
From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, January 05, 2011 6:05 PM
To: MacLeod, Kimberly
Subject: Tulsa's New Vision piece

Categories: Reviewed for Open Records Copying

Kim

I looked it over and have these suggested changes:

Be sure at the end of the last opening paragraph we change 2010 to 2011.

In the KPMG, lets reword the end of the sentence to say: with a new structure for managing change.
Lets strike " form and purpose of government

In PLANiTULSA, lets capitalize Director and after the word "manner" lets add "and"

In the Taxes paragraph lets change the title to Tax Collection

In Municipal Finance, second sentence, lets change to say: "Tulsa will start off the next legislative session in February having already introduced several bills....

In City/County, strike city county and instead its called Collaborative Government Advisory Committee.

Show me a new draft in the morning and hopefully we can get it out. Thanks

Terry

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, January 05, 2011 5:32 PM
To: Beyer, Vickie
Subject: RE: Employee Meeting

Categories: Reviewed for Open Records Copying

Kevin Malone with ExecuTime is expecting your call to answer his questions. At this point we just want a cost proposal to get an idea of what we are looking at. Be sure he understands our process for making this type of selection/purchase. Thanks

From: Beyer, Vickie
Sent: Wednesday, January 05, 2011 5:08 PM
To: Nannarone, Melissa
Cc: Doerflinger, Preston; Simonson, Terry
Subject: Employee Meeting

We need to schedule an employee meeting with the Building Maintenance and Operations group. Thomas Chandler is the manager and Dan Crossland is the deputy director.

Terry suggested that it might be more effective if you handle scheduling the meetings. Could you do that? Terry and Preston make the presentation, and Dan can help with who to invite on the Public Works side. Front line employees should be invited to the meetings.

Let me know if you need help. Thanks.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, January 05, 2011 3:18 PM
To: Beyer, Vickie
Subject: RE: Ed Crooks - KPMG

Categories: Reviewed for Open Records Copying

Thanks. I have told Mr Crooks that we are all set for the 14th. ♦

From: Beyer, Vickie
Sent: Wednesday, January 05, 2011 12:26 PM
To: Simonson, Terry
Subject: Fwd: Ed Crooks - KPMG

Begin forwarded message:

From: "Beyer, Vickie" <VBAYER@cityoftulsa.org>
Date: January 5, 2011 12:25:13 PM CST
To: Jack Neely <Jack@bmcok.com>
Subject: Re: Ed Crooks - KPMG

Super! Thanks.

On Jan 5, 2011, at 11:40 AM, "Jack Neely" <Jack@bmcok.com> wrote:

Vickie,

Happy New Year as well. I hope you enjoyed the holidays. I am available Friday January 14 at 2:30p to meet, and will plan to come to the 15th floor unless I hear otherwise.

Jack

From: Beyer, Vickie [mailto:VBAYER@cityoftulsa.org]
Sent: Wednesday, January 05, 2011 9:15 AM
To: Jack Neely
Subject: RE: Ed Crooks - KPMG

Happy new year, Jack!

Ed Crooks is a member of the KPMG division that handles public/private partnerships. Are you available Friday the 14th at 2:30 to meet with Mr. Crooks and the Mayor?

Thanks,

Vickie

From: Simonson, Terry
Sent: Wednesday, January 05, 2011 8:22 AM
To: Beyer, Vickie
Subject: Ed Crooks - KPMG

The only day available for the Mayor to meet with Mr. Crooks is Friday the 14th at 2:30. I think it would be good for us to have Jack Neely join us. Would you see if Jack is available? Mr. Crooks is going to be in OKC visiting family and wanted to come by to talk about the RFP which the TMUA is considering. Thanks.

Terry A. Simonson

General Counsel and Chief of Staff

Office of the Mayor

175 E. 2nd St., 15th Floor

Tulsa, OK 74103

918.596.7407

tsimonson@cityoftulsa.org

Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, January 05, 2011 3:18 PM
To: Crooks, Edwin
Subject: RE: Water PPP Follow-Up

Categories: Reviewed for Open Records Copying

Ed

We are set for the 14th at 2:30 in City Hall, 15th Floor, Mayors Office. The meeting will include me, Vickie Byers the manager of our Management Review Office, Jack Neely a member of the utility board and the Mayor who is also a member of the utility board. See you then.

Terry

From: Crooks, Edwin [mailto:ecrooks@KPMG.com]
Sent: Wednesday, January 05, 2011 11:26 AM
To: Simonson, Terry
Subject: RE: Water PPP Follow-Up

Terry,

That sounds great, thanks, and if we could see the folks from the utility board as well it would be perfect. Would you be able to meet earlier that day to get acquainted and give me the lay of the land?

Best regards, Ed

Ed Crooks
Managing Director
Infrastructure Advisory
KPMG LLP
Cell: 571.226.7222
Fax: 410.558.6243
ecrooks@kpmg.com

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Wednesday, January 05, 2011 9:23 AM
To: Crooks, Edwin
Subject: RE: Water PPP Follow-Up

Ed

Right now I have you on the Mayors schedule for Friday, the 14th, at 2:30. I'll confirm that for sure but for now lets plan on it. I am also trying to see if the member of the utility board responsible for developing the RFP can join us.

Terry

From: Crooks, Edwin [mailto:ecrooks@KPMG.com]
Sent: Tuesday, January 04, 2011 7:32 AM
To: Simonson, Terry

Cc: Kelly, Liam; Wong, Jeffrey S; Hamer, Ted
Subject: RE: Water PPP Follow-Up

Terry,

Happy New Year! I hope your holidays were enjoyable.

Just to follow up on our earlier exchange, I plan to be in Oklahoma around the weekend of January 15-16 to visit family in OK City. While I'm in the area, would it be possible to arrange a meeting with you and/or members of the Utility Authority on either the 14th, 17th or 18th? My hope was to share a bit more context about how other cities have explored alternative project delivery and financing models and, ultimately, what it takes to get a deal done. That might be useful background as you and the Authority structure an RFP for advisory support.

Please let me know if you think that might be possible and if so which date would be best.

Thanks and regards, Ed

Ed Crooks
Managing Director
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Cell: 571.226.7222
Fax: 410.558.6243
ecrooks@kpmg.com

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Sunday, December 05, 2010 12:30 PM
To: Crooks, Edwin
Cc: Kelly, Liam; Wong, Jeffrey S; Hamer, Ted
Subject: RE: Water PPP Follow-Up

Ed

Its my understanding that the utility authority is working up an RFP but I have not seen it so I don't know what the scope will be. I think they may finalize it later this month. I'll see if I can find out more about it and let you know. Thanks

Terry

From: Crooks, Edwin [ecrooks@KPMG.com]
Sent: Sunday, December 05, 2010 9:52 AM
To: Simonson, Terry
Cc: Kelly, Liam; Wong, Jeffrey S; Hamer, Ted
Subject: Water PPP Follow-Up

Terry,

Hopefully this e-mail finds you well and enjoying the holiday season. Liam and I wanted to follow-up with you on any questions you may have regarding the draft letter we submitted for Tulsa Water. As we initially discussed on the phone, our approach is to take the project one step at a time and give you objective advice that will help you decide whether - and how - to move the project forward into each successive stage.

If you have time over the next few weeks we would welcome the opportunity to discuss our work in person and how we might fine tune the approach outlined in our draft letter in order to better meet your needs.

Very Best Regards,
Liam Kelly & Ed Crooks
Ed Crooks
Managing Director
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Cell: 571.226.7222
Fax: 410.558.6243
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Sent: Wednesday, January 05, 2011 8:23 AM
To: Crooks, Edwin
Subject: RE: Water PPP Follow-Up

Categories: Reviewed for Open Records Copying

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Very Best Regards,

Liam Kelly & Ed Crooks

Ed Crooks

Managing Director

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Sent: Wednesday, January 05, 2011 8:22 AM
To: Beyer, Vickie
Subject: Ed Crooks - KPMG

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Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, January 05, 2011 8:09 AM
To: Crooks, Edwin
Subject: RE: Water PPP Follow-Up

Categories: Reviewed for Open Records Copying

Ed

The only possible date of these is the 14th. I'll check schedules and let you know if it can and what time.

Terry

From: Crooks, Edwin [mailto:ecrooks@KPMG.com]
Sent: Tuesday, January 04, 2011 7:32 AM
To: Simonson, Terry
Cc: Kelly, Liam; Wong, Jeffrey S; Hamer, Ted
Subject: RE: Water PPP Follow-Up

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, January 05, 2011 8:07 AM
To: Beyer, Vickie
Subject: RE: MRO Meeting

Categories: Reviewed for Open Records Copying

I'll check his 2:30. He has something then but I need to visit with him about can it be moved.

From: Beyer, Vickie
Sent: Wednesday, January 05, 2011 8:06 AM
To: Simonson, Terry
Subject: RE: MRO Meeting

If we meet afternoon, Kelly is tied up 1:30 – 2:30. We could also meet at 2:30. Cathy leaves at 3:00 on vacation for the remainder of the week.

From: Simonson, Terry
Sent: Wednesday, January 05, 2011 8:02 AM
To: Beyer, Vickie
Subject: RE: MRO Meeting

Have to check both Preston and the Mayor's schedule. I know that Mayor is not available until 1:30 due to a noon lunch meeting. Neither are in yet. I'll let you know when they are.

From: Beyer, Vickie
Sent: Wednesday, January 05, 2011 8:00 AM
To: Simonson, Terry; Doerflinger, Preston
Subject: MRO Meeting

I've checked MRO schedules. We need to do this at 9:00 or 1:00 to catch everyone. The 9:00 slot is very iffy. Lydia didn't make it in until 10:00 yesterday.

Want me to schedule something?

From: Simonson, Terry [tsimonson@cityoftulsa.org]
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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, January 05, 2011 5:37 AM
To: Beyer, Vickie
Subject: Re: Brink and AFSCME

Categories: Reviewed for Open Records Copying

Yes

Sent from my iPad

On Jan 4, 2011, at 5:54 PM, "Beyer, Vickie" <VBAYER@cityoftulsa.org> wrote:

> Should we invite Michael to the meeting with AFSCME next Tuesday at 2:00? It might be good for them to meet him.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, January 04, 2011 1:37 PM
To: Beyer, Vickie
Subject: FW: Water PPP Follow-Up

Categories: Reviewed for Open Records Copying

From: Crooks, Edwin [mailto:ecrooks@KPMG.com]
Sent: Tuesday, January 04, 2011 7:32 AM
To: Simonson, Terry
Cc: Kelly, Liam; Wong, Jeffrey S; Hamer, Ted
Subject: RE: Water PPP Follow-Up

Terry,

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Please let me know if you think that might be possible and if so which date would be best.

Thanks and regards, Ed

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Sent: Sunday, December 05, 2010 12:30 PM
To: Crooks, Edwin
Cc: Kelly, Liam; Wong, Jeffrey S; Hamer, Ted
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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 29, 2010 10:02 AM
To: Criswell, Cathy; Brader, Kelly; Bracken, Lydia; Beyer, Vickie
Cc: Bartlett, Dewey
Subject: FW: Resume redraft
Attachments: TFO.Resume.101224.doc

Categories: Reviewed for Open Records Copying

This is the resume of the business analyst that will be working with Michael.

From: terrysinonson@aim.com [mailto:terrysinonson@aim.com]
Sent: Sunday, December 26, 2010 9:46 AM
To: Simonson, Terry
Subject: Fwd: Resume redraft

-----Original Message-----

From: Jeff Stava <JStava@TULSACF.ORG>
To: pdoerflinger@aol.com; terrysinonson@aim.com
Cc: Ken Levit <ken@GKFF.ORG>
Sent: Sun, Dec 26, 2010 9:24 am
Subject: Fw: Resume redraft

Brinks former boss (head of Indy MRO) resume....

J. Stava
Tulsa Community Foundation

From: Michael Brink [mailto:michaelbrink924@sbcglobal.net]
Sent: Sunday, December 26, 2010 07:50 AM
To: Jeff Stava
Subject: FW: Resume redraft

Jeff ♦ Attached is Tom ♦'s resume.

Mike

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 29, 2010 9:55 AM
To: Criswell, Cathy; Beyer, Vickie
Subject: RE: Meeting with Michael Brink

Categories: Reviewed for Open Records Copying

We'll find another time. Need everyone there.

-----Original Message-----

From: Beyer, Vickie
Sent: Wednesday, December 29, 2010 8:32 AM
To: Criswell, Cathy
Cc: Simonson, Terry
Subject: Re: Meeting with Michael Brink

Won't work for me. I'll be out of the office Monday afternoon. What other slots are available?

On Dec 28, 2010, at 2:52 PM, "Criswell, Cathy" <ccriswell@cityoftulsa.org> wrote:

> Vickie,
>
> Can you meet with Michael Brink on Monday 1/3 - 3:00 - 4:00 PM in our
> office area?
>
>
>
> 1. Substantial time with the MRO team members. I'd like to get
> at least an hour with each individually and then I'll be meeting with
> the team multiple times during the first few weeks. Individually,
> I'd like to understand their skill sets and current responsibilities.
> I'd also like to get their assessment of the KPMG process, especially
> their involvement in identifying particular projects for managed
> competition.
>
>
>
>

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, December 28, 2010 2:07 PM
To: Criswell, Cathy
Subject: RE: Visit Schedule

Categories: Reviewed for Open Records Copying

Sure that would be helpful. Thanks

From: Criswell, Cathy
Sent: Tuesday, December 28, 2010 1:33 PM
To: Simonson, Terry
Subject: RE: Visit Schedule

Terry, I can get most of the items on Michael's list set up if you want. Let me know if you would like me to do that.

From: Simonson, Terry
Sent: Tuesday, December 28, 2010 11:39 AM
To: Brader, Kelly; Criswell, Cathy; Bracken, Lydia
Subject: FW: Visit Schedule

FYI

From: Michael Brink [mailto:michaelbrink924@sbcglobal.net]
Sent: Monday, December 27, 2010 8:10 AM
To: Doerflinger, Preston; Simonson, Terry
Cc: 'Jeff Stava'
Subject: Visit Schedule

Gentlemen:

As I discussed with Preston and Jeff, I plan to be in Tulsa the following dates for the first three weeks of January:

1/3 – 1/5
1/10 – 1/11
1/17 – 1/20

My associate, Tom Olsen, will likely be with me the week of the 17th. His resume is attached.

We are reviewing the KPMG documents in detail.

I'd like to get going as quickly as possible. I am open to your suggestions as to meetings/appointments I should schedule during the first few weeks. My own suggestions for meeting are as follows (not in any particular order):

1. Substantial time with the MRO team members. I'd like to get at least an hour with each individually and then I'll be meeting with the team multiple times during the first few weeks. Individually, I'd like to understand their skill sets and current responsibilities. I'd also like to get their assessment of the KPMG process, especially their involvement in identifying particular projects for managed competition.
2. Someone in City Procurement and/or Legal to understand the OK State requirements around RFPs, RFBs, etc.

3. Someone who can give me some background on the City labor situation (maybe in HR?) – unionization, traditional labor-management relationship, leadership, previous reform initiatives, etc. Specifically, I'd like to understand how city employees have been engaged thus far on the issue of managed competition.
4. Time with both Preston and Terry to further clarify expectations and reporting relationships. I'd also like to discuss the political context in Tulsa, the Mayor's initiatives, and how this project fits in. With Preston, I'd like to discuss the movement toward performance auditing to date.
5. Someone who can provide me with an overview of existing budget and performance reports.
6. I'd like to begin to spend time understanding the six projects identified as the top managed competition priorities – Equipment Management, IT Support, Building Operations, Street Maintenance, Forestry/Horticulture, Permitting. This includes getting on site at the facilities, walking around, talking with management and line employees, etc.

I'd be interested in any additional recommendations that you have. I realize that beginning to set these appointments this week will be challenging. I am happy to begin calling/emailing the appropriate people if you can provide guidance as to the right people. Or, if you would prefer that I coordinate appointments through a member of the MRO or another City staffer, I can do that.

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I wish you a Happy New Year.

Michael Brink
816.305.1720
michaelbrink924@sbcglobal.net

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, December 28, 2010 11:39 AM
To: Criswell, Cathy; Brader, Kelly; Bracken, Lydia
Subject: FW: Visit Schedule
Attachments: TFO.Resume.101224.doc

Categories: Reviewed for Open Records Copying

FYI

From: Michael Brink [mailto:michaelbrink924@sbcglobal.net]
Sent: Monday, December 27, 2010 8:10 AM
To: Doerflinger, Preston; Simonson, Terry
Cc: 'Jeff Stava'
Subject: Visit Schedule

Gentlemen:

As I discussed with Preston and Jeff, I plan to be in Tulsa the following dates for the first three weeks of January:

1/3 – 1/5
1/10 – 1/11
1/17 – 1/20

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michaelbrink924@sbcglobal.net

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, December 28, 2010 10:58 AM
To: Bunney, Mike

Categories: Reviewed for Open Records Copying

Mike

The consultant coming into to help with the KPMG implementation is Thomas Olsen. His firm is Pragmatik, LLC. I thought Stava said he had done some work for Boeing but not sure where or when. Thanks

Terry A. Simonson
General Counsel and Chief of Staff
Office of the Mayor
175 E. 2nd St., 15th Floor
Tulsa, OK 74103
918.596.7407
tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, December 27, 2010 8:12 PM
To: Beyer, Vickie
Subject: FW: Visit Schedule
Attachments: TFO.Resume.101224.doc

Categories: Reviewed for Open Records Copying

Wanted you to see what I received today.

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, December 27, 2010 2:08 PM
To: Jeff Stava
Subject: RE: Visit Schedule

Categories: Reviewed for Open Records Copying

I think when Mike gets here and sees what we have he may think we need more. But with Mike, Tom, Vickie, Kelly, and Lydia, I think 5 at this point might be enough. But, if not, we can look for other talent.

From: Jeff Stava [mailto:JStava@TULSACF.ORG]
Sent: Monday, December 27, 2010 2:04 PM
To: Simonson, Terry
Subject: RE: Visit Schedule

This is a game change from what we went into this with – the MRO is now less one and a half (?) ish people.

Not sure that is going to help get things done in this scenario. Any other talent around the city that we can pull from to staff the MRO?

Stava

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Monday, December 27, 2010 2:00 PM
To: Jeff Stava
Subject: RE: Visit Schedule

I don't mind waiting to visit with him. But the Criswell move will happen sometime in January, not sure when. And Lydia might need to take a lesser role. I think with Mike, Tom Olsen, Vickie, and Kelly, this will be the strongest team.

From: Jeff Stava [mailto:JStava@TULSACF.ORG]
Sent: Monday, December 27, 2010 1:40 PM
To: Simonson, Terry; Michael Brink; Doerflinger, Preston
Subject: RE: Visit Schedule

Terry –

Can we freeze the MRO staff and management decisions until after Mike gets here and starts to do the evaluation? Or are you thinking this needs to be done no matter?

J. Stava

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Monday, December 27, 2010 1:30 PM
To: 'Michael Brink'; Doerflinger, Preston
Cc: Jeff Stava
Subject: RE: Visit Schedule

Michael

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Look forward to seeing you soon.

Terry

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 22, 2010 2:03 PM
To: Brader, Kelly
Subject: RE: 1st Completed MRO PROJECT!!!!

Categories: Reviewed for Open Records Copying

Great work Kelly. You crossed the finish line first! I'll be sure to spread the word. Thanks for your tenacity and sticking with this.

Terry

From: Brader, Kelly
Sent: Wednesday, December 22, 2010 11:26 AM
To: Mayor
Cc: Simonson, Terry; Doerflinger, Preston; Beyer, Vickie; Criswell, Cathy; Bracken, Lydia; Jordan, Chuck
Subject: 1st Completed MRO PROJECT!!!!
Importance: High

Mayor Bartlett,

Please see my recommendation on Weapon Disposal. If you have any questions or need further information, please let me know.

Thank you,
Kelly Brader

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 22, 2010 1:59 PM
To: Beyer, Vickie
Subject: RE: 1st Completed MRO PROJECT!!!!

Categories: Reviewed for Open Records Copying

I agree and lets plan on it.

From: Beyer, Vickie
Sent: Wednesday, December 22, 2010 1:55 PM
To: Simonson, Terry; Doerflinger, Preston
Subject: RE: 1st Completed MRO PROJECT!!!!

We need to formally celebrate this. Can you spare time for a lunch sometime in early January?

From: Brader, Kelly
Sent: Wednesday, December 22, 2010 11:26 AM
To: Mayor
Cc: Simonson, Terry; Doerflinger, Preston; Beyer, Vickie; Criswell, Cathy; Bracken, Lydia; Jordan, Chuck
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Please see my recommendation on Weapon Disposal. If you have any questions or need further information, please let me know.

Thank you,
Kelly Brader

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 22, 2010 1:58 PM
To: Beyer, Vickie
Subject: RE: Friday Meetings

Categories: Reviewed for Open Records Copying

Politically, we would probably have better reception from the council and others if we considered dealing with neighborhood associations over the county. The county probably won't want to take on the additional costs

From: Beyer, Vickie
Sent: Wednesday, December 22, 2010 1:52 PM
To: Simonson, Terry
Subject: Re: Friday Meetings

Got it. Thanks.

Do you have thoughts about deeding certain parks to county or neighborhood associations? Haven't investigated; just want to hear your thoughts.

On Dec 22, 2010, at 1:49 PM, "Simonson, Terry" <TSIMONSON@cityoftulsa.org> wrote:

Forgot to mention a couple of things to you regarding the horticultural. If we need to look at a possible partner or joint venture, I have contacts with the Master Gardner program and they might be very interested in helping. They have hundreds of volunteers. Also, the Mayor had a conversation with Daniel Jeffries, the PR coordinator with the MET about the green waste/mulch issue. He had some ideas you might want to visit with him about. His number is 584 0584. His email is daniel@metrecycle.com

From: Beyer, Vickie
Sent: Wednesday, December 22, 2010 1:29 PM
To: Simonson, Terry
Subject: RE: Friday Meetings

Hahaha! So how many things are on your list to take care of over the break?!!

If I don't see you before we're out of here, have a Merry Christmas.

