

Leadership Lessons in Change

Gain valuable lessons in leadership and project management focusing on communication, stakeholders and execution from strategic planning and goals to finalizing and reflecting.

Thursday, May 4
10:20am – 11:20am



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Introductions

Name: Dr. Frank Williams, Speaker

- CFO, Mascoutah Community Unit District #19
- Mississippi Valley Regional



Name: Craig Collins, Moderator

- Illinois ASBO Statewide Professional Development Coordinator



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Leadership Lessons in Change

Learning Target

- To understand how to successfully execute change is a vital skill in being a leader
- To reflect on past change successes and failures



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Project

- “...efforts to create value through unique products, services, or processes.” (Project Management Institute)
- Used to quickly resolve problems
- May require extended timelines to produce outcomes

Project Management

- “...the use of specific knowledge, skills, tools, and techniques to deliver something of value to people.” (Project Management Institute)
- Lifecycle - initiation, planning, and execution



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How is a Change Born?

- Need - Capital Projects
 - Strategy to execute Mission/Vision
 - Copier lease expiring
 - Public bidding
- Solution
 - Executing Board of Ed Goals
 - How to save employees money on benefits
 - How to make timecard process easier
- Want
 - Change picture company
 - Change math curriculum



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Why is understanding how to implement and manage **CHANGE** important?

- Provide structure through Project Plan, which leads to a greater chance of success!
- Create better chances for success through Project Plan
- Helps to avoid confusion, anxiety, resistance, frustration, false starts

~~CHANGE~~

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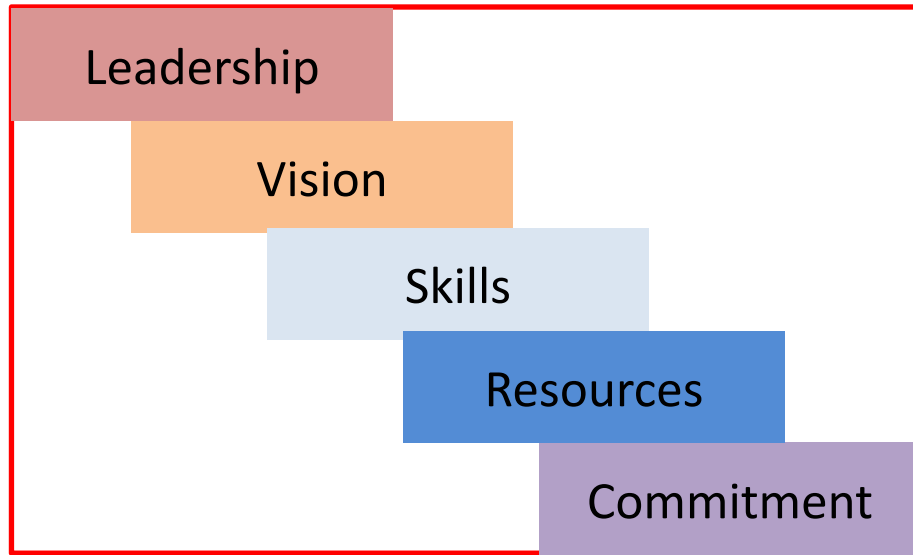
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Strategic Planning or Identification Piece

- RFP vs RFQ



Execution Piece

SUCCESS

Modified from Grant Lichtman (2014)



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Inclusiveness

- Kick-off meeting
- Enterprise Analysis
 - Make a list of all departments, all positions along with roles and responsibilities
 - At kick-off meeting review the list to ensure you are working/speaking with all stakeholders that will be impacted
- Internal stakeholders
 - Do I have the commitment of the Board, Superintendent, Principals, Directors, etc
 - Depth of internal stakeholders
 - When to engage and when not to engage



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Inclusiveness

Project name:		
Project scope:		
Project dates:		
Role	Responsibilities	Involved in the Project
Departments		
Superintendent	Runs the school	Yes
Business	Controls the in and outflow of money; manages grants, contracts, Qmlativ Finance, security/safety	
Student Services	Special Ed, Nurses, Psychs, Counselors, Pre-K,	
C&I	Curriculum, Classroom instruction and happenings, Coaches, Grant Coord, PLC	
Administrative Services/HR	Benefits, On-boarding, Principal guidance, Placements, Transcripts	
Food Services	Free/Reduced, makes and distributes breakfast and lunch	
B&G	Custodians, Grounds, Mechanics, Projects, Electricians	
Transportation	Bus students to and from school, to extra curricular activities and field trips, special ed	
IT	Provides support for the network, chromebooks, wi-fi, digital displays, firewall, employee devices, cameras	
Buildings		
Principals	Manage ball staff in buildings, main POC for students and families	
Secretaries	Financial, Attendance, Office	
Teachers	Educated students - Consider Departments and Subject Areas	
Aides	Assist in educating students	



