



# Navigating Organizational Transitions

*Best Practices For District Leaders*

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July 16, 2024



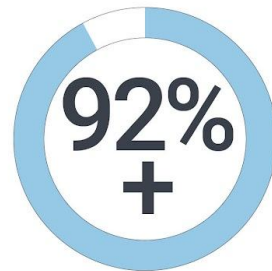
# Schools grow when people grow.



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**2000+**  
Schools  
and Districts



of our session  
participants rate us  
very good or  
excellent

# Hello and Welcome!



**Nick Esposito**

[nick@edelements.com](mailto:nick@edelements.com)

I work with districts on instructional and strategic initiatives. I have a strong passion for educator well-being and the student experience. In my free time I play ice hockey and write children's books.

# Navigating Organizational Transitions

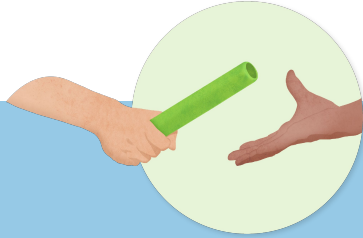
## *Best Practices for District Leaders*

### Today's Essential Questions

- ✓ What **mindsets** do we have and do we need during a transition?
- ✓ What are the building blocks of an effective **transition plan**?

Throughout today's session put a +1 or a thumbs up emoji in the chat when something resonates with you.

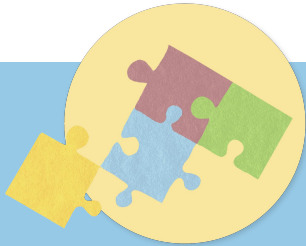
# You may be here because...



1. You are a leader preparing for a transition out of your current role.



2. You are a leader preparing to inherit a new role and situation.



3. You work in a group that is experiencing a transition.



4. Another Reason?

# Check In



In the chat please share:

**Role / District**

***What brings you here  
today?***

# The Transition Mindset

# Lead with Empathy



**You are a leader preparing for a transition out of your current role.**

**What are your transition priorities?  
How are you feeling?**



# Lead with Empathy | Feelings & Priorities



**Legacy Building  
(Nostalgia)**

**Take Care of Colleagues  
(Guilt)**

**Tie Up Loose Ends  
(Urgency)**

# Lead with Empathy



**You are a leader preparing to  
inherit a new role and situation.**

**What are your transition priorities?  
How are you feeling?**

# Lead with Empathy | Feelings & Priorities



**Learn About Current State  
(Overwhelmed)**

**Assert Value Add  
(Imposter Syndrome)**

**Rally Allies  
(Isolation)**

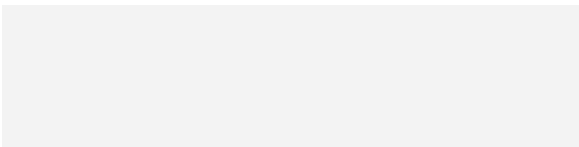
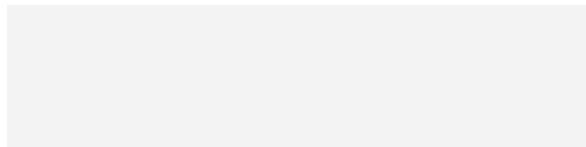
# Lead with Empathy



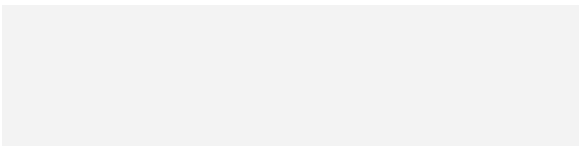
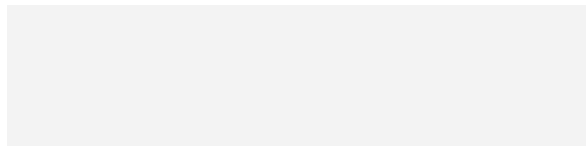
**You work for a group that is experiencing a transition.**

**What are your transition priorities?  
How are you feeling?**

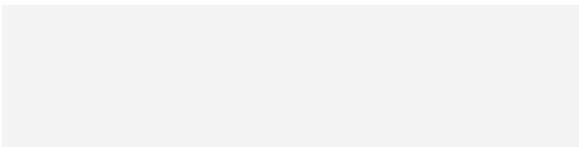
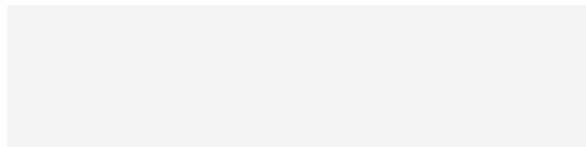
# Lead with Empathy | Feelings & Priorities