From: Simonson, Terry
Sent: Wednesday, December 22, 2010 1:18 PM

To: Beyer, Vickie
Subject: RE: Friday Meetings

I agree its time to retool the purpose of the Friday meetings. Since we won't have one for two weeks, I'll have some time to work on this and change our agenda. Thanks

From: Beyer, Vickie
Sent: Wednesday, December 22, 2010 9:41 AM
To: Simonson, Terry; Stout, Ben
Subject: Friday Meetings

Terry, can we reconsider our Friday Lean Team meetings? Those were initiated I believe to get the MRO up and running. That is completed to a large degree. I'm not sure we're getting good value for that time.

Could the meeting morph into more of an informational meeting perhaps:

- MRO shares project status, give department heads opportunity to hear, ask questions, offer feedback (not all department heads are included in the Friday meetings)
- Cathy & Mike Bunney's idea about stand and deliver meetings where department heads share progress on the action items in their strategic plans

Ben and I visited about this briefly last week, and I believe he has the same thoughts regarding the value of the Friday meetings. Ben, do you have suggestion about other things that could be standing agenda items?

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 22, 2010 1:46 PM
To: Stout, Ben
Subject: RE: Friday Meetings

Categories: Reviewed for Open Records Copying

Thanks Ben. I'll look this over during our break. Our next meeting probably won't be until January 7th so we've got some time.

From: Stout, Ben
Sent: Wednesday, December 22, 2010 1:37 PM
To: Beyer, Vickie; Simonson, Terry
Subject: RE: Friday Meetings

Yes think maybe we are moving to a point where we think about having meetings for staff to report out on action items and deliverables due. Below are some thoughts on a sample comprehensive agenda.

Sample Agenda

1. Administration Direction / Discussion
 - a. Direct and Set Priorities
 - b. Direct and Set Policy as Needed
 - c. Funding to Support MRO and Projects
 - d. Executive / Sponsor – Clear Road Blocks and Bottlenecks
 - e. Feedback on MRO Progress
2. MRO Status Reports / Updates
 - a. Administrative / Tracking
 - i. Program Completions and Successes
 - ii. Reduced Costs
 - iii. Increased Revenue
 - iv. Operational Efficiencies
 - b. Cathy Criswell
 - i. Strategic Planning
 - ii. Performance Measures
 - iii. Citizen Surveys
 - iv. CitiStat – Dashboards (eventually department heads report out monthly on key performance indicators and progress of strategic plans)
 - v. Active Projects Update by Priority
 - c. Vickie Beyer
 - i. Public / Private Partnerships
 - ii. Cost Savings / Revenue
 - iii. Active Projects Update by Priority
 - d. Kelly Brader
 - i. Strategic Sourcing
 - ii. Managed Competition
 - iii. Activity Based Costing
 - iv. Gain Sharing
 - v. Active Projects Update by Priority

- e. Lydia Bracken
 - i. Consolidation
 - ii. Gov. Partnerships
 - iii. Strategic Assessment
 - iv. Shared Services
 - v. Active Project Update by Priority
3. Department Head and LEAN team
 - a. Action / Deliverables
 - i. List here
 - b. Comments and Feedback
4. Others?

Thanks,
Ben

From: Beyer, Vickie
Sent: Wednesday, December 22, 2010 9:41 AM
To: Simonson, Terry; Stout, Ben
Subject: Friday Meetings

Terry, can we reconsider our Friday Lean Team meetings? Those were initiated I believe to get the MRO up and running. That is completed to a large degree. I'm not sure we're getting good value for that time.

Could the meeting morph into more of an informational meeting – perhaps:

- MRO shares project status, give department heads opportunity to hear, ask questions, offer feedback (not all department heads are included in the Friday meetings)
- Cathy & Mike Bunney's idea about "stand and deliver" meetings where department heads share progress on the action items in their strategic plans

Ben and I visited about this briefly last week, and I believe he has the same thoughts regarding the value of the Friday meetings. Ben, do you have suggestion about other things that could be standing agenda items?

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 22, 2010 1:44 PM
To: Beyer, Vickie
Subject: RE: Friday Meetings

Categories: Reviewed for Open Records Copying

Right now I'm up to about 5!!!. I hope you have a Merry Christmas too. I really appreciate you!!

From: Beyer, Vickie
Sent: Wednesday, December 22, 2010 1:29 PM
To: Simonson, Terry
Subject: RE: Friday Meetings

Hahaha! So how many things are on your list to take care of over the break?!!

If I don't see you before we're out of here, have a Merry Christmas.

From: Simonson, Terry
Sent: Wednesday, December 22, 2010 1:18 PM
To: Beyer, Vickie
Subject: RE: Friday Meetings

I agree its time to retool the purpose of the Friday meetings. Since we won't have one for two weeks, I'll have some time to work on this and change our agenda. Thanks

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 22, 2010 10:13 AM
To: Beyer, Vickie
Subject: RE: MRO Support: Hyperion Business/Financial Analyst

Categories: Reviewed for Open Records Copying

Okay.

From: Beyer, Vickie
Sent: Wednesday, December 22, 2010 10:12 AM
To: Simonson, Terry
Subject: RE: MRO Support: Hyperion Business/Financial Analyst

Thanks.

I see where Ben is going – use the expertise to support other IT initiatives. It's not a bad idea, just different from my vision. I am more interested in finding a master of the reporting piece of the Hyperion product with accounting expertise and project management experience. Ideally, we find or develop two of these people so we have some depth in the group. They would cost/report part of the time, then manage projects the other part of the time.

Let me think about it. I'll visit with Ben after the holidays, and we'll come up with a compromise.

From: Simonson, Terry
Sent: Wednesday, December 22, 2010 9:54 AM
To: Beyer, Vickie
Subject: FW: MRO Support: Hyperion Business/Financial Analyst

Yesterday you'll recall I mentioned that I had asked Ben to put some thoughts together about a business analyst job description before you reminded me that you were working on job descriptions as well. Below is what he sent to me.

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Subject: MRO Support: Hyperion Business/Financial Analyst

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- Financial Reporting Expert
- Understands, owns, and validates the data requirements for MRO reporting and workflows.

Ben

- Oracle/Hyperion Fin. Analyst

Golden Living - Fort Smith, AR

productive and efficient utilization of the **Hyperion** applications. Analyze potential ... with **Hyperion** Planning Plus
Experience in **Hyperion** Strategic Finance At least (1) one...

From Golden Living



[View Job Postings](#)

[Job Description](#)

Job Title:	Analyst Business/Systems 3
Location:	CORPORATE OH - 2
Reference:	200747

Org Marketing Statement

Acts as liaison between the customer and the programming staff regarding problems and enhancements of multiple applications, providing support for development, implementation and maintenance of existing, new or enhanced systems.

Maintains positive working relationship with client and client middle management by responding to concerns, complaints, and requests

Provides information to client regarding solution options available, including advantages and disadvantages to include recommendations of optimal solution based on evaluation

Serves as a mentor for other business analysts and new associates

Schedules and facilitates weekly meetings with programmers, operations and business analysts to set project priorities, proactively identify problem areas, coordinate problem resolution, and to ensure project is progressing on schedule

Communicates between pre-selected vendor and client to coordinate modifications, enhancements, or solutions to vendor-supplied software

Contributes to the creation of written documentation, which may include application flows, data flows, user guides, etc.

Manage and monitor small to medium projects and requests, communicating status information including resolutions, estimated completion dates, changes, issues, etc. to supervisor, team and customer as appropriate

Identifies scope, severity, and root cause of complex application

problems by questioning client, product experts, reviewing documentation, understanding of application, re-creating problem, doing research, etc.

Recognizes & analyzes potential impact and scope of various problem solutions on application, operating environment, downstream systems, user groups, budget, etc.

Creates and maintains budget for medium to large project

Defines test objectives, creates test plans and verifies programming results for integrated application testing by comparing to production results, reviewing reports, UI, etc. to determine if objectives of requirements were met

Develops the proposal for new or revised systems by defining problems, benefits, objectives & functional scope of proposed system or enhancement and translates this into detailed functional/design requirements and receives client approval

Determines capabilities of vendor products and feasibility of utilizing vendor products by interviewing vendor and collecting and analyzing statistical information

Prepares, coordinates and delivers structured and interactive training presentations and application feature presentations effectively

Design and development of enhancements and production support for business focused technical solutions leveraging (BI) and (EPM) products

Participate in business requirements, project scope determination

Work with multi-functional teams to create and improve processes and methodologies

Analyze business issues and design solutions utilizing the functionality of the Hyperion ESSBASE and Planning systems.

Develop and maintain system documentation for assigned projects/systems

Serve as a Subject Matter Expert (SME) for the Oracle EPM / Hyperion Financial

Improve the quality of financial reporting, accounting and forecasting systems.

Complete training of end-users as required to ensure productive and efficient utilization of the Hyperion applications.

Analyze potential benefits of Smartview and work with implementation team to deploy, train, and assist end users in creating ad-hoc reports.

Qualifications:

Bachelor's degree; preferably in Accounting, Finance, Information Systems, or Business Management.

Master's degree in IT or Finance is preferred. (CPA, CITP designation is a plus)

5+ years experience with Hyperion Planning Plus

Experience in Hyperion Strategic Finance

At least (1) one full life cycle implementation of Hyperion EPM software; more than 1 is preferred

5+ years of professional accounting experience with a background in financial consolidations, budgeting, reporting, and forecasting

2+ years of hands on BI or Technical experience & report writing, loading metadata, designing calculation models, documenting architectural designs, etc.

Experience with Microsoft Office including Excel

Minimum of 2 years of Project Management experience

Hyperion Analyst

About the Job

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- Provide customer support for Hyperion modules as listed above.
- Assist users with configuration decisions and training recommendations.
- Troubleshoot technical issues and work with Oracle Support to resolve Service Requests.
- Install, upgrade, configure, tune, and troubleshoot Hyperion modules as listed above.
- Develop Hyperion data integration, calculation scripts, load rules, and maintain security.
- Maintain Administrator documentation for all customizations and extensions.

The successful candidate will meet the following qualifications:

- Bachelor's degree or equivalent experience.
- Minimum of 3 years experience with one or more of the following: Hyperion modules: Planning, Essbase, or HFM.
- Minimum of 3 years experience with one or more of the following: Hyperion tools: EAS, Calc Scripts, Load Rules, Smartview, ODI, or FDM/ERP.
- Ability to maintain system stability, support multiple versions, and optimize the production environment.
- Thorough understanding of Hyperion Development Architecture and the Administration Console.
- Proven experience in development, implementations, production support, and upgrades.

- Experience with the following:
 - Hyperion Administration - installations, upgrades, patches, backup and recovery, and optimization
 - Scripting - PERL, VB, ASP, XML, XBRL, SQL, or MAXL in a MS SQL environment
 - Utilities - ESSCMD, HAL, ODI, MS DTS, Financial Reports, or Extended Analytics
 - OLAP Development - Metadata, Business Rules, Data Forms, Mapping, BI Applications, or Cube Design and Load
- Work ethics: A self-starter who can work equally as well independently or in a team environment.
- Willingness to work toward and achieve management directed goals and objectives.
- Possesses a customer-focused and team-oriented attitude.
- Effectively demonstrates verbal and written communication skills.
- Enjoys troubleshooting and can identify appropriate recommendations / solutions.
- Ability to work on multiple projects simultaneously and manage stressful situations.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 22, 2010 9:55 AM
To: Michael Brink
Subject: FW: MRO Support: Hyperion Business/Financial Analyst

Categories: Reviewed for Open Records Copying

Michael

I had asked my IT director to start some work on helping pull together the necessary background/profile of a business analyst we would need to work with our Hyperion system. Here is what he provided to me this morning.

Terry Simonson

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Sent: Wednesday, December 22, 2010 9:51 AM
To: Simonson, Terry
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View Job Postings
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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, December 21, 2010 1:41 PM
To: Beyer, Vickie
Subject: RE: Status Report

Categories: Reviewed for Open Records Copying

Thanks. I just sent everyone their assignments. I would think they could have this done by the end of the day Wednesday. ♦ Thanks for the calendar of days off.

From: Beyer, Vickie
Sent: Tuesday, December 21, 2010 1:36 PM
To: Simonson, Terry
Subject: Re: Status Report

Shall I let the others know or will you?

FYI-we are all here this week. Everyone is out Monday. Lydia and I will be gone all next week. We will be back for the party in January.

On Dec 21, 2010, at 1:31 PM, "Simonson, Terry" <TSIMONSON@cityoftulsa.org> wrote:

Thank you for these. I think I will say I would like them by the 31st not knowing everyone's vacation plans.

From: Beyer, Vickie
Sent: Tuesday, December 21, 2010 11:31 AM
To: Simonson, Terry
Subject: Status Report

Attached:

- Beyer Status Report
- Project Team Status Report ♦ 12/20/10
- Thoughts on reassignment of Public Works administrative functions

You didn't give us a deadline. When do you want these? Kelly is out today.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, December 21, 2010 1:40 PM
To: Criswell, Cathy; Brader, Kelly; Bracken, Lydia; Beyer, Vickie
Subject: Status Reports

Categories: Reviewed for Open Records Copying

As I said yesterday during our staff meeting, I would like to have an updated status report from each of you for the Mayor, Preston, and for Michael Brink when he arrives. I would like these by the 31st.

Here are the assignments that each of you were responsible for. For each, please provide:

1. what action steps you have taken with each of these,
2. what you have currently scheduled to occur next and when these will occur
3. what remaining tasks there are to complete the assignment and when do you expect those to be completed

CATHY

Strategic Planning
Surveys
Performance Measurement

KELLY

Gainsharing
Gun Disposal
Customer Service
Police Civilization

LYDIA

Service Level Agreements
Payroll
Animal Shelter
Code Enforcement
Planning and Grants
911 to Public Safety

VICKIE

Horticulture
Crossing Guards
PAC
Water/Wastewater Services
Job Descriptions
Meeting with AFSCME

Terry A. Simonson
General Counsel and Chief of Staff
Office of the Mayor
175 E. 2nd St., 15th Floor
Tulsa, OK 74103
918.596.7407

tsimonson@cityoftulsa.org

Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, December 21, 2010 1:32 PM
To: Beyer, Vickie
Subject: RE: Status Report

Categories: Reviewed for Open Records Copying

Thank you for these. I think I will say I would like them by the 31st not knowing everyone's vacation plans.

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Sent: Tuesday, December 21, 2010 11:31 AM
To: Simonson, Terry
Subject: Status Report

Attached:

- Beyer Status Report
- Project Team Status Report – 12/20/10
- Thoughts on reassignment of Public Works administrative functions

You didn't give us a deadline. When do you want these? Kelly is out today.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, December 21, 2010 9:00 AM
To: Beyer, Vickie
Subject: RE: Labor Relations Committee - Initial Meeting

Categories: Reviewed for Open Records Copying

I think this is a good agenda. I might want to include as a point of reference and basis copies of the pertinent sections in the collective bargaining agreements about having this process. I'll be back in touch. Thanks

From: Beyer, Vickie
Sent: Friday, December 17, 2010 4:37 PM
To: Simonson, Terry
Subject: Labor Relations Committee - Initial Meeting

I am assuming you were invited to the initial meeting 1/11/11 from 2:00-4:00 in the 15th floor boardroom. (Joyce failed to include me on the invitation!)

We must have the agenda items to Joyce by January 3 so she can send the agenda to Michael Rider by the 4th. I suggest these items:

- KPMG Report (Simonson-the story you can deliver in your sleep)
- Categories of projects and gainsharing (Kelly)
- Current projects (Beyer – need to determine if sub-committees should be formed)
- Planned projects (if we know by then)
- Planned approach for Labor Relations Committee and sub-committees (ie, form groups as projects warrant; establish forum for ideas not identified by KPMG) – (Joyce, Beyer)
- Other?
- Q&A

Add, modify, delete. Thanks.

Enjoy your weekend.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, December 20, 2010 3:38 PM
To: Beyer, Vickie
Subject: FW: Executive Committee minutes
Attachments: EXECUTIVE COMMITTEE MEETING.doc

Categories: Reviewed for Open Records Copying

-----Original Message-----

From: Willis, Carol
Sent: Monday, December 20, 2010 12:01 PM
To: wvonglahn@cox.net; Chris Cadieux; James McCarthy; Bartlett, Dewey; Ken Busby; Connie Cronley; Robyn Ewing; Robert LaFortune; Nancy Meinig; Jayne Reed; R. Thomas Seymour; Barbara Sturdivant; M. Teresa Valero; John Williams
Cc: Elliott, Shirley; Oliverson, Chad; Scott, John; Swiney, Mark; Hamilton, Monica; Nannarone, Melissa; Simonson, Terry; Doerflinger, Preston
Subject: Executive Committee minutes

Please find attached the minutes of the TPACT Executive Committee meeting held on December 10, 2010.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, December 17, 2010 4:45 PM
To: Beyer, Vickie
Subject: RE: Labor Relations Committee - Initial Meeting

Categories: Reviewed for Open Records Copying

I will check with Melissa Monday to make sure its on my calendar.. We can talk next week about the agenda. I agree these are the topics. Have a good weekend. See you Monday. Hang in there. I understand frustration but I assure you things are moving in the right direction. Terry

From: Beyer, Vickie
Sent: Friday, December 17, 2010 4:36 PM
To: Simonson, Terry
Subject: Labor Relations Committee - Initial Meeting

I am assuming you were invited to the initial meeting 1/11/11 from 2:00-4:00 in the 15th floor boardroom. (Joyce failed to include me on the invitation!)

We must have the agenda items to Joyce by January 3 so she can send the agenda to Michael Rider by the 4th. I suggest these items:

- KPMG Report (Simonson-the story you can deliver in your sleep)
- Categories of projects and gainsharing (Kelly)
- Current projects (Beyer – need to determine if sub-committees should be formed)
- Planned projects (if we know by then)
- Planned approach for Labor Relations Committee and sub-committees (ie, form groups as projects warrant; establish forum for ideas not identified by KPMG) – (Joyce, Beyer)
- Other?
- Q&A

Add, modify, delete. Thanks.

Enjoy your weekend.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, December 17, 2010 3:04 PM
To: Doerflinger, Preston; pdoerflinger@aim.com
Subject: FW: Executive Committee minutes
Attachments: EXECUTIVE COMMITTEE MEETING.doc

Categories: Reviewed for Open Records Copying

FYI

-----Original Message-----

From: Willis, Carol
Sent: Friday, December 17, 2010 10:07 AM
To: Simonson, Terry
Subject: Executive Committee minutes

Mr. Simonson,

Bill von Glahn suggested I get your input on the rough draft of these minutes from Monday's meeting. If they meet with your approval, I will put them in final form and distribute them. If there are changes that need to be made, please let me know.

Thank you so much.

Carol

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, December 17, 2010 12:47 PM
To: Phil Lakin, Jr.
Subject: RE: UPDATE ON VOTE FOR THURSDAY MORNING MEETINGS

Categories: Reviewed for Open Records Copying

Thanks. I have heard search numbers in the \$20k range but can confirm this with Ericka in HR. Salary numbers that have been bounced around were in the \$140k - \$150k range as this is what the director of planning in OKC is making. ♦

From: Phil Lakin, Jr. [mailto:plakin@TULSACF.ORG]
Sent: Friday, December 17, 2010 12:40 PM
To: Simonson, Terry
Cc: Jeff Stava
Subject: RE: UPDATE ON VOTE FOR THURSDAY MORNING MEETINGS

We ♦re in. Internally, we ♦ve approved enough to help hire a search firm to conduct a national search ♦ this is absolutely critical in finding the best person for this very important job. If we believe that we have indeed hired the best candidate, then we ♦ll be in for at least 2, but probably 3 years worth of salary support. I know I didn ♦t provide you with numbers, but am assuming that you will let us know approximate costs for search, and salary range will be dependent on the person selected.

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Friday, December 17, 2010 12:36 PM
To: Phil Lakin, Jr.
Subject: RE: UPDATE ON VOTE FOR THURSDAY MORNING MEETINGS

No they never brought up planning. We were just talking about the management review office and other city issues with the council. What is the latest on planning?

From: Phil Lakin, Jr. [mailto:plakin@TULSACF.ORG]
Sent: Friday, December 17, 2010 12:34 PM
To: Simonson, Terry
Subject: Re: UPDATE ON VOTE FOR THURSDAY MORNING MEETINGS

More than happy to help. You talked planning with Ken and Jeff while you were here, right, and know what we have and our position?

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Friday, December 17, 2010 12:32 PM
To: Phil Lakin, Jr.
Subject: RE: UPDATE ON VOTE FOR THURSDAY MORNING MEETINGS

FYI
You may be contacted next month by a group of the trustees from the PAC to learn more about the city / tzmi process and agreement. I met with the executive board last week to talk about the fiscal future of the PAC and what KPMG had to say about that. I mentioned that the PAC finds itself in a very similar situation as the zoo and they might learn from that process.

Terry

From: Phil Lakin, Jr. [mailto:plakin@TULSACF.ORG]

Sent: Friday, December 17, 2010 12:27 PM

To: bill@billleighty.com; Cartwright, Sherry; Al Unser; Calvin McClendon ; Daniel Keating; Darrell Gilbert ; Jamie Jamieson; Lauren Brookey; Matthew Moshiri; Mulder, Jeff; Nannarone, Melissa; Paul Baker ; Simonson, Terry

Subject: RE: UPDATE ON VOTE FOR THURSDAY MORNING MEETINGS

I, too, thought we had already settled on a Thursday meeting. Regardless, I think we should discuss at our next meeting, where we can see and hear each other and engage in a discussion, which is tough to do via email. Is it even legal for us to vote via email?