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Timeline

- Create with end in mind, essentially think backwards from launch date
- Key deadlines to consider:
 - Kick off meeting: 1st meeting to introduce project and identify all necessary stakeholders
 - Identify when the stakeholders need to be involved
 - Weekly check ins (frequency of meetings)
 - File sharing (if needed)
 - Quality Assurance (QA) or User Acceptance Testing (UAT)
 - Training
 - Internal and External Communication (include internal landing page)
 - Launch
 - Post Launch Communication
 - Debrief - www.ebi



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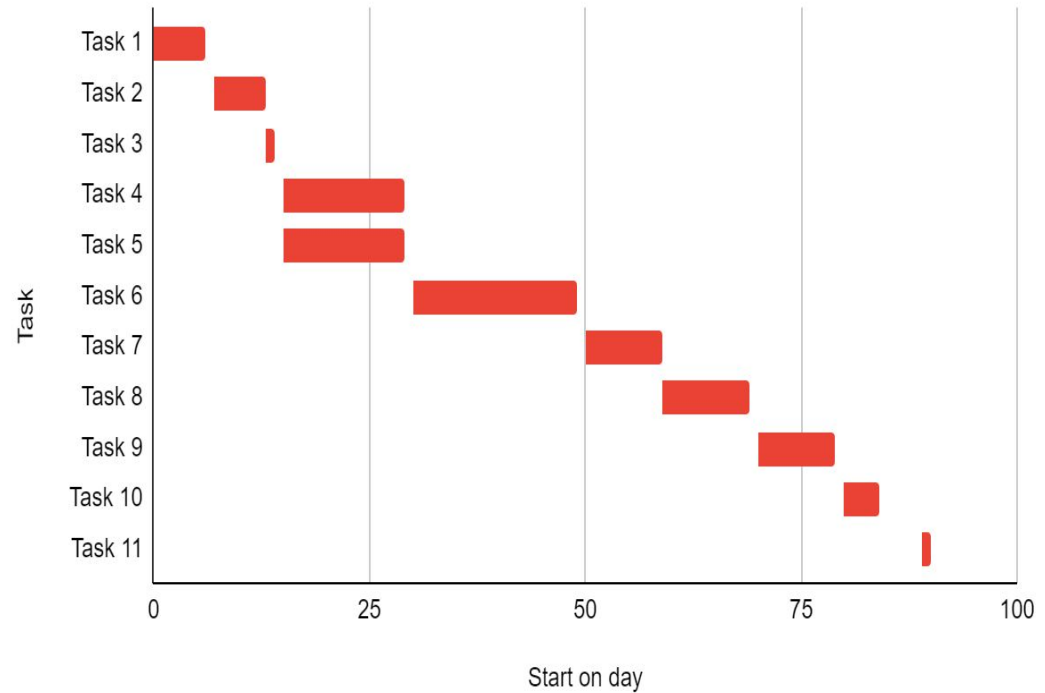
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Timeline

Task	Start date	End date	
1 - Data Gathering	Apr-12	Apr 19	0-6
2- Communication Meetings	Apr 20	Apr 27	7-12
3 - Omni Implementation Call	May 2	May 2	13
4 - Roadshows	May 2	May 20	15-29
5 - Deduction Cycle/Payroll Elections to Aflac	May 2	May 20	15-29
6- Save the Date	May 23	Jun 17	30-49
7 - QA Testing	June 18	June 30	50-59
8 - Open Enrollment online	Jul 1	Jul 15	59-69
9 - Open Enrollment in person	Jul 18	July 29	70-79
10 - Open Enrollment new emp	Aug 2	Aug 5	80-84
11 - Close Enrollment	Aug 12	Aug 12	89
12 - File to Mascoutah	Aug 26	Aug 26	99

Gantt Chart

Aflac Transition Chart



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Communication

Success will depend on communication!

