

Charting a Course for Boston

Organizing for Change

Practitioner Guide

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Overview

A case study is a story about how a person or group of people faced and dealt with challenges or opportunities. It is based on desk research and interviews with key actors but does not provide analysis or conclusions. Written from the perspective of the protagonist(s), it is designed to raise questions and generate discussion about the issues they faced. Cases are meant to help participants develop analytic reasoning, listening, and judgment skills to strengthen their decision-making ability in other contexts.

A case-based conversation is a way to anchor a conceptual discussion to concrete examples. It can bring a case to life and allow participants to place themselves in the shoes of the case protagonist(s), while also allowing a variety of perspectives to surface. This guide is designed to help you lead a conversation about the case, “Charting a Course for Boston: Organizing for Change.”

Conversation Goals

This case study is part of a portfolio of cases designed to help new mayors and their teams think strategically about both their transitions into their new roles and how to deliver on campaign promises.ⁱⁱ

The case was designed to underpin a discussion about building leadership teams for cross-cutting change. More specifically, the case was written to help city leaders think about how to organize for change that requires commitment and resources from across traditional verticals or “silos.”

This case supports a conversation that focuses on:

1. Reflecting on the challenge of delivering on a cross-cutting key priority; and
2. Determining which organizational structure is best to support this work.

ⁱ Mitchell Weiss was a transition advisor to Mayor-Elect Wu in 2021.

ⁱⁱ See other cases in the collection, including “Mayoral Transitions: How Three Mayors Stepped Into the Role, in Their Own Words;” and “Newport News: Breakthrough Expectations,” on our [website](https://www.cityleadership.harvard.edu/resources/) at <https://www.cityleadership.harvard.edu/resources/>.

Role of a Facilitator

The facilitator leads a conversation with a clear beginning and end, ensures that everyone is heard, and keeps the group focused. The conversation can be broken into three distinct segments: exploring the case, applying the central questions of the case to your organization's challenges, and formulating takeaway lessons. Some facilitation tips and tricks to keep in mind are below.

BEFORE the discussion

Make sure everyone takes the time to read the case. Participants have the option to fill out the attached worksheet to prepare themselves for the case discussion. If you choose to use the worksheet, make sure you bring enough printouts for all. When setting up the room, think about situating participants where they can see you and each other. Designate a notetaker as well as a place where you can take notes on a flipchart or white board. Plan for at least sixty to seventy-five minutes to discuss the case and takeaways and have a clock in the room and/or an assigned timekeeper. Mention that you may interrupt participants in the interest of progressing the conversation.

DURING the discussion

Encourage participants to debate and share opinions. State very clearly that there is no right or wrong "answer" to the case—cases are written so that reasonable people can disagree and debate different ideas and approaches. Be careful not to allow yourself or others to dominate the discussion. If the conversation is getting heated or bogged down on a particular issue, consider allowing participants to talk in pairs for a few minutes before returning to a full group discussion. Do not worry about reaching consensus, just make the most of this opportunity to practice thinking and learning together!

Case Synopsis

In November 2021, Michelle Wu was elected Boston's next mayor on the promise of systemic change. Four days after her win, and just eleven days before taking office, she began considering how best to staff and manage a range of over-arching priorities stemming from her campaign promises. Should she hire high-profile advisors in the mayor's office, assign the work to department heads, or pursue another arrangement?

On the Friday after her election, Mayor-Elect Wu gathered a team to strategize in a conference room outside her soon-to-be vacated city council office. A half dozen people surrounded her: her campaign manager, her transition director, and a few aides who would end up with roles in her administration. A variety of diagrams with boxes and arrows were splayed across the table. The goal was to shape the administration to help "institute big promises of reform," Wu recalled, "while bringing along the existing organization."