From: bill@billleighty.com [mailto:bill@billleighty.com]

Sent: Friday, December 17, 2010 11:59 AM

To: 'Cartwright, Sherry'; 'Al Unser'; 'Calvin McClendon'; 'District5'; 'District1'; 'District7'; 'Daniel Keating'; 'Darrell Gilbert'; 'Jamie Jamieson'; 'Lauren Brookey'; 'Matthew Moshiri'; 'Mulder, Jeff'; 'Nannarone, Melissa'; 'Paul Baker'; 'Phil Lakin, Jr.'; 'Simonson, Terry'

Cc: 'Ball, Terry'; 'Brown, Mark'; 'Christiansen, Lara'; 'Cox, Chris'; 'Crossland, Dan'; 'Graham, Amy'; 'Hamer, Gary'; 'Hardt, Charles'; 'Liechti, Matt'; 'MacLeod, Kimberly'; 'Pollard, Vicki'; 'Quarles, Peggy'; 'Somdecerff, Henry'; 'Stout, Brent'; 'Zachary, Paul'; 'Brown, Nathan'; 'Burks, Dana'; 'Cannon, Don'; 'Chatman-Ratliff, Allecia'; 'Compton, Shannon'; 'Cooper, Beverly'; 'Doctor, Nick'; 'Fothergill, John'; 'Megee, Jan'; 'Rees, Drew'

Subject: RE: UPDATE ON VOTE FOR THURSDAY MORNING MEETINGS

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From: Cartwright, Sherry [mailto:SCARTWRIGHT@cityoftulsa.org]

Sent: Friday, December 17, 2010 10:08 AM

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Cc: Ball, Terry; Brown, Mark; Cartwright, Sherry; Christiansen, Lara; Cox, Chris; Crossland, Dan; Graham, Amy; Hamer, Gary; Hardt, Charles; Liechti, Matt; MacLeod, Kimberly; Pollard, Vicki; Quarles, Peggy; Somdecerff, Henry; Stout, Brent; Zachary, Paul; Brown, Nathan; Burks, Dana; Cannon, Don; Chatman-Ratliff, Allecia; Compton, Shannon; Cooper, Beverly; Doctor, Nick; Fothergill, John; Megee, Jan; Rees, Drew

Subject: TAB:UPDATE ON VOTE FOR THURSDAY MORNING MEETINGS

Attached is the recording of the votes for Thursday meetings:

I HAVE ONLY HEARD FROM THREE BOARD MEMBERS SO FAR ON THE VOTE FOR THURSDAY MEETINGS FOR APRIL, JULY, OCTOBER AND DECEMBER.

Please respond on your vote for the Thursday morning meetings.

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Subject: RE: UPDATE ON VOTE FOR THURSDAY MORNING MEETINGS

Categories: Reviewed for Open Records Copying

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Terry

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To: bill@billleighty.com; Cartwright, Sherry; Al Unser; Calvin McClendon ; Daniel Keating; Darrell Gilbert ; Jamie Jamieson; Lauren Brookey; Matthew Moshiri; Mulder, Jeff; Nannarone, Melissa; Paul Baker ; Simonson, Terry
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To: Phil Lakin, Jr.
Subject: RE: UPDATE ON VOTE FOR THURSDAY MORNING MEETINGS

Categories: Reviewed for Open Records Copying

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Please respond on your vote for the Thursday morning meetings.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, December 17, 2010 12:31 PM
To: Willis, Carol
Subject: RE: Executive Committee minutes
Categories: Reviewed for Open Records Copying

Carol

Thanks. A couple of changes I would suggest:

On page one, I would change financial health to financial crisis

On page two, after the sentence that says: The KPMG study does not suggest privatization of the PAC I would add the sentence: What KPMG did recommend regarding the PAC is a public private partnership like the Gilcrease Museum partnership and identifying a non profit organization to be a sustaining partner and to assume primary responsibility for operating and capital costs of the PAC. They also recommended better inter departmental coordination between the PAC and SMG to expand its current network of event channels.

On page two, before the sentence which starts: A compromise.... I would add this lead in part: As an example of a department facing similar fiscal constraints and capital challenges, a compromise....

Thanks

Terry Simonson

-----Original Message-----

From: Willis, Carol
Sent: Friday, December 17, 2010 10:07 AM
To: Simonson, Terry
Subject: Executive Committee minutes

Mr. Simonson,

Bill von Glahn suggested I get your input on the rough draft of these minutes from Monday's meeting. If they meet with your approval, I will put them in final form and distribute them. If there are changes that need to be made, please let me know.

Thank you so much.

Carol

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, December 17, 2010 9:28 AM
To: Twombly, Jim
Subject: Union Meeting

Categories: Reviewed for Open Records Copying

Jim

Are you having your meeting next Wednesday with the union leaders? If so, I think the Mayor might want to meet with them. Thanks

Terry A. Simonson
General Counsel and Chief of Staff
Office of the Mayor
175 E. 2nd St., 15th Floor
Tulsa, OK 74103
918.596.7407
tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 15, 2010 3:23 PM
To: Stout, Ben
Subject: ABC

Categories: Reviewed for Open Records Copying

Ben

It has been my hope that the city and the TCF can reach an agreement soon on who will provide the professional services to implement the KPMG report, starting in January. As you may know, once we have someone back here to start the implementation, the beginning point will be determining the costs of the services selected for managed competition. Given that, its important that we are ready in January to begin the ABC process and that our staffs and software are ready to go. Do you see any problem with this schedule and our being ready to go in January with regards to our software is ready and our training has commenced? Thanks

Terry A. Simonson
General Counsel and Chief of Staff
Office of the Mayor
175 E. 2nd St., 15th Floor
Tulsa, OK 74103
918.596.7407
tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, December 13, 2010 8:18 PM
To: LaCroix, Allen; Stout, Ben; Felix-Warwick, Erica; MacLeod, Kimberly; Twombly, Jim; pdoreflinger@cityoftulsa.org
Subject: Lean Team Meeting
Categories: Reviewed for Open Records Copying

We will need to cancel this Fridays lean team meeting as all of the MRO staff will be in training.

Terry

From: Simonson, Terry [tsimonson@cityoffulsa.org]
Sent: Monday, December 13, 2010 7:06 PM
To: Powell, Joyce
Subject: RE: AFSCME Labor/Management (Efficiency and Productivity - KPMG)
Categories: Reviewed for Open Records Copying

Please double check for me that Melissa puts this on my calender. Thank you. Terry

From: Powell, Joyce
Sent: Monday, December 13, 2010 4:05 PM
To: Simonson, Terry; Felix-Warwick, Erica; Brader, Kelly; Criswell, Cathy; Bracken, Lydia; Bender, Gerald; Twombly, Jim
Cc: Nannarone, Melissa
Subject: AFSCME Labor/Management (Efficiency and Productivity - KPMG)
When: Tuesday, January 11, 2011 2:00 PM-4:00 PM.
Where: 15th Floor - Boardroom

When: Tuesday, January 11, 2011 2:00 PM-4:00 PM (GMT-06:00) Central Time (US & Canada).
Where: 15th Floor - Boardroom

Note: The GMT offset above does not reflect daylight saving time adjustments.

~~*~*~*~*~*~*~*~*

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, December 13, 2010 7:05 PM
To: Beyer, Vickie
Subject: RE: IFB-Time and Attendance

Categories: Reviewed for Open Records Copying

Yes I think we should update the document to include the integrated payroll module so we can be ready to pull the trigger as soon as we are ready. Thanks

From: Beyer, Vickie
Sent: Monday, December 13, 2010 4:10 PM
To: LaCroix, Allen; Stout, Ben
Cc: Bracken, Lydia; Twombly, Jim; Felix-Warwick, Erica; Simonson, Terry
Subject: IFB-Time and Attendance

A few weeks ago in the Friday Lean Team meeting, we agreed that we should amend the IFB to include the requirement that the successful bidder have an integrated payroll module. Could we go ahead and update our document so we can be ready to go if something shakes loose?

Also, should we include a requirement for integrated HRIS?

Without spending lots of effort, we might want to give thought to what changes we would need if we got funding for an enterprise-wide project. Perhaps that is already done.

Thanks.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, December 13, 2010 7:01 PM
To: Ewing, Robyn
Subject: RE: PAC

Categories: Reviewed for Open Records Copying

Hi Robyn

Thanks for the feedback. I think the trustees are on the right path to consider ways to help keep performing arts a mandate in their mission.

Terry

From: Ewing, Robyn [Robyn.Ewing@Williams.com]
Sent: Monday, December 13, 2010 5:03 PM
To: Simonson, Terry
Subject: RE: PAC

Hi Terry,

I think you did a great job explaining to the group what was going on. I saw Ken Busby later that day and he thought you did a good job of covering the topic and addressing the questions.

Robyn

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Monday, December 13, 2010 1:23 PM
To: Ewing, Robyn
Subject: PAC

Hi Robyn

Sorry I couldn't stay longer Friday to visit with you after the PAC Trustee Meeting.

Do you think it went okay? Did I cover the topics and concerns adequately in your view?

Thanks Robyn

Terry A. Simonson
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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, December 13, 2010 11:48 AM
To: Phil Lakin, Jr.
Subject: RE: Planning

Categories: Reviewed for Open Records Copying

No approval to hire is needed. This is a request of \$100k that includes a partial years salary and search costs. We are thinking that the annual salary will ultimately be in the \$140k range but that will depend in part on the person the position is offered to. I will check to see if the money for a search firm has to be approved. It may be that if there is a contract between TCF/GKFF and a search firm that no money actually comes to the city and this can be bypassed.

From: Phil Lakin, Jr. [mailto:plakin@TULSACF.ORG]
Sent: Monday, December 13, 2010 10:56 AM
To: Simonson, Terry
Subject: RE: Planning

Questions -- Is the approval of the City Council required to hire? Or, is it merely approval of the budget to hire an individual? Also, if TCF/GKFF makes a grant for the search firm, does it have to be approved by City Council?

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Monday, December 13, 2010 8:48 AM
To: Phil Lakin, Jr.
Subject: Planning

Phil

Just checking in to see if anything was decided at your last board meeting regarding the planning director/department initiatives. Thanks

Terry A. Simonson
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tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, December 13, 2010 8:49 AM
To: Beyer, Vickie
Subject: RE: Lean Team

Categories: Reviewed for Open Records Copying

Okay. Thanks for the heads up

-----Original Message-----

From: Beyer, Vickie
Sent: Monday, December 13, 2010 6:59 AM
To: Simonson, Terry
Subject: Re: Lean Team

May want to cancel this week, too. All members of the MRO will be in the costing class.

On Dec 10, 2010, at 9:38 AM, "Simonson, Terry" <TSIMONSON@cityoftulsa.org> wrote:

> We need to cancel today's lean team meeting. Preston is out today and
> I have to attend the economic development commission meetings from
> 1-4.
>
>
>
> Have a good weekend.
>
>
> Terry A. Simonson
>
> General Counsel and Chief of Staff
>
> Office of the Mayor
>
> 175 E. 2nd St., 15th Floor
>
> Tulsa, OK 74103
>
> 918.596.7407
>
> tsimonson@cityoftulsa.org
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> Fax: 918.596.9010
>
>

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Sunday, December 12, 2010 6:38 AM
To: Beyer, Vickie
Subject: RE: AFSCME

Categories: Reviewed for Open Records Copying

I think it would be good if you would call Jack Neely and report to him the response and reactions from the PAC trustees last week. It appeared they would be open to what we have talked with Jack about. It may be that he wants to contact the Chairman, Bill Von Glohn, to talk more about that. Thanks

From: Beyer, Vickie
Sent: Friday, December 10, 2010 11:59 AM
To: Powell, Joyce
Cc: Nannarone, Melissa; Felix-Warwick, Erica; Simonson, Terry
Subject: AFSCME

Please work with Melissa Nannarone to schedule an initial meeting (and any meetings after that). Terry is committed to these meetings and will be available.

January is fine. My Outlook calendar is current.

Thanks.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, December 10, 2010 11:42 AM
To: Benge, Chris
Subject: RE: Bills

Categories: Reviewed for Open Records Copying

Thanks for your good work getting this done.

From: Benge, Chris
Sent: Friday, December 10, 2010 11:37 AM
To: Bartlett, Dewey; Simonson, Terry; Twombly, Jim
Subject: Bills

Here's the latest on bill filings. Sullivan has surplus sinking funds an joint county/city purchasing agreements.

Sen. Marlett has the tax collection piece per CTAG and Scott Adkins.

Sen. Stanislawski has the increase in paying judgments. I would like to get a House bill too ideally, but have not had a chance to get that done.

Sen. Bingman and Ron Peters are filing energy authority bill each. Peters has several bills and may end up farming this one out, but said he was interested in carrying himself.

Chris Benge
City of Tulsa
918 596-7458
cbenge@cityoftulsa.org

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, December 10, 2010 9:05 AM
To: Beyer, Vickie
Subject: RE: AFSCME

Categories: Reviewed for Open Records Copying

Do you know where I am going in the PAC at 10:00? Preston won't be there.

From: Beyer, Vickie
Sent: Wednesday, December 08, 2010 4:33 PM
To: Powell, Joyce
Cc: Simonson, Terry; Felix-Warwick, Erica; Factor, Ken
Subject: RE: AFSCME

Committee/sub-committee. I see that each contract is slightly different. Please recommend how we should proceed. Thanks.

From: Simonson, Terry
Sent: Wednesday, December 08, 2010 4:23 PM
To: Beyer, Vickie
Subject: RE: AFSCME

Is there a section 17.3 that talks about a joint subcommittee on productivity and efficiency that might work better?

From: Beyer, Vickie
Sent: Wednesday, December 08, 2010 3:47 PM
To: Powell, Joyce
Cc: Felix-Warwick, Erica; Factor, Ken; Simonson, Terry
Subject: RE: AFSCME

Terry Simonson is eager to get the Labor Management Committee in place to ensure good discussion and information sharing regarding the KPMG surveys. Joyce, if we combine groups, does that mean we may have as many as 25 union reps (5 per unit) in attendance? Would the Mayor need to appoint management representatives?

Thanks for your help.

From: Powell, Joyce
Sent: Wednesday, December 08, 2010 11:28 AM
To: Beyer, Vickie
Cc: Felix-Warwick, Erica; Factor, Ken
Subject: RE: AFSCME

Except for the OT/AT Collective Bargaining Agreement (CBA), each of the AFSCME CBAs contain a "contracting out" article which addresses notification of the Union of possible contracting out of work or City services performed by Employees covered by the CBA. The AO and EC CBAs also require discussions concerning any permanent changes to staffing levels. The article numbers are:

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IT/IS - Article 17 (awarded by Arbitrator, different timeframes, etc)

AO - Section 41.3 - .5

EC - Section 41.3 - .5

Each CBA does provide for a quarterly Labor Management Committee meeting. I normally make an annual schedule of meetings, however, many of them are cancelled due to lack of agenda items or when we are heavy into negotiations. LMC would be a good forum for discussion of the KPMG items if you want the Union's input or opinion. We emphasize that the meetings are not negotiation sessions. Michael Rider and I have discussed scheduling meetings beginning in January (we normally have a meeting with a different unit each month). Let me know if you want to present any of KPMG ideas and to which groups. We can also combine groups.

Joyce

From: Beyer, Vickie
Sent: Tuesday, December 07, 2010 6:50 PM
To: Powell, Joyce
Cc: Felix-Warwick, Erica
Subject: AFSCME

ARTICLE 17 – LABOR-MANAGEMENT RELATIONS

Section 17.1 Representatives of the OT/AT Unit, not to exceed five (5) in number and from different departments, and representatives of the Employer will meet at least four times annually at mutually agreed upon times for up to two (2) hours to discuss matters of mutual concern relating to the interpretation, application, or administration of this Agreement and existing work rules which affect Employees. Each party will prepare and submit an agenda to the other party one (1) week prior to the scheduled meeting. Productivity and efficiency may be included in the topics of discussion.

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Is this the committee that we should activate in view of the upcoming analyses of the KPMG recommendations?

Is there another part of the contract that addresses when we notify the union of possible changes or elimination of jobs?

Thanks for your help.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, December 10, 2010 5:21 AM
To: Simonson, Terry

Categories: Reviewed for Open Records Copying

Describe 1-3 potential problems to address
Development of an RFP for EMS services
Economic development competitiveness
KPMG recommendations

City is well positioned to utilize resources offered
Commitment to act by Mayor - Letter of Intent from Mayor
Complete access provided to all high level managers

How a grant has the potential to enhance the city's capacity to act on key issues
Provides a planning document and clear direction towards a resolution
Information is the key to well grounded decision making. And information developed from all sides of an issue and then blended into a proposed course of action will provide the clarity on possible benefits, outcomes and consequences

City is ready to match IBM's investment with its own investment of time and talent
Mayor has advised those department heads and senior management staff associated with the requested projects that if selected they are to commit whatever time or additional staff that is necessary

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Thursday, December 09, 2010 2:00 PM
To: Benge, Chris
Subject: RE: Bill requests

Categories: Reviewed for Open Records Copying

Thanks Chris. Remember to check with Jim Twombly to see if OML is doing something with the energy bill. If not, lets find our own sponsor. Thanks

-----Original Message-----

From: Benge, Chris
Sent: Thursday, December 09, 2010 1:55 PM
To: Pat Paddleford
Cc: Simonson, Terry
Subject: RE: Bill requests

Pat,

The other requests we have deal with the possible creation of two authorities. The first would be a River Development Authority charged with river development here in Tulsa and other cities along the river.

The other would be a Multi-Modal of Multi-Transportation Authority for the purpose of addressing the airport, port of Catoosa, and rail line that currently exist around the Tulsa Airport area. We are thinking of some coordination of these transportation modes will create economic opportunities in the future.

I hope this helps. If you have any questions please don't hesitate to call.

Chris Benge
City of Tulsa
918 596-7458
cbenge@cityoftulsa.org

-----Original Message-----

From: Pat Paddleford [<mailto:paddlefordpa@okhouse.gov>]
Sent: Thursday, December 09, 2010 9:25 AM
To: Benge, Chris
Subject: FW: Bill requests

Sorry - guess Dan was a busy beaver yesterday requesting bills!
P.

-----Original Message-----

From: Daniel Sullivan
Sent: Wednesday, December 08, 2010 10:04 AM
To: Sue A. Derr; Dawn Marks
Cc: Pat Paddleford
Subject: Bill requests

I will need a few bill requests that came out of our Municipal Finance Task Force.

One would deal with inter local agreements between cities and counties. I want to remove the population barriers that prohibit some of these agreements.

Another would relate to changes to sinking funds. This would allow municipalities to vote on changes to their sinking fund balances to be used for other functions

The third bill would allow cities and counties to have agreements that could consolidate services, purchasing power, etc. The idea would be to give them freedom to collectively choose what those agreements would involve.

Dawn, I have I missed anything from our task force report?

Dan Sullivan

Sent from my iPad

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Thursday, December 09, 2010 9:32 AM
To: Bengé, Chris
Subject: RE: Bill requests

Categories: Reviewed for Open Records Copying

Great. Looks like Dan is on the ball!

-----Original Message-----

From: Bengé, Chris
Sent: Thursday, December 09, 2010 9:30 AM
To: Simonson, Terry
Subject: FW: Bill requests

Terry,

This is what Pat sent as verification Dan has asked for bill reservations.

Chris Bengé
City of Tulsa
918 596-7458
cbenge@cityoftulsa.org

-----Original Message-----

From: Pat Paddleford [<mailto:paddlefordpa@okhouse.gov>]
Sent: Thursday, December 09, 2010 9:25 AM
To: Bengé, Chris
Subject: FW: Bill requests

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 08, 2010 4:23 PM
To: Beyer, Vickie
Subject: RE: AFSCME

Categories: Reviewed for Open Records Copying

Is there a section 17.3 that talks about a joint subcommittee on productivity and efficiency that might work better?

From: Beyer, Vickie
Sent: Wednesday, December 08, 2010 3:47 PM
To: Powell, Joyce
Cc: Felix-Warwick, Erica; Factor, Ken; Simonson, Terry
Subject: RE: AFSCME

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Thanks for your help.

From: Powell, Joyce
Sent: Wednesday, December 08, 2010 11:28 AM
To: Beyer, Vickie
Cc: Felix-Warwick, Erica; Factor, Ken
Subject: RE: AFSCME

Except for the OT/AT Collective Bargaining Agreement (CBA), each of the AFSCME CBAs contain a "contracting out" article which addresses notification of the Union of possible contracting out of work or City services performed by Employees covered by the CBA. The AO and EC CBAs also require discussions concerning any permanent changes to staffing levels. The article numbers are:

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Joyce

From: Beyer, Vickie
Sent: Tuesday, December 07, 2010 6:50 PM
To: Powell, Joyce
Cc: Felix-Warwick, Erica
Subject: AFSCME

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To: Beyer, Vickie
Subject: RE: AFSCME

Categories: Reviewed for Open Records Copying

Great. Thanks for keeping this moving!

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Is there another part of the contract that addresses when we notify the union of possible changes or elimination of jobs?

Thanks for your help.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, December 07, 2010 7:08 PM
To: Jeff Stava
Subject: RE: KPMG Time

Categories: Reviewed for Open Records Copying

Ok. Call Wednesday.

From: Jeff Stava [JStava@TULSACF.ORG]
Sent: Tuesday, December 07, 2010 4:01 PM
To: Simonson, Terry
Subject: Re: KPMG Time

Terry,

Please call me at 629-1878 to discuss this.

Thanks,

Stava

J. Stava
Tulsa Community Foundation

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Tuesday, December 07, 2010 03:46 PM
To: Jeff Stava; Doerflinger, Preston <PDOERFLINGER@cityoftulsa.org>
Subject: KPMG Time

Jeff and Preston

I asked Bill to break down by personnel and time per week what their effort would entail. His response is attached. Given that they are committing 40 hours a week, with staff on site a full three weeks of each month beginning month one (which is probably January) I think we bring them on and blend Michael in when he is able to ramp up his hours, which according to his proposal, would be around April/May. Then it transitions over to Michael to guide the MRO as KPMG winds down. I think we can sufficiently control our costs with a tighter written contract with KPMG and better oversight controls at our end.

Terry

From: Zizic, William [mailto:wzizic@KPMG.com]
Sent: Monday, December 06, 2010 4:08 PM
To: Simonson, Terry
Subject: RE: Questions

Terry,

The attached sheet hopefully addresses your questions. If any clarification is needed, just let me know.

Also, let me know if you'd like to set a time to talk this week -- look forward to hearing from you!

Bill

William F. Zizic | Advisory - Business Effectiveness | KPMG LLP

303 E. Wacker Dr.
Chicago, IL 60601
Office: 312-665-2354
Mobile: 312-259-2869
Fax: 312-277-9496
Email: wzizic@kpmg.com

From: Simonson, Terry [<mailto:TSIMONSON@cityoftulsa.org>]
Sent: Saturday, December 04, 2010 5:37 PM
To: Zizic, William
Subject: Questions

Hi Bill

I will call you next week to tell you whats going on. In the meantime, can you tell me this about your latest proposal:

1. A estimated percentage breakdown of time on the project for each employee assigned to the project.
2. Can you break your hours down to a per month basis?