- Create a communication plan(s) to include
 - When
 - MUST outline the timeframe for ALL planned communications
 - Include initial, follow ups, and final
 - Worried about too much communication
 - Who
 - Target audience (internal or external)
 - What
 - A full message or a “save the date” message
 - How
 - What method - social media, District comm, building comm, email, phone blast, internal page, website, video



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Communication

Project: Impact Aid

Survey Opens: Friday, December 13

Last day to complete: Sunday,
January 26

Friday, December 13

- Competition between schools and classes kicks-off
 - Weekly prizes?
- Website
 - News story about Impact Aid
 - How to complete the survey
 - Graph showing completion
- Social Media
- Superintendent
 - Phone Blast
- Principals
 - Weekly newsletter

Friday, December 20

- Principals
 - Phone Blast
 - Skyward email to families with link to access survey
- Website
 - News story about Impact Aid
 - How to complete the survey
 - Graph showing completion
- Teachers
 - Pass out slip of paper with directions on how to complete the form

Success will depend on communication!

Friday, January 3

- Website
 - News story about Impact Aid
 - How to complete the survey
 - Graph showing completion

Friday, January 17

- Website
 - News story about Impact Aid
 - How to complete the survey
 - Graph showing completion
- Teachers
 - Pass out slip of paper with directions on how to complete the form

Monday, January 20 (last week!)

- Principals
 - Phone Blast
 - Skyward email to families with link to access survey



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PE Uniform Project

Project synopsis

- High school and middle school PE Depts wanted out of the PE Uniform business

Project Born

- Want

Solution

- Provide an online ordering store for families



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PE Uniform Project

Inclusiveness

- Internal stakeholders
 - PE Staff @ secondary schools
 - Activity Directors at secondary schools
 - Board of Ed/Sup
 - Financial Secretaries
 - Food Service
- External stakeholders
 - District Families
 - Online store vendor
- Kick-off meeting

Timeline

- Worked backwards from webstore launch date
- Deadlines established
 - artwork approval
 - product approval
 - communication to Free Meal families
 - testing of website (min 10 business days prior to launch)
 - communication to public
 - launch
 - Status check in dates

Communication

- Internal Stakeholders
 - All PE Staff
 - Building Financial Sec
 - Food Service
 - Superintendent
 - Building Principals
 - Board of Ed
- External
 - Community
- Wrote plan with first focus on internal providing updates on new workflow
- Updated Board on weekly update and community on FB and website



PE Uniform Project

Timeline

- Debrief - www.ebi
 - What went well
 - emergency pivot to new solution
 - communication with internal stakeholders.
 - open communication with Sup & BOE
 - Even better if
 - obtain feedback from more stakeholders prior to launch
 - demand better communication from vendor on issues

Leadership Lessons

- Strategy
 - Found a solution to a situation that staff wanted a different direction
- Despises Status Quo
 - Had to remember who had the Power when talking to vendor about issues
- Always prepared
 - Knew status of project at all times
 - Had to hard pivot when project started to fail
- Effective Communicator
 - Always kept key stakeholders in the loop with every twist
- Empathy
 - Had to recognize the struggle of the PE teachers and staff



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Transition to new medical insurance cooperative

Project synopsis

- Current cooperative was in a financial struggle

Project Born

- Need

Solution

- Find a new medical insurance provider with the same network



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Transition to new medical insurance cooperative

Inclusiveness

- Internal stakeholders
 - All staff with medical insurance
 - HR/Benefits Team
 - Union Insurance Committee
 - BOE/Sup
- External stakeholders
 - Section 125 vendor
 - Insurance Agent
 - HRA Agent
 - Current coop leadership and members
- Kick-off meeting

Timeline

- Financial penalty date
- Worked backwards conversion date
- Deadlines established
 - Latest date to make decision to leave
 - Other options turn in plans
 - Create plan designs
 - Share information with Ins Comm
 - Finalize plan designs
 - Discuss with Third Party
 - Set up employee meeting dates
 - [Launch internal website](#)
 - Launch/close decision form
 - New ID cards max date
 - Launch date

Communication

- Internal Stakeholders
 - All employees with medical insurance
 - Insurance Committee
 - Benefits/HR Teams
 - Payroll
- External
 - Current/New vendors
- [Create Internal website](#)
- Meeting/Open House
- Close choice date



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Transition to new medical insurance cooperative

Timeline

- Debrief - www.ebi
 - What went well
 - Internal website great information
 - Meetings recorded and shared
 - Open House meeting follow up
 - Plenty of email communication
 - Even better if
 - created spreadsheet calculator
 - try not to overthink

Leadership Lessons

- Strategy
 - Needed to find a fast solution, so leaned on resources and connections
- Always prepared
 - Needed to stay abreast of happenings with current Trust and armed with all of the information to make a decision
- Effective Communicator
 - Always kept key stakeholders in the loop with every twist
- Empathy
 - Had to recognize the struggle of employees understanding medical insurance
- Affects all employees
 - New medical coop will impact all employees for years to come



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Why is understanding how to lead change is important?