**Preserve Culture  
(Tribal)**



**Wait for Change  
(Skeptical)**



**Understand Orientation  
(Anxiety)**

# Lead with Empathy | Feelings & Priorities



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# The Problem with Transitions



Like quicksand, transitions are constantly developing and anxiety-inducing situations. To survive, it is important to not thrash about in all different directions, that will make it worse. Instead you must **stay calm** look to **structures** around you and kick your legs in a **consistent direction** - that will loosen the thick sand around you and enable you to pull yourself out. Most importantly, remember it is almost impossible to drown from quicksand.

# The Transition Plan



# Navigating and Building Your Leadership Team



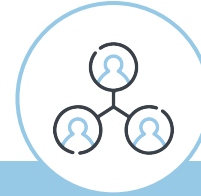
## Clarify Vision & Expectations

- Articulate your vision and expectations
- Chunk your vision into 30-60-90 day plans
- Communicate your vision
- Build a list of your naysayers
- Challenge your ideas and expectations



## Recruit Strategically

- Identify diverse skills, experiences, and perspectives
- Know thyself & get a deep understanding of your development areas/blind spots
- Hire individuals who complement your strengths
- Engage existing employees using their perceived strengths



## Invest in Professional Development

- Understand the current structures and internal perceptions of professional development (PD)
- Align PD goals to your district's goals
- Continuously nurture PD plans
- Building and coaching your leadership team is an ongoing process

# Use Empathy to Add Value



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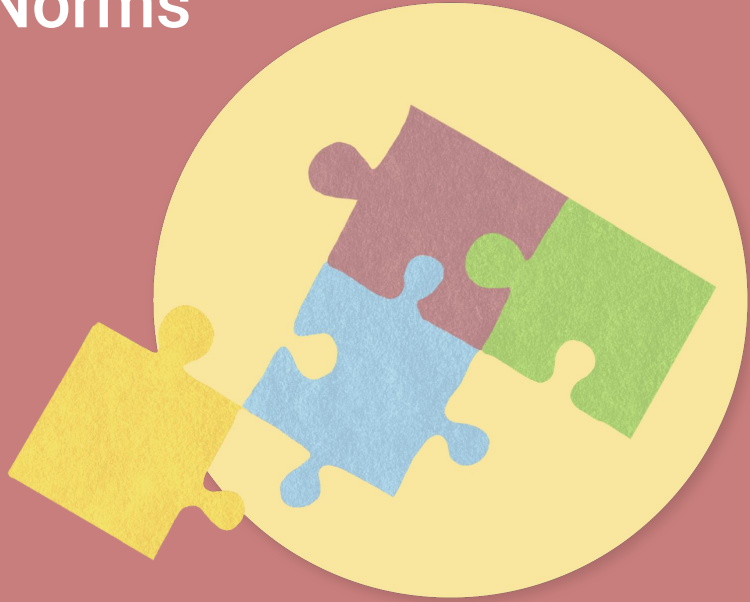
# Transition Plan | The Knowns

- A transition plan does not belong to an individual it belongs to the ecosystem.
- Transitions must be made every time someone new enters or leaves the organization.
- Plans must be in place BEFORE a transition becomes a need



# Phase 1

## Strategy, Systems & Norms



### Goal -

1. Enhance the systems and procedures to guarantee smooth transitions in the functioning of the team as a unified entity.
2. Develop a standardized method that can be adopted by the leaders in the future, aligning with the established priorities of the Cabinet team.

