Building AI Organizational Readiness for Digital Transformation

Doctoral Defense Presented by Ruiz Clark

April 17, 2026
Harvard Graduate School of Education

Estudio Olympia
MORELIA, MICH.

Project Overview

Case Study

Phase 1 of an AI capacity building project (henceforth “the Project”) implemented by Digital Promise for a large school district in California serving 70,000 students (henceforth “the District”).

AIM: *Support executive leaders to establish a district-wide vision for AI literacy & initial communication roadmap through a full-day workshop.*

Team & Timeline

Rapid Execution

Led 20 teammates to execute two program components in **36 days** full production days.

Background

Organizational Restructuring

An initiative of the newly created Advancement Team (within the equally new Powerful Learning Division).

Context

First Milestone

Served as the Powerful Learning Division’s first high-profile fee-for-service project.

The Broader Challenge

Turbulent Crosswinds

Facing political shifts, economic funding cliffs, and rapid technological disruption.

Ultimate Aim

Achieving meaningful Digital Transformation in the era of generative AI.

Core Argument

Digital Transformation relies on AI organizational readiness, system coherence, and organizational ambidexterity.

“Digital transformation in the age of AI is predicated on the collective aptitude of leaders within a given context to foster system-level coherence, thereby promoting district-wide AI literacy for all learners.”

Key Terms

AI Literacy
An individual learner's mastery over intelligent technologies, including the knowledge and skills to critically apply AI tools safely and effectively.

AI Organizational Readiness
The collective aptitude of a system to effectively integrate emerging technologies across workstreams.

Digital Transformation
The convergence of human-centered change management orchestrated strategically to unlock the fullest potential of technological integration across a system.

Change Management
A strategic process used to move an organization from its existing state to a desired state by addressing complex, human-centered challenges.

System Coherence
The strategic alignment of people, task, informal organization, and formal arrangement in order to achieve desired outputs.

Organizational Ambidexterity
The ability of an organization to simultaneously leverage existing assets (i.e. exploitation) while looking outwardly to untapped potential (i.e. exploration).

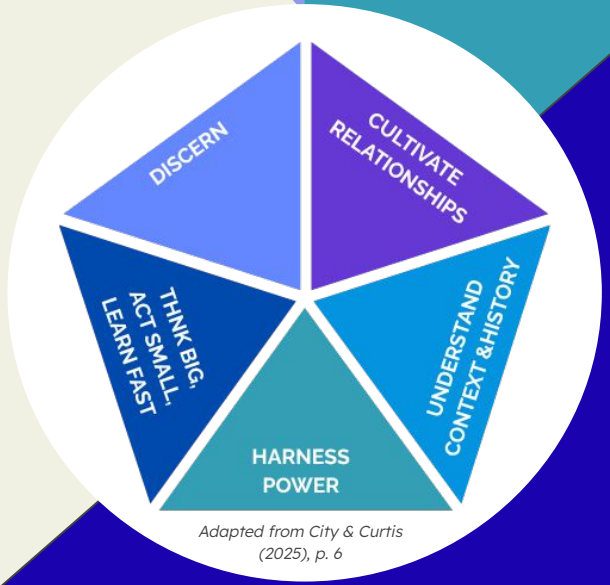
Theory of Action

If I strategically lead the Powerful Learning Team's first fee-for service project by:

- *Seeking to understand the context and history;*
- *Practicing deep listening in order to discern team dynamics;*
- *Cultivating a positive working environment that fosters relationship building;*
- *Harnessing the power of my own skills; and*
- *Learning iteratively while evaluating impact;*

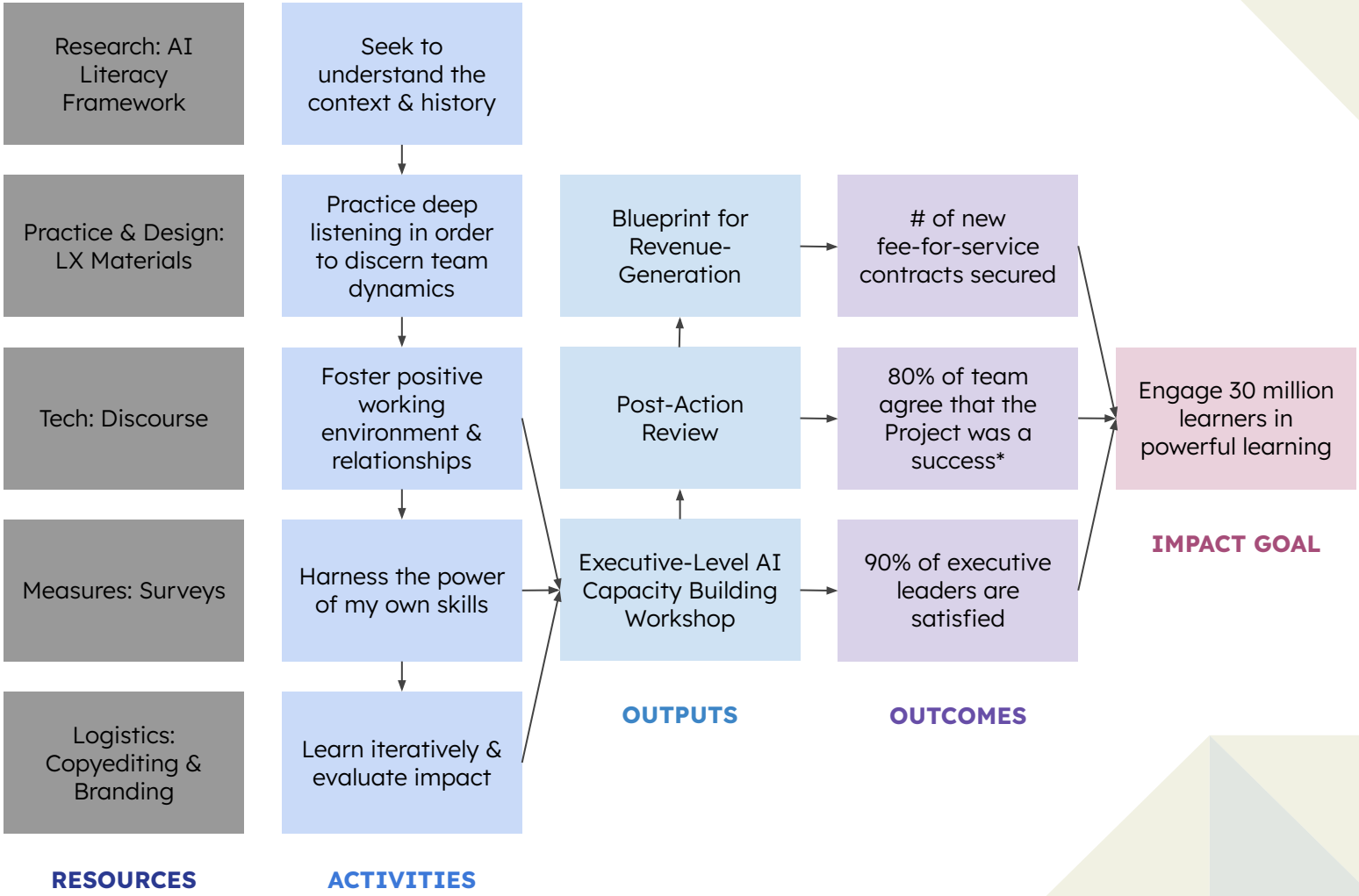
Then I will establish a blueprint for executive-level AI readiness programming that can be scaled,