Conversation Plan

Part 1: Exploring the Case (30 minutes)

The goal of this part of the conversation is to review the case from the point of view of the people involved. See suggested questions, which are also in the attached worksheet:

- *What are the tradeoffs between the two main models Mayor-elect Wu is considering? (See Appendix 1 for the two models.) Which of the two would you recommend, and how would you compensate for any of your chosen model's weaknesses?*
- *Given Wu's promises, what key changes should she make to the pre-existing organizational chart in case Appendix 1?*
- *What tools and techniques must be in place to coordinate work in cities that cuts across "silos"?*

Several insights may emerge from this discussion. For example, organizational structures that create senior positions to oversee cross-cutting change can have advantages: a more systemic orientation; soft power that comes with prominence and proximity to the mayor/senior executive; and the ability to get "outside the building" and look over the horizon, since they are not tied down to day-to-day emergencies. These characteristics also have potential downsides: a lack of direct control over resources (e.g., money and people) and distance from—and therefore tactical knowledge of—the day-to-day operations of the city. Structures that place most of the leadership within existing department heads may face advantages and disadvantages in the reverse. Matrix organizationsⁱⁱⁱ that combine features and benefits of both can also bring their own challenges, including mixed messaging or competing priorities.

What should be clear from this discussion is that organizing the work to be done goes well beyond the structure of an organizational chart, and it is not as simple as "breaking down silos." You can emphasize the following points:

- The organizational chart is only one piece of a four-piece system. (Organizing = structure + people + process + culture.)
- Often, a leader's intuition is to break down silos, but it is not that simple. You might share the old joke that without silos, there would be corn everywhere. As Geoff Mulgan argues in his book *Social Innovation: How Societies Find the Power to Change*, any silo-busting inevitably creates new coordination challenges.¹ Silos serve an important function; they are a way of organizing and containing the work to be done.
- A leader's next intuition might be to organize horizontally instead of vertically (i.e., by subject matter instead of functional department). However, horizontal silos also create coordination challenges and don't solve the problem of working and learning across teams.

Part 2: Application (25 minutes)

No matter which model an organization is operating under, the process must include dividing and assigning work. To help, many organizations use responsibility attribution matrices. Such tools can help

ⁱⁱⁱ Organizations operating under a matrix structure split authority between both functional leads and project leads to boost cross-departmental collaboration.

collaborators decide who will do the work when, and they can help leaders make the design choices of who has authority for what. The following describes several of these tools—the RACI, the RAPID®, and Mitchell Weiss’s custom tool for cities, called CITY.^{iv}

- The RACI matrix is a fillable chart and stands for Responsible (who does the work), Accountable (who reviews the work), Consulted (who else, if anyone, provides feedback on the work), and Informed (who needs to be looped in on the work, but does not necessarily need to be overloaded with the details).^v
- The RAPID® tool was developed by consulting firm Bain & Company, and stands for Recommend (who recommends an action), Agree (whose views need to be reflected in a proposal), Perform (who performs the decision being made), Input (who provides input, but whose views may or may not be reflected in the final proposal), and Decision (who commits the organization to action).²
- The CITY tool, which Weiss adapted from the above tools and others, helps define roles and responsibilities in the context of managing initiatives from city hall. The “C” stands for the person or people who create the plan and make the final recommendation. “I” stands for those people (including the public) who should provide input into the plan, such as advice, work, and other resources. “T” represents who needs to be told about the plan, but they don’t get to reject it. Finally, the “Y” is who owns the “yes.” The Y’s should be assigned judiciously, as the more people who have veto power, the more complicated completing the initiative can be.

If time allows, participants can use the CITY tool in the Appendix for a priority they are working on. You can create a chart on a whiteboard or virtual platform. Alternatively, ask participants if they have used similar tools before, if they were helpful or not, and why.

Part 3: Formulating Lessons (10 minutes)

This part of the conversation focuses on the lessons of the case discussion that participants may continue to reflect on and apply to challenges in their work. High-level takeaways to review after a productive discussion might include:

- For any new leader of a large organization, an organizational chart may be an early priority, but it is only one piece of the puzzle. Organizing means putting in place not just a structure, but the right people, culture, and process. In the early days of any new administration, outsiders and insiders are desperate to ask: Who is doing what? Which offices are you shaking up? Leaders (including new mayors) would do well to push back and say that structure will come, but not without a focus on culture for collaboration and a process for it.
- It helps when leaders realize that “silo-busting” isn’t as easy as it sounds. While tempting, given the need for cross-departmental work, alternate structures might simply trade one set of silos and challenges for another.

^{iv} CITY is adapted in part from the RACI, RAPID®, MOCHA, DARE and related decision-making and monitoring tools.

^v The exact origins of the RACI matrix are unclear, as the management technique has evolved over time through collective use, rather than being attributed to a single inventor. For more information, one source is “A Guide to the Project Management Body of Knowledge” (PMBOK® Guide) published by the Project Management Institute (PMI).

