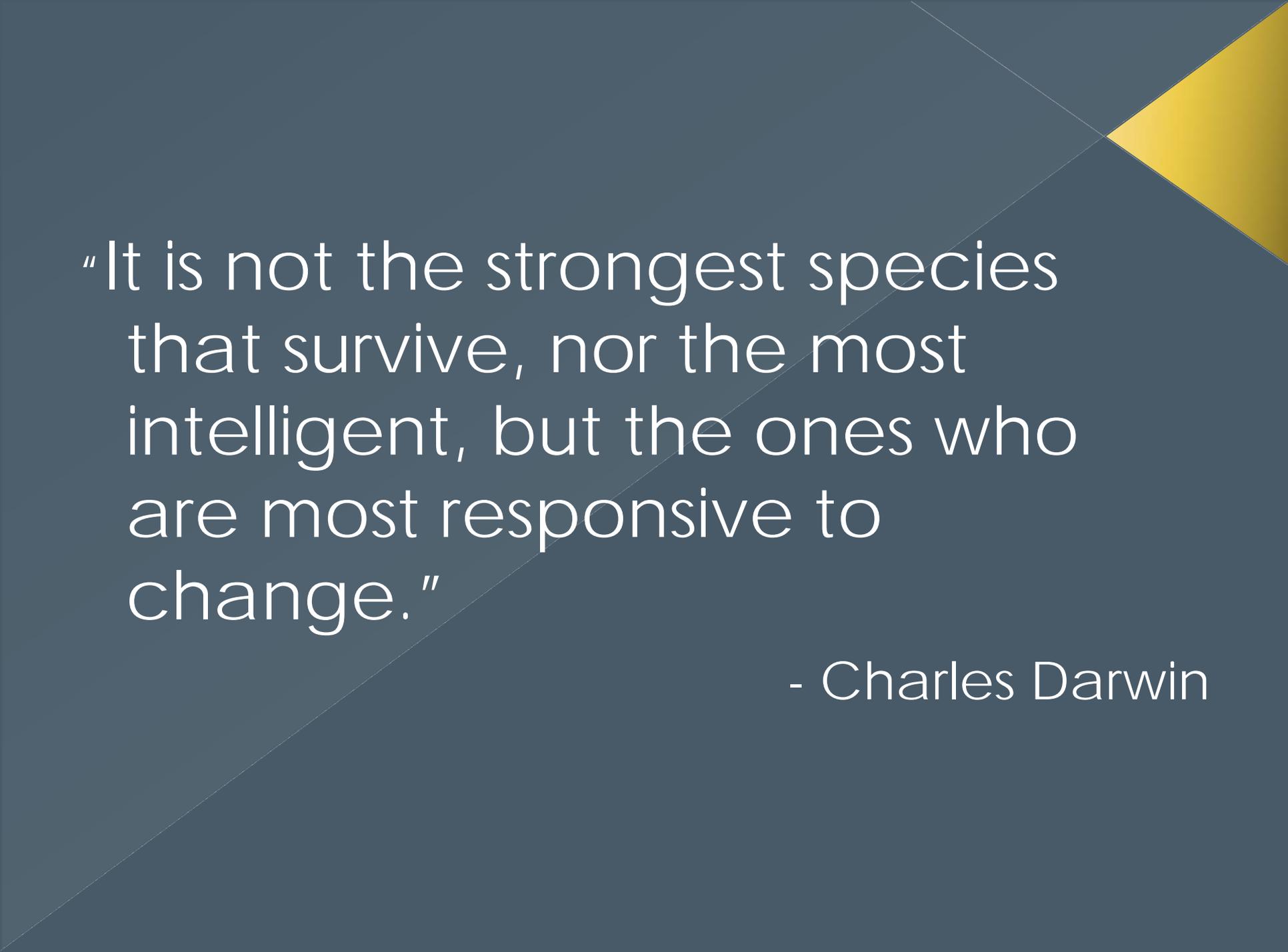


# Dealing with the Challenges of Leadership Change

Jodi Gorski  
Lara Herman  
Barb Pearson  
Steve Roberts  
Sara Walling





“It is not the strongest species that survive, nor the most intelligent, but the ones who are most responsive to change.”

- Charles Darwin

# Change is inevitable

- It happens to everyone
- Everyone reacts to change differently
- Understanding our reactions to change
- Understanding to how others react to change
- 1 in 10 executive director jobs turn over each year

# Resources Abound

## Google Results

- "Managing Change" = 19,900,000 results
- "Change Management Consultants" = 9,300,000 results
- "Change management publications" = 9,820,000 results

# Change in WI State Agency Management

- ◉ There's an election coming up... how will you handle it?
- ◉ New Secretaries
- ◉ New administrators
- ◉ New supervisors



