling.                                                    | I participated in the annual Emerging Leaders Program, hosted by the State Legislative Leaders Foundation. The program served to hone leadership skills and abilities of state legislators and was comprised of numerous group workshops, discussions, and classes.                                                                                                                                                                               |
| Describe your participation in the activity.                                                                | As a participant, I took part in leadership workshops, group discussions, and lectures.                                                                                                                                                                                                                                                                                                                                                           |
| Date, time and location of activity.                                                                        | July 6 – 9, 2015<br>Darden School of Business<br>University of Virginia                                                                                                                                                                                                                                                                                                                                                                           |
| Please explain how the activity will promote the interests of the Commonwealth, a county or a municipality. | My participation in this training program serves to expand and promote my leadership skills, enabling me to better serve my constituency and the Commonwealth in my role as a state legislator.                                                                                                                                                                                                                                                   |

|                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|---------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                   | <b>TRAVEL EXPENSES</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Identify the person or organization that offered to reimburse, waive or pay your travel expenses. | State Legislative Leaders Foundation                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Address of person or organization.                                                                | State Legislative Leaders Foundation<br>1645 Falmouth Road<br>Centerville, MA 02632                                                                                                                                                                                                                                                                                                                                                                                               |
| Provide information in as much detail as possible:                                                | <i>Itemization and explanation of amounts offered:</i>                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Transportation:                                                                                   | <i>Air, train, bus, and taxi fare and rental car hire, etc.</i><br>\$23.98 (transportation) + \$390.81 (travel) = \$414.79                                                                                                                                                                                                                                                                                                                                                        |
| Lodging:                                                                                          | <i>Overnight accommodations.</i><br>\$840.00                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Meals:                                                                                            | <i>Breakfast, lunch, dinner, special events.</i><br>\$72.66                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Admission:                                                                                        | <i>Registration, admission, tickets, etc.</i><br>\$1,590.91 (tuition and fees)                                                                                                                                                                                                                                                                                                                                                                                                    |
| Other (please list):                                                                              | <i>Refreshment, instruction, materials, entertainment, etc.</i><br>N/A                                                                                                                                                                                                                                                                                                                                                                                                            |
| Total:                                                                                            | \$2,918.36                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Write an X beside any relevant statement.                                                         | <input checked="" type="checkbox"/> I have attached the relevant itinerary.<br><input checked="" type="checkbox"/> I have attached the relevant agenda.                                                                                                                                                                                                                                                                                                                           |
| For the exemption to apply, check off <u>both statements</u> .                                    | Having disclosed the facts above, I determine that:<br><input checked="" type="checkbox"/> Acceptance of the reimbursement, waiver or payment of travel expenses will serve a legitimate public purpose i.e., it will promote the interests of the Commonwealth, a county or a municipality; AND<br><input checked="" type="checkbox"/> Such public purpose outweighs any special non-work related benefit to me or to the person providing the reimbursement, waiver or payment. |
| Employee signature:                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                |
| Date:                                                                                             | 9/3/15                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

Attach additional pages if necessary.

Elected state or county employees – file with the State Ethics Commission.

Members of the General Court – file with the House or Senate clerk or the State Ethics Commission.

Elected municipal employee – file with the City Clerk or Town Clerk.

Elected regional school committee member – file with the clerk or secretary of the committee.

University of Virginia  
The Darden School of Business  
EMERGING LEADERS PROGRAM



THE STATE LEGISLATIVE  
LEADERS FOUNDATION

July 6-9, 2015

**SCHEDULE OF EVENTS**

All classes will be held in Classroom 50 of The Darden School. All meals will be in The Abbott Center Dining Room unless otherwise stated. Learning Team Meetings will be held during the program in designated Darden School Learning Team Rooms or Hotel Learning Team Rooms.

**MONDAY, JULY 6, 2015**

Afternoon

Arrival and Check in, Inn at Darden, Gatehouse

5:30 - 6:00 PM

Reception, Wilkerson Courtyard (weather permitting) If inclement weather will be located inside the Abbott Center

6:00 - 7:15 PM

Dinner, Abbott Center Dining Room

7:15 - 7:45 PM

Introductory Activities, Program Welcome  
Ed Freeman, Darden Faculty Leader

Evening

Learning Team Meetings, Hotel Learning Team Rooms  
**Material: The Second Machine** by Brynjolfsson & McAfee