- Change is how District move forwards with implementing ideas
- Projects are how strategic plans are executed

Why is important to know the lingo?

- Knowing the lingo allows for credibility
- Knowing the lingo puts everyone involved on the same page



Questions and Answers

We thank you for your time!



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Presenters:

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Appendix

- Stairway of Successful Innovation
- Key Terms



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Leadership

- Scanning external & internal environment
- Developing your SWOT
- External = Opportunities & Threats
 - Industry, Locally, Globally, Government
 - ID stakeholders - Community, Municipality, Tax Payers (may be different than community)
- Internal = Strengths & Weaknesses
 - Workflows, People, Finances
 - ID stakeholders using Enterprise Analysis - Employee Groups (BOE, Directors, Principals, Teachers, Aides, Transportation, Food Services, B&G, other classified groups)

Leader #2, #6, #7

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Vision

Leader #1

- Choose your Ideas
 - Based on your External/Internal Analysis
- SWOT Box

Strengths (Internal) <ul style="list-style-type: none">•S1:XXX - why is this a strength and why did you choose it•S2:XXX - why is this a strength and why did you choose it•S3:XXX - why is this a strength and why did you choose it	Weaknesses (Internal) <ul style="list-style-type: none">•W1:XXX - why is this a weakness and why did you choose it•W2:XXX - why is this a weakness and why did you choose it•W3:XXX - why is this a weakness and why did you choose it
Opportunities (External) <ul style="list-style-type: none">•O1:XXX - why is this a opportunity and why did you choose it•O2:XXX - why is this a threat and why did you choose it•O3:XXX - why is this a threat and why did you choose it	Threats (External) <ul style="list-style-type: none">•T1:XXX - why is this a threat and why did you choose it•T2:XXX - why is this a threat and why did you choose it•T3:XXX - why is this a threat and why did you choose it



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Vision

Leader #1

- Start of Action Plans

To move through this process there is specific language you need to use:

- *Strengths - Maintain or improve or monitor*
- *Weaknesses - Improve, attack, monitor or mitigate*
- *Opportunities - Pursue or not pursue or attack*
- *Threats - Attack, mitigate or monitor*



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Skills

Resources

- Do I have the talent in-house to execute the project?
 - If yes, do I have the funding, IT & Employee Bandwidth
 - Example: Camera/Security Project
 - If no, do I bring in consultants, hire someone who does, abandon the project



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Commitment

- Internal stakeholders
 - Do I have the commitment of the Board, Superintendent, Principals, Directors, Union etc
- External stakeholders
 - Do I engage the external stakeholders for their commitment
 - Ex. Bond issuance, Mission and Vision, Strategic Planning



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Key Terms

- **Strength, Weaknesses, Opportunities, Threats (SWOT) Analysis**
 - conducting a study to identify strengths and weaknesses (external items) as well as opportunities and threats (internal items)
- **SWOT Box**
 - method of determining and organizing your strengths, weaknesses, threats, opportunities along with the “why” behind each
- **Gap Analysis**
 - simple method of arranging your SWOTs in priority order with the “why” behind each
- **Action Plan Language**
 - Creative portion of SWOT Analysis where team decides action for the items placed in Gap Analysis by using defining language
 - *Strengths - Maintain or improve or monitor*
 - *Weaknesses - Improve, attack, monitor or mitigate*
 - *Opportunities - Pursue or not pursue or attack*
 - *Threats - Attack, mitigate or monitor*



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Key Terms

- **Specific, Measurable, Achievable, Relevant, Time-Bound (SMART) Goals**
 - Statements designed to foster clear and mutual understanding of what expected levels of performance and success are
- **Enterprise Analysis**
 - When used in Project Management the project team identifies all of the stakeholders needed for discussion of executing the project
- **Gantt Chart**
 - Used to show tasks and events against time along with which stakeholders are involved during that event or task
- **Communication Plan**
 - Designed to schedule the messaging for a project with an understanding of who, what, when, where, and how
- www.ebi
 - acronym for What Went Well/Wrong, Even Better If...used the debrief meeting to reflect on the project as a whole



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