# Our Change Matrix

**C** = Capture

**H** = Human

**A** = Assessment  
of

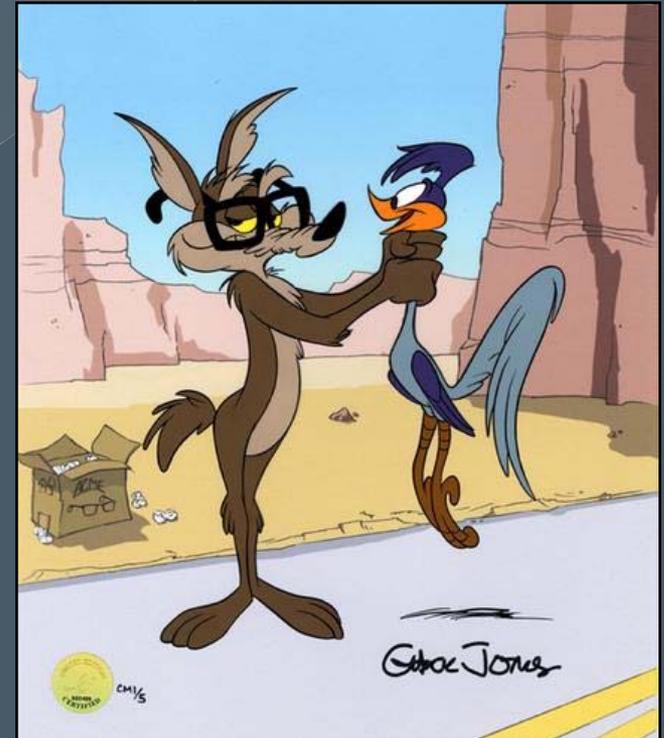
**N** = Needs

**G** = Generate

**E** = Engagement

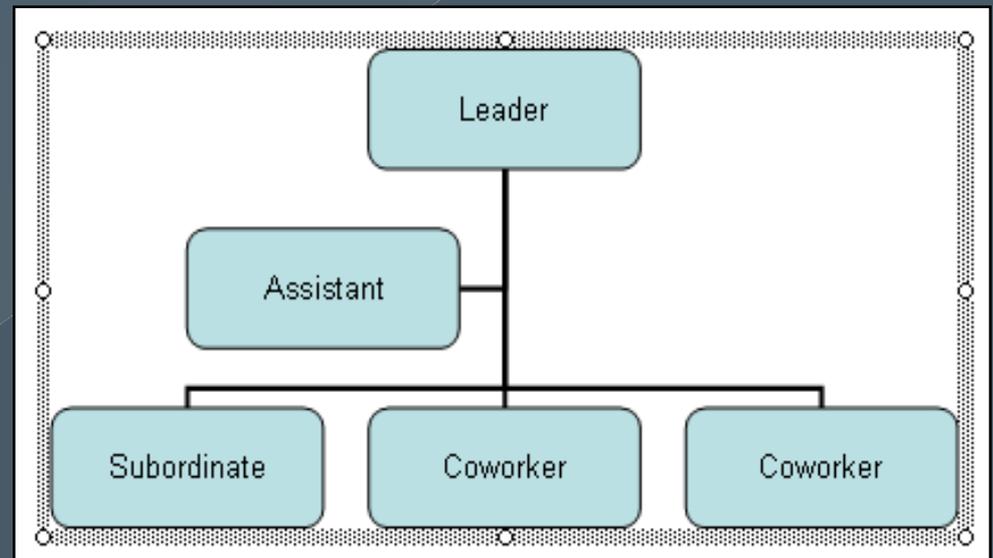
# Capture

- ◉ Prepare for
  - › the outgoing management team's departure
  - › the arrival of a new management team
  - › by capturing knowledge, data, and information about the agency



# Capture - Information

- Agency  
Overview-history,  
mission, divisions
- Key players within  
the agency
- Organizational  
charts





# Capture

What should be captured?

- Policies and Procedures
- Strengths, Weaknesses, Opportunities, Threats (SWOT)
- Stakeholders/Collaborators/Special interests/Boards—key contacts and customers
- List of other reference materials—online resources, manuals, documents and forms, historical data

# Capture

What information?

- ◉ Programs, projects, obligations
- ◉ Critical processes
- ◉ Specific personnel areas of expertise
- ◉ Schedules, timelines, deadlines
- ◉ Budget



# Capture - How

- ◉ Determine who within the agency will be responsible for capturing this information
  - › Will it be done by Division? Bureau? Section?
- ◉ Set up time frames for completing the capturing of this data
  - › Information should be updated as needed

# Human Aspects

## Why people resist change

- > Fear
- > Close-minded
- > Skeptical
- > Powerless



# Human Aspects



- ◉ Emotional Intelligence
  - > Yourself first

- ◉ Facilitate

- > Empathize
- > Listen
- > Respectful/Honest
- > Communication



# Human Aspects

- Effective Communication
  - Requires good listening skills
  - Open/receptive to feedback
  - Clear
  - Straightforward/honest
  - Frequency



# Human Aspects



- ◎ Employee involvement
  - > Two-way communication
  - > Provide an active role in the change process
- ◎ Implications of the change
  - > Short term
  - > Long term



# Assessment of Needs

## ◎ Human Resources

- › Which staff members can take on key functions during the transition?
- › Is there a succession plan in place?
- › Will furloughs, hiring freezes, retirements, transfers, etc play into the transition?