# Phase 1 - Strategy, Systems & Norms

## Importance of this Phase:

- Provides accurate picture of reality
- Minimizing the impact of the “Domino Effect”
- Flattens learning curve for new leaders

## Key Deliverables:

1. Updating Roles & Accountabilities of the Cabinet
2. Coaching Support with Mentorship Model
3. Teaming with norms & practices
4. Initial draft of the Portrait of an AECSD Leader



# Phase 1 - Strategy, Systems & Norms

Milestones	Key Actions	Value Add
<ul style="list-style-type: none"><li>● Process map of governance structure and roles within district</li><li>● Overview of evaluation and hiring policies</li><li>● Identification of unfilled positions or unfilled roles</li><li>● Recommendations for next steps within 30 days, 3 months, and 6 months</li></ul>	<ul style="list-style-type: none"><li>● Review district org charts and department briefing documents</li><li>● Review recruitment policies &amp; hiring plans with union contracts</li><li>● Interview Central Office department leads &amp; senior staff</li><li>● Gather input from all central office staff &amp; principals</li></ul>	<ul style="list-style-type: none"><li>● Create a plan to restructure central office, if appropriate</li><li>● Create service goals with each department</li><li>● Create professional development goals and plans</li><li>● Work with Central Office departments to ensure a successful start of the school year</li></ul>

# Empathy Check



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# Phase 2

## First 100 Days



### Goal -

1. Support the newly established leadership team throughout their first 100 days in the district
2. Facilitate and steer a comprehensive process that incorporates feedback loops from constituents
3. Foster a community of trust by formulating a theory of action that outlines coordinated actions and aligned priorities



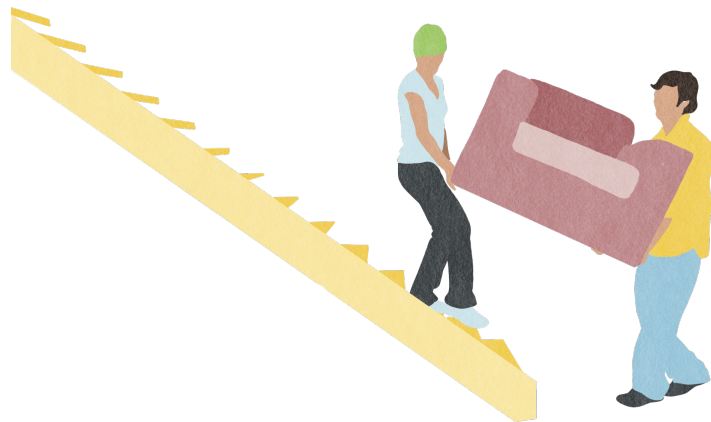
# Phase 2 - First 100 Days

## Importance of this Phase:

- Engage all voices (builds trust)
- Nothing slips through the cracks (builds momentum)
- Add value as new team (create buy-in)

## Key Deliverables:

1. Vision for the First 100 Days as a Cabinet team
2. Communication Plan
3. Implementation Roadmap



# Phase 2 - First 100 Days

## Key Actions

- Governance & Roles
- Strategy & Policy
- Curriculum & Instruction
- Board Relations
- Communications

## Value Add

- Leadership team is able to synthesize learnings into a single coherent mission and message
- Identify key contributors

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# Phase 3

## Build Momentum



### Goal -

1. Establish norms within the leadership teams at both the district and school levels to develop shared language and practices to bolster collaboration and transparent communication
2. Refine existing structures to support ongoing development of leaders to ensure stronger pipeline of leaders across the district

# Phase 3 - Build Momentum

## Importance of this Phase:

- New leaders own the progress of the work (He/She becomes We)
- Celebrate the work of the ecosystem

## Key Deliverables:

1. Individual goals and metrics aligned to role and accountability within the district
2. Progress monitoring updates on First 100 Days (Report Card)
3. Ongoing support for school level direct supports and professional development



# Phase 3 - Strategy, Systems & Norms

## Key Actions

- Examine current data to assess current / future systems and strategies
- Develop explicit goals and success criteria moving forward
- Provide relevant professional learning
- Find ways to celebrate work being done (even the small wins)



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**In the chat:**  
**Which of these phases do you feel like  
your district needs to prioritize?**



# K12 Education Consulting services that deliver sustainable results.

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## INSTRUCTION

- Personalized & Blended Learning
- School Improvement & Transformation
- Instructional Frameworks

## STRATEGY

- Strategic Planning
- ESSER Funding Planning
- Curriculum Strategy

## LEADERSHIP

- Organizational Leadership & Teams
- District Operations

## SURVEYS & ANALYTICS

- Strategic Planning Surveys
- Community Engagement Surveys
- Teacher Effectiveness Surveys

# Join us next time!

Stay on to chat or send us  
an email!

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upcoming webinars here



[nick@edelements.com](mailto:nick@edelements.com)