*You will be given your learning team group at the opening dinner.*

**TUESDAY, JULY 7, 2015**

|         |   |       |    |                                                                                                                                                                                                                                       |
|---------|---|-------|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7:00    | - | 8:00  | AM | Breakfast, Abbott Center Dining Room                                                                                                                                                                                                  |
| 8:00    | - | 9:30  | AM | Class Discussion, Classroom 50<br>Topic: Economic Inequality- What are the Issues?<br><b>Material: <u>The Second Machine</u></b> , by Brynjolfsson & McAfee<br><i>Professor Freeman</i>                                               |
| 9:30    | - | 9:45  | AM | Refreshment Break, Outside Classroom 50                                                                                                                                                                                               |
| 9:45    | - | 11:15 | AM | Class Discussion, Classroom 50<br>Topic: Ethics, Values and Leadership<br><b>Material: <u>Plato - Republic</u></b><br><i>Professor Scott</i>                                                                                          |
| 11:15   | - | 12:15 | PM | Group Photo, Front Steps of Saunders Hall<br>Lunch, Abbott Center Dining Room                                                                                                                                                         |
| 12:15   | - | 1:45  | PM | Class Discussion, Classroom 50<br>Topic: Cross-Sector Collaboration<br><b>Material: <u>Triple-Strength Leadership, The Inter-Sector Toolkit, Pay for Success Financing for Early Childhood Programs</u></b><br><i>Professor Frank</i> |
| 1:45    | - | 2:00  | PM | Refreshment Break, Outside Classroom 50                                                                                                                                                                                               |
| 2:00    | - | 3:00  | PM | Class Discussion, Classroom 50<br>Topic: Health & Wellness<br><b>Material: <u>How Regular Exercise Helps, Decisions Decisions, End Mindless Eating</u></b> articles<br><i>Jodi Harris</i>                                             |
|         |   | 3:15  | PM | Meet outside Gatehouse to load buses for Monticello Tour                                                                                                                                                                              |
| 6:15    | - | 8:00  | PM | Cook-Out, Flagler Courtyard, The Darden School                                                                                                                                                                                        |
| Evening |   |       |    | Individual Preparation for Wednesday class sessions                                                                                                                                                                                   |

**WEDNESDAY, JULY 8, 2015**

|               |    |                                                                                                                                                                                                             |
|---------------|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7:00 - 8:00   | AM | Breakfast, Abbott Center Dining Room                                                                                                                                                                        |
| 8:00 - 10:00  | AM | Class Discussion, Classroom 50<br>Topic: Darden Ethics Simulation<br><b>Material: <u>Turning Gears</u></b><br><i>Professors Frank and Freeman,</i>                                                          |
| 10:00 - 10:15 | AM | Refreshment Break, Outside Classroom                                                                                                                                                                        |
| 10:15 - 11:45 | AM | Class Discussion, Classroom 50<br>Topic: Ethics and Political Leadership<br><b>Material: <u>Vignettes Prepared by Participants</u></b><br><i>Professors Frank &amp; Freeman</i>                             |
| 11:45 - 12:45 | PM | Lunch, Abbott Center Dining Room                                                                                                                                                                            |
| 12:45 - 2:15  | PM | Class Discussion, Classroom 50<br>Topic: Ethics, Values and Leadership- Part II<br><b>Material: <u>Plato- Republic</u></b><br><i>Professor Scott</i>                                                        |
| 2:15 - 2:30   | PM | Refreshment Break, Outside Classroom                                                                                                                                                                        |
| 2:30 - 4:30   | PM | Class Discussion & Simulation, Classroom 50<br>Topic: Negotiation and Political Leadership- Populator<br><b>Material: <u>In-class Assignment, no prep work</u></b><br><i>Professors Frank &amp; Freeman</i> |
| 4:30 - 5:30   | PM | Individual Preparation/Personal Time                                                                                                                                                                        |
| 5:30          | PM | Depart Gatehouse for Residence of Professor Freeman for Dinner<br><b><i>*will return at 8:00 PM</i></b>                                                                                                     |
| Evening       |    | Individual Preparation for Thursday class sessions<br><b>Material: <u>What Got You Here Won't Get You There</u></b>                                                                                         |

