

Government Leaders Forum

Transition Excellence

Wednesday, September 4



Transition Excellence – Agenda

Segment	Time	Format	Outcomes
Introduction	40 min	Plenary	<ul style="list-style-type: none">• “State of the transition” discussion• Introduce facilitators and transition experience• Introduce CEO Excellence / transition excellence framework and Effective Practice Review (EPR) exercise
Small group discussion and coaching	20 min	Breakout groups	<ul style="list-style-type: none">• Group discussion on common themes, opportunities, and challenges• Participants identify commitments to build on strengths or address areas of opportunity
Concluding plenary	10 min	Plenary	<ul style="list-style-type: none">• Facilitators share key takeaways, participants share commitments

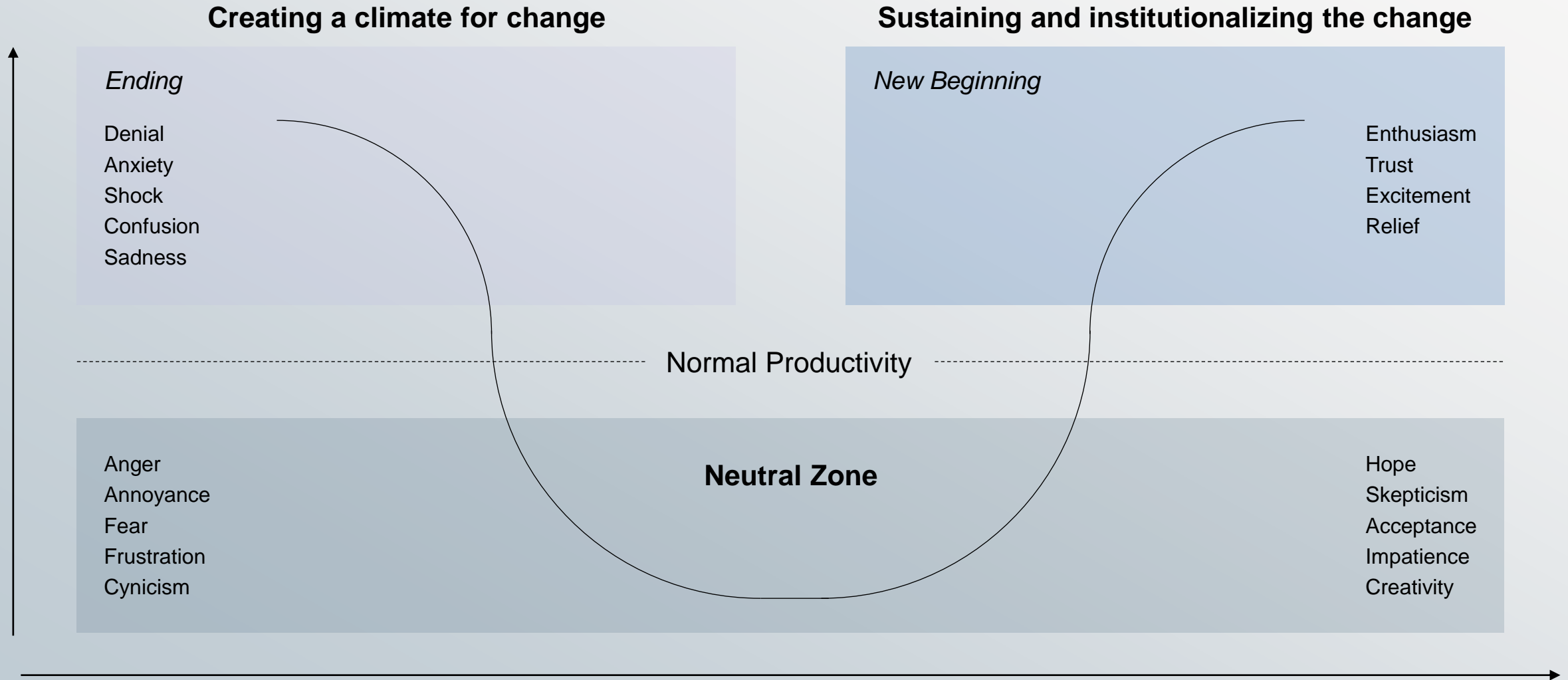
Government Leaders Forum

Presidential Transition Leading Through Change

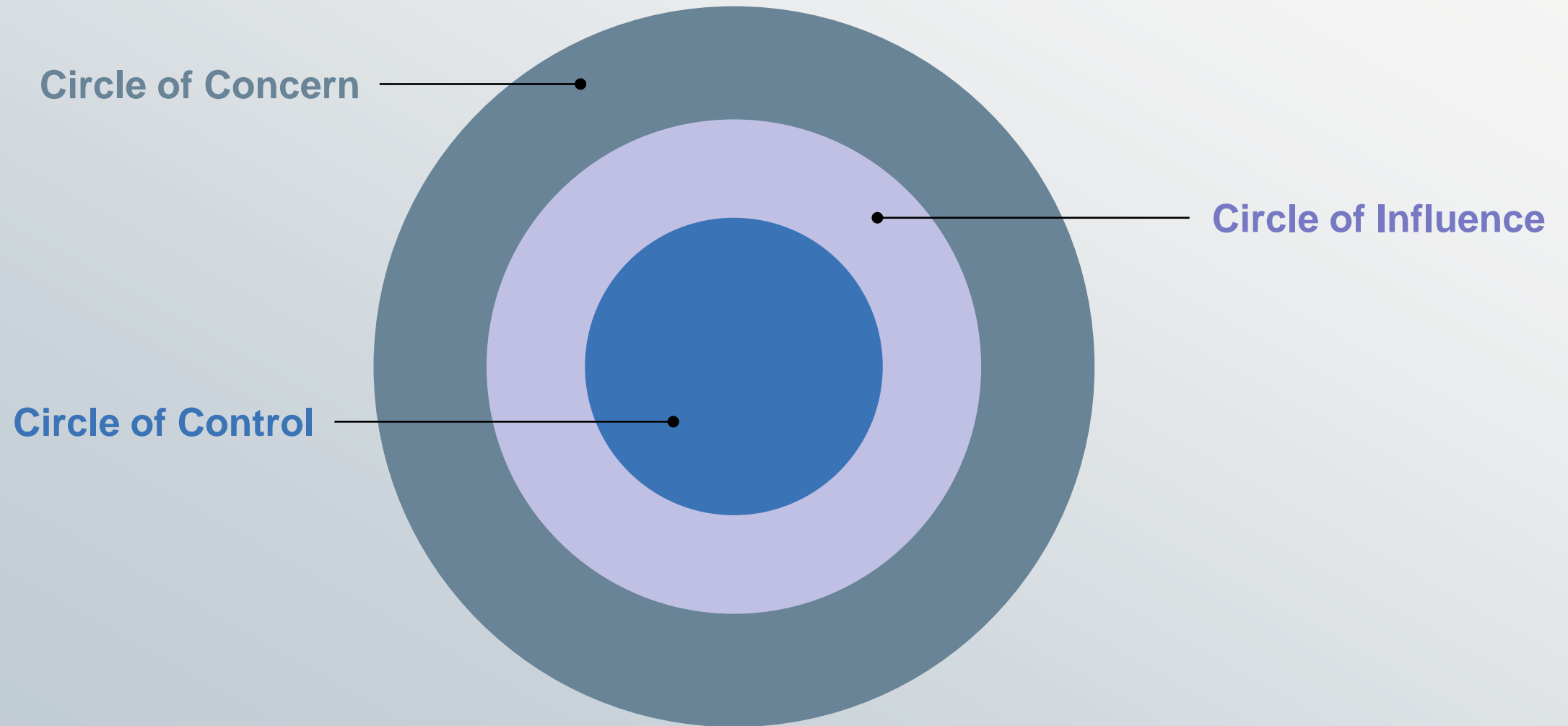
Valerie Smith Boyd
Director of the Center for Presidential Transition



The Transition Curve



What can you control?



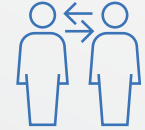
Building Trust with New Leaders



Provide useful
transition materials



Present yourself as a
nonpartisan resource



Discuss major issues
and priorities



Share any potential landmines
or problems – “no surprises”



Listen to find out what is
more important to them

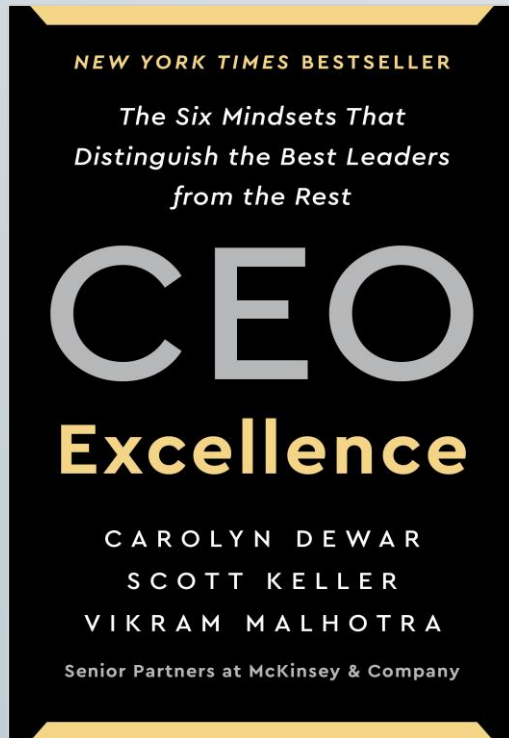
What do Agency Review Teams need?

