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**TULSA DEVELOPMENT AUTHORITY BOARD MEETING**

**MEETING OF: August 4, 2016**

**TO: CHAIRMAN AND BOARD MEMBERS**  
**FROM: OFFICE OF TULSA DEVELOPMENT AUTHORITY**  
**SUBJECT: TDA OPERATIONAL PLAN DEVELOPMENT**

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**Background:**      **Redeveloper:**      **Tulsa Development Authority**  
                         **Owner:**              **Tulsa Development Authority**  
                         **Developer:**          N/A  
                         **Engineer:**            N/A  
                         **Location:**            N/A  
                         **Size of Tract:**        N/A  
                         **Number of Lots:**     N/A  
                         **Development Area:** N/A  
                         **Comp Plan:**          N/A  
                         **Fair Market Value:** N/A  
                         **Executive Director:** O.C. Walker

On April 7, 2016, the TDA Board of Commissioners reviewed and approved Resolution No. 6195, a contract with EverMore Services to provide services for the preparation of the Operational Plan. This is a request for the TDA Board of Commissioners to accept the annual operating plan for 2016 – 2017 prepared by EverMore Services, LLC. EverMore’s Services will help in achieving many of the project deliverables, as well as to mentor, coach, and train staff in incorporating the new practices that come from the deliverables. The annual Operational Plan purpose is to focus on achievement of specific outcomes with defined deliverables each fiscal year. The 2016 – 2017 Operational Plan sets forth the key drivers, detailed actions, estimated budget, manpower requirements and proposed start and completion dates for the following initiatives:

- Research other urban renewal authorities as to how they are financed, how they operate and how they spur redevelopment
- Research on why project succeed or fail
- Develop system requirements to automate and streamline processes, document procedures and development staffing requirements to optimize expense
- Undertake Staff Development

**Attachments:**      TDA Operational Plan Development – Proposed Approach

**Recommendation:** Staff recommends that the TDA Board of Commissioner accept the 2016-2017 Operational Plan created by EverMore Services, LLC.

**Reviewed by:**      O.C. Walker II  
                         Executive Director

ACTION: APPROVAL: \_\_\_\_\_ APPROVAL W/ CONDITION: \_\_\_\_\_ DENIAL: \_\_\_\_\_ TABLED: \_\_\_\_\_  
VOTE: \_\_\_\_\_

ACTION: APPROVAL: \_\_\_\_\_ APPROVAL W/ CONDITION: \_\_\_\_\_ DENIAL: \_\_\_\_\_ TABLED: \_\_\_\_\_  
VOTE: \_\_\_\_\_



CYNTHIA J STEWART  
Principal

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## TDA Operational Plan Execution – Proposal

7/29/2016

Building on TDA's work using the services of Cynthia J Stewart, principal at EverMore Services, LLC, during June and July 2016 to develop the 2016-2017 Operational Plan, Ms. Stewart offers her services in support of the TDA Board, Executive Director and Staff to provide the subject matter expertise (SME) identified in the Operational Plan for the planned initiatives:

- II. Streamline Processes,
- III. Undertake Staff Development, and
- IV. Research Past TDA Projects.

Ms. Stewart will work under direction of the Board Chair, selected Commissioner(s) and the Executive Director to execute those actions requiring an SME and detailed in the operational plans for these initiatives.

Ms. Stewart brings specific and credible expertise to support TDA in accomplishing these initiatives, having attained her MBA at University of Tulsa, and certified as an expert in 1) managing quality and organizational excellence, 2) using lean six sigma to achieve operational excellence, and 3) using open book leadership to achieve cultural excellence. She adds to these qualifications her experience in leading 100s of teams and 1000s of people from the C-Suite to the front line in achieving first tier performance for the companies, as Director and top executive consultant for Central and South West and American Electric Power. Lastly, Ms. Stewart has developed TDA's Strategic Plan and Operational Plan as an outsider looking in; two plans that fulfill TDA's desire to move forward in excellence for the citizens of Tulsa.

Ms. Stewart will work according to the approved estimates for these initiatives, totaling 33 days, billing hours worked at an hourly rate of \$175. for a total of \$46,200. Ms. Stewart is willing to cap any overages of her hours worked at \$50,000 and to ensure satisfactory completion according to TDA's timeline and budget.

EMS and TDA are prepared to commence work once approval is given to proceed by the TDA Board and the work agreement is signed.

