



100-Day ROADMAP: PRTC Executive Director March 25 – July 6, 2017

The Priorities for the First 100 Days

- Expectations & Vision/Values: Establish guidelines for success with staff & commissioners
- Comraderie & Trust: Getting to know each other
- Learning the System: How things get done internally & externally
- Develop & Present the 2017 Action Plan for the next 180 Days

The Board of Commissioners holds its July 2017 Meeting where I present the 2017 Action Plan...the first Thursday in July is the target and everything is adjusted to meet that deadline.

The First 10 Days: Prior to Arrival: In the 10-days *prior to arrival*, all on-boarding steps complete: payroll, usernames, business cards, etc. Workspace is ready for arrival. In the two weeks *prior to arrival*, materials are readied and reviewed with early meetings scheduled.

Days 11 - 40: April 3rd and Beyond – Listening & Expectations...“What, When & How?” questions

- April 3rd, 2p: Welcome meeting with the Chair, Executive Director & Department Heads.
- Weekly meeting with Department Heads: group meeting to provide the ground rules for success as well as group expectations; observe group dynamics and leadership skills
- Weekly “One-on-Ones” with Department Heads: emphasis is listening to the individual, their role, skill sets and suggestions; includes “getting to know you” and “what to expect” discussion
- Begin contacting member governments (through Chair & Commissioners) for brief introduction opportunities on meeting agendas
- Begin weekly meeting/call with PRTC chair
- Begin bi-weekly Executive Update to Board of Commissioners (e-mailed 3 -5 key items, short & to the point; often includes routine information updates or activities)
- Management-by-Walking-Around, as well as seeking “meet-and-greet” opportunities with line staff, operators, mechanics, etc. (with department heads making introductions and helping answer questions)
- Attend Departmental Staff Meetings to listen & learn
- Ride the system: pick a few routes to observe as a “regular rider”
- Phone calls to PRTC Board Members, Alternates & nearby peers
- Phone calls and meetings with key consulting firms and contractors
- Begin attending external meetings (Board of Supervisors, City Councils, Chamber)
- Collection and Review of Key Planning and Management Documents:
 - Strategic Plan draft & source documents review
 - If available: Ops Analysis; Peer Reviews; CapX Planning Forecasts; Prior Triennial Review Report; Prior Audit Report; any key VDOT/MPO audit/ planning documents.
 - Employee Handbook, Operating Contract, Labor Contract, Discipline Code and associated key HR materials
 - Public and Media Presence: website, social media, bus schedules, posters & handouts.

Days 41 - 70: Gather Data & Validate: The “Why?” questions

- Maintain weekly staff meeting with Department Heads; “One-on-Ones” are now bi-weekly with feedback to direct reports on key issues
- Begin face-to-face meetings with all Commission members and alternates
- Seek early wins: Act on a few suggestions; empower managers to execute their own ideas
- Mid-course Action & Board Report (to address & update on items than cannot wait)
- Review of Materials (requested of staff within the first 30 days):
 - Breakdown of FY2018 budget and assumptions, to include revenue and expense
 - All active and planned grants with description and timelines for grant award
 - Review of procurement structure and open/active procurements and contracts
 - Updated Org Chart; job descriptions; payroll costs & associated HR info
 - Review of Ops Data: Ridership, performance reports, etc.
- Individual performance discussions (facilitated with HR) to provide feedback regarding behavioral & performance gaps, and opportunities for improvement, as needed
- Begin correcting errors/omissions & improvements: branding, website, social media, performance measures, general information and printed materials
- Increase external meeting frequency: seek new opportunities (Chamber of Commerce, Rotary, United Way, Urban League, etc.) for outreach
- In-depth review of capital projects match fund, reserve fund, and establish 2017-2018 federal grant priorities for STIP/TIP and procurements processes
- Focus in-depth on the VRE/PRTC relationship (financial; informational; oversight, etc.)
- Make change and keep Board in the loop (begins a period of high sensitivity)

Days 71 - 100: Prioritize & Plan for 2017: The “To What Effect?” Questions

- Identify & Prioritize Top10 Opportunities with low-level SWOT review
 - Staff retreat (half-day, possibly facilitated) to review findings & priorities
 - Review Top5 Priority List: reflect on what needs to be done and in what order
 - Review Next5 Priority List: identify what can be done in Top5 process that ensures Next5 is also executed quickly
 - Compare/Contrast with planning documents and board/executive priorities
 - Team development of Action Plan: ownership, accountability and deadlines
 - Apply resources to slowdowns and manage risk; reduce unknowns to 30% and execute
- Organizational & personnel assessment:
 - Analyze individual & team work product and overall organizational initiative
 - Analyze Org Chart/Structure & Contract Operator functions
- Develop Executive Session Assessment Package & Presentation for Commission
 - Personnel: Org structure & personnel actions
 - Contractual: Contractor performance & impacts (all)
 - Service: Branding, information, routes, marketing, etc.
 - Financial: Critical issues for operating & capital expenses
 - Recommendations: What needs to change/be done with timelines & costs
- Engage feedback loop: internal and external stakeholders (where appropriate) to help calibrate PRTC’s performance capabilities with resource availability
- Goals & Objectives for CY2017 & FY2018 prepared and incorporated into PRTC’s routine
- **July 6th* : Presentation to Commission on Recommended Enhancements**