So that Digital Promise can become an ambidextrous organization with sustainable revenue streams, fueling its growth towards reaching 30 million learners.

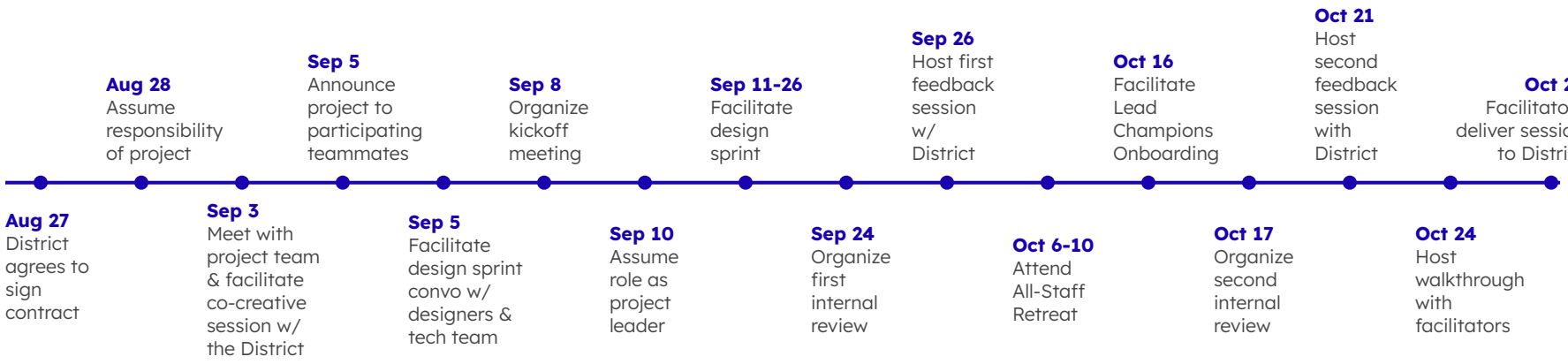


Adapted from City & Curtis (2025), p. 6

PROJECT LOGIC MODEL



36-Day Sprint



Project Outcomes

Outcome #1

Executive Approval

100% of executive leaders were satisfied or extremely satisfied with the session.*