Thanks

Terry

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, December 07, 2010 3:46 PM
To: Jeff Stava; Doerflinger, Preston
Subject: KPMG Time
Attachments: Tulsa Managed Comp Effort Detail.pdf
Categories: Reviewed for Open Records Copying

Jeff and Preston

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William F. Zizic | Advisory - Business Effectiveness | KPMG LLP

303 E. Wacker Dr.
Chicago, IL 60601
Office: 312-665-2354
Mobile: 312-259-2869
Fax: 312-277-9496
Email: wzizic@kpmg.com

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Terry

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, December 07, 2010 3:14 PM
To: Beyer, Vickie
Subject: RE: MFD for MRO Office

Categories: Reviewed for Open Records Copying

Sounds good to me.

From: Beyer, Vickie
Sent: Tuesday, December 07, 2010 2:16 PM
To: Stout, Ben; Sherman, Pam
Cc: Simonson, Terry; Young, Blaine; Criswell, Cathy; Brader, Kelly; Crossland, Cheral
Subject: RE: MFD for MRO Office

Cheral Crossland showed me an unused (or very seldom used) machine in the north copy room on 15. She suggested we use that one instead of getting another, and it sounds like a great idea to me.

From: Stout, Ben
Sent: Tuesday, December 07, 2010 8:26 AM
To: Sherman, Pam
Cc: Simonson, Terry; Beyer, Vickie; Young, Blaine; Criswell, Cathy; Brader, Kelly
Subject: RE: MFD for MRO Office

Thanks Pam!

From: Sherman, Pam
Sent: Tuesday, December 07, 2010 8:19 AM
To: Stout, Ben
Cc: Simonson, Terry; Beyer, Vickie; Young, Blaine; Criswell, Cathy; Brader, Kelly
Subject: MFD for MRO Office

Ben, the MFD has been ordered. Service ticket number is 103669. Anticipated delivery date, December 20th or 21st. I'll keep you posted on the date as it is firmed up. Pam

Pamela Sherman

Right of Way Administration and
Support Manager
Phone 918.596.7619
Fax 918.699.3476
psherman@cityoftulsa.org

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, December 07, 2010 9:53 AM
To: Jeff Stava
Subject: FW:
Attachments: KPMG and Michael Brink Proposals Analysis.doc
Categories: Reviewed for Open Records Copying

Jeff

I did an analysis of the two proposals this weekend and have it attached. Preston and I have talked about it. This is just a budget analysis. From an initial cost basis, Brinks is greater than KPMG anywhere from \$84k to \$200k depending upon which of his managed competition costs are used.

I am now working on how the operations of these two proposals can be blended and who would do what. I'll get that to you as soon as I have something.

Terry

From: terrysimonson@aim.com [mailto:terrysimonson@aim.com]
Sent: Tuesday, December 07, 2010 5:52 AM
To: Simonson, Terry
Subject:

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Sunday, December 05, 2010 11:30 AM
To: Crooks, Edwin
Cc: Wong, Jeffrey S; Hamer, Ted; Kelly, Liam
Subject: RE: Water PPP Follow-Up

Categories: Reviewed for Open Records Copying

Ed
Its my understanding that the utility authority is working up an RFP but I have not seen it so I don't know what the scope will be. I think they may finalize it later this month. I'll see if I can find out more about it and let you know. Thanks

Terry

From: Crooks, Edwin [ecrooks@KPMG.com]
Sent: Sunday, December 05, 2010 9:52 AM
To: Simonson, Terry
Cc: Kelly, Liam; Wong, Jeffrey S; Hamer, Ted
Subject: Water PPP Follow-Up

Terry,
Hopefully this e-mail finds you well and enjoying the holiday season. Liam and I wanted to follow-up with you on any questions you may have regarding the draft letter we submitted for Tulsa Water. As we initially discussed on the phone, our approach is to take the project one step at a time and give you objective advice that will help you decide whether - and how - to move the project forward into each successive stage.
If you have time over the next few weeks we would welcome the opportunity to discuss our work in person and how we might fine tune the approach outlined in our draft letter in order to better meet your needs.

Very Best Regards,
Liam Kelly & Ed Crooks
Ed Crooks
Managing Director
Infrastructure Advisory
KPMG LLP
Cell: 571.226.7222
Fax: 410.558.6243
ecrooks@kpmg.com

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Sunday, December 05, 2010 7:23 AM
To: Beyer, Vickie
Subject: RE: MRO

Categories: Reviewed for Open Records Copying

I think the two of them can work together though as I have gone through their two proposals Michael's is between \$84k and \$200k over the KPMG proposal to do the same things depending upon which of his numbers I use. I don't know how realistic it is him being an employee as this has never been proached with him. I have also thought about having only 3 positions being posted but we can't afford to let you go. Your too valuable and plugged into my thinking and where this effort needs to go. I spoke with Cathy about her returning to the risk management services after the first of the year only this time make it a more meaningful operation and more inclusive than it was before. I think she would like that and is working up what a new and improved risk management dept would look like and how it would operate.

Sooner Victory!!

From: Beyer, Vickie
Sent: Saturday, December 04, 2010 7:19 PM
To: Simonson, Terry
Subject: Re: MRO

If Michael comes in April as an employee, then there is never an overlap of consultants. He can work With KPMG, not in competition with them. And it would probably cost a lot less. Plus he would be in place to help prevent KPMG overruns.

I'm willing to give up my spot. We can talk about other ways I can support the effort.

Post 3 jobs in January. Post the manager job after that so any internals (Cathy) will be in probation and not eligible to apply. Just makes it easier.

Go, Sooners.

On Dec 4, 2010, at 6:12 AM, "Simonson, Terry" <TSIMONSON@cityoftulsa.org> wrote:

Thanks for these thoughts. It addresses one of the two concerns of the foundation. They think he would fit nicely in that role. Thier other concern is cost overruns by KPMG. We need someone who can hit the ground the first of January and committ a great deal of time. KPMG can, Michael can't.

I can see Bill starting in January to ramp up the process but we only use them for 6 months. Starting in April (when Michaels time is more open) he comes on board. We have an overlap of three months (Apil to June) where they are both there. Starting in July KPMG is gone and Michael stays on board at least through September. This would accomplish several things: We get started hard ealier, cuts the total time we need anyone from 12 to 9 months (January through September) but we get 6 months of each of them, should help cap and cut the total costs, provides a three month transition period with both of them here during the most critical months (April through June) to find savings, allows time to see if Michael is interested in being more full time

I've got more thinking to do about this and other scernios. Stay warm, too.

From: Beyer, Vickie
Sent: Friday, December 03, 2010 5:17 PM

To: Simonson, Terry
Subject: MRO

Suppose we hire Michael as a City employee to run the MRO? If he is going to run it, it would be good to own him. There is probably someone on the temporary team who would consider rolling out to support the group as a contractor. ☺

As you strategize this weekend, keep that card in your pocket. It might be the way to have both Michael and KPMG onboard.

Stay warm!

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Saturday, December 04, 2010 5:31 PM
To: Jeff Stava
Subject: RE: Council and Survey

Categories: Reviewed for Open Records Copying

Thanks. I will. I've been working on the proposal comparisons and have some questions for Bill. I'll pull it together for you next week and let you know what I learn from him.

From: Jeff Stava [JStava@TULSACF.ORG]
Sent: Saturday, December 04, 2010 5:12 PM
To: Simonson, Terry
Cc: pdoreflinger@aim.com
Subject: Re: Council and Survey

Great idea. Let us know what Joe says.

J. Stava
Tulsa Community Foundation

From: Simonson, Terry [<mailto:TSIMONSON@cityoftulsa.org>]
Sent: Saturday, December 04, 2010 05:11 PM
To: Jeff Stava
Cc: pdoreflinger@aim.com <pdoreflinger@aim.com>
Subject: RE: Council and Survey

No matter what they say about the survey we're pushing ahead with no delay. I can see them trying some of their bullshit to either slow it down or try to politicize it to their advantage. Some may be afraid to hear what their constituents have to say. I think I will also have a private meeting with Joe Worley to tell him what's up but we want no press. I'm thinking of doing that because someone on the council won't be able to keep their mouth shut and will end up telling PJ or Brian. If Joe knows they get the story when the survey is done, he'll keep a lid on the press.

From: Jeff Stava [JStava@TULSACF.ORG]
Sent: Friday, December 03, 2010 2:01 PM
To: Simonson, Terry; Doerflinger, Preston
Subject: RE: Council and Survey

Great points. Thanks.

From: Simonson, Terry [<mailto:TSIMONSON@cityoftulsa.org>]
Sent: Friday, December 03, 2010 11:12 AM
To: Jeff Stava; Doerflinger, Preston
Subject: Council and Survey

There is one other very important point you may want to make or may be asked about by councilors. Its actually two questions with one answer:

2 questions

What will the survey information be used for?
Why are we doing it now or should we wait?

1 answer

We are taking a new more publicly inclusive approach to strategic planning and budgeting than has ever been done before. Rather than just department heads or councilors sitting around throwing out what they personally believe to be the priorities for planning and spending, we are going to the citizens ("customers") first and ask them what their priorities are.

The survey and its results are the first step in a 4 step process:

1. Ask the citizens their wants, needs, priorities on where the city should be directing its resources, both money and manpower.
2. Take the information received from the survey and have each department build their strategic plan around the information received from the surveys pertinent to their departments.
3. Develop a performance budget which shows how the financial resources will be used to implement their strategic plan
4. Develop performance measures

This is how the survey will be used. And the planning and budget process for the Mayor's office begins in January which is why we need to get this under way sooner rather than later.

Terry A. Simonson
General Counsel and Chief of Staff
Office of the Mayor
175 E. 2nd St., 15th Floor
Tulsa, OK 74103
918.596.7407
tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Saturday, December 04, 2010 5:11 PM
To: Jeff Stava
Cc: pdorefflinger@aim.com
Subject: RE: Council and Survey

Categories: Reviewed for Open Records Copying

No matter what they say about the survey we're pushing ahead with no delay. I can see them trying some of their bullshit to either slow it down or try to politicize it to their advantage. Some may be afraid to hear what their constituents have to say. I think I will also have a private meeting with Joe Worley to tell him whats up but we want no press. I'm thinking of doing that because someone on the council wont' be able to keep their mouth shut and will end up telling PJ or Brian. If Joe knows their get the story when the survey is done, he'll keep a lid on the press.

From: Jeff Stava [JStava@TULSACF.ORG]
Sent: Friday, December 03, 2010 2:01 PM
To: Simonson, Terry; Doerflinger, Preston
Subject: RE: Council and Survey

Great points. Thanks.

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Friday, December 03, 2010 11:12 AM
To: Jeff Stava; Doerflinger, Preston
Subject: Council and Survey

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Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Saturday, December 04, 2010 6:13 AM
To: Beyer, Vickie
Subject: RE: MRO

Categories: Reviewed for Open Records Copying

Thanks for these thoughts. It addresses one of the two concerns of the foundation. They think he would fit nicely in that role. Thier other concern is cost overruns by KPMG. We need someone who can hit the ground the first of January and committ a great deal of time. KPMG can, Michael can't.

I can see Bill starting in January to ramp up the process but we only use them for 6 months. Starting in April (when Michaels time is more open) he comes on board. We have an overlap of three months (Apil to June) where they are both there. Starting in July KPMG is gone and Michael stays on board at least through September. This would accomplish several things: We get started hard ealier, cuts the total time we need anyone from 12 to 9 months (January through September) but we get 6 months of each of them, should help cap and cut the total costs, provides a three month transition period with both of them here during the most critical months (April through June) to find savings, allows time to see if Michael is interested in being more full time

I've got more thinking to do about this and other scernios. Stay warm, too.

From: Beyer, Vickie
Sent: Friday, December 03, 2010 5:17 PM
To: Simonson, Terry
Subject: MRO

Suppose we hire Michael as a City employee to run the MRO? If he is going to run it, it would be good to own him. There is probably someone on the temporary team who would consider rolling out to support the group as a contractor.
☺

As you strategize this weekend, keep that card in your pocket. It might be the way to have both Michael and KPMG onboard.

Stay warm!

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, December 03, 2010 11:29 AM
To: Kevin Canfield
Subject: RE: Thanks, Terry. I'll call.

Categories: Reviewed for Open Records Copying

Kevin

The money to fund the planning director and the zoning work isn't coming from just one source but several sources that are pooled together to cover several budget items.

We are pooling the collection of delinquent sales tax, reimbursements to the city, and miscellaneous income to the city.

We are asking that the budget be amended to provide \$100k for a 6 month salary for a planning director and \$300k to retain a professional firm to begin the revisions of the zoning code as recommended in PlaniTulsa.

Terry

-----Original Message-----

From: Kevin Canfield [mailto:Kevin.Canfield@tulsaworld.com]
Sent: Thursday, December 02, 2010 10:13 AM
To: Simonson, Terry
Subject: Thanks, Terry. I'll call.

>>> "Simonson, Terry" <TSIMONSON@cityoftulsa.org> 12/2/2010 6:14 AM >>>

Kevin

Call me later to discuss. Sometime after 3:30.

Terry

From: terrysimonson@aim.com [terrysimonson@aim.com]
Sent: Thursday, December 02, 2010 6:13 AM
To: Simonson, Terry
Subject:

Kevin

Please use any of these remarks in the story

Ideally, what should have happened was the city have hired the planning director before the PlaniTulsa process began so that he or she would have been involved from the start. As it is we have been moving forward as fast as we can since the report was completed this past fall. When the PlaniTulsa process concluded the implementation of many parts of have a planning function within the city worthy of being the 45th largest city in the country began. We resolved that we would not take a piecemeal approach towards such a critically important city function.

We are taking a more comprehensive approach which has included: developing a reorganization plan of city planning functions, some of which are scattered in other departments; studying and validating the KPMG report recommendations which address our planning services; dovetailing the PlaniTulsa report into the recently released RFP for the city's first sustainability master plan; developing a request for proposals to solicit the best firms in the country for rewriting portions of our zoning code as the PlaniTulsa report recommended;

identifying funding needed for these changes, and updating a new job description for the planning directors position.

It is our plan to present this to the city council within the next two weeks. Once the council approves the funding, the search for the planning director will begin in earnest.

Once hired, the planning director will have a number of tasks waiting on his or her desk such as: analyzing those planning functions currently being done by INCOG to determine what if any should be brought in house with the city's planning department; studying the viability and practicality of the city of Tulsa having its own planning commission, and tackling how to coordinate the many plans which have already been done in addition to PlaniTulsa, such as the downtown master plan, the downtown housing study, and others.

The best thing we can do is realize that this process is best started in the hands of a planning professional and not with those who do not have this background. We don't want to politicize this process.

This email has been scanned by the MessageLabs Email Security System.
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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, December 03, 2010 4:57 AM
To: plakin@tulsacf.org
Subject: FW: Thanks, Terry. I'll call.

Categories: Reviewed for Open Records Copying

PHIL

HERE IS SOME BACKGROUND INFO I SENT CANFIELD FOR HIS STORY THIS WEEKEND. YESTERDAY WE SENT TO THE CITY COUNCIL A BUDGET AMENDMENT WHICH INCLUDES \$100K FOR PLANNING DIRECTOR SALARY AND \$300K TO RETAIN PROFESSIONAL SERVICES TO REWRITE ZONING CODE TO BE CONSISTENT WITH PLANITULSA. THE EARLIEST THE COUNCIL CAN APPROVE THIS REQUEST IS THE 16TH.

JUST WANTED YOU TO KNOW.

TERRY

From: Kevin Canfield [Kevin.Canfield@tulsaworld.com]
Sent: Thursday, December 02, 2010 10:12 AM
To: Simonson, Terry
Subject: Thanks, Terry. I'll call.

>>> "Simonson, Terry" <TSIMONSON@cityoftulsa.org> 12/2/2010 6:14 AM >>>
Kevin
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Sent: Thursday, December 02, 2010 6:13 AM
To: Simonson, Terry
Subject:

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, December 03, 2010 4:33 AM
To: Kevin Canfield
Subject: RE: Thanks, Terry. I'll call.

Categories: Reviewed for Open Records Copying

Kevin

A new piece for the story. Yesterday the Mayor signed off on a budget amendment to send to the city council which includes the funds for the planning director and the consulting services to rewrite the zoning code. According to the city council process, it should come before the council for a final vote on the 16th.

Terry

From: Kevin Canfield [Kevin.Canfield@tulsaworld.com]
Sent: Thursday, December 02, 2010 10:12 AM
To: Simonson, Terry
Subject: Thanks, Terry. I'll call.

>>> "Simonson, Terry" <TSIMONSON@cityoftulsa.org> 12/2/2010 6:14 AM >>>

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Terry

From: terrysimonson@aim.com [terrysimonson@aim.com]
Sent: Thursday, December 02, 2010 6:13 AM
To: Simonson, Terry
Subject:

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Thursday, December 02, 2010 6:14 AM
To: kevin.canfield@tulsaworld.com
Subject: FW:

Categories: Reviewed for Open Records Copying

Kevin
Call me later to discuss. Sometime after 3:30.

Terry

From: terrysimonson@aim.com [terrysimonson@aim.com]
Sent: Thursday, December 02, 2010 6:13 AM
To: Simonson, Terry
Subject:

Kevin
Please use any of these remarks in the story

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, December 01, 2010 1:39 PM
To: Beyer, Vickie
Subject: RE: Budget Instructions

Categories: Reviewed for Open Records Copying

Yes I think it would be good to at least get their thoughts. I would think that TUMA would want that as well.

From: Beyer, Vickie
Sent: Wednesday, December 01, 2010 1:26 PM
To: Simonson, Terry
Cc: Criswell, Cathy; Brader, Kelly; Bracken, Lydia
Subject: RE: Budget Instructions

I had an afterthought.

Terry, when we planned to meet with Charles, we were going to ask him to require each of his section managers to submit budgets that reflected some type of cost savings. Do we still want to ask that of our enterprise friends?

From: Bracken, Lydia
Sent: Wednesday, December 01, 2010 1:03 PM
To: Simonson, Terry
Cc: Criswell, Cathy; Brader, Kelly; Beyer, Vickie
Subject: Budget Instructions

Terry,

Here are our suggestions for budget instructions.

Strategic Planning

Create or update your department's strategic planning to include a mission statement, goals and objectives, action plans, and performance indicators. Strategic planning guidance has been prepared and distributed by the Office of Management Review. If you have questions or need assistance, contact Cathy Criswell.

Service Level Agreements

One of the opportunities for efficiency and effectiveness, recommended in the management guide provided by KPMG, is utilizing internal and external customer service level agreements with clearly defined service-level expectations and provisions in place for non-performance. Provide a list of Service Level Agreements/Agreements of Service that have been established between your department and other city departments, authorities, boards and commissions, or external customers. Also, provide a list of internal and external entities that have a service relationship with your department and could benefit from improving existing or establishing new service level agreements.

Managing Change

Review the strategic opportunities suggested for your department in the Management Guide prepared by KPMG. List the top three opportunities recommended in the report, in order of priority, that you believe should be implemented along with a brief explanation of why each has been chosen. Also, provide any additional ideas, not addressed in the KPMG Management Guide, for increased effectiveness, efficiency and cost savings that could be implemented within your department or city-wide.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 30, 2010 9:26 PM
To: Beyer, Vickie
Subject: RE: Water Distribution Meeting Tomorrow

Categories: Reviewed for Open Records Copying

Thanks. FYI my cell is 724 3005 I never answer my city cell phone.

From: Beyer, Vickie
Sent: Tuesday, November 30, 2010 8:51 PM
To: Simonson, Terry; Nannarone, Melissa
Subject: Re: Water Distribution Meeting Tomorrow

Will do?

Melissa, please check Terry's schedule and recommend two dates/times in the near future. Thanks.

On Nov 30, 2010, at 8:29 PM, "Simonson, Terry" <TSIMONSON@cityoftulsa.org> wrote:

Lets arrange a meeting with Rider as soon as possible. Can you?

From: Beyer, Vickie
Sent: Tuesday, November 30, 2010 4:27 PM
To: Simonson, Terry; Doerflinger, Preston
Cc: Felix-Warwick, Erica
Subject: Water Distribution Meeting Tomorrow

I received a call from Erica. She has been contacted by AFSCME President Michael Rider. He has received numerous calls from concerned Distribution employees that there will be massive lay-offs soon as a result of the KPMG study. The Distribution group can be quite confrontational, so be prepared.

I called Clayton Edwards to ask that he contact his managers before tomorrow's meeting to dispel this rumor. He agreed to do it.

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Categories: Reviewed for Open Records Copying

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 30, 2010 3:46 PM
To: Felix-Warwick, Erica
Cc: Doerflinger, Preston
Subject: MRO

Categories: Reviewed for Open Records Copying

Erica

Here are some of the projects that the MRO team is working on:

Research and drafting policies/ordinances etc. for a gain sharing program for employees

Developing a strategic planning training module. Sessions with department heads are being arranged currently.

Identifying opportunities for Service Level Agreements between departments where one department provides a service to another department.

Developing supplemental budget instructions to be used in the FY 11 – 12 budget packets to department heads to identify methods to implement KPMG recommendations within their department

Continuing to review and verify information contained in the KPMG report by meeting with department employees

Meeting with employee groups to explain the next steps of implementation

Reviewing best practices from other cities on implementation strategies

Researching managed competition opportunities

Software training on activity based costing and management.

Is this what you were needing?

Terry A. Simonson
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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 30, 2010 3:33 PM
To: Jeff Stava
Cc: Doerflinger, Preston
Subject: RE: Revised Managed Competition Proposal

Categories: Reviewed for Open Records Copying

I can meet anytime Thursday afternoon if that works for you. How about you Preston?

From: Jeff Stava [mailto:JStava@TULSACF.ORG]
Sent: Tuesday, November 30, 2010 2:27 PM
To: Simonson, Terry; Doerflinger, Preston
Subject: RE: Revised Managed Competition Proposal

I have Mike's proposal too. We just finished a conference call and he is making some edits. Can we arrange a time for us to meet and discuss?

Stava

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Tuesday, November 30, 2010 2:25 PM
To: Jeff Stava; Doerflinger, Preston
Subject: FW: Revised Managed Competition Proposal

Jeff and Preston

I received this today from Bill. Their revised, scaled down version. We might be moving in the right direction.

Terry

From: Zizic, William [mailto:wzizic@KPMG.com]
Sent: Tuesday, November 30, 2010 1:51 PM
To: Simonson, Terry
Cc: Wong, Jeffrey S
Subject: Revised Managed Competition Proposal

Terry,

Updated proposal draft is attached. This proposal would focus on designing the managed competition program and executing 6 competition initiatives (vs. the 12 areas in the previous letter).