Submitted By:

Cynthia J Stewart  
Principal  
EverMore Services, LLC



Growing Tulsa. Enriching Communities.

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**2016-2017 OPERATIONAL PLAN**

**DRAFT For Discussion, July 12, 2016**

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# Introduction

The Tulsa Development Authority (TDA) undertook in 2015 development of their Strategic Plan for the years 2015-2021. This Strategic Plan set the direction for TDA through restatement of its *Purpose, Mission, Vision* and *Values* going forward.

In fulfilling its Purpose, Mission, Vision and Values, TDA set forth in the plan the Overarching Strategic Goal to *Advance Economic Diversity*, along with Strategic Initiatives to *Grow Tulsa, Enrich Communities, Partner for Economic Development* and *Secure the Future*. For each Strategic Initiative, TDA outlined specific Strategic Outcomes and Actions in the *Moving Forward* section (pages 27-30) of the Strategic Plan.

As a first step towards accomplishing TDA’s Strategic Initiatives, Outcomes and Actions, the Strategic Plan reported TDA’s intent to develop an annual operational plan to focus on achievement of specific outcomes with defined deliverables each fiscal year. The key deliverables for the entire Strategic Plan include:

Strategic Initiative	#	Deliverable
N/A	2 <sup>nd</sup> IIP	Annual Operational Plan
Grow Tulsa	1.A	TDA Redevelopment Plan
“	1.B	Joint ventures for development projects
Enrich Communities	2.A	Target development projects (Redevelopment Plan)
“	2.B	Sector Plans
Partner for Economic Development	3.A	Strong Economic Development partnerships
“	3.B	Research on why TDA projects fail or succeed
Secure the Future	4.A	Creative incentives for developers & property buyers
“	4.B	Federal program designation for projects
“	4.C	Diversified operating revenue funds
“	4.D	Research other urban renewal authorities
“	4.D	Streamlined workflows
“	4.D	Staff development

This 2016-2017 Operational Plan sets forth the key drivers, detailed action steps, estimated budget, manpower requirements, and proposed start and completion dates for the following initiatives:

- I. Research other urban renewal authorities as to how they are financed, how they operate and how they spur development;
- II. Develop system requirements to automate and streamline processes, document procedures and develop staffing requirements to optimize expenses; and
- III. Undertake staff development; and
- IV. Research why TDA projects fail or succeed.

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# I: Research Urban Renewal Authorities

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## *Objective*

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Study and gain insights into other urban renewal authorities (referred to herein as “Authorities” or “Authority”) as to how they are financed, how they operate and how they spur development. (Reference: *Moving Forward, 4. Secure the Future, Paragraph D(i) on page 30*)

## *Key Drivers*

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1. Gain insights into other Authorities as to how they are financed, how they operate and how they spur development, in order to...
2. Adopt or adapt any practices that further the efficiencies and effectiveness of TDA in *Advancing Economic Diversity*.

## *Measures for Success*

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1. Completed initiative on time with TDA Board Approval at September 2016 Board Meeting
2. Completed initiative within budget
3. Improve operating efficiencies, secure financial operations, and more effectively spur development.

## *Scope*

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Meet with up to three Authorities, such as Denver, Colorado Springs, Orlando, Oklahoma City, San Antonio, Kansas City or Wichita, to review their governance model, operations, financing, project funding and economic development activity and partnerships. Tour one or more areas with the highest economic development underway.

## *Stakeholders Involved*

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- TDA: ED and Board Member(s)
- City Authority: Executive Director, General Counsel, Board Chair
- City Stakeholders: City Manager, Directors of Economic Development & Planning

## *Action Plan*

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**Target Start Date:** July 11, 2016  
**Target Completion Date:** September 11, 2016  
**Target Deliverable:** Summary Report of recommendations for improving TDA practices

**Estimated Budget:** Travel costs for ED & Board member estimated at \$2000 per trip or \$6000 for three trips are accounted for in 2016-2017 budget

**Assumptions:** Assume 1-day visits with each Authority; the Action Plan may be used for any Authority selected

#	Research One Authority – Action Steps	Board	ED	Staff	SME
1	Contact the Executive Director to preview TDA’s strategic planning efforts and the initiative to gain insights from other Authorities; set a meeting and tour; and follow-up with a letter and copies of the Strategic Plan		1	1	
2	Prepare travel arrangements, as needed			1	
3	Meet with Authority and city stakeholders; tour economic development areas ( <i>includes travel time</i> )	12	12		
4	Discuss and record findings and recommendations	2	2	2	
5	Develop summary report that compares TDA practices and makes recommendations for new or improved practices		4		
6	Present summary report and recommendations for TDA Board Approval		1		
7	Send a thank you and follow-up correspondence to Authority and city stakeholders		1		
	Total Estimated Effort (hours) per Authority	14	21	4	
	Total Estimated Effort (hours) for 3 Authorities	42	63	12	