91% would recommend it to other districts.*

**N = 12*

Outcome #2

Team Approval

80% of implementation team regarded the Project as a success.**

**N = 15*

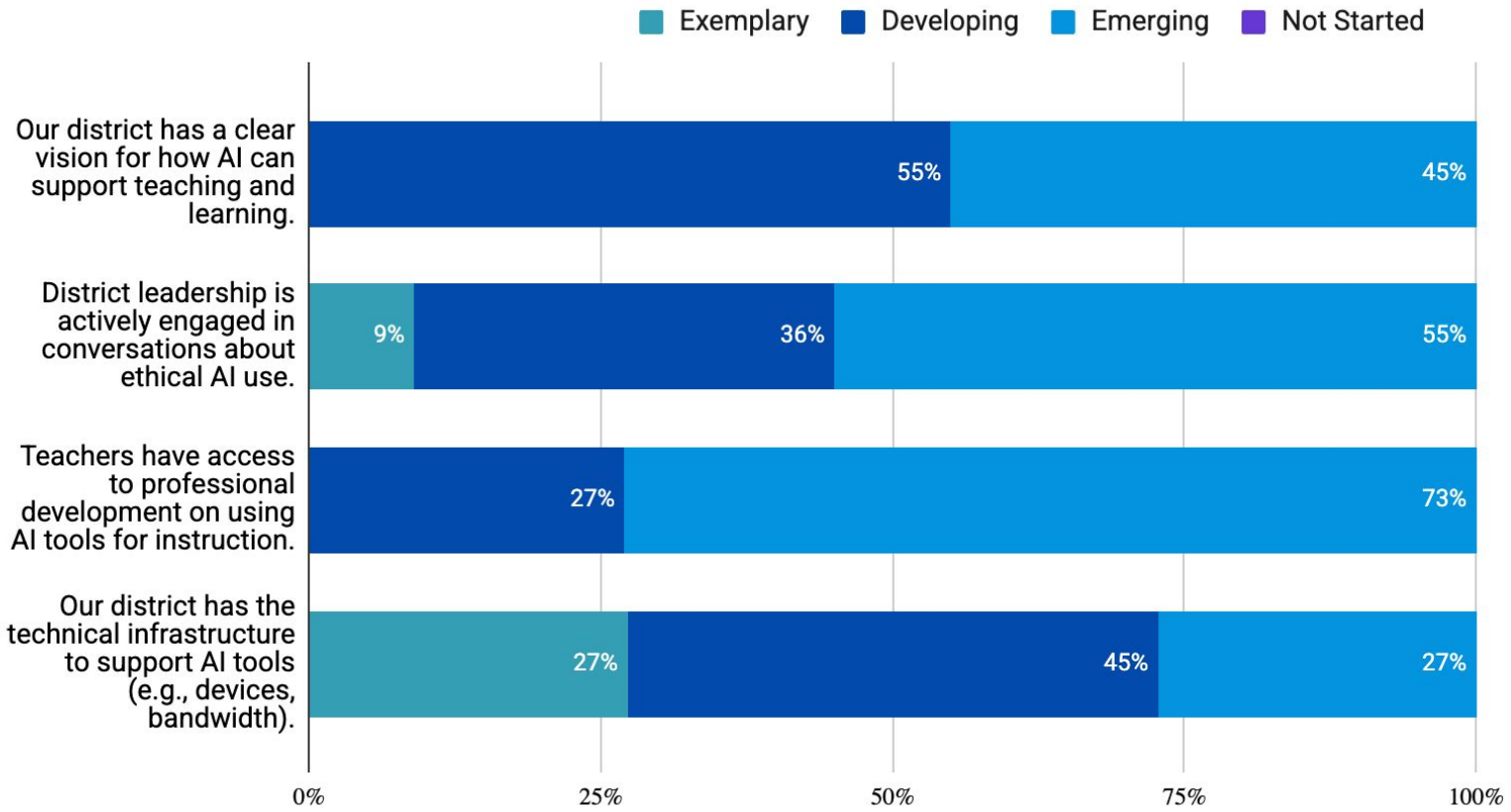
Outcome #3

Fee-for-Service

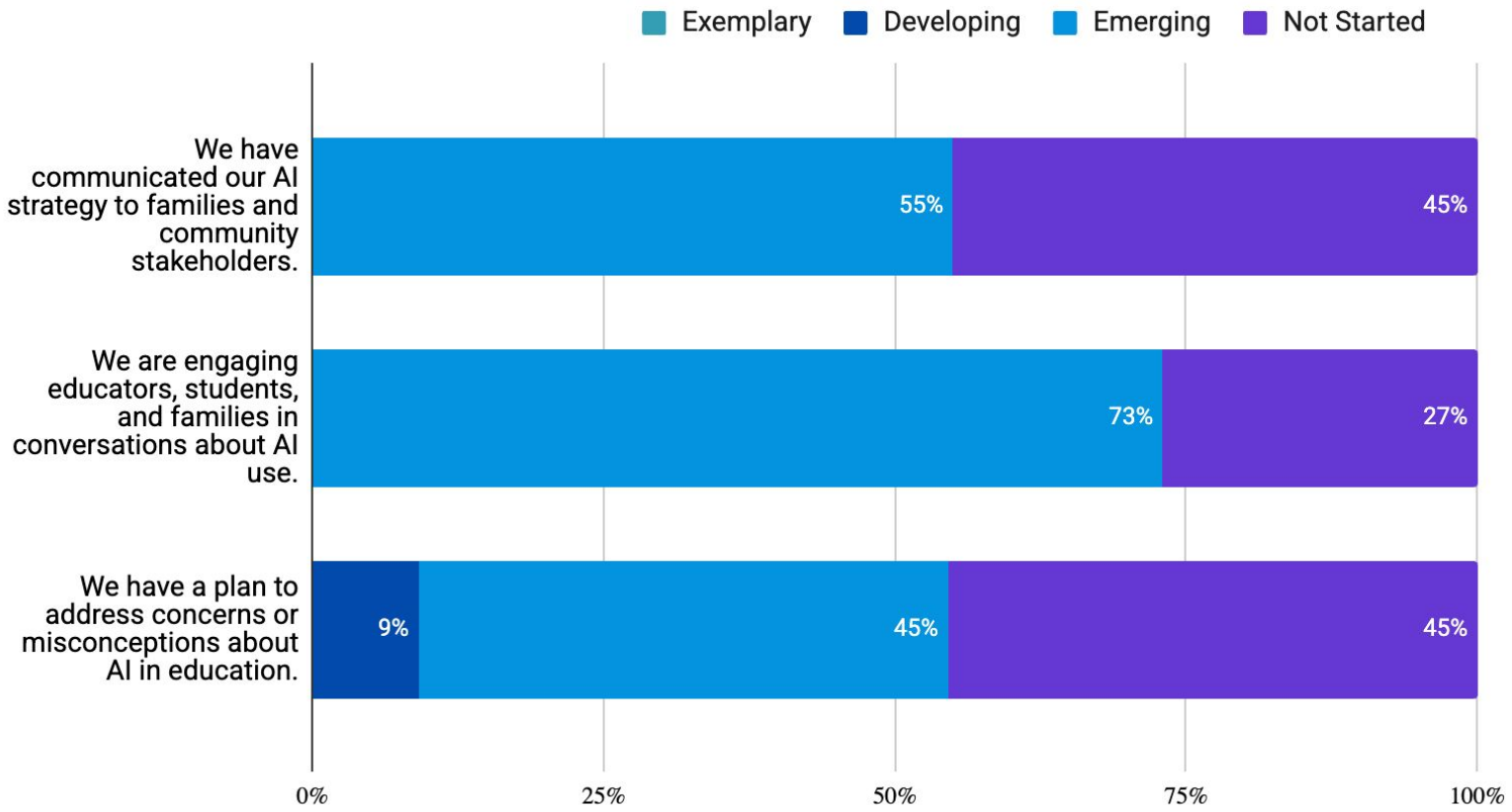
3 presentations that repurpose content.

5 new leads generated through CALIE's Spring CUE.

Strengths: Post-Training Baseline Survey Results (N = 11)



Areas for Growth: Post-Training Baseline Survey Results (N = 11)



I used to think...

Digital Leadership Convergence Model

Adaptive leaders catalyze change management by establishing coherence to foster ambidexterity, enabling digital transformation through AI organizational readiness.

OUTER RING

Adaptive Leadership for Change Management

The process that mobilizes people: Contextualize, Deep Listening, Co-create, and Iterate collectively.

MIDDLE RING

Ambidexterity & System Coherence

Aligning core operations, structures, processes, and infrastructure to balance exploitation and exploration.

INNER CORE

Digital Transformation

The ultimate goal achieved through **AI Organizational Readiness** and technological integration.

Final Thoughts

> *"One cannot step twice into the same river." — Heraclitus*
>
> The task is to **reimagine the system** so students can cross the technological Rubicon before them.

IMPLICATIONS FOR SITE

Digital Transformation

The Powerful Learning Division must focus on guiding school districts through Digital Transformation by helping them fundamentally reimagine the purpose of education.

IMPLICATIONS FOR SECTOR

System Convergence

The Digital Leadership Convergence Model can help districts balance human-centered change management with the technical aspects of AI integration in order to catalyze digital transformation.

IMPLICATIONS FOR SELF

My Source of "Power"

This Project showcased my capacity for adaptive leadership in an otherwise highly technical space.