Also, on page 4 we've priced each of the 6 initiatives separately so that our assistance can scale in accordance with the level of investment available to the City.

We hope this helps and please let us know if there's any question on this. Thanks again,

Bill

William F. Zizic | Advisory - Business Effectiveness | KPMG LLP

303 E. Wacker Dr.
Chicago, IL 60601

Office: 312-665-2354
Mobile: 312-259-2869
Fax: 312-277-9496
Email: wzizic@kpmg.com

From: Simonson, Terry [<mailto:TSIMONSON@cityoftulsa.org>]
Sent: Monday, November 29, 2010 2:44 PM
To: Zizic, William
Subject: RE: KPMG "Point of View" Thought Pieces

Bill

Why don't you move forward with developing a proposal with this alternative approach and I will save with everyone. Thanks

Terry

The information in this email is confidential and may be legally privileged. It is intended solely for the addressee. Access to this email by anyone else is unauthorized. If you are not the intended recipient, any disclosure, copying, distribution or any action taken or omitted to be taken in reliance on it, is prohibited and may be unlawful. When addressed to our clients any opinions or advice contained in this email are subject to the terms and conditions expressed in the governing KPMG client engagement letter.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 30, 2010 3:32 PM
To: Criswell, Cathy; Brader, Kelly; Bracken, Lydia; Beyer, Vickie
Subject: update

Categories: Reviewed for Open Records Copying

FYI
Today we got both proposals: KPMG revisions and Michael Brink's. I have not seen Michaels, it went to Jeff. I am trying to arrange a time to get with Jeff to go over both. Just wanted you to know about this movement.

Terry A. Simonson
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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 30, 2010 2:32 PM
To: Jeff Stava
Subject: RE: Revised Managed Competition Proposal

Categories: Reviewed for Open Records Copying

Made him an offer he couldn't refuse!!!

From: Jeff Stava [mailto:JStava@TULSACF.ORG]
Sent: Tuesday, November 30, 2010 2:31 PM
To: Simonson, Terry
Cc: Doerflinger, Preston
Subject: RE: Revised Managed Competition Proposal

Yes. How did you get that?

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Sure. Let me look and let you know. Sure you noticed got KPMG to cut the cost in half!

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Bill

William F. Zizic | Advisory - Business Effectiveness | KPMG LLP

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Fax: 312-277-9496
Email: wzizic@kpmg.com

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Subject: RE: KPMG "Point of View" Thought Pieces

Bill

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Terry

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Jeff and Preston

I received this today from Bill. Their revised, scaled down version. We might be moving in the right direction.

Terry

From: Zizic, William [mailto:wzizic@KPMG.com]
Sent: Tuesday, November 30, 2010 1:51 PM
To: Simonson, Terry
Cc: Wong, Jeffrey S
Subject: Revised Managed Competition Proposal

Terry,

Updated proposal draft is attached. This proposal would focus on designing the managed competition program and executing 6 competition initiatives (vs. the 12 areas in the previous letter).

Also, on page 4 we've priced each of the 6 initiatives separately so that our assistance can scale in accordance with the level of investment available to the City.

We hope this helps and please let us know if there's any question on this. Thanks again,

Bill

William F. Zizic | Advisory - Business Effectiveness | KPMG LLP

303 E. Wacker Dr.
Chicago, IL 60601

Office: 312-665-2354
Mobile: 312-259-2869
Fax: 312-277-9496
Email: wzizic@kpmg.com

From: Simonson, Terry [<mailto:TSIMONSON@cityoftulsa.org>]
Sent: Monday, November 29, 2010 2:44 PM
To: Zizic, William
Subject: RE: KPMG "Point of View" Thought Pieces

Bill

Why don't you move forward with developing a proposal with this alternative approach and I will save with everyone. Thanks

Terry

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 30, 2010 2:25 PM
To: Jeff Stava; Doerflinger, Preston
Subject: FW: Revised Managed Competition Proposal
Attachments: Tulsa Managed Comp Letter 11-XX-10 DRAFT.pdf

Categories: Reviewed for Open Records Copying

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 30, 2010 12:18 PM
To: Beyer, Vickie
Subject: RE: 911 Center

Categories: Reviewed for Open Records Copying

Let me get back with you. I have to step out now for a short bit.

From: Beyer, Vickie
Sent: Tuesday, November 30, 2010 12:16 PM
To: Simonson, Terry
Subject: RE: 911 Center

I'll watch you eat! I just gobbled here at my desk. Shall I come up?

From: Simonson, Terry
Sent: Tuesday, November 30, 2010 12:11 PM
To: Beyer, Vickie
Subject: RE: 911 Center

Want to have lunch so you can tell me

From: Beyer, Vickie
Sent: Tuesday, November 30, 2010 12:09 PM
To: Simonson, Terry
Subject: RE: 911 Center

Aaargh! Terry, it's time you make me leader! You should hear the wildness. I'm going to jump out the window!!!

From: Simonson, Terry
Sent: Tuesday, November 30, 2010 12:01 PM
To: Beyer, Vickie; Brader, Kelly; Bracken, Lydia; Criswell, Cathy
Subject: 911 Center

While we are still running in place waiting to take off, I would like us to focus our attention on the recommendation in the IT section of the report that recommends moving the 911 operation to the public safety operations. I have visited with both Chief Jordan and the Mayor and they would like this to be a priority.

So, there will need to be some discovery fact finding first on the mechanics to make such a move. (transferring personnel from IT to the TPD, budget changes, any costs involved, etc.) We also need to talk with the Chief about supervision of the employees. I think he can provide this and that might free up an IT supervisor.

I also think it would be helpful to get the statistics from IT on the breakdown of calls (TPD, TFD, Sheriff, EMSA) for the past year

If you guys could work up an implementation plan I think that would be a good start before we pull the trigger on this.

Thanks

Terry A. Simonson
General Counsel and Chief of Staff
Office of the Mayor
175 E. 2nd St., 15th Floor
Tulsa, OK 74103
918.596.7407
tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 30, 2010 12:12 PM
To: Bracken, Lydia
Subject: RE: 911 Center

Categories: Reviewed for Open Records Copying

Great. Let s get together soon so we can talk about it. I think I have some time Wednesday. Check with Melissa

From: Bracken, Lydia
Sent: Tuesday, November 30, 2010 12:10 PM
To: Simonson, Terry; Beyer, Vickie; Brader, Kelly; Criswell, Cathy
Subject: RE: 911 Center

Terry:

We've discussed and I am taking the lead on this. lb

From: Simonson, Terry
Sent: Tuesday, November 30, 2010 12:01 PM
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Subject: 911 Center

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Sent: Tuesday, November 30, 2010 12:01 PM
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Subject: 911 Center
Categories: Reviewed for Open Records Copying

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Categories: Reviewed for Open Records Copying

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Terry

From: Zizic, William [mailto:wzizic@KPMG.com]
Sent: Saturday, November 27, 2010 8:10 AM
To: Simonson, Terry
Subject: RE: KPMG "Point of View" Thought Pieces

Terry

Thanks for the insight on this. I completely understand the need to speed up the savings and reduce the cost. One option I'm thinking of would be to streamline the KPMG proposal to focus on setting up the managed competition program and focusing on key competition initiatives, such as Waves 1, 2, and 3. The competitions definitely have the greatest potential to pay back the soonest and generate the largest savings.

The KPMG onion could easily be scaled back in terms of the strategic planning and re-org initiatives, which I think would be better candidates for the MRO staff to handle without us (and we're always happy to share our opinions on re-orgs and strategic planning/performance management initiatives even if it's not in our proposal explicitly).

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If the all-in target investment is \$700K (\$350k x 2), I can talk to Jeff and Bridget about maximizing the number of competitions included in that amount. I'm happy to pull together a new letter under the scenario above if it's helpful?

Bill

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Email: wzizic@kpmg.com

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Sent: Saturday, November 27, 2010 6:12 AM
To: Zizic, William
Subject: RE: KPMG "Point of View" Thought Pieces

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Terry

From: Zizic, William [wzizic@KPMG.com]
Sent: Friday, November 26, 2010 9:28 AM
To: Doerflinger, Preston; Simonson, Terry; Jeff Stava
Subject: KPMG "Point of View" Thought Pieces

Preston, Terry, Jeff:

I hope the Thanksgiving holiday was enjoyable! As you weigh the decision to partner with KPMG, we wanted to offer some brief thought pieces that may be useful to you in framing your conversations. We developed these pieces to communicate KPMG's "Point of View" on these topics based on our team's nearly 20 years of experience assisting clients in these areas.

We remain vested in your success as a City in acting on the Strategic Review and obtaining the best help available to implement these initiatives. I've attached the "Point of View" slip sheets that cover Activity-Based Costing, Managed Competition, Organizational Transformation, and Strategic Planning/Performance Management.

We're hoping these documents provide a helpful guide in making sure key phases of each process are covered and critical questions relating to each area of assistance are fully addressed. Critical questions are presented under the "How Do Leading Organizations Approach...?" section of each piece (see dotted-line boxes).

As always, please let us know if you have any questions on this collateral or how they are addressed in our proposal. And please remember that we are happy to tailor our proposal further as needed to better meet your needs and available level of investment. Sincerely,

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 29, 2010 11:46 AM
To: Beyer, Vickie
Subject: FW: Meeting Date Set

Categories: Reviewed for Open Records Copying

-----Original Message-----

From: Willis, Carol
Sent: Monday, November 29, 2010 11:37 AM
To: William von Glahn; Chris Cadieux; James McCarthy; Bartlett, Dewey; Ken Busby; Connie Cronley; Robyn Ewing; Robert LaFortune; Nancy Meinig; Jayne Reed; R. Thomas Seymour; Barbara Sturdivant; M. Teresa Valero; John Williams
Cc: Simonson, Terry; Doerflinger, Preston; Nannarone, Melissa; Hamilton, Monica; Scott, John; Elliott, Shirley; Oliverson, Chad; Fendt, Steve; Sharp, Pat
Subject: Meeting Date Set

The meeting with Terry Simonson and Preston Doerflinger has been set for Friday, December 10, at 10:00 a.m. in the PAC Gallery. Although it will be an Executive Committee meeting, all Trustees are encouraged to attend. The KPMG study will be presented and discussed.

Carol

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Saturday, November 27, 2010 1:19 PM
To: jstava@TCF.org; pdoreflinger@cityoftulsa.org; pdoreflinger@aim.com
Subject: FW: KPMG "Point of View" Thought Pieces

Categories: Reviewed for Open Records Copying

In responding to Bill's emails on the status of their proposal I told him we are still studying the proposal but that at this point the city couldn't not afford it's half of the proposal currently on the table. (which is about \$600k) I also told him we needed to reduce the proposal costs and speed up the cost savings before we could give it serious consideration. His response to my email is below.

From: Zizic, William [wzizic@KPMG.com]
Sent: Saturday, November 27, 2010 8:09 AM
To: Simonson, Terry
Subject: RE: KPMG "Point of View" Thought Pieces

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Sent: Friday, November 26, 2010 8:22 AM
To: Simonson, Terry

Categories: Reviewed for Open Records Copying

There are four areas to improve our operations, efficiencies, and employee morale that the Mayor has directed the MRO team to work on.

Gainsharing

Strategic Planning

Service Level Agreements

Budget Instructions to Depts.

Employee interactions

Best Practice Reviews

Confirming and Verifying Report Information

Show them the org chart and project management outline

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, November 24, 2010 8:31 AM
To: Bunney, Mike
Subject: FW: NEED GUIDANCE - EDC and CVB

Categories: Reviewed for Open Records Copying

Wanted you to see the exchange between Vince and I. You have to start at the bottom and work up.

From: Vincent LoVoi [mailto:vincentlovoi@cox.net]
Sent: Tuesday, November 23, 2010 9:52 PM
To: Simonson, Terry
Subject: Re: NEED GUIDANCE - EDC and CVB

Fair questions. Here goes:

WHO: The committee is comprised of me (current EDC chair), Mary Smith (chair-elect), Elliot Nelson (next chair-elect), Dean van Trease, Cassie Reese (member of CVB board AND EDC), and Pete Regan (who worked with Mary over the Spring to review the performance metrics for the CVB. I intentionally did not appoint Steve Mitchell for appearance purposes (though Linda Redemann opined at the last EDC meeting that there's no conflict under the Tulsa conflict of interest rules) but invited him to sit in on our meetings because of his role with the new ownership of the downtown Crowne Plaza/Hyatt. And I asked Mike Bunney to sit on the Committee.

WHAT'S EXPECTED FROM INVITEES: We've asked participants to address three questions: What is the right expectation from a CVB? What is the right selection process? What are the right success metrics?

INVITEES: we've invited the Chamber, Marshall Murdaugh, Aimbridge (the Hyatt group) and any other hotels who would join them, the Tulsa Hotel and Lodging Association, Mike Bunney said he could characterize the KPMG recommendation, and SMG.

TAKE-AWAY: The Committee and most parties (Murdaugh and Chamber) agree that an RFP in-and-of-itself is unlikely to produce an alternative to the Chamber because there simply aren't a lot of vendors offering CVB services. Thus, the question is how to better manage the Chamber (both financially and performance), or how to incubate alternatives, or how to transition to allow alternatives to emerge. None of these are perfect solutions and thus we don't really know what the answer is. I guess if we did we wouldn't need to be doing this.

PRODUCTIVE AND WORTHWHILE: If we can start a dialogue that gets all parties moving toward the same goal, we think we will have accomplished a lot. It won't be done in a day. But the status quo ante is not acceptable -- unreported use of funds, dissension among the hotels, etc.

Hope this helps clarify. I told Page today that the meeting on Tues is intended to get people focused away from personalities and back to the policy questions on the table. Most of us are volunteers and we just want to do the right thing!

Let me know. I guess the best thing you all could do for us would be to communicate to the Chamber board that the should try to work with us on Tues and get the process moving forward. Thanks for all you do.

-- Vince

On Nov 23, 2010, at 9:21 PM, Simonson, Terry wrote:

Vince

I visited with the Mayor today about this. He is fine with the vetting proposal you have in place. He is also fine with letting everyone know that he will seriously consider putting out an RFP for the CVB business next spring. It will be a competition. The winner will assume the role at the end of the contract next year. This is consistent with the KPMG recommendation. To prepare the RFP, it will be important that all of the right people are involved in describing what services are expected from a top flight CVB operation so that the specifications contained in the RFP fully describe what services are expected. Tell me more how you see the plan for Tuesday: who is on the committee, what you expect from the invitees, who do you expect the invitees to be, what do you hope will be the take away from this meeting that you would deem it productive and worthwhile. Thanks

Terry

From: Vincent LoVoi [vincentlovoi@cox.net]
Sent: Tuesday, November 23, 2010 5:27 PM,
To: Simonson, Terry
Subject: NEED GUIDANCE - EDC and CVB

Terry:

Thanks for making the time to join the EDC committee on Tuesday to hear the presentations on the CVB. Regrettably, the session may not be as productive as we hoped. I need your guidance on how to handle the situation.

The chamber had David Page, the banker and one of its board members (whom I don't know), call me today to explain that the Chamber will not present to the EDC on Tuesday . He didn't explain and I probed a bit, but he sidestepped. He also explained that they question whether the EDC has the authority to explore the CVB contract. I asked Page to commit their position to writing and send it to me. I received a note that went further to say in effect that the chamber does not intend to ever meet with the EDC and instead wants to organize an alternative process through Mike Bunney because he is the contract administrator (my signature is on the contract). I've copied Page's note below. N.B., Page's note arrived in two different type-faces.

This is basically a "constitutional question" for the EDC. If we have no authority to learn about the CVB then we're on a fool's errand when we undertake our legal responsibility to recommend use of the hotel/motel tax to the Mayor. We cannot pretend to provide citizen-oversight if we can't ask questions. Moreover, if the contract recipients can shop for a friendlier forum when legitimate questions arise, for example, over the use of funds (our request for an audit which was voted for unanimously in June) and performance (our exploration of the success metrics), then this isn't real oversight in any event.

Thus, I'd like to have your guidance. My inclination is to proceed with our meeting on Tuesday with the other parties and to decline to participate in an "alternative forum" and bring them into our process. But we serve the Mayor and need some clearer guidance. Mike Bunney attended an EDC committee meeting we held last week to plan the oversight process and at which the idea for Tuesday's meeting arose. He said little and certainly did not indicate an intention to undertake a conflicting process. Mike is a member of committee and will be there on Tuesday.

So with that, let me know. Sooner is better obviously because of the holiday. Sorry to drop this in your lap, but I feel like Diogenes and hope I've found the honest man! Feel free to call me at home (743 3622), on my mobile (519 6521), or at either of my offices (582 1226 or 743 8772). Thanks.

-- Vince

Vincent LoVoi

Vince,

Thanks for taking my call today. As I stated in our conversation, I think our objectives regarding the effectiveness of the CVB are aligned. Regarding the Tuesday meeting, we're interested in dialogue on this subject, but have conflicts that make Tuesday unworkable. In addition, we want the right players involved in that discussion, which we think should be representatives of the Chamber, of the THLA, and Mike Bunney, the person who manages our CVB contractual relationship with the city. We welcome the participation of Councilman Westcott and defer to the Mayor whether he wants EDC involved in this discussion in addition to his CVB designee, Mike Bunney. At this point, we believe these are the proper stakeholders to participate in this discussion.

David

David Page

Market President-Tulsa | JPMorgan Chase | OK2-6110 | 15 E. Fifth Street | Tulsa, OK 74103

Office ☎ 918-586-5430 | Cell ☎ 918-629-0721 | Facsimile 📠 918-586-5474 | Email ✉ david.g.page@chase.com

Vincent LoVoi

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, November 24, 2010 7:38 AM
To: Doerflinger, Preston; pdoerflinger@aim.com
Subject: MRO

Categories: Reviewed for Open Records Copying

We have set every Monday from 1:30 to 2:30 as a MRO staff meeting. I think it would be good if you can put this on your calendar. See you Monday. Have a great Thanksgiving.

Terry A. Simonson
General Counsel and Chief of Staff
Office of the Mayor
175 E. 2nd St., 15th Floor
Tulsa, OK 74103
918.596.7407
tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 23, 2010 4:00 PM
To: Karen Keith; Fred Perry
Subject: Admin Servicex

Categories: Reviewed for Open Records Copying

Hi Karen and Fred

A few weeks ago when the city was starting to renegotiate the city's contract with JD Young for our printing needs, I suggested they talk with Admin Services to see if they could do any part of our printing requirements. I bragged extensively on the good work they do. I felt it would be a good partnership and a way for the county to make some additional money. I saw the Memo from Greg and Chad dated November 18th to you. My instruction to my purchasing dept was to tell JD Young that before they would get another contract I wanted them to meet with the county to see if JD Young could sub out some of the work to your Admin Serv. Just wanted to keep you in the loop.

Have a great Thanksgiving.

Terry A. Simonson
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tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 23, 2010 2:08 PM
To: Jeff Stava
Subject: RE: Re:

Categories: Reviewed for Open Records Copying

Got it. Will call. I agree with waiting to talk with KPMG.

From: Jeff Stava [mailto:JStava@TULSACF.ORG]
Sent: Tuesday, November 23, 2010 11:23 AM
To: Simonson, Terry
Subject: Re:

Left VM - call me 629-1878 when you can....

J. Stava
Tulsa Community Foundation

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Tuesday, November 23, 2010 10:47 AM
To: Jeff Stava
Subject:

I sent Shapard the Mayor's suggestions. Should have a new and final survey back, hopefully today. Will send to you. On the KPMG front, I got an email from Bill wanting to talk about where we are at and headed. Have you talked with him lately? I don't mind talking with him about what we are thinking about. Of course, I would not mention Michaels name at this point. Or are you planning to call him?

Terry A. Simonson
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Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 23, 2010 2:04 PM
To: Connelly, Pat
Subject: RE: Deirdre Dexter final pay

Categories: Reviewed for Open Records Copying

Thanks Pat. Also, we will not move forward yet to the council to accept the larger donation by TCF for the KPMG project. They are waiting on some additional information before they make their gift amount final. Just wanted you to know.

From: Connelly, Pat
Sent: Tuesday, November 23, 2010 1:02 PM
To: Simonson, Terry
Subject: RE: Deirdre Dexter final pay

I will check it out and let you know something next week. I don't think there will be a problem as they are keeping some positions open. PC

From: Simonson, Terry
Sent: Tuesday, November 23, 2010 10:44 AM
To: Connelly, Pat
Subject: RE: Deirdre Dexter final pay

I understand. And the Mayor agreed to pay David on an interim basis her monthly salary so when you have a chance please help me reconcile their department budget and where it might be headed down the road with these changes. Thanks

From: Connelly, Pat
Sent: Tuesday, November 23, 2010 8:57 AM
To: Simonson, Terry
Subject: FW: Deirdre Dexter final pay

Terry,
Just an FYI - I know we discussed some savings from leaving the job open for three months but her payout will consume about two months worth. PC

From: Harkey, Glenda
Sent: Monday, November 22, 2010 9:51 AM
To: Connelly, Pat
Subject: Deirdre Dexter final pay

FYI - they are paying out her vacation balance of 336.0 hours @ \$79.0599 = \$26,564

Glenda Harkey
Payroll Manager
175 E Second Suite 885
Tulsa OK 74103
918-596-7519
918-699-3173 (fax)

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 23, 2010 11:14 AM
To: Criswell, Cathy; Brader, Kelly; Bracken, Lydia; Beyer, Vickie
Cc: Doerflinger, Preston
Subject: City Council

Categories: Reviewed for Open Records Copying

Next Thursday, the 2nd, sometime in the afternoon, Preston will be giving the City Council an update on the KPMG project. I think it would be good if each of you could go with him so he can reintroduce you to them, tell them a little more about the MRO office, etc. If time allows, each of you might be prepared to say a word or two about any particular project you are working on.

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Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 23, 2010 10:47 AM
To: Jeff Stava

Categories: Reviewed for Open Records Copying

I sent Shapard the Mayor's suggestions. Should have a new and final survey back, hopefully today. Will send to you. On the KPMG front, I got an email from Bill wanting to talk about where we are at and headed. Have you talked with him lately? I don't mind talking with him about what we are thinking about. Of course, I would not mention Michaels name at this point. Or are you planning to call him?

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tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 22, 2010 6:30 PM
To: michaelbrink924@sbcglobal.net
Subject: Re:

Categories: Reviewed for Open Records Copying

Yes please make the proposal your priority. You can visit w them later about their questions.