*Change is inevitable - except from a vending machine.*

*~Robert C. Gallagher*



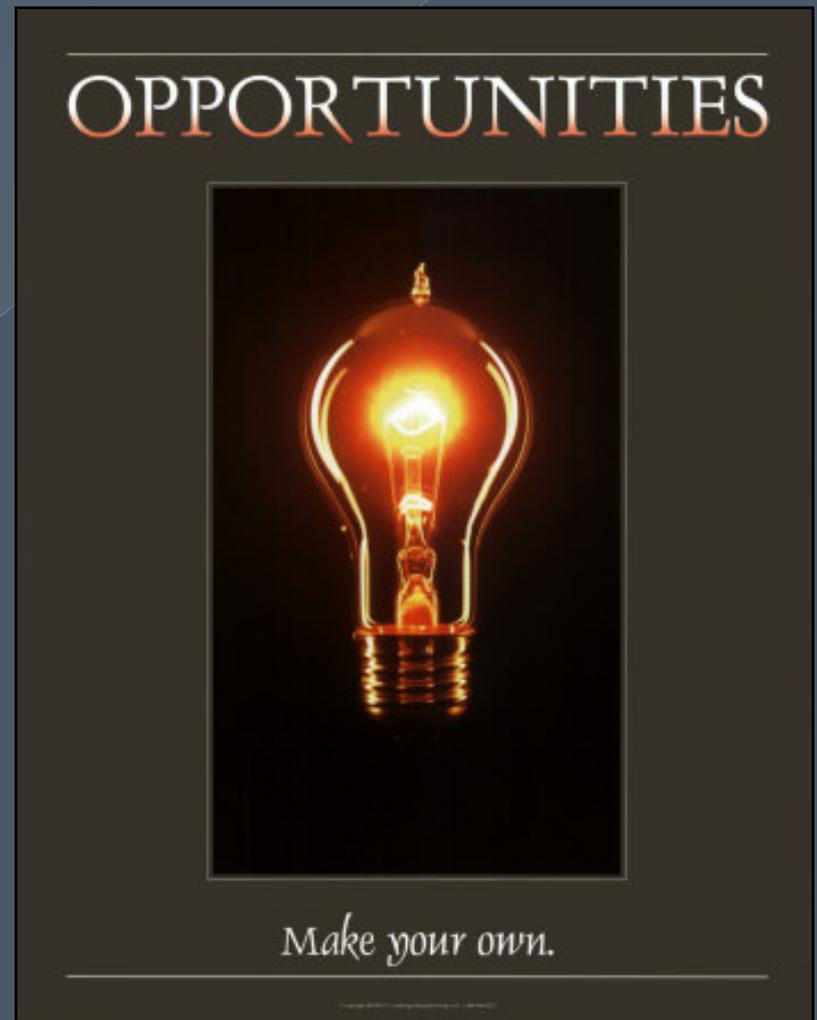
# Assessment of Needs

## ◉ Organizational

- Will new positions be needed?
- Are additional resources needed to keep moving forward (beyond people)?
- What issues are on the horizon that will need to be addressed?
- How are initiatives being allocated across the existing organizational structure?

# Generate

- Opportunities
- Ideas



# Generate - Opportunities

- Efficiencies

- Workflows
- Work reduction
- Long-distance conferencing
- Waste reduction



- Outreach

- For new collaborations
- Value-added activities

- To change workplace culture

- Short term, midterm and long term



# Generate - Ideas

What your organization isn't doing, but either could or should

- › Revisit your vision or mission statement
- › How to obtain goals over time



# Engage

...The goal is to ensure that the new management can concentrate on relationship building and important goals and challenges, not put out fires and struggle to set priorities

## The Three Types of Employees

1

**ENGAGED** employees work with passion and feel a profound connection to their company. They drive innovation and move the organization forward.

2

**NOT-ENGAGED** employees are essentially "checked out." They're sleepwalking through their workday, putting time -- but not energy or passion -- into their work.

3

**ACTIVELY DISENGAGED** employees aren't just unhappy at work; they're busy acting out their unhappiness. Every day, these workers undermine what their engaged coworkers accomplish.



# Engage – new management

- ◉ Early – ensures work continues in an efficient, effective and uninterrupted way
- ◉ Help them understand how your department works - why it works (or doesn't) and what you would like them to do to help

# Engage - Briefing Book

- Consolidate these issues into a briefing book for new management
- Demonstrates employee commitment to knowledge transfer and interest in succession planning
- Communicate!!



# Engage - around the updated vision

- Establishing a common vision can mitigate fear
- Communicate with employees, new management & stakeholders



# Engage - Build enthusiasm

- ◉ By delegating authority for tasks
- ◉ Identify resources (internal and/or external)
- ◉ Build action plans and a champion for each
- ◉ Evaluate results
- ◉ Provide feedback





# Common Change Management Mistakes

1. Not understanding the importance of people
2. Not appreciating that people have different reactions to change
3. Being less than candid
5. Not "setting the stage" for change
6. Believing that change-communication was what employees heard or read
7. Underestimating human potential

# Closing

- Transition as an opportunity not a crisis

"When you're finished changing,  
you're finished." - Benjamin Franklin



# Resources

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