A digital capstone…

theconvergencemodel.com

Questions?

Frameworks

Adaptive Leadership

“Leadership begins… with the diagnostic work of separating a problem’s technical elements from its adaptive elements” (Heifetz et al., 2009, Chapter 5, para. 5)

“establishing a sense of urgency, creating the guiding coalition, developing a vision and strategy, communicating the change vision, empowering a broad base of people to take action, generating short-term wins, consolidating gains… and institutionalizing new approaches in the culture” (Kotter, 2012, p. 15)

AI ORGANIZATIONAL READINESS

"AI Readiness training is not the same as merely learning about AI. Rather, AI Readiness recognises the diversity of the professions, workplaces and sectors for whom AI has a potential impact" (Luckin et al., 2022, p. 1)

"[Organizational readiness is] a multi-level, multi-faceted construct. As an organization-level construct, readiness for change refers to organizational members' shared resolve to implement a change (change commitment) and shared belief in their collective capability to do so (change efficacy)" (Weiner, 2009, p. 1)

"[AI organizatioanl readiness is] the state of an organization in terms of willingness and ability of its stakeholders, and suitability of its environment, processes, data and resources for adopting and operating AI" (Tehrani et al., 2024, p. 4)

DIGITAL TRANSFORMATION

"[Digital transformation is] a process that aims to improve an entity by triggering significant changes to its properties through combinations of information, computing, communication, and connectivity technologies" (Vial, 2019, p. 118)

"[Digital transformation is] the integration of digital technologies by companies and the impact of the technologies on society" (European Parliament, 2021, What is digital transformation?)

'In an age of digital innovation, leaders in every industry should strive to transform every part of the organization, from user experience… to operational management. But we cannot forget that it is people who make [organizations] work' (Westerman, 2016, p. 3)

ORGANIZATIONAL AMBIDEXTERITY

"… had two sets of eyes – one pair focusing on what lay behind, the other on what lay ahead" (O'Reilly & Tushman, 2004, p. 74)

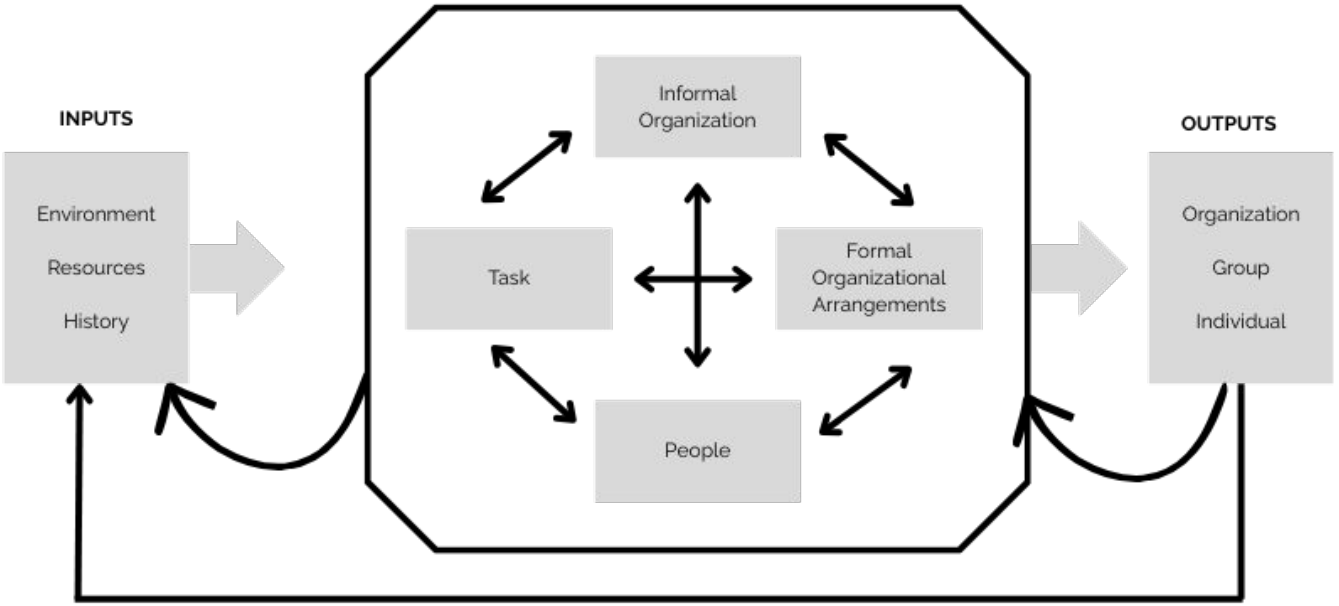
"[Exploration is characterized by] search, variation, risk taking, experimentation, play, flexibility, discovery, innovation… [exploitation entails] refinement, choice, production, efficiency, selection, implementation, execution" (March, 1991, p. 71)

"This combination of autonomy and access to core business assets, all under the sponsorship of a senior leader and team with a shared ambition for growth, is what defines the ambidextrous organization approach" (Binns et al., 2022, p. 108)

AI Literacy

Mills et al., 2025, p. 6

Coherence



Adapted from Nadler-Tushman (1980, p. 47)