### *Deliverables*

This section provides guidance in developing the documents and deliverables for this initiative, including:

1. Authority Initial Correspondence for Step 1
2. Interview Questions for Step 3
3. Summary Report and Recommendations for Step 5
4. Follow-up Correspondence for Step 7

#### **1. AUTHORITY INITIAL CORRESPONDENCE (STEP 1)**

Dear [name of stakeholder],

Thank you for your willingness to meet with us on \_\_\_\_\_, 2016. We look forward to meeting you and other city officials to hear about your Authority, and to tour your hottest economic development areas. Accompanying me will be [name], [title].

As I mentioned in our call, the purpose of our meeting with you is to study and gain insights as to how your Authority is financed, how you operate and how you spur development.

Our recommended agenda is to meet with you, your Board Chair and your General Counsel starting at 9:00 am. Then we'd like to meet with the City Manager and City Director(s) over Economic Development and Planning up through noon or for lunch. We will host lunch, and then would appreciate touring one or two sites where you have the hottest activity in economic development.

We are attaching the TDA 2015-2021 Strategic Plan, which provides a good overview about our authority and what we're up to. We offer this as a discussion guide for our meeting, in addition to the questions attached. Together these identify the topics for the information we seek concerning your authority. If you have a strategic plan, we would appreciate your sending it along for our study and review in advance of our meeting. If you have any particular questions, please send them along to me as well.

We ask your permission in advance to record the discussions for transcription by our staff to report what we learn to our Board of Commissioners, and to enhance our practices based on insights we learn from you.

We look forward our visit.

Sincerely,

O.C. Walker  
Executive Director  
Tulsa Development Authority

Cc: Name, Title (for attending Board member)  
Att: Interview Questions and 2015-2021 Strategic Plan

## **2. INTERVIEW QUESTIONS (STEP 3)**

The TDA 2015-2021 Strategic Plan will be used as the outline to guide the discussion, allowing the Authority being studied to compare and contrast itself with TDA. TDA interviewers could make notes on paper copies of the plan to help in creating the summary report. Additional information will be gathered using the following questions. Sessions should be recorded, if allowed, for later transcription by staff in preparation of the report.

*For Executive Director and Board Chair:*

1. Vision and Prospect – history of the Authority
2. What We Do – primary functions
3. Who We Are – governance structure, staff and board makeup
4. Purpose, Mission, Vision & Values statements
5. SWOT Analysis
6. Stakeholders
  - a. Economic Development Partners – key roles
  - b. Other Key Stakeholder Groups
  - c. Means used to communicate and connect with stakeholders
7. Strategic Goal, Initiatives, and Outcomes (2016 forward)
8. Development Strategies
  - a. Critical Success Factors for Projects
  - b. Development Approach
  - c. Projects (Historic, Recent, Future)
  - d. Properties (Assets)
9. Financial Strategies
  - a. Economic Impacts
  - b. Sources of Operating Funds
  - c. Sources of Development Project Funds
10. Core Processes – Acquisitions, Dispositions, Rehabilitation, Tax Increment Districts, Tax Abatements
  - a. List of their core processes
  - b. General description of each process
  - c. What apps (systems) used, if any, to support these processes?
  - d. How is document retention handled (online, offsite or onsite storage)?

*For General Counsel:*

OC to provide questions

*For City Manager:*

OC to provide questions

*For City Directors of Economic Development and Planning*

OC to provide questions

### **3. SUMMARY REPORT & RECOMMENDATIONS (STEP 5)**

Report Outline

1. Background on Initiative
2. Summary of Findings
  - a. Similarities with TDA
  - b. Differences with TDA
  - c. Insights and Learning
    - i. What to keep the same
    - ii. What to change