**THURSDAY, JULY 9, 2015**

|               |    |                                                                                                                                                                                                                |
|---------------|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7:00 - 8:00   | AM | Breakfast, Abbott Center Dining Room                                                                                                                                                                           |
| 8:00 - 10:00  | AM | Class Discussion, Classroom 50<br>Topic: Personal Leadership: Making a Difference<br><b>Material: <u>What Got You Here Won't Get You There</u>, Marshall Goldsmith</b><br><i>Professor Freeman</i>             |
| 10:00 - 10:15 | AM | Refreshment Break, Outside Classroom                                                                                                                                                                           |
| 10:15 - 11:30 | AM | Class Discussion, Classroom 50<br>Topic: Personal Leadership: Making a Difference (continued)<br><b>Material: <u>What Got You Here Won't Get You There</u>, Marshall Goldsmith</b><br><i>Professor Freeman</i> |
| 11:30 - 12:15 | PM | Summary and Wrap Up<br>Professor Freeman                                                                                                                                                                       |
| 12:15 - 1:15  | PM | Lunch, Abbott Center Dining Room<br><br>Participant Departures                                                                                                                                                 |

**We hope you enjoyed the program. Have a safe trip home.**

| Emerging Leaders Program 6-9 July 2015)                                     |                                                                                                                                                                                                                 |                                                                                                               |                                                                                                                                                                              |  |
|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| Monday                                                                      | Tuesday                                                                                                                                                                                                         | Wednesday                                                                                                     | Thursday                                                                                                                                                                     |  |
| 6-Jul                                                                       | 7-Jul                                                                                                                                                                                                           | 8-Jul                                                                                                         | 9-Jul                                                                                                                                                                        |  |
| Participant Arrivals                                                        | Freeman<br>8:00 - 9:30 AM<br>Economic Inequality: What are the issues?<br><u>The Second Machine</u> , Brynjolfsson and McAfee                                                                                   | Frank & Freeman<br>8:00 - 10:00 AM<br><u>Darden Ethics Simulation</u><br><u>Turning Gears</u>                 | Professor Freeman<br>8:00 - 10:00 AM<br><u>Personal Leadership: Making a Difference</u><br><u>What Got You Here Won't Get You There</u> , Marshall Goldsmith                 |  |
|                                                                             | Professor Scott<br>9:30 - 9:45 AM<br>Refreshment Break                                                                                                                                                          | 10:00 - 10:15 AM<br>Refreshment Break                                                                         | 10:00 - 10:15 AM<br>Refreshment Break                                                                                                                                        |  |
|                                                                             | Professor Scott<br>9:45 - 11:15 AM<br><u>Ethics, Values and Leadership</u><br><u>Plato - Republic</u>                                                                                                           | Frank & Freeman<br>10:15 - 11:45 AM<br><u>Ethics and Political Leadership</u><br>Ethics Vignettes             | Professor Freeman<br>10:15 - 11:30 AM<br><u>Personal Leadership: Making a Difference</u><br>(Continued)<br><u>What Got You Here Won't Get You There</u> , Marshall Goldsmith |  |
|                                                                             | 11:15 - 11:30 AM Group Photo<br>11:30 - 12:15 PM Lunch                                                                                                                                                          | 11:45 - 12:45 PM<br>Lunch                                                                                     | 11:30 - 12:15 PM<br>Summary & Wrap-Up<br>Program Evaluations                                                                                                                 |  |
| Opening Night Begins at 5:30 PM Followed by dinner and program introduction | Professor Frank<br>12:15 - 1:45 PM<br>Cross-Sector Collaboration<br><u>Triple-Strength Leadership</u> , <u>The Intersector Toolkit</u> , <u>Pay for Success</u> , <u>Financing for Early Childhood Programs</u> | Professor Scott<br>12:45 - 2:15 PM<br><u>Ethics, Values and Leadership- Part II</u><br><u>Plato- Republic</u> | 12:15 - 1:15 PM<br>Optional Lunch & Participant Departures                                                                                                                   |  |
|                                                                             | 1:45 - 2:00 PM<br>Refreshment Break                                                                                                                                                                             | 2:15 - 2:30 PM<br>Refreshment Break                                                                           |                                                                                                                                                                              |  |
|                                                                             | Jodi Harris<br>2:00 - 3:00 PM<br><u>Health and Wellness</u>                                                                                                                                                     | Frank & Freeman<br>2:30 - 4:30 PM<br><u>Negotiation and Political Leadership</u><br>Populator Simulation      |                                                                                                                                                                              |  |
|                                                                             |                                                                                                                                                                                                                 |                                                                                                               |                                                                                                                                                                              |  |
| Evening Learning Team Meetings-Hotel Learning Team Rooms                    | 3:15 PM Depart Gatehouse for Monticello<br>6:15 PM Reception & Cook-Out, Wilkerson Courtyard                                                                                                                    | 5:30 PM Depart Gatehouse for Freeman Residence<br>6:00-8:00 PM Reception & Dinner, Home of Professor Freeman  |                                                                                                                                                                              |  |