From: michaelbrink924@sbcglobal.net <michaelbrink924@sbcglobal.net>
To: Simonson, Terry
Sent: Mon Nov 22 17:53:00 2010
Subject: Re:
No worries, just wanted to get some feedback on whether I needed to turn my attention to them as a precursor to finishing the proposal draft.

Sent on the Sprint® Now Network from my BlackBerry®

From: "Simonson, Terry" <TSIMONSON@cityoftulsa.org>
Date: Mon, 22 Nov 2010 17:23:31 -0600
To: 'Michael Brink' <michaelbrink924@sbcglobal.net>
Subject:

Michael

Don't worry about spending any time on the questions from the MRO at this point until Jeff and I talk. I think they just thought of more questions about your experience after you left that they didn't think to ask during your visit.

Terry A. Simonson
General Counsel and Chief of Staff
Office of the Mayor
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Tulsa, OK 74103
918.596.7407
tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 22, 2010 5:24 PM
To: Michael Brink

Categories: Reviewed for Open Records Copying

Michael

Don't worry about spending any time on the questions from the MRO at this point until Jeff and I talk. I think they just thought of more questions about your experience after you left that they didn't think to ask during your visit.

Terry A. Simonson
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Office of the Mayor
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Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 22, 2010 3:58 PM
To: Criswell, Cathy
Subject: RE: Guidance for Strategic Planning

Categories: Reviewed for Open Records Copying

Thank you. I have printed this off and will take home to read.

Terry

From: Criswell, Cathy
Sent: Monday, November 22, 2010 3:16 PM
To: Doerflinger, Preston; Simonson, Terry; Beyer, Vickie
Subject: Guidance for Strategic Planning

I have written a guidance document, which is attached. I will now begin making appointments with department heads to determine what they have and to plan how to get any missing elements completed. I will distribute the guidance attached to each of the emails to department heads when I send out meeting requests.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 22, 2010 3:51 PM
To: Michael Brink
Subject: FW: Questions for Michael

Categories: Reviewed for Open Records Copying

Michael

I met with the MRO staff and they pulled together the following questions. If you could respond at your earliest convenience that would be great. Thanks

Terry

-----Original Message-----

From: Beyer, Vickie
Sent: Monday, November 22, 2010 4:37 AM
To: Simonson, Terry
Subject: Questions for Michael

How many years of experience do you have with municipal projects? What unique challenges are inherent in municipalities? How did you deal with these? Give an example.

Describe the MRO you worked in. How many people were there? How was it structured? What was your role? What does leading an MRO look like to you? Specifically how would you lead?

Tell me about your biggest project at Indianapolis. How long did it take? How many were on the team, what were their roles and how did you select them? What savings did you identify? Have you checked back to see if the savings continue?

What other projects did you lead (looking for the long list, not the short list)? Where did you make the biggest impact? Are the savings ongoing?

Describe a project that just didn't work. Why didn't it work? What did you learn from that?

Were any department heads or other leadership resistant? How did you deal with those people? Did the Mayor make leadership changes to cull resistance? How did that help/hurt in the long run?

What is the largest number of people you have ever managed directly? Describe that group-people, level, function, effectiveness. What worked and what didn't work as you lead that group?

Were you a civil servant or an appointee at Indianapolis? Your focus now is municipal efficiency. Why did you leave the MRO? Is the MRO still intact? What contributed to the success/failure of the MRO?

What would Stitt (?) say is your strong suit? Why would he say that? Give examples. Where would he say you have the most room for improvement? Give examples.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 22, 2010 3:49 PM
To: Willis, Carol
Subject: RE: Trust Meeting

Categories: Reviewed for Open Records Copying

The 10th works for me.

Terry

-----Original Message-----

From: Willis, Carol
Sent: Monday, November 22, 2010 1:22 PM
To: William von Glahn; Chris Cadieux; James McCarthy; Bartlett, Dewey; Ken Busby; Connie Cronley; Robyn Ewing; Robert LaFortune; Nancy Meinig; Jayne Reed; R. Thomas Seymour; Barbara Sturdivant; M. Teresa Valero; John Williams
Cc: Elliott, Shirley; Oliverson, Chad; Scott, John; Swiney, Mark; Hamilton, Monica; Nannarone, Melissa; Basgall, Christy; Dimmick, Robert; Simonson, Terry; Doerflinger, Preston
Subject: Trust Meeting

We are trying to establish a date for the Trustees to meet with Terry Simonson and Preston Doerflinger to discuss the KPMG study. The date originally suggested, December 1, is not going to work so there are two other dates now on the table: Friday, December 10, at 10:00 a.m. or Tuesday, December 14, at 4:00 p.m.

Please let me know as soon as possible if either, neither or both dates work for you.

Thank you so much.

Carol

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 22, 2010 12:57 PM
To: Doerflinger, Preston
Subject: RE: Tulsa World Article - Auditor seeks funds to hire outside help

Categories: Reviewed for Open Records Copying

Ok. Should we do this next week?

From: Doerflinger, Preston
Sent: Monday, November 22, 2010 12:19 PM
To: Simonson, Terry
Subject: FW: Tulsa World Article - Auditor seeks funds to hire outside help

I would like to discuss with you and get some assistance with my response to this request.

From: Turner, Lana
Sent: Monday, November 22, 2010 11:54 AM
To: Doerflinger, Preston
Cc: Twombly, Jim; Gateward, Terri
Subject: FW: Tulsa World Article - Auditor seeks funds to hire outside help

Mr. Doerflinger,

After reading an article in Sunday's Tulsa World, Mr. Fred Menge, a citizen of Tulsa, business professional, and BRIDGE participant contacted the Human Rights Department to inquire whether others would have an opportunity to bid and provide external assistance to further address KPMG efficiency study recommendations. I feel this is a relevant question and deserves an immediate response. It is anticipated that City of Tulsa funds be used to match funding from Tulsa Community Foundation. Mr. Menge's email address is fred.menge@magnir.com and he can be reached at (918) 877-1063 X700

Also, I would ask that I am provided a response so that I may share with others who may contact our office. Please follow-up with Mr. Menge regarding any opportunity for consideration of outside firm to help the City Management Review Office drill down deeper into recommendations received in KPMG Study.

Statement in Tulsa World Article 11/21/10

"City Auditor Preston Doerflinger will seek city funding to hire outside help for the Management Review Office that he is heading up to vet the 1,100 recommendations included in the KPMG efficiency study."

**Refer to below email correspondence*

Thanks,

Dr. Lana Turner-Addison

From: Fred Menge [mailto:fred.menge@magnir.com]
Sent: Monday, November 22, 2010 10:48 AM
To: Gateward, Terri
Cc: Turner, Lana; Gwen; Smith, Michael
Subject: Re: Tulsa World Article - Auditor seeks funds to hire outside help

Terri.

Thank you for taking time away from your vacation day to reply to my email. I feel there is a sense of urgency on my part to understand the City's contracting process since the City Audit department has made a decision to directly hire a firm as mentioned below.

I would kindly like to know the contracting rules and regulations with respects to this issue prior to the City Council meeting and City Auditor Doerflinger's announcement next week. I am available to meet at anytime between now (with the exception of Thanksgiving Day) and then if needed.

Thank you again for your department's assistance.

Fred

On Mon, Nov 22, 2010 at 9:54 AM, Gateward, Terri <TGateward@cityoftulsa.org> wrote:
Fred, though I am not in the office this week, I have read your concerns and am forwarding this email to my manager, Dr. Michael Smith and my director, Dr. Turner-Addison so that they are aware of your concerns. I will discuss this with them when I return. But if you feel that the hiring will be sooner than later, please reply to all and ask my management for prompt assistance concerning this matter.

I somehow feel that Dr. Turner-Addison may already be addressing this since you copied her on the email.

Please keep me informed.

Terri Gateward

From: Fred Menge [fred.menge@magnir.com]
Sent: Monday, November 22, 2010 8:30 AM
To: Gateward, Terri
Cc: Turner, Lana; Gwen
Subject: Tulsa World Article - Auditor seeks funds to hire outside help

Terri,

I read a City of Tulsa article in the Sunday, November 21, 2010 edition of the Tulsa World that I would like to obtain clarification. The article discusses the recent City of Tulsa KPMG audit and the upcoming announcement by City Auditor Preston Doerflinger to name a firm that the City will hire to help resolve the KPMG audit findings.

His statement reads "Doerflinger has a Dec. 2 meeting set with the City Council, at which point he expects to name the firm that it wants to hire and announce how much it will cost the city. The goal is to have the firm on site and all of the office's puzzle pieces in place by Jan. 1, Doerflinger said."

I would like to know why the City has not posted an open bid for the services that City Auditor Doerflinger mentions. I ask since City Auditor Doerflinger discusses funding the project work with City funds. My understanding is that the City is suppose to bid these projects out if they are in excess of a certain dollar amount.

As a City of Tulsa BRIDGE participant, our company provides the types of services that are mentioned in the article and we would like the opportunity to participate in this City funded project.

I would also like to add that I contacted the City of Tulsa Audit department on a previous occasion in reference to our services. Please see the attached email.

Thank you for your assistance.

--

Fred Menge, CISA, CISM
President, Magnir Group LLC
401 S. Boston Ave., Suite 2300
Tulsa, OK 74103

P: (918) 877-1063 X700

F: (800) 303-1783

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--

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www.magnir.com

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 22, 2010 5:38 AM
To: Beyer, Vickie
Subject: RE: Questions for Michael

Categories: Reviewed for Open Records Copying

These are very good questions. I will add them to mine and send it off to Michael today.

P.S. The Mayor met with Charles. He will be leaving the city by June of next year. Keep to yourself.

From: Beyer, Vickie
Sent: Monday, November 22, 2010 4:36 AM
To: Simonson, Terry
Subject: Questions for Michael

How many years of experience do you have with municipal projects? What unique challenges are inherent in municipalities? How did you deal with these? Give an example.

Describe the MRO you worked in. How many people were there? How was it structured? What was your role? What does leading an MRO look like to you? Specifically how would you lead?

Tell me about your biggest project at Indianapolis. How long did it take? How many were on the team, what were their roles and how did you select them? What savings did you identify? Have you checked back to see if the savings continue?

What other projects did you lead (looking for the long list, not the short list)? Where did you make the biggest impact? Are the savings ongoing?

Describe a project that just didn't work. Why didn't it work? What did you learn from that?

Were any department heads or other leadership resistant? How did you deal with those people? Did the Mayor make leadership changes to cull resistance? How did that help/hurt in the long run?

What is the largest number of people you have ever managed directly? Describe that group-people, level, function, effectiveness. What worked and what didn't work as you lead that group?

Were you a civil servant or an appointee at Indianapolis? Your focus now is municipal efficiency. Why did you leave the MRO? Is the MRO still intact? What contributed to the success/failure of the MRO?

What would Stitt (?) say is your strong suit? Why would he say that? Give examples. Where would he say you have the most room for improvement? Give examples.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, November 19, 2010 2:58 PM
To: Michael Brink
Subject: RE: Thanks

Categories: Reviewed for Open Records Copying

Thanks Michael. The sooner we receive your proposal the sooner we can move the decision making process along. Everyone is ready to get started. Look forward to hearing from you soon.

Terry

From: Michael Brink [mailto:michaelbrink924@sbcglobal.net]
Sent: Friday, November 19, 2010 2:02 PM
To: Simonson, Terry
Subject: Thanks

Terry, I appreciate the chance I had to speak with you and the rest of the City of Tulsa team yesterday. I came away impressed with the Mayor's commitment to competitive government and will work diligently to put together a mutually-beneficial proposal.

Please don't hesitate to contact me in the meantime if you have further questions or input.

Sincerely,

Michael Brink
816.305.1720
michaelbrink924@sbcglobal.net

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, November 19, 2010 5:20 AM
To: Connelly, Pat
Cc: Beyer, Vickie
Subject: Payroll Info

Categories: Reviewed for Open Records Copying

Pat
Would you contact Vickie in the MRO to help her with some payroll information? Thanks

Terry

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, November 19, 2010 4:49 AM
To: Beyer, Vickie
Subject: RE: PAC

Categories: Reviewed for Open Records Copying

Did you get the zoo management agreement? The one I left you was from June. It has been updated since but I didn't have time to get my hands on the most recent one before I left yesterday.

From: Beyer, Vickie
Sent: Friday, November 19, 2010 4:44 AM
To: Simonson, Terry
Subject: Re: PAC

Also for Jack Neely. I'll learn some things from him. Good!

On Nov 19, 2010, at 4:35 AM, "Simonson, Terry" <TSIMONSON@cityoftulsa.org> wrote:

This is a good request. Let me know if you don't get cooperation.

From: Beyer, Vickie
Sent: Thursday, November 18, 2010 7:19 PM
To: Scott, John
Cc: Simonson, Terry
Subject: PAC

Hi John,

It was nice to meet with you and your group the other day. I'm planning to schedule another meeting in December so we can review the KPMG survey responses and give me an opportunity to learn more about the PAC. I had planned to include you, Nancy Hermann, Shirley Elliott and Steve Fendt. Do you agree with these participants? Is there anyone else that should be included initially?

In the meantime, Terry shared with me some schedules you had given him earlier this year. Could you provide me this updated or additional information:

- 1) Final FY10 Monthly Expense and Revenue Report
- 2) All management agreements or contracts with third parties, including Tickets.com, Trigen, and the parking lot owned by the Trust
- 3) A schedule of rental activity for FY10 including renter, purpose, dates, amounts, etc. for all PAC rental spaces; data from past five years would also be helpful

- 4) PAC calendar for FY11
- 5) PAC floor plan

I appreciate your help.

Vickie

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, November 19, 2010 4:48 AM
To: Beyer, Vickie
Subject: RE: KPMG & Payroll Data

Categories: Reviewed for Open Records Copying

I can tell Connelly to do that. I have asked that question before. Any other depts you want this for?

From: Beyer, Vickie
Sent: Friday, November 19, 2010 4:41 AM
To: Simonson, Terry
Subject: Re: KPMG & Payroll Data

Jack Neely wants an updated list of staff and salaries. Let's see what Kier says. I'm hoping he authorizes Glenda to give the MRO what we need as we go forward. I'm sure she won't release without authorization from him.

On Nov 19, 2010, at 4:33 AM, "Simonson, Terry" <TSIMONSON@cityoftulsa.org> wrote:

What type of detail are you wanting to get? What you need might help me determine where to go to find it. Thanks

From: Beyer, Vickie
Sent: Thursday, November 18, 2010 6:50 PM
To: Kier, Mike
Cc: Simonson, Terry
Subject: KPMG & Payroll Data

Depending on the project, the MRO may need payroll detail by position. What are your thoughts on the best way for us to get that information? Should we go to the department or to Glenda or to someone else?

As you might surmise, I need some information on PAC employees.

Thanks.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, November 19, 2010 4:35 AM
To: Beyer, Vickie
Subject: RE: PAC

Categories: Reviewed for Open Records Copying

This is a good request. Let me know if you don't get cooperation.

From: Beyer, Vickie
Sent: Thursday, November 18, 2010 7:19 PM
To: Scott, John
Cc: Simonson, Terry
Subject: PAC

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- 4) PAC calendar for FY11
- 5) PAC floor plan

I appreciate your help.

Vickie

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, November 19, 2010 4:34 AM
To: Beyer, Vickie
Subject: RE: KPMG Update

Categories: Reviewed for Open Records Copying

Good. Restless means they are looking for a leader with a message.

From: Beyer, Vickie
Sent: Thursday, November 18, 2010 7:01 PM
To: Simonson, Terry
Subject: RE: KPMG Update

The natives are restless!

From: Edwards, Clayton
Sent: Thursday, November 18, 2010 6:59 PM
To: Beyer, Vickie
Cc: Felix-Warwick, Erica; Brownwood, Robert; Caruthers, Richard; Hardt, Charles
Subject: Re: KPMG Update

Need to schedule meetings for the following work groups:

Water Distribution - East District
Mohawk Water Treatment Plant
A.B. Jewell WTP
Raw Water Supply
Lakes (Spavinaw)

Thanks

From: Beyer, Vickie
To: Vaughan, Matt; Edwards, Clayton
Cc: Felix-Warwick, Erica
Sent: Thu Nov 18 15:49:16 2010
Subject: RE: KPMG Update

We are still working to schedule meetings. Let me know who we need to include and we'll get them prioritized.

(Clayton, there is a Distribution Meeting at 7:00 a.m. on December 1.)

From: Vaughan, Matt
Sent: Thursday, November 18, 2010 3:45 PM
To: Beyer, Vickie
Cc: Edwards, Clayton
Subject: KPMG Update

I have other work groups that are interested in hearing the updates. Do you know if other meetings are scheduled?

Matt Vaughan, P.E.
Water Pollution Control Manager
City of Tulsa Public Works Department

**175 East 2nd Street, Suite 890
Tulsa, OK 74103-3220
918-596-9845 office phone
918-669-3883 fax**

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, November 19, 2010 4:32 AM
To: Beyer, Vickie
Subject: RE: KPMG & Payroll Data

Categories: Reviewed for Open Records Copying

What type of detail are you wanting to get? What you need might help me determine where to go to find it. Thanks

From: Beyer, Vickie
Sent: Thursday, November 18, 2010 6:50 PM
To: Kier, Mike
Cc: Simonson, Terry
Subject: KPMG & Payroll Data

Depending on the project, the MRO may need payroll detail by position. What are your thoughts on the best way for us to get that information? Should we go to the department or to Glenda or to someone else?

As you might surmise, I need some information on PAC employees.

Thanks.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Thursday, November 18, 2010 6:38 PM
To: Beyer, Vickie
Subject: RE: KPMG Proposal-Not Water
Categories: Reviewed for Open Records Copying

Lets talk tomorrow in the afternoon. Thanks for your perspective. It's helpful.

From: Beyer, Vickie
Sent: Thursday, November 18, 2010 5:13 PM
To: Simonson, Terry
Subject: RE: KPMG Proposal-Not Water

Cathy said she thought perhaps he had better direct experience actually doing the work than KPMG. Lydia nodded. My gut bothers me a little.'s

I wish he had been more specific in some of his answers about approach. I also question why he would say in his resume that "MSB" (which is him) has experience with water/wastewater (in fact, it's first on his list), but then say to us directly that he is more suited to smaller managed competition projects. Something about him . . .

But -

He comes with a good recommendation, and his rates are likely much, much less than KPMG (and probably very negotiable, since he's a start-up). I can't wait to see his proposal and I would like him to tell us more specifically what a day with Mike might be like. We need to be sure he can teach us something and that he'll be good at it.

I reserve judgment!

You?

-----Original Message-----
From: Simonson, Terry
Sent: Thursday, November 18, 2010 4:09 PM
To: Beyer, Vickie
Subject: Re: KPMG Proposal-Not Water

Did u guys like mike

----- Original Message -----
From: Beyer, Vickie
To: Simonson, Terry
Sent: Thu Nov 18 09:37:26 2010
Subject: Re: KPMG Proposal-Not Water

We are ready!

On Nov 18, 2010, at 8:31 AM, "Simonson, Terry" <TSIMONSON@cityoftulsa.org> wrote:

> I may have Michael Brink available to bring down to meet my hot tots
> around 10. Please let everyone know. Thanks
>

> -----Original Message-----
> From: Beyer, Vickie
> Sent: Thursday, November 18, 2010 6:32 AM
> To: Simonson, Terry
> Subject: KPMG Proposal-Not Water
>
> Could I review a copy of the non-water proposal? What exactly are they
> going to do for that kind of price? Maybe we could get a better value
> if they provide templates, training around those, then periodic
> consultation should we hit a wall.
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Sent: Thursday, November 18, 2010 4:09 PM
To: Beyer, Vickie
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Categories: Reviewed for Open Records Copying

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> **Sent:** Thursday, November 18, 2010 6:32 AM
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Categories: Reviewed for Open Records Copying

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-----Original Message-----

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Subject: KPMG Proposal-Not Water

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, November 17, 2010 6:48 PM
To: Criswell, Cathy
Subject: RE: KPMG Surveys

Categories: Reviewed for Open Records Copying

Sure, I think thats fine.

From: Criswell, Cathy
Sent: Wednesday, November 17, 2010 5:26 PM
To: Simonson, Terry
Cc: Beyer, Vickie; Bracken, Lydia; Brader, Kelly
Subject: KPMG Surveys

Terry, I had a request from IT department to see their employee surveys. Is that OK with you?

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, November 17, 2010 10:04 AM
To: Bracken, Lydia
Subject: FW: Service Agreement
Attachments: Service Agreement with COT.pdf

Categories: Reviewed for Open Records Copying

Lydia
They have a SLA at the airport. Here is their example for you to see.
Terry

From: Mulder, Jeff
Sent: Wednesday, November 17, 2010 8:53 AM
To: Simonson, Terry
Subject: Service Agreement

Terry
Here is the service agreement that we have with the City of Tulsa.
Thanks,
Jeff

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, November 17, 2010 5:42 AM
To: Simonson, Terry

Categories: Reviewed for Open Records Copying

From the resume it appears you have two sizable projects currently underway: Strategic Procurement Review and Initiative Management. Given that, do you have the current resources to bring to the Tulsa project?

How many people per month and how many days per month are you prepared to commit to the Tulsa project?

Can you provide the resumes of the staff who will be assigned to the Tulsa project?

From the projects/experience referenced on the resume, what cities where these projects?

What is your timing to start in Tulsa+

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 16, 2010 5:11 PM
To: Beyer, Vickie
Subject: RE: MRO

Categories: Reviewed for Open Records Copying

Vickie

Would you call Jack Neely at some point and visit with him about his thoughts regarding the PAC. Since he was involved in the Gilcrease / TU model, he has thoughts along those lines for the PAC and I would really like you to see what we can do to develop his ideas further. Thanks

-----Original Appointment-----

From: Beyer, Vickie
Sent: Monday, November 15, 2010 5:10 PM
To: Criswell, Cathy; Brader, Kelly; Bracken, Lydia; Simonson, Terry
Subject: MRO
When: Tuesday, November 16, 2010 2:30 PM-3:00 PM (GMT-06:00) Central Time (US & Canada).
Where: MRO

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 15, 2010 6:55 AM
To: Beyer, Vickie
Subject: Re: TMUA

Categories: Reviewed for Open Records Copying

Not sure. Need to find out

From: Beyer, Vickie
To: Simonson, Terry
Sent: Mon Nov 15 06:29:32 2010
Subject: Re: TMUA
I'll be there. Which room?