- iii. What to add
    - iv. What to stop doing
- 3. Recommendations
  - a. Suggested Improvements
    - i. Operations
    - ii. Funding
    - iii. Economic Development
- 4. Background on each Authority [may use Strategic Plan Table of Contents as an outline as shown below]
  - a. Vision and Prospect – history of the Authority
  - b. What We Do – primary functions
  - c. Who We Are – governance structure, staff and board makeup
  - d. Purpose, Mission, Vision & Values statements
  - e. SWOT Analysis
  - f. Stakeholders
    - i. Economic Development Partners – key roles
    - ii. Other Key Stakeholder Groups
    - iii. Means to communicate and connect with stakeholders
  - g. Strategic Goal, Initiatives, and Outcomes (2016 forward)
  - h. Development Strategies
    - i. Critical Success Factors for Projects
    - ii. Development Approach
    - iii. Projects – (Historic, Recent, Future)
    - iv. Properties (Assets)
  - i. Financial Strategies
    - i. Economic Impacts
    - ii. Sources of Operating Funds
    - iii. Sources of Project Funds
  - j. Core Processes – Acquisitions, Dispositions, Rehabilitation, Tax Increment Districts, Tax Abatements
    - i. List of their core processes
    - ii. General description of each process
    - iii. Are any apps (systems) used to support these processes?
    - iv. How is document retention handled (online, offsite or onsite storage)?

#### **4. FOLLOW-UP CORRESPONDENCE (STEP 7)**

Dear [name of stakeholder],

Thank you for your hospitality on [date]. We thoroughly enjoyed meeting with you and [name, name, etc.]. We found the meeting extremely informative for us, and certainly accomplished our purpose to gain useful insights that we may apply to Tulsa Development Authority.

A few of the things we learned we plan to implement soon. These include:...

We are proud to be part of growing the legacy of the Tulsa Development Authority in growing Tulsa, enriching our communities and advancing economic diversity. We'd like to welcome you to visit us in Tulsa and tour some of our projects and properties, and engage any questions you may have. We look forward to a continuing relationship.

Again, thank you for a rewarding day.

Sincerely,

O.C. Walker  
Executive Director  
Tulsa Development Authority

## II: Streamline Processes

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### *Objectives*

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Streamline TDA processes to achieve the 2015-2021 TDA Strategic Plan. (Reference: *Moving Forward*, 4. *Secure the Future*, Paragraph D on page 30)

### *Key Drivers*

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1. Evaluate operating expenses and processes to identify ways to optimize use of funds, while increasing productivity.
2. Document associated procedures to create a TDA Procedures Manual to ensure smooth transitions in the unexpected event of staff turnover.
3. Determine staffing requirements and define staff positions needed to fulfill the vision, goals and objectives moving forward.
4. Develop system requirements and select a business application system (app) to automate and streamline processes.

### *Measures for Success*

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1. Complete initiative on time with TDA Board Approval at November 2016 Board Meeting
2. Complete initiative within budget
3. Complete all deliverables (see below)
4. (ROI) Higher volume of work with same or similar operational resources and staff

### *Scope*

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TDA's core processes under evaluation include the following:

1. Disposition of City of Tulsa Properties
2. Disposition of TDA Properties
3. Property Acquisition
4. Development Projects (management & oversight)
5. Assembling Land
6. TIF Districts
7. Tax Abatements
8. Downtown Development (Gap Funding)
9. Loans for Underserved Citizens
10. Property Leasing
11. Property Maintenance
12. Sector Planning
13. Redevelopment Planning
14. Board Meetings
15. Communicating opportunities and processes for potential investors, developers, private citizens, etc.

### *Stakeholders Involved*

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- Developers
- Area Citizens
- Business Owners
- Property Owners
- City Staff
- TDA

### *Action Plan*

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**Target Start Date:** August 11, 2016  
**Target Completion Date:** November 11, 2016  
**Target Deliverable:** Process Workflows, Communication Flows, Procedures Manual, Roles & Responsibilities, and Business System Implementation (all reflecting improvements and efficiencies)  
**Estimated budget:** App (unknown), SME Process Expert (estimated \$42,000)  
**Assumptions:** Assume 15 business processes and 60 procedures; assume system that meets TDA’s requirement is available for purchase

#	Streamline Processes – Action Steps	Board	ED	Staff	SME
1	Interview ED and staff for each process		15	30	32
2	Document Improved Process Workflows, System Interfaces, Stakeholder Communications & Required Procedures				64
3	Develop TDA Procedures Manual				40
4	Validate and finalize process workflows & procedures		15	30	32
5	Document System Requirements, Research and Recommend System 2-3 System Alternatives				32
6	Work with staff to implement system and associated procedures; identify training requirements and how to get trained; staff receives vendor training on system		16	32	32
7	Develop communication plan & letters for external parties affected by new system and procedures (submitting contracts, RFPs, etc.); execute plans		2	4	8
Total Estimated Effort (hours)			48	96	240