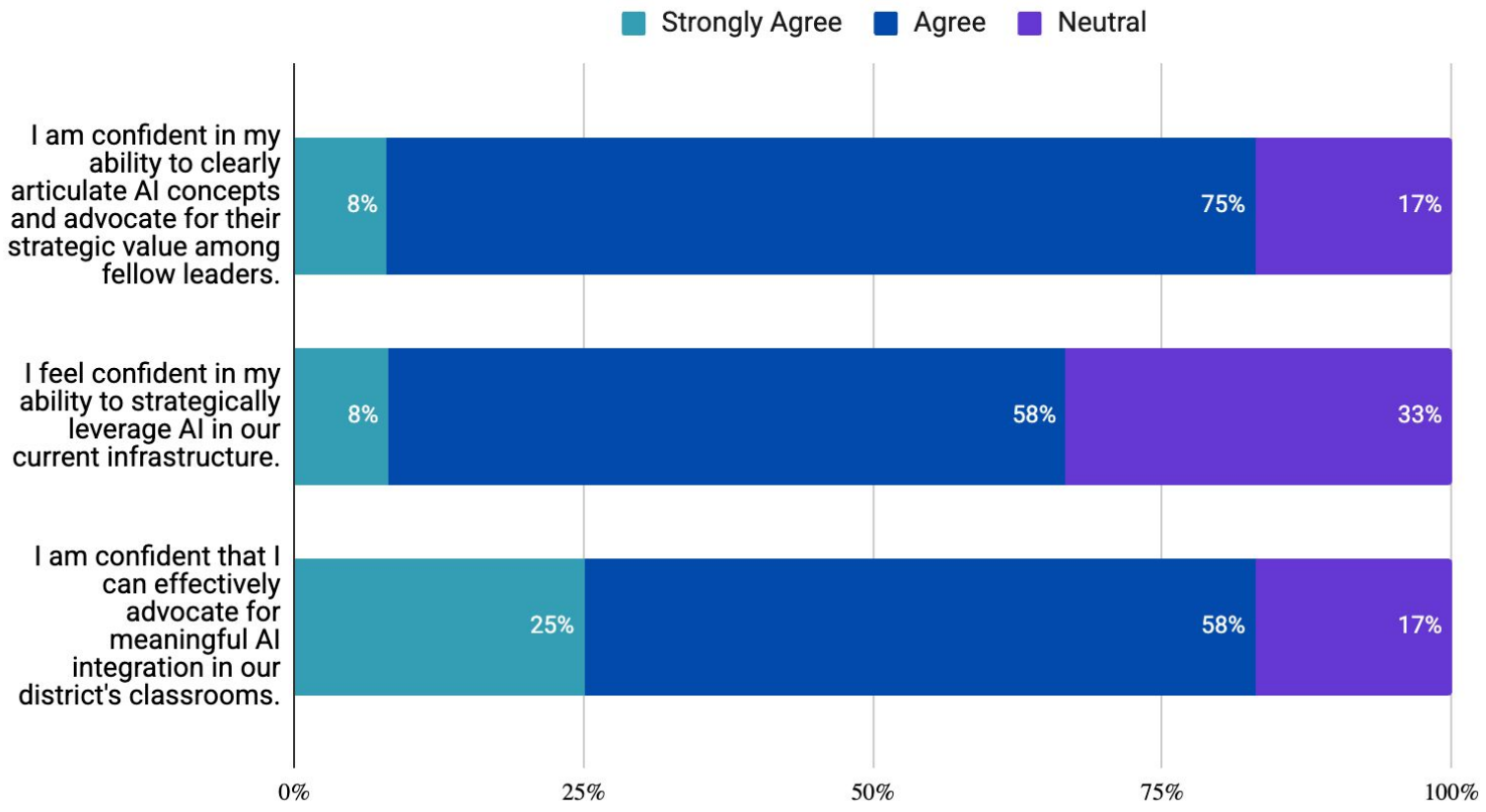
Managing Complex Change Model

Vision	Skills	Motivation	Resources	Action Plan	**Change**
	Skills	Motivation	Resources	Action Plan	**Confusion**
Vision		Motivation	Resources	Action Plan	**Anxiety**
Vision	Skills		Resources	Action Plan	**Resistance**
Vision	Skills	Motivation		Action Plan	**Frustration**
Vision	Skills	Motivation	Resources		**False Start**

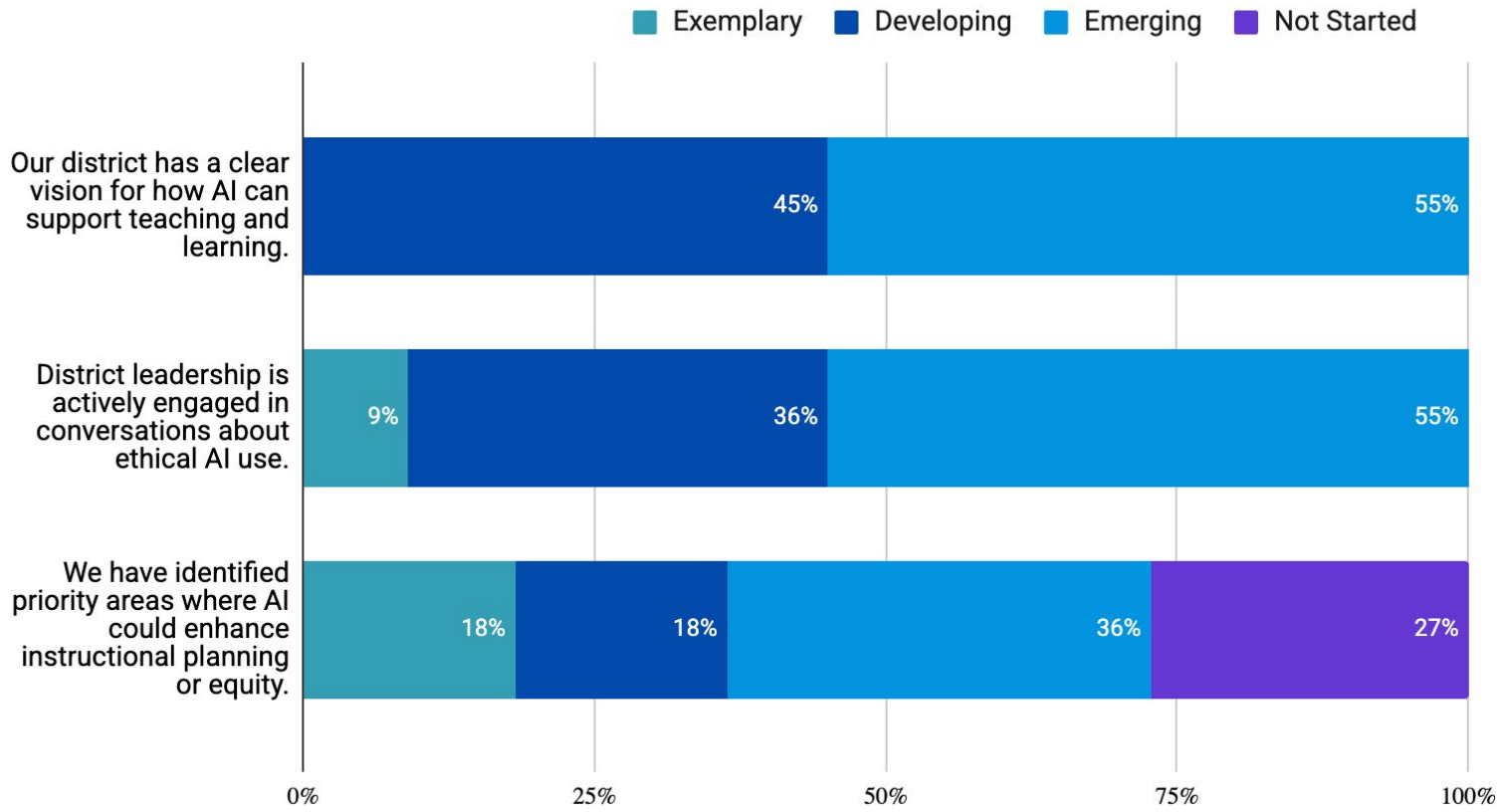
Adapted from Ambrose (1987), Lippitt (1987), & Knoster et al. (2000, p. 97)