On Nov 14, 2010, at 8:22 PM, "Simonson, Terry" <TSIMONSON@cityoftulsa.org> wrote:

Thanks. There is a presentation before the PAC board of trustee on Monday at 4. You might want to attend if you can.

From: Beyer, Vickie
Sent: Friday, November 12, 2010 3:07 PM
To: Simonson, Terry
Subject: TMUA

This week's Finance & Revenue agenda includes this item:

Update and discussion of search for outside financial advisor and legal counsel to assist the TMUA and TUB regarding recommendations in the KPMG Report

The committee meets at 8:00 next Wednesday morning in the 10-south conference room.

There is nothing on the full board agenda.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Sunday, November 14, 2010 8:22 PM
To: Beyer, Vickie
Subject: RE: TMUA

Categories: Reviewed for Open Records Copying

Thanks. There is a presentation before the PAC board of trustee on Monday at 4. You might want to attend if you can.

From: Beyer, Vickie
Sent: Friday, November 12, 2010 3:07 PM
To: Simonson, Terry
Subject: TMUA

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The committee meets at 8:00 next Wednesday morning in the 10-south conference room.

There is nothing on the full board agenda.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, November 12, 2010 4:01 PM
To: Criswell, Cathy; Brader, Kelly; Bracken, Lydia; Beyer, Vickie
Subject: Budget Instructions

Categories: Reviewed for Open Records Copying

In about 2 weeks the Mayor will be issuing his first set of budget instructions to dept heads on things he wants them to be thinking about when they start budget preparations in January. I know that we want to include in those instructions asking the dept heads their thoughts and plans on implementation of KPMG recommendations in their departments. It would help me if you guys could work together on some of these budget instructions and help me come up with what we want to ask of the dept heads. Thanks

Terry A. Simonson
General Counsel and Chief of Staff
Office of the Mayor
175 E. 2nd St., 15th Floor
Tulsa, OK 74103
918.596.7407
tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, November 12, 2010 1:38 PM
To: Hamilton, Monica
Subject: RE:

Categories: Reviewed for Open Records Copying

I have spoken with the Mayor about this as well as the other office issues. I am to put together a plan for him which I am working on.

Thanks
Terry

From: Hamilton, Monica
Sent: Friday, November 12, 2010 9:15 AM
To: Simonson, Terry
Subject: Fw:

Terry,

I'm following up on our conversation. Please let me know where we stand. Thanks.
Monica Hamilton
Director, Mayor's Action Center
918-596-7605

From: Hamilton, Monica
To: Simonson, Terry
Sent: Wed Nov 03 14:13:31 2010
Subject:

Terry,

As we are reorganizing and preparing for changes in the Mayor's Office; I am again asking for an adjustment in my salary commensurate with what has been offered to other appointees. I am currently the lowest paid member of the Mayor's appointed staff. Since Mayor Bartlett took office I have taken on additional responsibilities and supervise staff other than the Mayor's Action Center and play a critical role in interacting with other departments, citizens and community groups. Further, as head of the Mayor's Action Center the past 4 years, I have successfully established a higher standard of service to the benefit of both the mayor and citizens of Tulsa as cited in the recent KPMG study.

I will get with Melissa to schedule an appointment so that we can further discuss. Another item of concern is the Mayor's Action Center structure. While we are preparing the FY11-12 budget I request that the MAC be separated from Communications. Since its creation in 1990 the Mayor's Action Center has always been a separate and distinct function from any other department with the Director reporting directly to the Mayor or Chief of Staff, again similar to other mayoral appointees.

I look forward to meeting with you.

Monica Hamilton
Director, Mayor's Action Center
918-596-7605
mhamilton@cityoftulsa.org

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Thursday, November 11, 2010 5:29 AM
To: Zizic, William
Subject: RE: Re:

Categories: Reviewed for Open Records Copying

Bill
I think that can help alot. Thanks for that effort
Terry

From: Zizic, William [wzizic@KPMG.com]
Sent: Wednesday, November 10, 2010 1:34 PM
To: Simonson, Terry
Subject: RE: Re:

Terry,

After talking to Jeff Wong about this, what we would propose is to provide you with a summary of savings experience of other cities that we've pulled from publicly available research sources.

This summary would be provided separate from our contract and more of a "whitepaper" document for your discussions with the Council. We'll pull together a draft and we then can discuss if it would work for you.

Also, we received the approvals today to release the letter and expect to get it to you by days' end.

Bill

William F. Zizic | Advisory - Business Effectiveness | KPMG LLP

303 E. Wacker Dr.
Chicago, IL 60601
Office: 312-665-2354
Mobile: 312-259-2869
Fax: 312-277-9496
Email: wzizic@kpmg.com

From: Simonson, Terry [<mailto:TSIMONSON@cityoftulsa.org>]
Sent: Saturday, November 06, 2010 7:17 PM
To: Zizic, William
Subject: RE: Re:

Thanks Bill. Look forward to getting it. Yes, I did get your message about savings. My reason for asking (and maybe there is some examples you can include from other cities) is that this will be the first time we ask the city council to actually spend city money on the project. And given that it might be in the \$350k range, I would sure like them to know the very real likelyhood that we will save at least what we are spending. Since they don't understand much about the oportunities and the proven savings they have, maybe there could be some type of addendum or cite some proven examples where these new approaches have saved cities money.

Terry

From: Zizic, William [wzizic@KPMG.com]
Sent: Saturday, November 06, 2010 5:53 PM

To: Simonson, Terry
Subject: Re:

Hi Terry

The proposal had to go through a couple additional internal reviews due to the changes we made. We expect to hear by Monday - sorry for the delay on this.

Good to hear that MRO setup is progressing well. Did you happen to see my message about us not being able to include the competition savings % in our proposal?

Bill

From: Simonson, Terry [<mailto:TSIMONSON@cityoftulsa.org>]
Sent: Saturday, November 06, 2010 06:47 PM
To: Zizic, William
Subject:

Hey Bill

How's the proposal coming? We now have a new MRO office set up one floor below the Mayors with great space for your team and ours. Ben Stout has the purchase of the software needed underway. Hope to hear soon.

Terry

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 09, 2010 9:58 AM
To: Criswell, Cathy
Subject: RE: Draft Strategic Planning Letter - Mayor to Department Heads

Categories: Reviewed for Open Records Copying

Ok. I will include this information. Thanks

From: Criswell, Cathy
Sent: Tuesday, November 09, 2010 9:50 AM
To: Simonson, Terry
Subject: RE: Draft Strategic Planning Letter - Mayor to Department Heads

I can finish writing the training by the end of next week. The following week of November 22 is Thanksgiving week, so I suggest beginning training sessions the week of November 29. I will ask Cheral Crossland to help me get the classes scheduled and we can begin contacting department heads as soon as the letter is sent out, this week or next.

From: Simonson, Terry
Sent: Tuesday, November 09, 2010 9:43 AM
To: Criswell, Cathy
Subject: RE: Draft Strategic Planning Letter - Mayor to Department Heads

What I want to address in this message to the department heads is the training program we are setting up to teach them what we want. When do you think this will be ready to launch? If you have a general idea, I will add to this message that they will be contacted by you to schedule them for the training sessions.

From: Criswell, Cathy
Sent: Monday, November 08, 2010 6:33 PM
To: Simonson, Terry
Subject: Draft Strategic Planning Letter - Mayor to Department Heads

Attached for your consideration.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 09, 2010 9:43 AM
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From: Criswell, Cathy
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Subject: Draft Strategic Planning Letter - Mayor to Department Heads

Attached for your consideration.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 09, 2010 5:17 AM
To: Jeff Stava
Subject: RE: Status of Phase II Letter

Categories: Reviewed for Open Records Copying

Perhaps he can be added to or replace someone on the KPMG team at a lower costs than some of their folks.

From: Jeff Stava [JStava@TULSACF.ORG]
Sent: Monday, November 08, 2010 8:58 PM
To: Simonson, Terry
Subject: Re: Status of Phase II Letter

Michael Brink. We understand he has availability -- don't know details. Will get all details asap and determine viability....

J. Stava
Tulsa Community Foundation

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Monday, November 08, 2010 08:20 PM
To: Jeff Stava
Subject: RE: Status of Phase II Letter

Who is this guy and his background and availability? I think the managed competition applications they recommend have a prove savings. Even Goldsmith says whether its private or public it saves 20 percent. This is where we need to get started right away. And the city is ready now to get started.

From: Jeff Stava [JStava@TULSACF.ORG]
Sent: Monday, November 08, 2010 7:50 PM
To: Simonson, Terry
Cc: pdoreflinger@cityoftulsa.org
Subject: Re: Status of Phase II Letter

This could save us a lot of money and help us focus KPMG's talent and effort on what is important. Rather than them send an army of folks to do stuff that doesn't make a big difference in the end.

This guy knows the mechanics of the model and how to manage the implementation.

Could save us time and money. Have to check it out.

J. Stava
Tulsa Community Foundation

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Sent: Monday, November 08, 2010 07:38 PM
To: Jeff Stava
Cc: pdoreflinger@cityoftulsa.org <pdoreflinger@cityoftulsa.org>

Subject: RE: Status of Phase II Letter

Okay. We are just waiting for the proposal to know the cities portion so the Mayor and Preston can make an appearance before the council for the necessary funding. Council only meets twice this month, the 16th and the 30th. We may shoot for the 30th to allow time to work this out. The MRO is ready to get to work. I know what Goldsmith had to say but given the ground work KPMG has done, I think they are more ready than anyone to hit the ground December 1st to put together the cost savings agenda.

Terry

From: Jeff Stava [JStava@TULSACF.ORG]
Sent: Monday, November 08, 2010 7:29 PM
To: Simonson, Terry; Doerflinger, Preston
Subject: Re: Status of Phase II Letter

Ken and I have networked past Goldsmith and a couple leads later we have a consultant who used to be a student of Goldsmith and worked for his right hand man (the man who lead the effort for the Mayor).

Getting with him tomorrow and will report to you all if he is a viable / economical alternative....or most likely supplement to KPMG.

J. Stava
Tulsa Community Foundation

From: Zizic, William [mailto:wzizic@KPMG.com]
Sent: Monday, November 08, 2010 05:40 PM
To: Jeff Stava; Simonson, Terry <TSIMONSON@cityoftulsa.org>; Doerflinger, Preston <PDOERFLINGER@cityoftulsa.org>
Subject: Status of Phase II Letter

Jeff, Terry, Preston:

Just to provide an update on the letter, we've "tightened" the scope of our assistance as previously requested.

However, the additional detail around each managed competition and organizational realignment initiative to be performed prompted added KPMG internal reviews.

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Please let me know if there's any questions on this. We will have it to you as soon as we hear back. Thanks,

Bill

William F. Zizic | Advisory - Business Effectiveness | KPMG LLP

303 E. Wacker Dr.
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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 08, 2010 8:41 PM
To: Jeff Stava
Subject: RE: Status of Phase II Letter

Categories: Reviewed for Open Records Copying

We are going to announce Benge joining the Mayors staff on the 17th. We would like to include in the press announcement a statement from TCF. Want to give us a quote? Also, he will be announced tomorrow to joining the Fallin transition team which gives us great connections.

From: Jeff Stava [JStava@TULSACF.ORG]
Sent: Monday, November 08, 2010 7:50 PM
To: Simonson, Terry
Cc: pdoreflinger@cityoftulsa.org
Subject: Re: Status of Phase II Letter

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303 E. Wacker Dr.
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Please let me know if there's any questions on this. We will have it to you as soon as we hear back. Thanks,

Bill

William F. Zizic | Advisory - Business Effectiveness | KPMG LLP

303 E. Wacker Dr.
Chicago, IL 60601
Office: 312-665-2354
Mobile: 312-259-2869
Fax: 312-277-9496
Email: wzizic@kpmg.com

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 08, 2010 7:38 PM
To: Jeff Stava
Cc: pdoreflinger@cityoftulsa.org
Subject: RE: Status of Phase II Letter

Categories: Reviewed for Open Records Copying

Okay. We are just waiting for the proposal to know the cities portion so the Mayor and Preston can make an appearance before the council for the necessary funding. Council only meets twice this month, the 16th and the 30th. We may shoot for the 30th to allow time to work this out. The MRO is ready to get to work. I know what Goldsmith had to say but given the ground work KPMG has done, I think they are more ready than anyone to hit the ground December 1st to put together the cost savings agenda.

Terry

From: Jeff Stava [JStava@TULSACF.ORG]
Sent: Monday, November 08, 2010 7:29 PM
To: Simonson, Terry; Doerflinger, Preston
Subject: Re: Status of Phase II Letter

Ken and I have networked past Goldsmith and a couple leads later we have a consultant who used to be a student of Goldsmith and worked for his right hand man (the man who lead the effort for the Mayor).

Getting with him tomorrow and will report to you all if he is a viable / economical alternative....or most likely supplement to KPMG.

J. Stava
Tulsa Community Foundation

From: Zizic, William [mailto:wzizic@KPMG.com]
Sent: Monday, November 08, 2010 05:40 PM
To: Jeff Stava; Simonson, Terry <TSIMONSON@cityoftulsa.org>; Doerflinger, Preston <PDOERFLINGER@cityoftulsa.org>
Subject: Status of Phase II Letter

Jeff, Terry, Preston:

Just to provide an update on the letter, we've "tightened" the scope of our assistance as previously requested.

However, the additional detail around each managed competition and organizational realignment initiative to be performed prompted added KPMG internal reviews.

Apologies for the delay on this, but we have to get approval before we can release the new version. We expect to have approval tomorrow or Wednesday.

Please let me know if there's any questions on this. We will have it to you as soon as we hear back. Thanks,

Bill

William F. Zizic | Advisory - Business Effectiveness | KPMG LLP

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 08, 2010 6:39 PM
To: Stout, Ben; Beyer, Vickie
Subject: RE: VPN Access

Categories: Reviewed for Open Records Copying

Sure that sounds fine to me.

From: Beyer, Vickie
Sent: Monday, November 08, 2010 5:54 PM
To: Simonson, Terry; Stout, Ben
Subject: VPN Access

I would like to have VPN access to my MRO computer so I can access it from home. If you approve, I will check with others on the team to see if they would like the access also.

Thanks.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Sunday, November 07, 2010 6:19 PM
To: Beyer, Vickie
Subject: RE: Relationship with TMUA

Categories: Reviewed for Open Records Copying

Thank you Ms. President.

From: Beyer, Vickie
Sent: Sunday, November 07, 2010 5:37 PM
To: Simonson, Terry
Subject: Re: Relationship with TMUA

It's part of my job as president of the fan club!

On Nov 6, 2010, at 8:50 PM, "Simonson, Terry"
<TSIMONSON@cityoftulsa.org> wrote:

> I too want to keep the relationships. I think you are my
> countweight: because after 20 years being a courtroom lawyer and
> advocate, I take my cause or my client the whole distance and to the
> mat when I believe in them. That can be a little overwhelming to some
> folks who aren't used to a relentless advocate but I don't like to
> lose But there is a place for the kinder gentler approach which I can
> show at times. Just remind me once in awhile.

>
>
>

From: Beyer, Vickie
> **Sent:** Saturday, November 06, 2010 8:41 PM
> **To:** Simonson, Terry
> **Subject:** Re: Relationship with TMUA

> I think we'll get there. I just want to guard the relationships until
> we do.

> Not as prolific as you are - but always thinking!

>
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>> We know about their issue. Heard it from Sevenoaks and Hudson It was
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>> in their operations that needs improvement? I don't think Jim is
>> seeing the full picture where our project can be m of help to them.
>> He thinks things are fine yet has issues with the city support
>> services. I don't think a decision will be made that quickly but he
>> needs to starting thinking that maybe our project can answer his
>> concerns
>>
>> Guess you work like me. .

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Sunday, November 07, 2010 10:20 AM
To: Criswell, Cathy
Subject: RE: KPMG reports are not contradictory

Categories: Reviewed for Open Records Copying

I agree and Vickie does too. She has been meeting one on one with PW management and we are trying to put together a meeting with him and his deputies and managers. We have also been having one on one meetings with members of the utility board as well.

From: Criswell, Cathy
Sent: Sunday, November 07, 2010 9:39 AM
To: Simonson, Terry
Subject: KPMG reports are not contradictory

I worked with Mayor Taylor and Public Works staff on the corrective action for the KPMG forensic audit. I was on the KPMG performance review team. Because of this, we were in a position to have information from both.

Among other things, the KPMG performance review is about eliminating non-value added activity. Control procedures are always value-added activities. One of us on the team needs to be assigned to getting Mr. Hardt to understand all of this better, getting his support and turning around his skepticism.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Saturday, November 06, 2010 8:46 PM
To: Beyer, Vickie
Subject: RE: Relationship with TMUA

Categories: Reviewed for Open Records Copying

I too want to keep the relationships. I think you are my countweight: because after 20 years being a courtroom lawyer and advocate, I take my cause or my client the whole distance and to the mat when I believe in them. That can be a little overwhelming to some folks who aren't used to a relentless advocate but I don't like to lose But there is a place for the kinder gentler approach which I can show at times. Just remind me once in awhile.

From: Beyer, Vickie
Sent: Saturday, November 06, 2010 8:41 PM
To: Simonson, Terry
Subject: Re: Relationship with TMUA

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Not as prolific as you are - but always thinking!

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> think a decision will be made that quickly but he needs to starting
> thinking that maybe our project can answer his concerns

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> Guess you work like me. .

>
>
>
>

From: Beyer, Vickie
> **Sent:** Saturday, November 06, 2010 7:49 PM
> **To:** Simonson, Terry
> **Subject:** Relationship with TMUA

>
> Jim Cameron really wants to talk to the Mayor about the hiring of the
> Chief Technology Officer. I understand interviews are Monday, but
> Jim's meeting with the Mayor is not until Wednesday. It would be good
> if the Mayor doesn't announce his decision until after he has met with
> Jim.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Saturday, November 06, 2010 8:35 PM
To: Beyer, Vickie
Subject: RE: Relationship with TMUA

Categories: Reviewed for Open Records Copying

We know about their issue. Heard it from Sevenoaks and Hudson. It was a perfect intro for me to ask them why they don't try competition for IT services and how could anyone say there is nothing in their operations that needs improvement? I don't think Jim is seeing the full picture where our project can be of help to them. He thinks things are fine yet has issues with the city support services. I don't think a decision will be made that quickly but he needs to start thinking that maybe our project can answer his concerns.

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To: Simonson, Terry
Subject: Relationship with TMUA

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Saturday, November 06, 2010 7:17 PM
To: Zizic, William
Subject: RE: Re:

Categories: Reviewed for Open Records Copying

Thanks Bill. Look forward to getting it. Yes, I did get your message about savings. My reason for asking (and maybe there is some examples you can include from other cities) is that this will be the first time we ask the city council to actually spend city money on the project. And given that it might be in the \$350k range, I would sure like them to know the very real likelihood that we will save at least what we are spending. Since they don't understand much about the opportunities and the proven savings they have, maybe there could be some type of addendum or cite some proven examples where these new approaches have saved cities money.

Terry

From: Zizic, William [wzizic@KPMG.com]
Sent: Saturday, November 06, 2010 5:53 PM
To: Simonson, Terry
Subject: Re:

Hi Terry

The proposal had to go through a couple additional internal reviews due to the changes we made. We expect to hear by Monday - sorry for the delay on this.

Good to hear that MRO setup is progressing well. Did you happen to see my message about us not being able to include the competition savings % in our proposal?

Bill

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Saturday, November 06, 2010 06:47 PM
To: Zizic, William
Subject:

Hey Bill

How's the proposal coming? We now have a new MRO office set up one floor below the Mayors with great space for your team and ours. Ben Stout has the purchase of the software needed underway. Hope to hear soon.

Terry

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Saturday, November 06, 2010 5:48 PM
To: Phil Lakin, Jr.
Subject: RE: Tulsa Area United Way Challenge Grant Opportunity

Categories: Reviewed for Open Records Copying

Phil
We are getting ready to move forward with the planning director search process. When you have a chance to read the email about this that I sent you last week, let me hear from you.

Terry

From: Candice Hall [CHall@TULSACF.ORG] On Behalf Of Phil Lakin, Jr. [plakin@TULSACF.ORG]
Sent: Friday, November 05, 2010 3:26 PM
To: Phil Lakin, Jr.
Subject: Tulsa Area United Way Challenge Grant Opportunity

Dear TCF Fund Advisors,

Since 2002, the Tulsa Community Foundation has presented to the Board of Trustees the current status of the Tulsa Area United Way's community campaign as it draws to an end. This year we are extending our reach to include donor advisors and asking for your consideration of a series of Foundation, Small Business and Leadership Challenge grants that have been made available to match your pledge to the campaign, dollar for dollar.

The aftermath of the severe recession has been a double-edged sword: demands on agencies providing basic needs assistance has increased dramatically (see the attached document for some humbling statistics about the increased needs this year) while the community continues to adjust to reduced revenue, continued slow growth in many sectors with more citizens unemployed or underemployed.

United Way set a goal of \$24,067,551, making it slightly higher than last year's campaign of \$23.9 million. **Today, TAUW stands approximately \$500,000 short of this goal.** While the United Way has been fortunate to have a number of Community Leadership Challenge grants made available to this year's campaign (more fully described in the attachment), I would like to highlight the **\$50,000 H.A. & Mary K. Chapman Charitable Trust Challenge**. This program will match funding dollar for dollar for Tulsa area foundations and TCF donor advised funds that did not make a contribution in 2008 and 2009. These matching programs represent a significant opportunity for you to help TAUW reach their community goal while leveraging your personal contribution.

I know you have a number of agencies available to support. I simply wanted to make this information known to you should you wish to support the United Way from the TCF fund for which you serve as an advisor. **TAUW's campaign closes November 11, at 6 p.m.** If you want to support the campaign, please contact me directly (via email or phone); otherwise, as is standard practice at TCF, you won't receive any additional communications on this opportunity from TCF.

Thanks in advance for your consideration,

Bill

Phil

William F. Thomas

Phil Lakin, Jr.

Chairman of the Board
Tulsa Community Foundation

Chief Executive Officer
Tulsa Community Foundation
918-494-8823 O
www.TulsaCF.org

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Saturday, November 06, 2010 5:47 PM
To: wzizic@kpmg.com

Categories: Reviewed for Open Records Copying

Hey Bill

How's the proposal coming? We now have a new MRO office set up one floor below the Mayors with great space for your team and ours. Ben Stout has the purchase of the software needed underway. Hope to hear soon.