## *Deliverables*

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This section provides guidance in developing the documents and deliverables for this initiative, including:

1. Process Workflows
2. Roles and Responsibilities and Updated Job Descriptions
3. Stakeholder Communication Flows
4. System Requirements, Research, Selection, Implementation and Training
5. Procedures Manual
6. Stakeholder Communications Associated With Any Changes

### **1. PROCESS WORKFLOWS (STEP 2)**

The process workflows will be documented in Excel where columns represent process steps and rows represent stakeholders (staff, ED, Board, City staff, developers, etc.), system functions, system interfaces, external communications (such as emails), and supporting procedures.

Each process workflow spells out the steps, roles and responsibilities by staff, the system requirements, required communications such as emails to external parties, training requirements, and more. The staffing requirements may be derived from these workflows.

### **2. ROLES AND RESPONSIBILITIES (STEP 2)**

The process workflows spell out roles and responsibilities by staff (stakeholder) in executing the processes. These will be used to update current job descriptions and determine required skills for staff members.

### **3. STAKEHOLDER COMMUNICATION FLOWS (STEP 2)**

The process workflows spell out the needed communications such as emails to external parties. It is expected that the system that gets selected and implemented will automate most of the email communications.

### **4. SYSTEM REQUIREMENTS, RESEARCH, SELECTION, IMPLEMENTATION AND TRAINING (STEP 2, 5, 6)**

The process workflows spell out the system functions needed by step, and what steps and communications can be automated. These represent system requirements that will be used to evaluate systems for implementation and use by TDA. System training needs will be documented with suggested sources for provision of the training. (Assuming TDA finds a system available on the market, most software companies provide the training.)

## **5. PROCEDURES MANUAL (STEP 3)**

A printed manual with documented procedures. There may be one or more procedures per process; some procedures may be used in multiple processes. This will be discovered during the development of the process workflows.

## **6. STAKEHOLDER COMMUNICATIONS (STEP 7)**

Where the TDA changes affect how stakeholders work with TDA in the future, a communication plan to inform them of these changes will be produced, including examples and timing of communications.

# III: Undertake Staff Development

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## *Objective*

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Assess current personnel to determine development needed to operate at peak performance levels to achieve TDA's business strategy plan. (Reference: *Moving Forward, 4. Secure The Future, Paragraph D.iv, page 30*)

## *Key Drivers*

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1. Establish an environment, culture and mindset at TDA that functions with the energy and efficiencies of an entrepreneur, while operating within the confines of public body corporate. Essentially, move TDA's mindset from "what is legally required" to "what is best practice."

## *Measures for Success*

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1. Improved productivity as measured by staff to project volume based on total project costs for projects completed during the fiscal year
2. Improved pace for achieving desired outcomes
3. Improved knowledge base within staff and improved operating environment
4. Empowered and accountable staff

## *5. Increased engagement with stakeholders and public Scope*

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Current ED and staff

## *Stakeholders Involved*

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- TDA Board
- TDA Staff and ED
- TDA General Counsel
- City of Tulsa Directors for Economic Development and Planning
- Community of Engaged and Interested Developers and Investors

## *Action Plan*

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<i>Target Start Date:</i>	October 11, 2016
<i>Target Completion Date:</i>	December 11, 2016
<i>Target Deliverable:</i>	Staff evaluations and development plans
<i>Estimated Budget:</i>	Vendor to conduct feedback session (estimated \$1500-\$2000) Costs for the assessments (estimated \$15-\$150 per person)

**Assumptions:**

Outside system training costs (unknown)  
Staff evaluations will include input from ED, staff, TDA Board and selected City of Tulsa Directors; Use 360 degree evaluations for each staff member, which includes input from supervisor, staff member, peer and “customer”

#	Undertake Staff Evaluation – Action Steps	Board	ED	Staff	SME
1	Determine criteria for evaluating staff and identify an outside assessment tool (and vendor) to help in staff assessments	1	2	3	
2	Conduct staff and Board assessments (using external tool) and conduct feedback sessions	40	8	24	16
3	Develop 360 degree staff evaluations for each staff member based on evaluation criteria and new job descriptions (Board evaluates ED; ED evaluates 3 staff)	2	6	3	
4	Conduct individual staff performance evaluations	1	3	6	
5	Create development plans with input from staff	1	4	3	
6	Identify and secure staff development resources		3	3	
7	Calendar interim and annual evaluations		1		
	Total Estimated Effort (hours)	45	27	42	16

