



## **Ketchum Urban Renewal Agency**

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**P.O. Box 2315 | 480 East Ave. N. | Ketchum, ID 83340**

June 21, 2021

Chair and Commissioners  
Ketchum Urban Renewal Agency  
Ketchum, Idaho

### **RECOMMENDATION TO APPOINT KURA SECRETARY AND TREASURER**

#### Introduction/History

Staff is recommending the KURA Board appoint Tara Fenwick as the KURA Secretary and Shellie Rubel as the KURA Treasurer (see attached resumes)

Tara is the City of Ketchum City Clerk/Business Administration Manager and Shellie is the City of Ketchum Treasurer. Historically, the Ketchum City Clerk and Treasurer have served as Secretary and Treasurer to the KURA.

It necessary to appoint and identify the KURA Treasurer as part of the bond refinancing.

#### Current Staffing and Administrative Costs

Presently, the KURA reimburses the city for the cost of staffing and materials and services. Total staffing costs in FY 21 are budgeted at \$84,001, however, due to the vacancies, it is anticipated the KURA staff expenses will range between \$50,000-\$60,000.

Materials and services account for office supplies, Caselle licensing, telephone, computers and copiers and utilities will be charged as budgeted at \$32,869. in FY 21.

#### Recommendation

Staff recommended the Board appoint Tara Fenwick as KURA Secretary and Shellie Rubel as KURA Treasurer.

# Tara Fenwick

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469-525-2927 • Sun Valley, Idaho 83353

Innovative senior leader with extensive experience in information technology, process engineering, project management and team leadership. Demonstrates a strong ability to successfully navigate organizations through periods of accelerated change and growth. Collaborative communicator focused on building effective relationships and promoting synergy across the enterprise to drive positive change. Skilled at revitalizing 'tired' teams, empowering individual performance improvement and engaging talent to successfully address large-scale complex business challenges.

## *Areas of Expertise:*

- |                                  |                                  |                                  |
|----------------------------------|----------------------------------|----------------------------------|
| ▪ Shared Services Leadership     | ▪ IT Service Leadership          | ▪ Project/Change Management      |
| ▪ Cross-functional Teamwork      | ▪ Strategic Planning/Forecasting | ▪ Systems Analysis/Documentation |
| ▪ Global Customer Service        | ▪ High Performing Team Builder   | ▪ Risk / Quality Assurance       |
| ▪ Operations Process Improvement | ▪ Staff Training/Development     | ▪ Remote / Dynamic Work          |
| ▪ Business Transformation        | ▪ R-NPS/T-NPS/E-NPS              | ▪ LEAN Practitioner/Teacher      |

## Professional Experience

**The Sun Valley Company • Sun Valley, Idaho • 12/2019 – 5/2021**

### **HEAD - PROPERTY MANAGEMENT – ADMINISTRATION**

Directing a professional team of property managers and accounting specialists responsible to deliver premier property management services for ten luxury Condominium Associations.

#### **Key Accomplishments:**

- Using LEAN process improvement practices – engaged customers for feedback, assessed effectiveness of team structure, reduced back logs, reengineered workflows and implemented use of new technologies and developed cross-functional team work between Finance and Operations.
- Selected and procured SAS Property Management system to automate office workflows and provide modern administrative interface with 9 HOA's / 511 households.
- Envisioned, developed and implemented a dynamic remote work program for the Operation to ensure business continuity during Covid-19 pandemic.

**Farmers New World Life Insurance • Bellevue, WA • 3/2014 – 9/2019**

### **DIRECTOR - SHARED SERVICES – OPERATIONS**

Led 23 professional staff working in 2 locations and virtually across the U.S. to deliver mission critical support functions for Contact Center, Underwriting, Sales Support, In-Force Policy Administration and Claims in a shared services business model. The team is recognized throughout the company as a 'go-to' opportunity for career development and consistently earns a 90%+ e-NPS rating.

#### **Key Accomplishments:**

- Directed the design and implementation of a shared services workforce management team. Engaged colleagues to collaborate during the development to ensure enterprise standards for the disciplines of; KPI reporting, data analysis, budgeting, staffing, workforce planning, service training and quality assurance.
- Chaired the Director's daily KPI review meeting, providing consultation on how to improve daily service and sales support outcomes by use of data and projected service demands.
- Planned, scheduled and delivered 10,000+ instructional hours of technical and procedural classroom training to 300 Agent and Customer facing service staff attaining high feedback ratings averaging 4.8 on a 5-point scale.
- Applied LEAN methodologies to solve the inconsistencies in service delivery for Customers and Agents. Established synergies between procedures, training and quality assurance teams enhancing one-call handling effectiveness.
- Conceptualized and instituted policy and procedures documentation processes with centralized oversight for handling consumer complaints and responses to the Departments of Insurance in all 50 States.