- Identifying a tool to organize cross-cutting work can help leaders make progress with their teams. There is nothing scientific about CITY or any other similar tool; they all have strengths and weaknesses. But the Wu administration's use of tools like this helps us see that addressing cross-cutting coordination with something is much better than nothing, and that while some organizations most certainly have something, too many have nothing. Participants should know they can introduce models like these if they encounter a gap.
- Even in its brevity, this discussion highlights just how much city change (and government change) is systemic, cross-cutting change. Any strategy for elevating cities today should consider systems-level thinking and tactics.

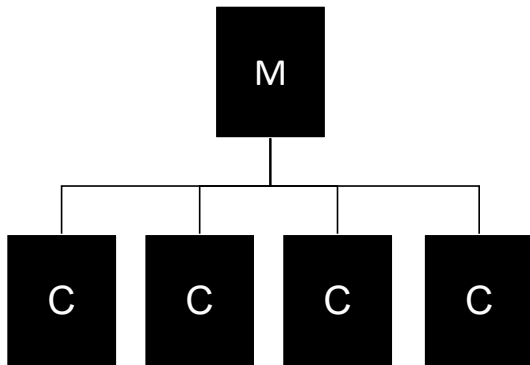
Worksheet

1. *What are the tradeoffs between the two main models Mayor-elect Wu is considering? Which of the two would you recommend, and how would you compensate for any of your chosen model's weaknesses?*
2. *Given Wu's promises, what key changes should she make to the pre-existing organization chart in Appendix 1 of the case?*
3. *What tools and techniques must be in place to coordinate work in cities that cut across "silos"?*

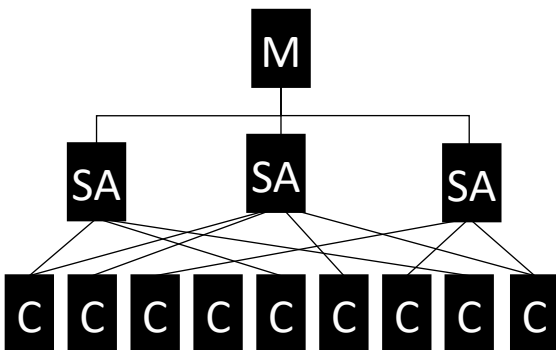
Appendices

Appendix 1 Two Organizational Models

Model 1: Mayor and Cabinet Heads



Model 2: Mayor, Senior Advisors, and Cabinet Heads



Appendix 2 The CITY Decision-Making Tool

This table describes the different decision roles that make up the acronym CITY:

C	I	T	Y
CREATES the plan; will make the final recommendation	INPUTS into the plan; could include advice/resources from people who will have to complete the work or from others, including community	Needs to be TOLD ; does not have veto rights to the plan but needs to be alerted about it	Owens the “YES” ; will need to provide final approval for the plan

Source: Mitchell Weiss, 2022

To prepare the CITY tool, create your own table listing commitments along the left side. In this case, the table below has been populated with several action items associated with Wu’s campaign promise of Boston’s Green New Deal. (See Appendix 2 in the case study for more details on the initiative.) List team members, administration leaders, and other stakeholders across the top. For each commitment, assign roles (either a “C,” “I,” “T,” or “Y”) to the relevant stakeholders. Below is a truncated example of a completed CITY tool (for illustration purposes only; does not reflect actual role assignments).

Commitment	Description	Mayor	Chief of Staff	Chief of Policy	Chief, New Urban Mechanics	Chief of Ops	Chief Comms Officer
Decarbonization	Commit to city-wide carbon neutrality by 2040.	Y		I	I	C	T
Justice Audit	Perform a citywide justice audit to inform a justice framework.	Y	I	C			T
Clean Energy Infrastructure	Accelerate solar and efficiency measures.	T	I	I	I	Y	T
Green Workforce Development	Create jobs to support a clean economy.	Y	I	I		I	T

Source: Mitchell Weiss, 2022

Endnotes

¹ Geoff Mulgan, *Social Innovation: How Societies Find the Power to Change*, Bristol University Press, 2019, muse.jhu.edu/book/80690.

² “RAPID® Decision Making,” Bain & Company, October 13, 2023, <https://www.bain.com/insights/rapid-decision-making/>, August 2026.