**Deliverables**

This section provides guidance in developing the deliverables for this initiative, including:

1. Evaluation Criteria for Step 1
2. Staff Assessment Tools for Step 2
3. 360 Performance Evaluation & Development for Step 3 & Step 5

**1. EVALUATION CRITERIA (STEP 1)**

Companies typically establish a set of criteria for evaluating staff. Once the criteria become verbalized, they form the basis for the performance evaluation. Criteria typically cover these areas:

1. Behavioral alignment with company core values
2. Impact on achievement of TDA Strategic Initiatives and Operational Goals
3. Professionalism exhibited in the workplace
4. Teamwork skills in helping each other achieve the company values and goals

5. Technical skills in achieving company goals and executing job requirements
6. Quality of the end results (products) in executing job requirements
7. Interpersonal skills in working with staff, board and outside stakeholders

## **2. STAFF ASSESSMENT TOOLS (STEP 2)**

There are many different assessment tools that companies use for a variety of reasons, primarily in regard to individual and team development. There are local vendors who can provide the assessment tool and conduct a feedback session for staff and Board, including EverMore Services, which offers Gallup's StrengthsFinder. These tools empower individuals and teams in gaining a better understanding of how to work better together by leveraging each other's strengths and differences. The most commonly used ones include:

1. Birkman ([www.birkman.com](http://www.birkman.com))
2. Myers Briggs ([www.myersbriggs.org](http://www.myersbriggs.org))
3. DiSC ([www.everythingdisc.com](http://www.everythingdisc.com))
4. StrengthsFinder ([www.gallupstrengthscenter.com](http://www.gallupstrengthscenter.com))

## **3. 360 DEGREE PERFORMANCE EVALUATION & DEVELOPMENT (STEP 3)**

The 360-degree performance evaluation is a long-standing practice adopted by many companies for the last several decades. While it may be common practice for the employee's supervisor to be the only person providing input on his/her performance, employees find it more informative to gain input from their supervisor, one or more peers, and one or more "customers," and to provide input from their perspective as well. This blended perspective typically provides deeper insights and balances individual perspectives to give a more balanced and more helpful view. When employee performance evaluations are undertaken with the intent to help employees build on their strengths, while recognizing areas for improvement, employees feel more comfortable in the process than if only the employee's weaknesses are emphasized. A recent study proves that an effective employee evaluation process positively impacts workplace culture.

In conducting 360-degree reviews, the supervisor reaches out to the parties he/she wants to seek input from. Typically this is a simple call, letter or email, for example:

Dear ...

We are conducting 360-degree performance reviews for our employees and seek your input regarding Ann Shore. We hope you are willing to provide input regarding your experiences in working with Ann, in regard to three questions. Your input will be held confidential unless you prefer otherwise.

Regarding Ann, we seek your insights in answer to these questions:

1. What have you experienced in regard to her strengths?

2. What have you experienced in regard to her interpersonal skills? (or customer service skills, or team skills, or technical skills)?
3. What have you experienced in regard to any areas needing improvement?

We appreciate you taking the time and providing your candid responses. It is our goal to help Ann maximize her strengths, while gaining new skills in areas she can improve.

Sincerely,

OC Walker, Executive Director  
Tulsa Development Authority

The 360-degree performance evaluation template is designed to be used by internal staff and the supervisor in providing input for themselves or others. The supervisor uses it to compile feedback from all parties; and then gives the final blended version to the employee for discussion in his/her performance evaluation. Here is an example that can be customized once TDA has set up their evaluation criteria. Ratings should be accompanied by specific examples that provide supporting evidence to help the employee gain insight into their behavior or results.