Terry

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Saturday, November 06, 2010 11:48 AM
To: Bracken, Lydia
Subject: RE: Bagels in the kitchen
Categories: Reviewed for Open Records Copying

Lydia

When I look at the mayors office budget through October, I find that we have only spent 9% of the office supply budget. I think we could use some of that money for office supplies for the MRO. We just need to remember to leave enough to get us through the next 8 months of the fiscal year. Thanks

Terry

From: Bracken, Lydia
Sent: Friday, November 05, 2010 9:42 AM
To: Bartlett, Dewey; Beyer, Vickie; Bird, Clay; Bracken, Lydia; Brader, Kelly; Bunney, Mike; Criswell, Cathy; Crone, Kyle; Crossland, Cheral; Fidler, Brett; German, Shelley; Hamilton, Monica; Hardt, Charles; Intern1, Mayor; Kier, Mike; MacLeod, Kimberly; Martin, Wendy; Midget, Dwain; Nannarone, Melissa; Neal, Susan; Parkhurst, Hillary; Pharis, Dafne; Russ, Adrienne; Simonson, Terry; Stout, Ben; Turner, Lana; Twombly, Jim
Subject: Bagels in the kitchen

There are bagels and cream cheese in the kitchen. Please eat!

Lydia Bracken

Office of the Mayor
175 E. 2nd Street
Tulsa, OK 74103
T: 918.596.7700
F: 918.699.3413
E: lbracken@cityoftulsa.org

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, November 05, 2010 1:22 PM
To: Beyer, Vickie
Subject: Re: Comments re: Meeting at Underground Collections
Categories: Reviewed for Open Records Copying

Please call me. Thanks.

From: Beyer, Vickie
To: Simonson, Terry
Sent: Thu Nov 04 17:50:32 2010
Subject: RE: Comments re: Meeting at Underground Collections
Got it! (You must have just picked up my message!)

From: Simonson, Terry
Sent: Thursday, November 04, 2010 5:04 PM
To: Beyer, Vickie
Subject: RE: Comments re: Meeting at Underground Collections

I don't really use my work cell much so if you need to reach me call 724 3005, my personal cell. Thanks for all you do.

T

From: Beyer, Vickie
Sent: Wednesday, November 03, 2010 10:19 PM
To: Simonson, Terry
Subject: Re: Comments re: Meeting at Underground Collections

That's what I want to talk to you about tomorrow. Charles, Clayton and Lou Reynolds bent my ear for two hours afterward-not in a bad way.

But the meeting--Ken Hill is working on an RFB using documents Jack Neely provided. He is to have it ready by the 11/17 meeting.

Lou Reynolds and Jim Cameron don't believe KPMG is neutral and therefore will work to have the bid rejected. Position is KPMG set themselves up for more business by making the 3P recommendation.

On Nov 3, 2010, at 9:57 PM, "Simonson, Terry" <TSIMONSON@cityoftulsa.org> wrote:

Ok. So how did the TUMA meeting go today?

From: Beyer, Vickie
Sent: Wednesday, November 03, 2010 9:01 PM
To: Simonson, Terry
Subject: Comments re: Meeting at Underground Collections

There may have been a few misstatements:

- Underground Collections IS included in the Water Services recommendation made by KPMG.
- Transfer to general fund is not controlled by Council; Finance is the orchestrator and promotor of the increase from 5.5% to 7.5%. When the increase was made, TMUA was very clear that they intended the

increase to be temporary. They are more vocal each year about reducing the percentage to the previous level. This item may become quite contentious this year in light of the KPMG study.

- I believe Dan Crossland knows the cost of repairing a pothole. If yes, we may want to use a different example.

I thought this meeting was much, much better than the payroll meeting. However, I think the "water services" groups are going to be very aware of enterprise funding and much less interested in general fund issues. It might be helpful to talk about the millions of dollars in deferred maintenance hanging out there in spite of having water rate increases of 16% and sewer rate increases of 36% over the last five years. (I'll have to check my percentages, but these are very close.)

Also, the front line employees didn't believe anyone from their area had completed surveys (and Mark Rogers didn't jump up to tell everyone who did them!). If it comes up in other meetings, I suggest you call out the manager to see who completed the surveys so employees see that "their people" really did do them.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Friday, November 05, 2010 6:07 AM
To: Crossland, Cheral
Subject: KPMG Lean Team Meeting

Categories: Reviewed for Open Records Copying

Cheral

Would you please send out a meeting reminder to the following for todays KPMG Lean Team meeting at 1:30

LaCroix
Jordan
Stout
Warwick
MacCloud
Beyers
Criswell
Bracken
Brader

Thanks

Terry

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Thursday, November 04, 2010 6:35 PM
To: Beyer, Vickie
Subject: Re: Comments re: Meeting at Underground Collections

Categories: Reviewed for Open Records Copying

I did. Sorry I missed you

From: Beyer, Vickie
To: Simonson, Terry
Sent: Thu Nov 04 17:50:32 2010
Subject: RE: Comments re: Meeting at Underground Collections
Got it! (You must have just picked up my message!)

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Also, the front line employees didn't believe anyone from their area had completed surveys (and Mark Rogers didn't jump up to tell everyone who did them!). If it comes up in other meetings, I suggest you call out the manager to see who completed the surveys so employees see that "their people" really did do them.

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call out the manager to see who completed the surveys so employees see that "their people" really did do them.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Thursday, November 04, 2010 5:48 AM
To: jstava@TCF.org; pdoreflinger@cityoftulsa.org
Subject: FW: Suggested Initiative Sequencing

Categories: Reviewed for Open Records Copying

Wanted you guys to see the latest from Bill. I told him we would like to have this resolved and them starting by at least the first of December.

From: Zizic, William [wzizic@KPMG.com]
Sent: Wednesday, November 03, 2010 2:36 PM
To: Simonson, Terry
Subject: RE: Suggested Initiative Sequencing

Terry,

Jeff Wong is currently reviewing the revised letter and should be able to have it to you and Jeff Stava by weeks' end.

Apologize for the delay on this, I've been out sick the last few days.

Also, we've had some other projects pop-up that could impact our ability to start in November and early December.

Any idea how soon we would be getting started?

Thanks,

Bill

William F. Zizic | Advisory - Business Effectiveness | KPMG LLP

303 E. Wacker Dr.
Chicago, IL 60601
Office: 312-665-2354
Mobile: 312-259-2869
Fax: 312-277-9496
Email: wzizic@kpmg.com

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Thursday, October 28, 2010 6:13 PM
To: Zizic, William
Subject: RE: Suggested Initiative Sequencing

Bill

Thanks for the update.

I did review the P3 proposal. The utility board people are thinking about hiring their own firm but there is not strong support for that. So, next week the Mayor and I will start to meet one on one with the utility board members to show them the proposal we got from KPMG and tell them this is the way we want to go. Now, there are 7 members on this board. It will take 4 to accept it and pay for it out of their enterprise funds. The Mayor is one of the 7. We are going to start working on them one at a time until we get 4 that will support it. I think we have 3 at this point. I'll keep you posted.

Please send me the next proposal you send to Jeff. Jeff and I did make a deal: we are buying the needed software and the foundation will pay for our community wide citizen survey that we want to establish a baseline

for our strategic plan. Ben has already started the process to get the software and I have interview a survey company and am expecting a proposal from them any day which I will send to Jeff.

We have found space on the 14th floor to house the MRO and your team when they arrive.

Look forward to hearing soon.

Terry

From: Zizic, William [wzizic@KPMG.com]
Sent: Thursday, October 28, 2010 4:38 PM
To: Simonson, Terry
Subject: RE: Suggested Initiative Sequencing

Terry,

Just to let you know I'm working with Jeff to update the proposal. Will get back to you and Jeff Stava likely early next week with a new copy.

Also, have you had a chance to review the P3 proposal for the Water System at all?

Bill

William F. Zizic | Advisory - Business Effectiveness | KPMG LLP

303 E. Wacker Dr.
Chicago, IL 60601
Office: 312-665-2354
Mobile: 312-259-2869
Fax: 312-277-9496
Email: wzizic@kpmg.com

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Tuesday, October 26, 2010 4:35 PM
To: Zizic, William
Subject: RE: Suggested Initiative Sequencing

Bill

We had our talk and it was good. Here is what you can do:

1. Your sequencing is good. The only change requested was to put payroll administration in Wave 1 and move Grants Administration to Wave 2.
2. With that change, if you would include in the next engagement letter this sequencing process and timeline to Jeff, he will be looking for this in your next letter to him.
3. One thing I think we need to include for each of the Wave's and their competition projects, is some estimated range of possible savings on each project as a result of these endeavors. Such as: Range of possible savings: 10% to 20% or what ever your experience has shown you are realistic savings expectations. I know it wont be dollar amounts but I think a percentage range will make the TCF Board feel comfortable with a target.

When you have reformatted your letter to Jeff, please send me a copy as well. Thanks Bill

Terry

From: Zizic, William [mailto:wzizic@KPMG.com]
Sent: Tuesday, October 26, 2010 11:18 AM
To: Simonson, Terry
Subject: Re: Suggested Initiative Sequencing

Terry

Was this helpful to the discussion yesterday?

Bill

From: Zizic, William
Sent: Monday, October 25, 2010 02:15 PM
To: 'Simonson, Terry' <TSIMONSON@cityoftulsa.org>
Cc: 'Jeff Stava' <JStava@TULSACF.ORG>; Doerflinger, Preston <PDOERFLINGER@cityoftulsa.org>; Wong, Jeffrey S
Subject: Suggested Initiative Sequencing

Terry,

Jeff Wong and I discussed our suggested sequencing of the managed competition initiatives you specified last week. We've also listed some "organizational realignment" projects for you to consider as well.

You'll notice that Waves 1 and 2 focus on "overhead" departments and Waves 3 and 4 are "production" departments. Equipment, Streets, and Supply Chain have been each broken into 2 initiatives given their size.

For the months in parentheses, we would expect to focus on costing and defining specs for these services, with the knowledge that the RFP advertisement and selection processes may drag on beyond.

Hope this is a helpful start to the discussion. Let us know once this list is firm and we can tailor our pricing proposal to it. Thanks,

Bill

Wave 1 (Months 1-3)

- Managed Competition Projects:
 1. Equipment Maintenance (Collision/Body, Parts, Fuel)
 2. Building Operations (Janitorial, Plumbing, Electrical, Mechanical, HVAC)
 3. Legal (Contracts, Litigation, Real Estate, Public Defender)
 4. Payroll Processing
- Organizational Realignment Projects:
 1. Planning/Code Enforcement
 2. Grants Administration

Wave 2 (Months 4-6)

- Managed Competition Projects:
 1. Equipment Maintenance (Light, Heavy, Police, Fire)
 2. IT Support (Help Desk, Data Center, Database, Telecom)
 3. Claims Administration (Workers Comp)

- Organizational Realignment Projects:
 1. Supply Chain (Sourcing, Purchasing)
 2. Payroll Administration

Wave 3 (Months 7-9)

- Managed Competition Projects:
 1. Forestry (Cultivation, Planting, Trimming, Removal)
 2. Mowing (Drainage, Right-of-Way, Parks, Other Property)
 3. Street Maintenance (Sweeping, Patching, Snow/Ice Removal)
- Organizational Realignment Projects:
 1. Budget Development and Admin
 2. Supply Chain (Contracting, Materials Management)

Wave 4 (Months 10-12)

- Managed Competition Projects:
 1. Street Maintenance (Graffiti Removal, City Property Maintenance, Illegal Dumping, Trails)
 2. Permitting (Building Plans, Infrastructure)
 3. Neighborhood Code Enforcement (Nuisance Abatement, Housing, Parking, Abandoned Buildings)

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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, November 03, 2010 9:57 PM
To: Beyer, Vickie
Subject: RE: Comments re: Meeting at Underground Collections

Categories: Reviewed for Open Records Copying

Ok. So how did the TUMA meeting go today?

From: Beyer, Vickie
Sent: Wednesday, November 03, 2010 9:01 PM
To: Simonson, Terry
Subject: Comments re: Meeting at Underground Collections

There may have been a few misstatements:

- Underground Collections IS included in the Water Services recommendation made by KPMG.
- Transfer to general fund is not controlled by Council; Finance is the orchestrator and promotor of the increase from 5.5% to 7.5%. When the increase was made, TMUA was very clear that they intended the increase to be temporary. They are more vocal each year about reducing the percentage to the previous level. This item may become quite contentious this year in light of the KPMG study.
- I believe Dan Crossland knows the cost of repairing a pothole. If yes, we may want to use a different example.

I thought this meeting was much, much better than the payroll meeting. However, I think the "water services" groups are going to be very aware of enterprise funding and much less interested in general fund issues. It might be helpful to talk about the millions of dollars in deferred maintenance hanging out there in spite of having water rate increases of 16% and sewer rate increases of 36% over the last five years. (I'll have to check my percentages, but these are very close.)

Also, the front line employees didn't believe anyone from their area had completed surveys (and Mark Rogers didn't jump up to tell everyone who did them!). If it comes up in other meetings, I suggest you call out the manager to see who completed the surveys so employees see that "their people" really did do them.

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, November 03, 2010 5:20 PM
To: Zizic, William
Subject: RE: Suggested Initiative Sequencing

Categories: Reviewed for Open Records Copying

Bill

The foundation is waiting for your revised letter but they are committed to match the city dollar for dollar for at least the balance of this fiscal year. And I believe we have found our match, which Preston and the Mayor will present to the council, hopefully by the end of this month. So I would hope you could get started at least by December 1st if not very soon thereafter. We are setting up the MRO office one floor below us, Ben has order the appropriate management software, the project leaders are familiarizing themselves with details of the report, so I think this timing will work.

Terry

From: Zizic, William [mailto:wzizic@KPMG.com]
Sent: Wednesday, November 03, 2010 2:37 PM
To: Simonson, Terry
Subject: RE: Suggested Initiative Sequencing

Terry,

Jeff Wong is currently reviewing the revised letter and should be able to have it to you and Jeff Stava by weeks' end.

Apologize for the delay on this, I've been out sick the last few days.

Also, we've had some other projects pop-up that could impact our ability to start in November and early December.

Any idea how soon we would be getting started?

Thanks,

Bill

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Email: wzizic@kpmg.com

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Thursday, October 28, 2010 6:13 PM
To: Zizic, William
Subject: RE: Suggested Initiative Sequencing

Bill

Thanks for the update.

I did review the P3 proposal. The utility board people are thinking about hiring their own firm but there is not strong support for that. So, next week the Mayor and I will start to meet one on one with the utility board members to show them the proposal we got from KPMG and tell them this is the way we want to go. Now, there

are 7 members on this board. It will take 4 to accept it and pay for it out of their enterprise funds. The Mayor is one of the 7. We are going to start working on them one at a time until we get 4 that will support it. I think we have 3 at this point. I'll keep you posted.

Please send me the next proposal you send to Jeff. Jeff and I did make a deal: we are buying the needed software and the foundation will pay for our community wide citizen survey that we want to establish a baseline for our strategic plan. Ben has already started the process to get the software and I have interview a survey company and am expecting a proposal from them any day which I will send to Jeff.

We have found space on the 14th floor to house the MRO and your team when they arrive.

Look forward to hearing soon.

Terry

From: Zizic, William [wzizic@KPMG.com]
Sent: Thursday, October 28, 2010 4:38 PM
To: Simonson, Terry
Subject: RE: Suggested Initiative Sequencing

Terry,

Just to let you know I'm working with Jeff to update the proposal. Will get back to you and Jeff Stava likely early next week with a new copy.

Also, have you had a chance to review the P3 proposal for the Water System at all?

Bill

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Email: wzizic@kpmg.com

From: Simonson, Terry [mailto:TSIMONSON@cityoftulsa.org]
Sent: Tuesday, October 26, 2010 4:35 PM
To: Zizic, William
Subject: RE: Suggested Initiative Sequencing

Bill

We had our talk and it was good. Here is what you can do:

1. Your sequencing is good. The only change requested was to put payroll administration in Wave 1 and move Grants Administration to Wave 2.
2. With that change, if you would include in the next engagement letter this sequencing process and timeline to Jeff, he will be looking for this in your next letter to him.
3. One thing I think we need to include for each of the Wave's and their competition projects, is some estimated range of possible savings on each project as a result of these endeavors. Such as: Range of possible savings: 10% to 20% or what ever your experience has shown you are

realistic savings expectations. I know it wont be dollar amounts but I think a percentage range will make the TCF Board feel comfortable with a target.

When you have reformatted your letter to Jeff, please send me a copy as well. Thanks Bill

Terry

From: Zizic, William [mailto:wzizic@KPMG.com]
Sent: Tuesday, October 26, 2010 11:18 AM
To: Simonson, Terry
Subject: Re: Suggested Initiative Sequencing

Terry

Was this helpful to the discussion yesterday?

Bill

From: Zizic, William
Sent: Monday, October 25, 2010 02:15 PM
To: 'Simonson, Terry' <TSIMONSON@cityoftulsa.org>
Cc: 'Jeff Stava' <JStava@TULSACF.ORG>; Doerflinger, Preston <PDOERFLINGER@cityoftulsa.org>; Wong, Jeffrey S
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From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Wednesday, November 03, 2010 9:48 AM
To: Phil Lakin, Jr.
Subject: Planning Director

Categories: Reviewed for Open Records Copying

Phil

Here is where we are with the planning directors position and what needs to be done.

We have a new, comprehensive job description ready to go out that should attract experienced, talented planners.

The salary range for this position, as classified, tops out at \$135,000.

Currently, the city does not have funds budgeted for this position.

Before we move forward with the release of the job announcement, we need to have the source and necessary amount of funding identified.

Before we make any funding request to the council to add a salary in the planning department for a planning director, we need to know:

1. If the topped out salary in the range is low, what should be the topped out amount?
2. How much, if any, with TCF contribute towards the salary
3. How much will we need to seek from the council to fully fund the position?

So, of these, the only questions to you that I would like your input on are numbers 1 & 2. As soon as we have questions 1 and 2 answered, we will know the answer to number 3, and we can start the process to request these funds from the council. Once approved, we would then be ready to release the announcement.

Terry A. Simonson
General Counsel and Chief of Staff
Office of the Mayor
175 E. 2nd St., 15th Floor
Tulsa, OK 74103
918.596.7407
tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 02, 2010 4:33 PM
To: Beyer, Vickie
Subject: RE: KPMG

Categories: Reviewed for Open Records Copying

How'd I do today?

From: Beyer, Vickie
Sent: Tuesday, November 02, 2010 10:50 AM
To: Simonson, Terry
Subject: RE: KPMG

Thank you, Terry.

From: Simonson, Terry
Sent: Tuesday, November 02, 2010 10:49 AM
To: Crossland, Dan; Mulder, Jeff
Cc: Beyer, Vickie
Subject: KPMG

Dan and Jeff

As you might know, Vickie Beyers is helping us with some of the KPMG recommendations. Two of those (crossing guards and horticultural) are part of her assignments so she will be contacting you to talk about these. Just wanted to give you that heads up.

Terry A. Simonson
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Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 02, 2010 12:56 PM
To: MacLeod, Kimberly
Subject: RE: Mayor's Office Budget

Categories: Reviewed for Open Records Copying

I have that. Should I call Brian? I have a 1:00 KPMG report that will probably go to 2:30. Then I have a 3:00 and a 4:30. ♦
Let me know.

From: MacLeod, Kimberly
Sent: Tuesday, November 02, 2010 12:49 PM
To: Simonson, Terry; Kier, Mike
Subject: Fwd: Mayor's Office Budget

Kim MacLeod, Communications Dept., City of Tulsa, 918-596-7803, cell 918-527-0164
Sent from my iPhone

Begin forwarded message:

From: Brian Barber <Brian.Barber@tulsaworld.com>
Date: November 2, 2010 12:23:41 PM CDT
To: "MacLeod, Kimberly" <KMACLEOD@cityoftulsa.org>
Cc: "Allen, Michelle" <MALLEN@cityoftulsa.org>
Subject: Mayor's Office Budget

I need an updated budget for the Mayor's Office including a breakdown of the staffing salaries and benefits, as well as other expense categories such as travel. If there are vacancies, please note them and their allotted payments and whether or not they are to be filled.. Finance Director Mike Kier told the council this morning that he would prepare a new budget chart of the Mayor's Office for them.

This email has been scanned by the MessageLabs Email Security System.
For more information please visit <http://www.messagelabs.com/email>

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 02, 2010 10:49 AM
To: Crossland, Dan; Mulder, Jeff
Cc: Beyer, Vickie
Subject: KPMG

Categories: Reviewed for Open Records Copying

Dan and Jeff

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tsimonson@cityoftulsa.org
Fax: 918.596.9010

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Tuesday, November 02, 2010 5:45 AM
To: Beyer, Vickie
Subject: RE: Projects

Categories: Reviewed for Open Records Copying

I'm in the office this morning from 9:30 to 11:30

From: Beyer, Vickie
Sent: Monday, November 01, 2010 5:19 PM
To: Simonson, Terry
Subject: Re: Projects

Deal.

Interesting that TMUA's Finance & Revenue Committee is not meeting this week. Perhaps they're bringing all guns to your presentation at Underground Collections. Or maybe not. Just know it could happen.

On Nov 1, 2010, at 5:11 PM, "Simonson, Terry"
<TSIMONSON@cityoftulsa.org> wrote:

> Lets talk tomorrow.
>
> -----Original Message-----
> **From:** Beyer, Vickie
> **Sent:** Monday, November 01, 2010 5:11 PM
> **To:** Simonson, Terry
> **Subject:** Projects
>
> I will be scheduling meetings with Jeff Mulder (crossing guards) and
> Dan Crossland (greenhouse) in the next day or two. I also plan to
> contact staff in Finance and Public Works to begin validating
> financial and budget numbers.
>
> When I make the contacts, it will likely start some ripples with staff
> and Charles. Are you ready for that?
>
>

From: Simonson, Terry [tsimonson@cityoftulsa.org]
Sent: Monday, November 01, 2010 5:12 PM
To: Beyer, Vickie
Subject: RE: Projects

Categories: Reviewed for Open Records Copying

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-----Original Message-----

From: Beyer, Vickie
Sent: Monday, November 01, 2010 5:11 PM
To: Simonson, Terry
Subject: Projects

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