

Mayoral Transitions

How Three Mayors Stepped into the Role in Their Own Words

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, “Mayoral Transitions: How Three Mayors Stepped into the Role in Their Own Words.”

Conversation Goals

This case study is part of a portfolio of cases designed to help incoming public leaders and their teams think strategically about how to transition into new roles and deliver on campaign promises.ⁱ

The case comprises three brief, first-person transition stories and was developed to help participants reflect on leaders’ different pathways as they take the helm. While each transition is unique, the case explores ways to navigate common themes and challenges.

ⁱ See other cases in the collection, including “Charting a Course for Boston: Organizing for Change” and “Newport News: Breakthrough Expectations,” on our [website](https://www.cityleadership.harvard.edu/resources/) at <https://www.cityleadership.harvard.edu/resources/>.

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This case supports a conversation to help participants explore the following:

1. Understand that all transitions are unique, and there is no single transitions playbook.
2. Nevertheless, know that mayors and other public leaders can consider common themes that apply to many transitions and can help make the most of their first several months in office. These themes include how one might assess and diagnose their situations, build teams, prioritize promises, and focus on gaining trust both inside and outside city hall.
3. Consider how to align values with transition activities.
4. Create a values statement and identify key first moves to take.

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 worksheets to prepare themselves for the case discussion. If you choose to use the worksheets, 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

This case presents the transition stories of three mayors who took the helm of different US cities under varying circumstances that called for distinct strategic actions. Transitioning into the mayor's office—whether it represents a jarring shift from the status quo or a firm commitment to continuity—is a daunting challenge. Through the stories of these three mayors, the case offers a basis for discussion on thoughtfully stepping into the new role, building a team (or working with an inherited team), asserting power, and managing expectations in preparation for delivering on campaign promises.

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. Ask participants to briefly introduce each case protagonist at a high-level, describe the setting in which they came into office, and the challenges they faced. For example:

- Louisville, Kentucky, Mayor Greg Fischer: Fischer inherited a competent city hall; however, he realized there are some shortcomings regarding how the staff operated. *Which elements of the previous administration's operations should he keep or stop? What new things should he and his new team start doing?*
- Mount Vernon, New York, Mayor Shawyn Patterson-Howard: Patterson-Howard is in the center of a figurative wildfire and must determine a path forward. *Which hot spots should she prioritize? Where should she build a control line, what can she let burn out, and who could she trust to join her on the front lines?*
- Miami, Florida, Mayor Francis Suarez: Suarez comes into office after a “landslide” victory with ambitious plans. *However, does he have—or could he get—the authority and power to deliver on his campaign promises?*

To enrich the discussion, you can pose the following questions. Alternatively, share these questions before the session via Worksheet 1.

- *What were the main challenges the incoming mayors faced as they transitioned into their roles?*
- *What types of challenges did each of the mayors have to face? How should they address them?*
- *Of the three mayoral transitions depicted in the case, which resonates most with you? Why? If none seems resonant, are there aspects of each that you relate to?*

Part 2: Application (25 minutes)