The suggested rating scale is as follows:

- 1 – Sub-par performance – exhibits weakness that is unlikely to improve
- 2 – Low performance – exhibits weakness that would take significant effort to improve
- 3 – Average performance – exhibits strength with growth needed
- 4 – Above average performance – exhibits strength with some room to improve
- 5 – Superior performance – exhibits mastery of strength

Employee Name Evaluation By	Date For Period
<b>1. Behavioral Alignment With Core Values</b>	<b>Rating</b>
<i>Supporting Evidence</i>	
<b>2. Impact On Achievement of TDA Strategic Initiatives and Operational Goals</b>	<b>Rating</b>
<i>Supporting Evidence</i>	
<b>3. Professionalism Exhibited in the Workplace</b>	<b>Rating</b>
<i>Supporting Evidence</i>	
<b>4. Teamwork skills in helping each other achieve the company values and goals</b>	<b>Rating</b>
<i>Supporting Evidence</i>	
<b>5. Technical skills in achieving company goals and executing job requirements</b>	<b>Rating</b>

<i>Supporting Evidence</i>	
<b>6. Quality of the end results (products) in executing job requirements</b>	<b>Rating</b>
<i>Supporting Evidence</i>	
<b>7. Interpersonal skills in working with staff, board and outside stakeholders</b>	<b>Rating</b>
<i>Supporting Evidence</i>	
<b>Recommended Development Plan</b>	<b>Completion Date</b>
Actions to improve (or develop) [skill]: 1. Action 1 2. Action 2	
Actions to improve (or develop) [skill]: 3. Action 1 4. Action 2	
Action to improve (or develop) [skill]: 5. Action 1	
<b>Supervisor Comments</b>	
<b>Employee Comments</b>	
<b>Signatures</b>	<b>Date</b>
<b>Supervisor</b> _____	_____
<b>Employee</b> _____	_____

# IV: Research Past TDA Projects

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## *Objective*

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Research economic studies that reveal “lessons learned” from successful and failed projects in areas needing economic recovery in order to provide insights for TDA that spur more rapid, relevant economic development. (Reference: *Moving Forward*, 3. Partner For Economic Development, Paragraph B, page 29)

## *Key Drivers*

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1. Gain a better understanding of why economic development projects succeed or fail, in order to...
2. Incorporate “lessons learned” into the Critical Success Factors for Development Projects defined by TDA Board and Staff during the 2015 strategic planning process (Reference: *Strategic Plan*, page 17) in order to...
3. More effectively evaluate future development projects on their merits to *Advance Economic Diversity* and spur more rapid, relevant economic development.

## *Measures for Success*

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1. Completed initiative on time with TDA Board Approval at March 2017 Board Meeting
2. Completed initiative within budget
3. Gained actionable and insightful lessons learned leading to pursuit of more successful future projects

## *Scope*

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Research projects that TDA undertook and completed in the years 2009 to current, including Acquisitions, Dispositions, Rehabilitation, Tax Increment Districts, and Tax Abatements. Start with and refine the list based on Historic, Current and Future Projects listed in the 2015-2021 Strategic Plan. (Reference: *Strategic Plan*, pages 22-23)

## *Stakeholders Involved*

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- Developers
- Area Citizens
- Business Owners
- Property Owners
- City Staff
- TDA



*Action Plan*

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**Target Start Date:** January 11, 2016  
**Target Completion Date:** March 11, 2016  
**Target Deliverable:** Validated list of Critical Success Factors for Development Projects  
**Estimated Budget:** City of Tulsa Accounting Support (?)  
 SME Support for Report (estimated at \$1400)  
**Assumptions:** Assume 21 projects and 21 stakeholders based on those listed in the 2015-2021 Strategic Plan (Reference: Strategic Plan, pages 22-23)

#	Research Past Projects – Action Steps	Board	ED	Staff	SME
1	Confirm list of projects for review based on Historic, Current and Future Project Lists in the 2015-2021 Strategic Plan (pages 21-23)	1	1		
2	Create master document for projects to review - include name, dates, description, stakeholders - organize project files needed for review			2	
3	Set up interview meetings with 20 stakeholders			4	
4	Supply financial and economic data ( <i>City of Tulsa or County – to be confirmed by OC</i> )				16
5	Interview stakeholders and document their insights	20	20	20	
6	Evaluate each project based on Advancing Economic Diversity and meeting Critical Success Factors; and document findings	10	10	10	
7	Develop summary report with help of consultant including lessons learned and recommendations for any needed updates to the Critical Success Factors for Development Projects		8		8
8	Present summary report and recommendations for TDA Board Approval		1		
	<b>Total Estimated Effort (hours)</b>	<b>35</b>	<b>40</b>	<b>36</b>	<b>24</b>

*Deliverables*

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This section provides guidance in developing the deliverables for this initiative, including:

1. Past Project Review Information for Step 2

2. Stakeholder Interview Questions for Step 3
3. Past Project Summary Report for Step 7

**1. PAST PROJECT REVIEW INFORMATION (STEP 2)**

1. Create a new document and copy in the project information from the strategic plan, as shown in the first table below, one project at a time. Copy the second table shown below into the new document, underneath each project to be reviewed. *[CSF1-7 are summary statements of the Critical Success Factors on page 17-18 in the 2015-2021 Strategic Plan.]*
2. Research and record the economic impact by project.
3. Project Evaluation - Use a rating of 1 to 10 (low to high) based on how well this project helped to achieve each critical success factor. Document the rating and reason for the rating.