Full Data

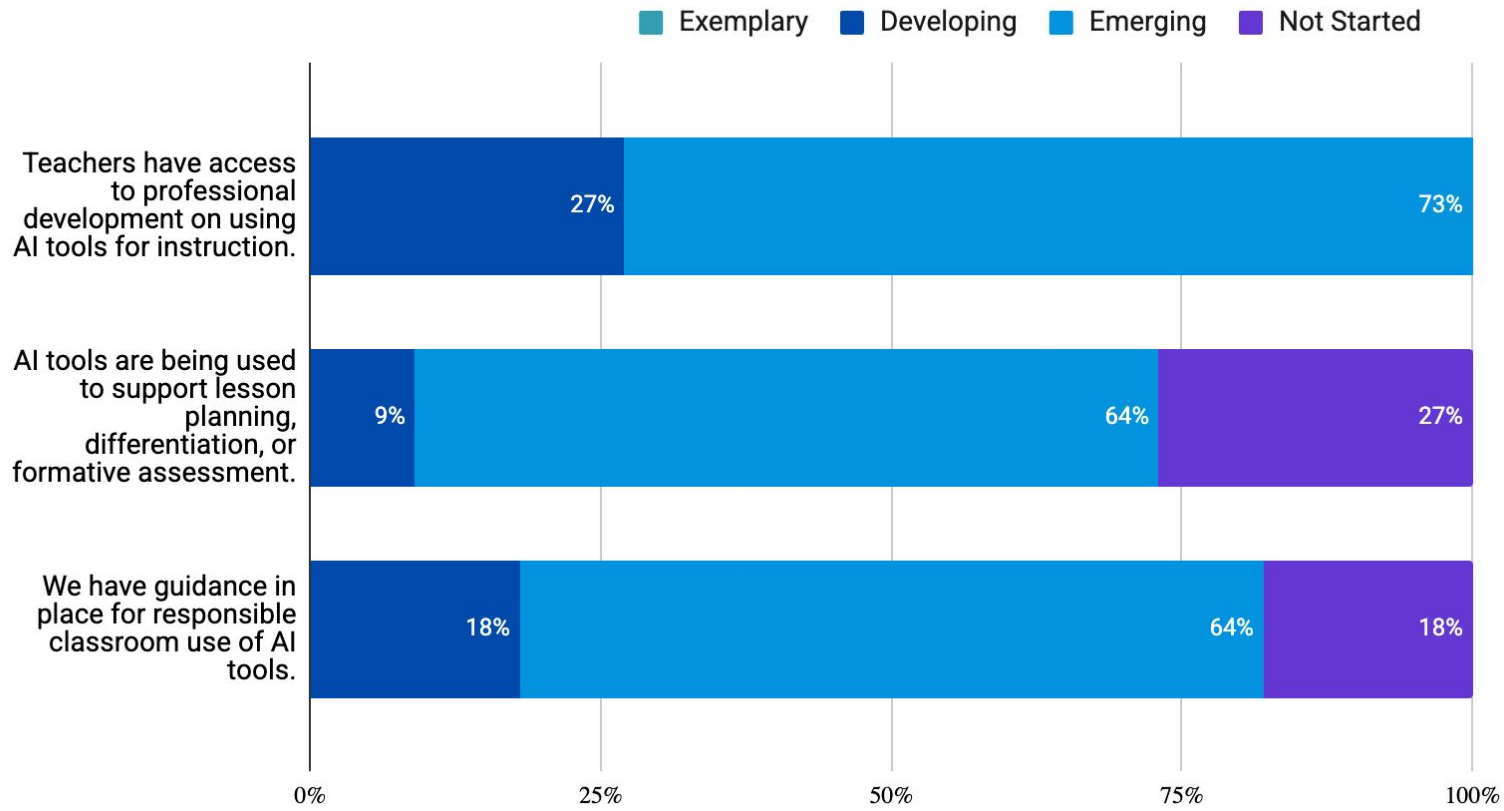
Post-Training Baseline Survey Results: Overall Confidence (N = 12)