Historically, review teams have sought out of the following information:

- 1 Critical decisions new administrations would need to make in the first 100 to 200 days of their term
*including budgetary information
- 2 Top issues and priorities currently facing the agency, including recent developments
- 3 Significant changes to agency priorities, operations, organizational chart, budget, or other areas in the last 4 years
- 4 Actions new leadership could take to score quick wins and avoid pitfalls that could set them back
- 5 Information to support confirmation prep for Senate-confirmed nominees

Individual reflection: Effective Practice Review

The **Effective Practice Review** exercise is based on McKinsey's *CEO Excellence* publication and tested approaches for executive coaching through the full "life cycle" of a CEO



> This approach identified foundational mindsets that we **have adapted to the public sector context**



The Effective Practice Review can help you to identify top priority areas to prepare for and focus on for the upcoming transitions

Effective Practice Review (1/2)

Which of the following statements best describes how the agency currently performs?

Make your assessment (✖) on each of the practices and how they currently appear within the agency

	1	2	3	4	5
	Exploring		Functioning		Leading
SET THE DIRECTION					
Vision	We avoid top-down vision; leaders throughout the organization have their own visions		We motivate employees with outperforming our peers		We significantly raise our aspirations for the agency with what it means to “win”
Strategy	We aggregate and pursue many bottom-up initiatives		Our agency's priorities are based on the priorities of the administration		We take on complex priorities early and track progress through comprehensive measurements
Resource allocation	We distribute budget and executive energy evenly over time		We shift resources every budget cycle in a way that balances “keeping harmony” and pursuing new priorities		We frequently reallocate executive energy and seek new financial resources for priority areas
ALIGN THE ORGANIZATION					
Culture	Our values and leadership model has remained unchanged for years		The administration and agency leader’s messaging reinforces the culture the agency desires		Our top team agrees on what matters most and takes a well-coordinated approach to personally owning it
Organizational design	We reorganize the agency occasionally to address pain points		We make design tradeoffs that are responsive to the needs and scale of the agency		We solve for “stagility” by creating an organization that is stable, accountable, and agile
Talent	We rely upon a short-list of talented leaders to fill big roles and lead big initiatives		We encourage/elevate strong performers and take action to support our low performers		We ensure the highest value-creating roles have the best-fit talent
MOBILIZE THROUGH LEADERS					
Senior staff composition	Our leaders are not aligned to the goals, mission, and needs of the agency		We ensure senior staff members are highly competent and trustworthy		We have a group of senior staff members with complementary skills and attitudes to lead change
Teamwork	Our top team is collegial together and operates largely in silos outside of top-team meetings		Our top team has effective norms and engages in healthy debate		We continuously improve team effectiveness by combining data, dialogue, and speed
Operating rhythm	Our senior staff members feel that meetings aren’t a productive use of time		Our meeting calendar is clearly organized and coherent; meetings are well structured		Meeting timing, content, and protocols allow us to effectively set strategy and execute

Effective Practice Review (2/2)

Which of the following statements best describes how the agency currently performs?

Make your assessment (⊗) on each of the practices and how they currently appear within the agency

	1	2	3	4	5
	Exploring		Functioning		Leading
CONNECT WITH STAKEHOLDERS					
Social purpose	We have limited bandwidth to prioritize citizen needs and social purpose		Our administration has a compelling mission, vision, and change story backed with facts		We think about the big picture by defining our 'why?' and embedding it into the core of the agency
Interaction	We minimize interactions with stakeholders because the job first and foremost is to run the agency		We proactively prioritize which stakeholder groups are met with clear objectives for interactions		We have open channels with stakeholders to understand their needs - the optimizes accordingly
Moments of truth	We improvise to deal with unpredictable crises as they arise		We mobilize quickly to respond to crises based on clear protocols		We build resilience ahead of crises among citizens by detecting and responding early
MANAGE PERSONAL EFFECTIVENESS					
Time and energy	My schedule is built around what others ask – I am here to serve		I am disciplined about spending time on priority areas for the agency, enabled by a good assistant		I manage my time and energy with office support, while making time for personal responsibilities
Leadership model	I operate largely based on my predecessor and whom my administration needs me to be		I operate authentically to who I am is as a leader, without compromising on personal values		I operate true to my convictions and values while adjusting my behaviors to what's needed
Perspective	My wellness is based on external factors - everything rests on me		My role is important to the agency's success, but I also recognize much is out of my control		I stay humble by maintaining a "serve first" mindset