RFTA CEO Transition Update

David D. Knapp, Ph.D.

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Roles & Responsibilities Work

1. I have been serving as an advisor/sounding board for Kurt – along with Dan, Mike, Craig Dubin, and Erin Kemp – on the COO search.
2. I also have been helping Kurt and Mike identify and assume some of the roles and responsibilities Dan is performing. (For example, we are getting together at the conclusion of this Board meeting.)
3. Finally, I have been working with the same group mentioned in # 1 to re-examine the organizational chart to determine what, if any, changes in roles, responsibilities, and reporting relationships makes sense moving forward. (As I have mentioned in each presentation to the Board, I see the CEO Succession as just the first step in an organization-wide succession-planning process to help develop/retain RFTA employees.)

Coaching Work

1. I continue to conduct 1:1 coaching sessions with Kurt and Mike, based on the results of their EQi 360 report – as well as any other issues that arise.
2. I also have been working with a number of Directors (both those in the current Supervisory Academy cohort and those who are not). This work has gone beyond traditional 1:1 development work to include topics specifically around the upcoming leadership and organizational changes.

Facilitation Work

1. I am providing outside perspective and best-practices advice for Kurt, Mike, Craig Dubin, and Erin Kemp during meetings with the Directors on developing a formal RFTA work-from-home policy – an issue almost all of my clients are struggling with.
2. I also am helping the same group review the current RFTA Values to make sure they align both with the current organizational Vision and Mission – as well as Kurt's leadership vision for the future. (For example, we have a working session scheduled for July 22.)
3. Finally, I am helping the same group incorporate OKRs (Objectives and Key Results) into the current strategic-planning and budgeting process. (For example, we have a working session on that topic scheduled for August 19.)

Contract/Funding Update

1. As we discussed during the March 14 Board meeting, my work has continued under the original contract I signed with the Board last year.
2. As we also discussed during that meeting, now that we are getting close to exhausting those original funds, I am working with Kurt, Craig, Erin, and Tammy Sommerfeld to draft a separate organizational consulting services contract that would cover the remainder of the work I've just summarized.

Any Questions or Concerns?

Contact Information

David D. Knapp, Ph.D.

david@marathonleadership.com

(720) 480-3161

www.marathonleadership.com