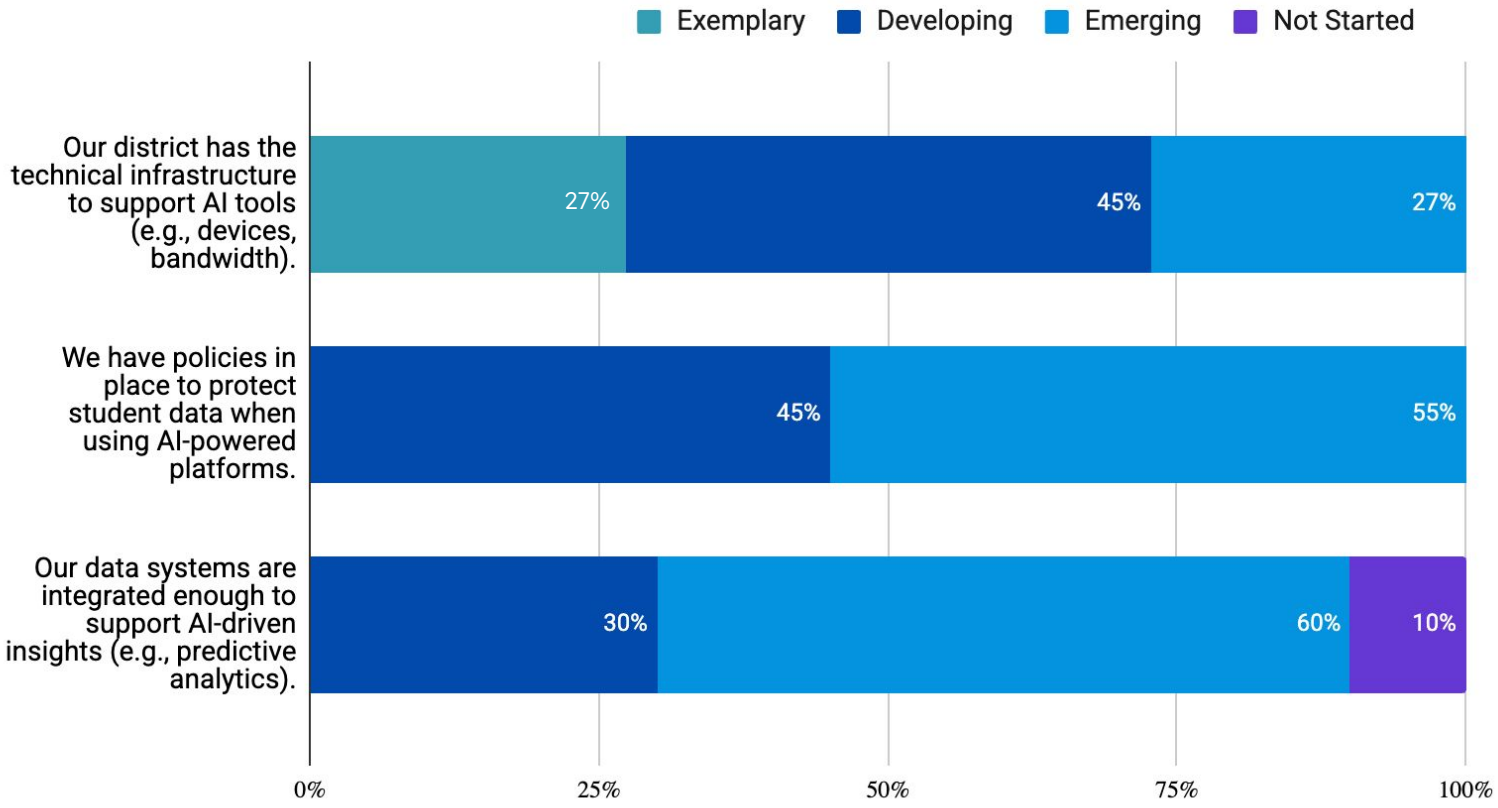
Post-Training Baseline Survey Results: Vision & Leadership (N = 11)



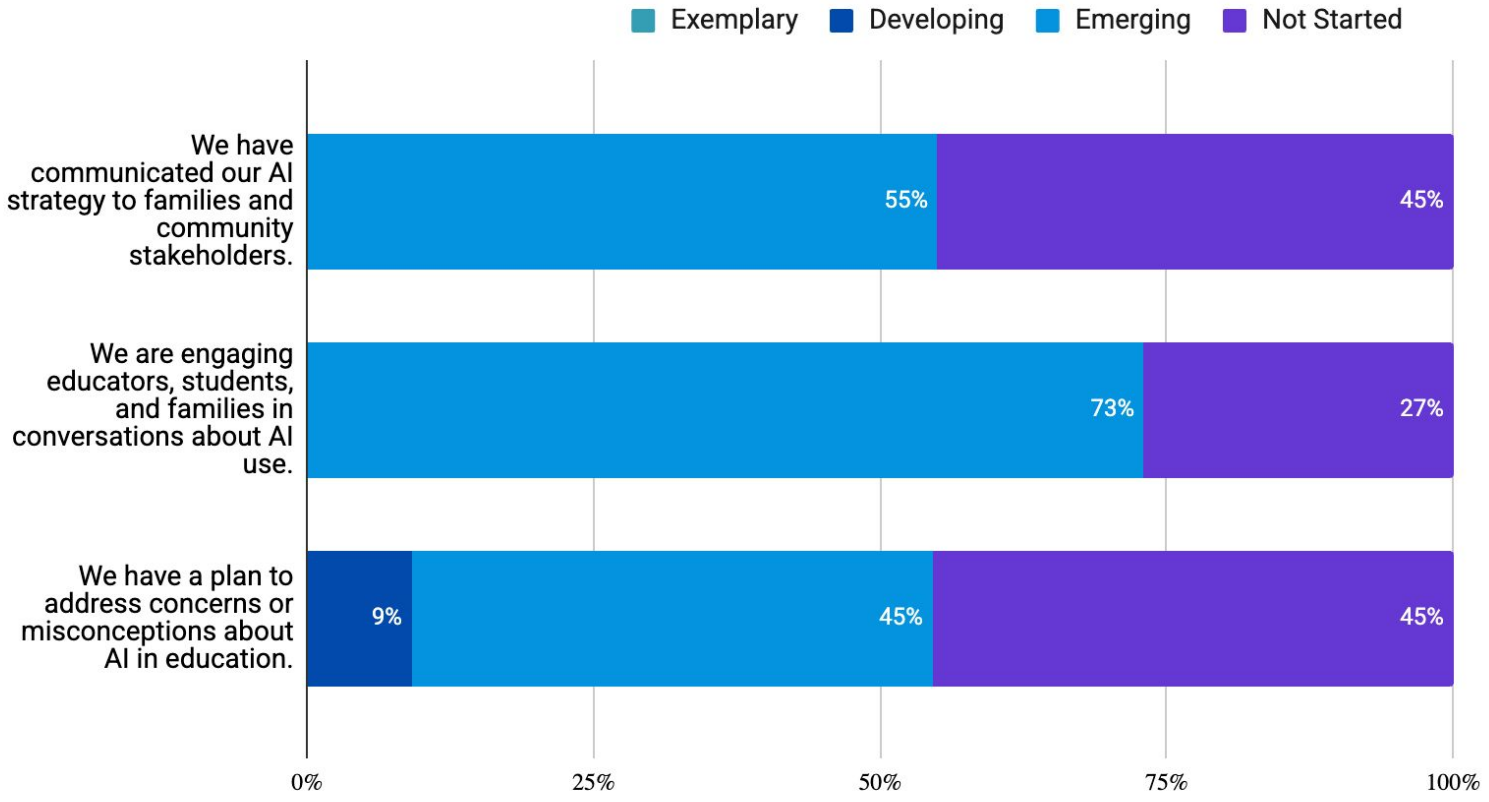
Post-Training Baseline Survey Results: Instructional Integration (N = 11)