Project	Location	Type	Developer	Complete	Cost	Economic Impact
Detroit Lofts	105 N Detroit Ave	Conversion: Downtown Housing Fund Loan	Brickhugger LLC	2010	\$5.5M	Avg. \$x/annually

Critical Success Factor	Rating	Comments
Economic Diversity		
CSF 1: Meet community needs and achieve economic development goals		
CSF 2: Increase commercial development in hot spots		
CSF 3: Attract jobs		
CSF 4: Support financial viability and economic growth		
CSF 5: Establish critical mass of housing, services and commercial activity		
CSF 6: Address the now, while being sustainable		
CSF 7: Grow strong successful local, regional & national partnerships		
Other Stakeholder Comments		

**2. STAKEHOLDER INTERVIEW QUESTIONS (STEP 3)**

1. Contact each stakeholder to set a meeting.

2. Send a follow-up letter when the meeting is set, as shown below.
3. Use the questions in the letter to guide each interview.
4. Ask the stakeholder to rate the project according to the CSFs.
5. Record the stakeholder comments.

Dear [name of stakeholder],

As part of the TDA 2015-2021 Strategic Plan, we identified an initiative to review past projects for any lessons learned in why projects succeed or fail. We'd like to meet with you for up to an hour and get your insights regarding \_\_\_\_\_ that was completed in \_\_\_\_\_.

The information we have on your project(s) is shown below.

Project	Location	Type	Developer	Complete	Cost	Economic Impact
Detroit Lofts	105 N Detroit Ave	Conversion: Downtown Housing Fund Loan	Brickhugger LLC	2010	\$5.5M	Avg. \$x/annually

We are evaluating projects based on the Critical Success Factors listed in this table, and will seek your ratings and comments during our interviews. Ratings run from 1 (low) to 10 (high) based on how well the project met the criteria.

Critical Success Factor	Rating	Comments
Economic Diversity		
CSF 1: Meet community needs and achieve economic development goals		
CSF 2: Increase commercial development in hot spots		
CSF 3: Attract jobs		
CSF 4: Support financial viability and economic growth		
CSF 5: Establish critical mass of housing, services and commercial activity		
CSF 6: Address the now, while being sustainable		
CSF 7: Grow strong successful local, regional & national partnerships		
Other Stakeholder Comments		

In addition, we'd like to ask questions including the following:

1. What role did you play in the project?
2. We show the cost as \_\_\_\_\_. Does that agree with your records?
3. Do you have any records regarding the economic impact to the people served and/or the return on investment for your company?
4. Looking back, what would you say went well with the project?
5. What contributed to the project's success?
6. What did not go well with the project?
7. What contributed to the things that did not go well?
8. If you had an opportunity to do the project again, what would you do differently?
9. If you had it to do over, would you do this project? Why or why not?
10. Do you have any recommendations for TDA that would contribute to the success of future economic development projects similar to this one?

On behalf of TDA and its Board of Commissioners, we appreciate your candid responses and that you agreed to take the time to meet with us. We are on a quest to continue to grow, improve, progress and impact Tulsa for generations to come. Your honest and thoughtful feedback will help us tremendously.

With Appreciation and In Service,

O. C. Walker  
 Executive Director  
 Tulsa Development Authority

### **3. PAST PROJECT SUMMARY REPORT (STEP 7)**

#### Table of Contents

1. Background
2. Summary of Lessons Learned
3. Recommendations
4. List of Projects Reviewed
5. Stakeholder Responses by Project
6. Next Steps

#### Template for Stakeholder Responses by Project

Project	Location	Type	Developer	Complete	Cost	csf 1	csf 2	csf 3	csf 4	csf 5	csf 6	csf 7
Detroit Lofts	105 N Detroit Ave	Conversion: Downtown Housing Fund Loan	Brickhugger LLC	2010	\$5.5M							



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