



Nate Burkett

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FYI



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From: Nathan Burkett

Sent: Tuesday, June 30, 2020 2:38 PM

To: 'Crooks, John' <jcrooks@shakopeeutilities.com>

Cc: Nathan Reinhardt <nreinhardt@ShakopeeMN.gov>; Melissa Schlingman (MSchlingman@ShakopeeMN.gov) <MSchlingman@ShakopeeMN.gov>

Subject: More Meeting Follow-up

John,

This message is in follow up from my email last week. I have met with our finance team to discuss a proposed approach to evaluating consolidation of financial operations between the city and SPU. We are all excited about the opportunity to improve efficiencies and deliver even better value to the Shakopee community. I apologize for the length of this email – but there is a lot to convey! All that follows are suggestions, and we would appreciate and comments you have back on the proposal.

As an overarching philosophy for our approach to this evaluation we would like to evaluate: 1) What are the gaps with the Finance and Administration Director position open, and how can we help to fill those gaps both in the near and short term and 2) What are the areas of duplication between the city and SPU that can potentially be eliminated and 3) Bring in a new perspective to both organizations to identify areas for improvement.

- We propose meeting during the week of July 6-10 to kick things off. Times available right now are –
 - Anytime Tuesday, July 7
 - PM Wednesday July 8
 - AM Friday, July 10
- At a minimum we propose to have me, Finance Director Nate Reinhardt, Accounting Manager Melissa Schlingman, you, and at least one of your finance staff in attendance – as well as anyone else you think will bring value to the conversation. During the first meeting we would like to discuss opportunities and challenges, and come to an agreement about how to evaluate each of the opportunities and challenges.
- We have also discussed the data that we think would be valuable for us to see from SPUC. Anything that you have that you can send over quickly and easily is great, we will do our best to review prior to meeting – anything not easily accessible we can discuss during our meeting. We also would like to ask if there is any information you would like from us, and we will provide it.
 - Policies and Procedures
 - Investment policy
 - Debt policy

- Fund balance policy
- Purchasing policy
- Budgeting policy
- Cash collection policy – hierarchy of application of payments (i.e. if a bill total is \$100, and a payment of \$50 is received – where does it get coded to?)
- Billing practices (how many zones, differences between commercial and residential?)
- Meter reading practices (does data entry happen manually?)
- Organizational information
 - How many employees in finance/billing?
 - Finance/Admin job descriptions
 - Who does what/where do certain employees spend the majority of their time?
 - Who is taking over Finance and Admin Director duties in the interim?
- Financial data
 - General ledger report/trial balance report – shows where balances are at and each accounting code but summary to department/project codes – looking to understand account structure
 - Budget and capital improvement plan

Thanks again John, and we look forward to meeting!



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From: Nathan Burkett

Sent: Friday, June 26, 2020 9:38 AM

To: Crooks, John <jcrooks@shakopeeutilities.com>

Subject: Meeting Follow-up

John,

Thanks for a great meeting yesterday. It was good to sit down and consider ideas that could be mutually beneficial. As promised, here is my summary and understanding of what we agreed to going forward:

1. We will study the possibility of fully integrating financial operations with a goal of deciding the best course by the end of the year.
 - a. No later than next week Nate Reinhardt (Finance Director) and I will get you a list of questions, data we would like to see (and some to share with you), and a proposed task list for the next couple of months.
2. We will have our IT professionals meet with a goal of identifying potential areas of cost savings and efficiency, specifically asking them to look at:
 - a. Network/Servers/purchasing
 - b. Agenda/broadcast software
 - c. GIS/ESRI
 - d. Laserfiche
 - e. Office365

Please confirm this course – make changes if you think I have missed something.

Again, thank you – and have a great weekend!