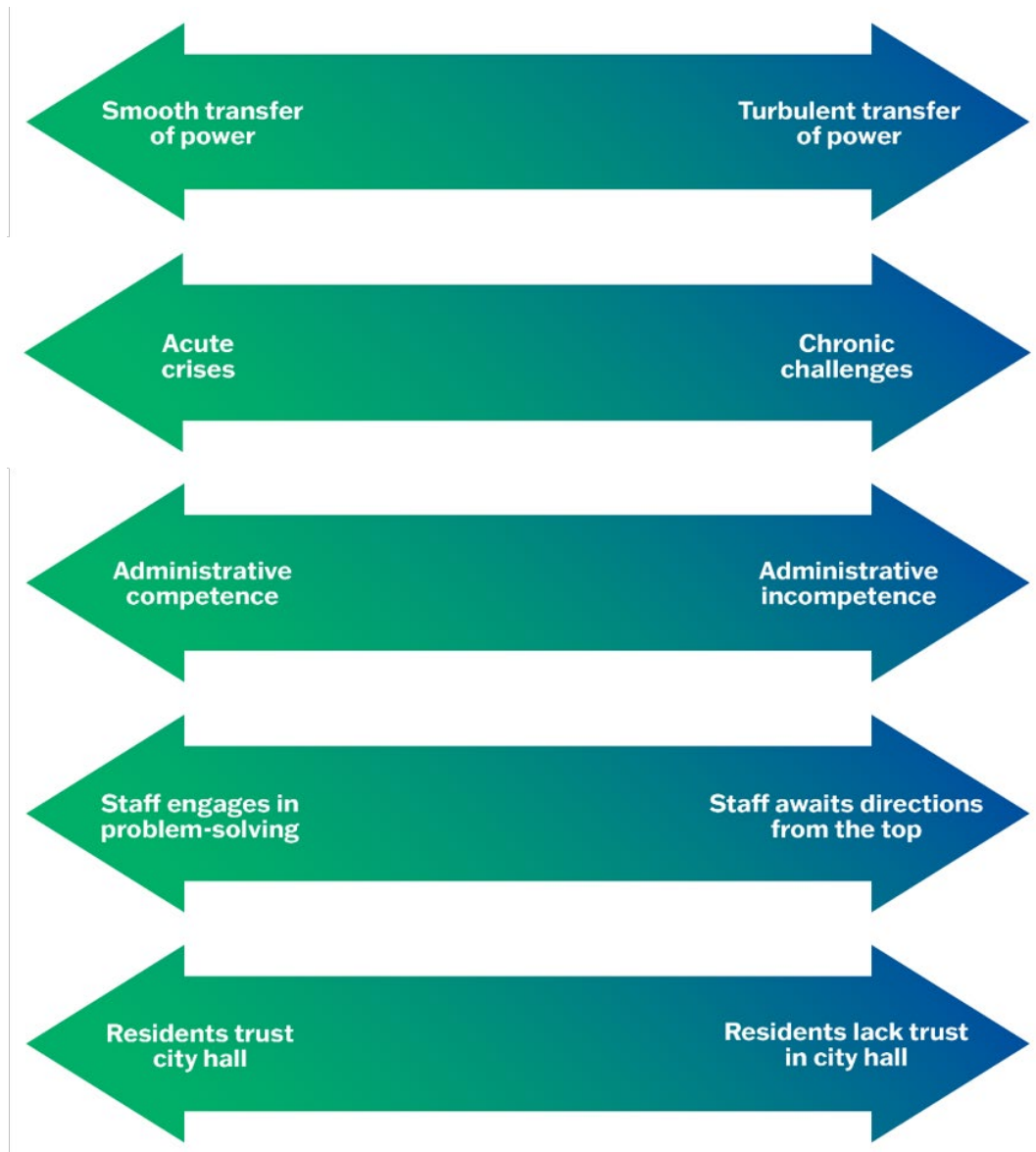
While the mayors in the case study hail from a range of settings and face a wide variety of issues, there are several conditions that may be worth exploring based on the similarities and differences between the three stories. You can use Worksheet 2 to frame the conversation.

Ask, solely based on the information provided in the case:

- *Which of these conditions are present, neutral, or lacking for each mayor? Which of these present opportunities? Which of these present challenges?*

On the following “five conditions” spectra, participants can either write the initials of the three mayors along each of the spectra individually, in pairs, or you can do the exercise with the class on the board or a virtual platform. Remind them that there is room for disagreement and there is no perfect answer. Note that these conditions represent several dimensions worth exploring based on the similarities and differences between the three case vignettes, but they are not meant to be exhaustive—other conditions are conceivable, too.

Five Conditions



In addition to the conditions above, you may also ask if the mayors can be defined by having either an “insider” or “outsider” status, or both.

Turning to their own transitions, participants can reflect on the fact that, in addition to assessing the backdrop of a leader’s transition, they can overlay their leadership values to uncover a path forward. Ask them to reflect on their core beliefs and principles that guide them in their personal and professional lives and allow them to effectively oversee, lead, and manage others. To memorialize these beliefs, present the following values statement template, and have them work individually to complete it:

“As mayor, I believe that _____, _____, and _____ matter most for achieving my goals and the goals of those I serve.” (See Worksheet 3.)

If time allows, ask several participants to share their draft leadership values statement. Encourage them to continue to revise their statements over time.

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:

- There is no single way to design a transition. There isn't one "roadmap." Transitions are highly contextual and personal.
- Although elected leaders often use the first one hundred days to formulate strategy, gain stakeholder buy-in, and roll out policy initiatives, most find that the process of taking office requires them to make a series of transitions that extend well beyond the first hundred days.
- Adopt a diagnostic mindset. *What are the critical assets that you bring to the leadership position? What skills and capabilities does your team have at the ready? What challenges is your city facing now? What gaps do you notice—and what steps can you and your team take to address them?*
- Consider how to leverage being an outsider or an insider; each identity has its strengths and weaknesses.
- Prepare yourself and your team to be nimble as circumstances change and you learn more about the challenges you face.
- Recognize the values you bring to your office. *What feels like bedrock and where can your leadership philosophy evolve and remain consonant with your values?*

Worksheet 2: Placing Your Conditions on a Spectrum

My transition conditions	What this means for me
← Smooth transfer of power → ← Turbulent transfer of power →	
← Acute crises → ← Chronic challenges →	
← Administrative competence → ← Administrative incompetence →	
← Staff engages in problem-solving → ← Staff awaits directions from the top →	
← Residents trust city hall → ← Residents lack trust in city hall →	
← Other: →	
← Other: →	

In addition to the spectra above, consider whether your status as an “insider,” “outsider,” or both should be a consideration.

Worksheet 3: My Values Statement

A values statement expresses your priorities and principles, shaping your approach to leading and managing others. Take a few minutes to reflect on your own values statement that guides you in your personal and professional life. In doing so, you are naming and committing to the core elements of your leadership philosophy.

“As mayor, I believe that _____, _____, and _____ matter most for achieving my goals and the goals of those I serve.”