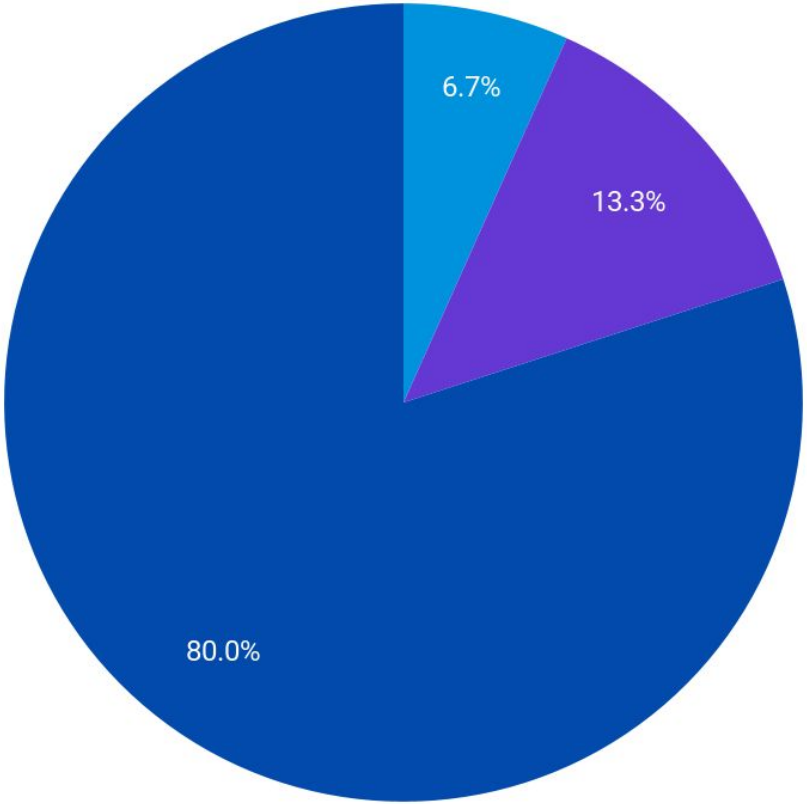
Post-Training Baseline Survey Results: Infrastructure & Data Systems (N = 11)



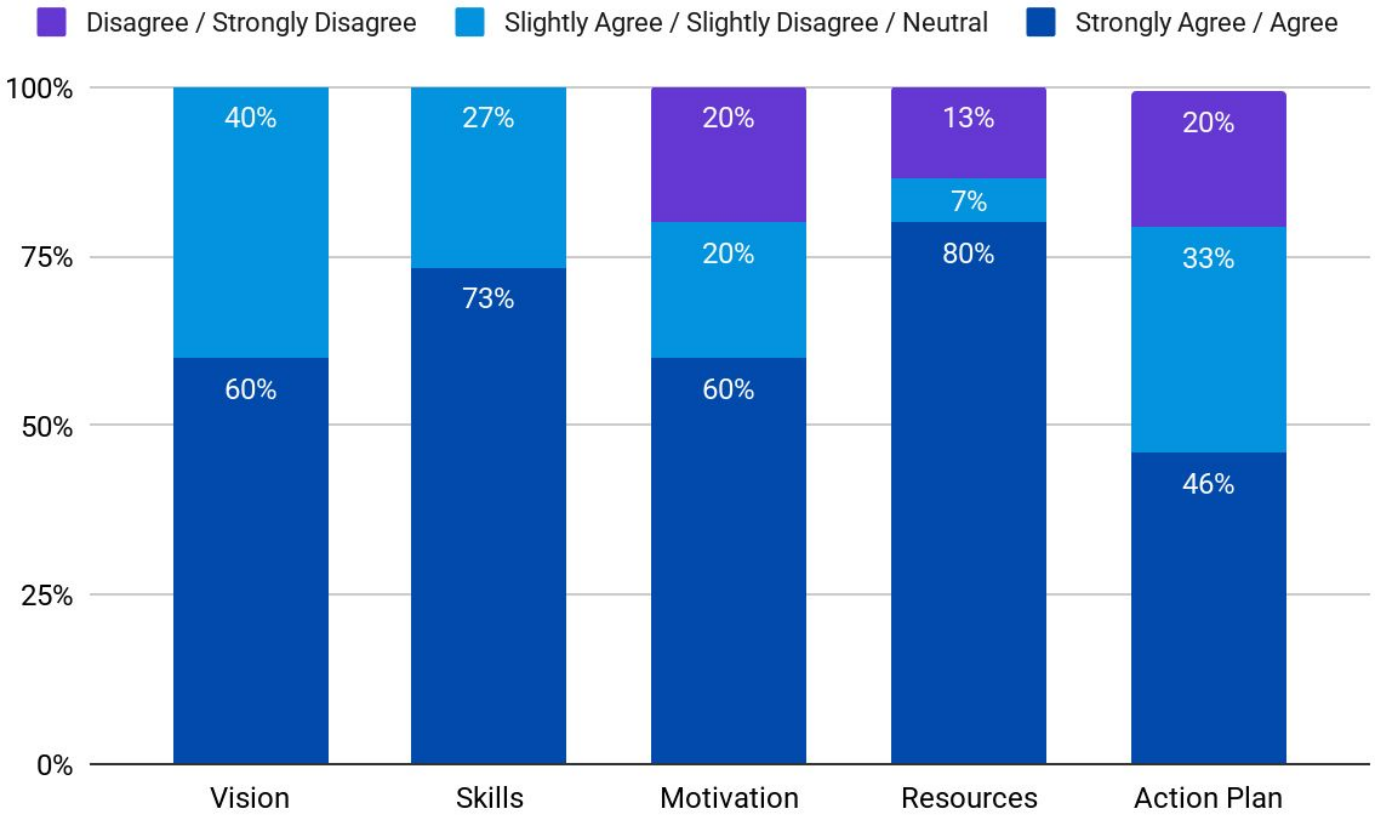
Post-Training Baseline Survey Results: Communication & Engagement (N = 11)



Team’s Perception of Success (N = 15)



Post-Training Internal Staff Survey (N = 15)



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Dad,
We love you
Ana + Bell

Thank you

Dr. Frank Barnes
Dr. Ying Xu
Dr. Mekka Smith
Mdm. Adrienne Kraushaar
Project Team

Margarita & Matt
EdLD Faculty & Staff
C13 + C12, C14, & C15+
Larisa Hovannisian & Haig Bedros