90-DAY ONBOARDING PLAN AND GOALS

Organizational Recommendations

- Shift to a bi-monthly meeting schedule, closing year with meetings in October and December
  - Allows staff to focus on value-added activities focused on organizational improvement, as opposed to board preparation and follow-up activities
- Connect TDA staff with COT staff through participation in regular staff meetings
- Evaluate relocation of staff to COT

30 Day Goals

- Establish regular staff meeting schedule for TDA staff
  - CURRENTLY TUESDAY AT 11 AM
- Establish regular meeting schedule with City of Tulsa Economic and Community Development staff
  - Place bi-weekly MOED team meetings on calendar
  - Place bi-weekly CDP team meetings on calendar
    - NOT CURRENTLY INVITED TO THESE
  - Schedule weekly 30-minute check-in with Chief of Economic Development
- Meet individually with existing staff to understand key skills, duties, projects, and estimation of how hours are spent on a weekly basis
  - Review internal investigation memorandum detailing initial assessment
  - Strengthen Staff skills in project management
  - Strengthen Staff skills in newsletter creation and content management
- Review Project Plans and Accounting Reports for TIFs under management by TDA
  - Review Chairwoman’s files and meet with Kian Kamas and Jim Coles as needed
  - Central Park TIF
    - Note: Review opinion RE: overcollection within TIF
  - Technology TIF
  - North Peoria TIF
  - Brady Village TIF
- Set meeting with Ashley Philippsen regarding Kirkpatrick Heights-Greenwood Master Planning project
  - Understand key engagement needs from TDA
  - Develop engagement plan for TDA staff and board
- Set meeting with Ashley Philippsen regarding Greenwood Unity Heritage Citizen Advisory Team
  - Understand work done to-date
  - Understand potential next steps related to Sector Plan amendment
- Develop calendar for upcoming three (3) months of board meetings and required actions
- Set meeting with Jot Hartley RE: declaratory judgment for North Peoria TIF and Project Oasis
Collaborate with Chairwoman on appropriate conflict management for this matter

• Schedule and conduct introductory meeting with Leslie Batchelor, Jot Hartley, and City staff regarding Al Fresco project and TIF

• Set meeting with Kian Kamas and Nick Doctor regarding ABC strategic planning project
  o Understand implications of recommendations on TDA and future structure
  o Discuss ongoing engagement needs for TDA staff and Board leadership

60 Day Goals

• Issue RFP for TDA-OWNED vacant lots in North Tulsa

• Set meetings with the active projects in which TDA is involved to understand current status, project needs, next steps, etc.:
  o Morton Redevelopment – understand financing and viability
  o Zebra – understand status and timeline for beginning of work
  o Black Pearl – understand status and timeline for beginning of work, potential support needs
  o Laura Dester – understand status and timeline for beginning of work, potential support needs
  o One Place – understand status and timeline for beginning of work

• Prepare memo for City and Board leadership providing an overview of active projects and recommended next steps

• Prepare memo for City and Board leadership on assessment of existing staff skills

• In coordination with Ashley Philippsen, prepare memo related to recommended next steps on GUHCAT and Sector Plan Amendment

• Conduct assessment of TDA files, both paper and digital
  o Identify needs to migrate paper files to digital

• In coordination with General Counsel, conduct a review of State Statutes governing Urban Renewal Authorities to identify annual reporting needs and other relevant statutory requirements
  o Identify unmet needs and develop work plan to meet statutory requirements

90 Day Goals

• Conduct an inventory and assessment of TDA residential lots and prepare an overview memo summarizing the viability of lots for redevelopment opportunities

• Conduct assessment of the Lansing Business Park Facilities
  o Develop understanding of operational costs of the space
  o Develop understanding of long-term viability of owning and operating the space

• In coordination with Center for Economic Development Law, Jot Hartley, and MOED staff, develop schedule for approval and implementation of the Al Fresco TIF

• Conduct a review of existing Sector Plans and prepare a memo for City and Board leadership outlining suggested areas of focus to ensure progress on implementation of Sector Plan recommendations
  o Crosbie Heights
  o Pearl District
  o Greenwood-Unity Heritage
• Conduct review of existing policies and national best-practice policies related to real estate development, acquisition, and disposition for Urban Renewal Authorities
  o Prepare memo for City and Board leadership identifying gaps or opportunities for improvement within existing policies, or gaps or opportunities for improvement as it relates to relevant City/municipal policies impacting Urban Renewal Authorities