## Additional Experience

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- Collaborated with Corporate Risk Officer to improve the Company Business Continuity program. Championed and facilitated launch of a work-from-home program positioning Operations with a business resiliency platform that is exercised on a daily basis. This endeavor proved the ability to conduct 'business as usual' during unanticipated office closures.
- Supported a strategic initiative to relocate corporate headquarter implementing dynamic workplace methods and technologies by delivering companywide technical training on Cisco tools; WebEx Teams, Video Conferencing, Online Meetings and Screen Share.

**JC Penney • Plano, TX • 2010 – 2014**

### SENIOR MANAGER – SYSTEMS ENGINEERING – INFORMATION TECHNOLOGY

Directed 125 FTE's coaching management and staff to improve operational performance in various IT disciplines – technical help desk, hardware and software asset management, batch job engineering, monitoring and capacity management.

#### Key Accomplishments:

- Established use of ITIL best practices for 3 highly technical operations teams increasing delivery of work performance and technical support to exceed required targets.
- Transformed internal IT service help desk by reconfiguring Avaya Telephony IVR and implementing standards for management in performing real-time watch and daily reporting of the customer experience.
- Improved staff performance by setting clear expectations achieving single day service request responsiveness with zero pending work volumes.
- Awarded 'IT Team of the Year' for implementation of *Splunk* technologies to improve retail system performance monitoring for 36,000+ point of sale devices.

**EXPEDIA Inc. • Bellevue, WA • 2008 – 2010**

### SENIOR MANAGER – GLOBAL CALL CENTER – CUSTOMER CARE

Managed 20 FTE's in the Expedia North America global customer care command center team responsible for monitoring 24x365 service outcomes for both U.S. and International service providers.

#### Key Accomplishments:

- Skillfully stabilized staffing churn by establishing clear performance expectations, and implementing operation standards across three geographically separate teams (*2 U.S. and 1 International*).
- Solved poor team morale by implementing training programs for improving real-time analytics and reporting.
- Collaborated with a technical project team formed to migrate Avaya Telephony to Cisco Contact Center Technologies.
- Chaired critical technical operations conference calls 'war-rooms' during U.S. and International travel disruption events.

**Safeco Corporation • Seattle, WA • 1994 – 2008**

### SENIOR MANAGER - NATIONAL COMMAND CENTER OPERATIONS (2003 – 2007)

- Managed 23 FTE's performing 24x365 national command center watch for Safeco's 4 call centers.

### SYSTEMS MANAGER - INFORMATION TECHNOLOGY (2000 – 2003)

- Managed several technical support service teams responsible for delivering information technology helpdesk services to a large corporate user population, including on-demand executive support.

### BUSINESS SYSTEMS ANALYST/PROJECT MANAGEMENT - INFORMATION TECHNOLOGY (1997 – 2000)

- Performed business systems analysis, project planning and team management for strategic system development projects.

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## Education, Certification

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Bachelor of Arts - Communications - ST. CATHERINE UNIVERSITY | St. Paul, MN

LEAN Certification, ITIL V3 Certification – Employer Sponsored Programs

IT Leadership, Project/Change Management, Systems Analysis Certifications - University of Washington, Seattle, WA

French Language, Culture and Art History Certifications - Sorbonne and Alliance Française, Paris, France

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## Philanthropic Leadership

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P.E.O. International – [www.peointernational.org](http://www.peointernational.org) (2009 – PRESENT)

- Washington State - Executive Board – Secretary, Treasurer and Organizer (2017 – 2019)
- Washington State - Kitsap County - Reciprocity Council – President (2017 – 2018)
- Texas State – Reciprocity Council – Membership Chair (2013 – 2014)
- Texas State - Education Loan Fund – Representative (2013 – 2014)

## **SHELLIE L GALLAGHER-RUBEL, CMC**

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141 S. Hiawatha Drive, Box 982, Hailey, Idaho 83333 208-721-2737

[rubel.sghdheaven@gmail.com](mailto:rubel.sghdheaven@gmail.com)

### **Qualifications Profile:**

- A highly organized and detail-focused Manager, Certified Public Funds Investor through Association of Public Treasurers of US & Canada. Certified Municipal Treasurer/Finance Officer through ICCTFOA.
- Comprehensive knowledge of accounting and auditing principles with a track record of accurately and efficiently supporting overall financial activities and office functions. Proficient in budget, payroll, benefits, PERSI-retirement, general ledger, financial statements, investments, and full charge booking.
- Excellent technology skills with financial accounting systems. Quickly incorporate proprietary applications and new methodologies.

### **Professional Experience:**

**City of Ketchum, Ketchum, Idaho** *Municipality consisting of 2,706 citizens and 113 employees*

#### **May 2015 – Present - Interim City Treasurer**

Responsible for Investments, General Ledger Balancing/Reconciliation, Financial Analysis/Reporting, Banking/Reconciliation, Investment Balancing, Budget, Audit, Document Management, Payroll, Benefits, Retirement and State and Federal Taxes. Variety of Special Projects. Parking Operations; Customer Service Appeals, Cash Handling and Collections. Serve as backup for Utility Billing, Accounts Payable, Accounts Receivable, Council meeting packets, as well as Business Tax Collection/Business License.

**Blaine County School District, Hailey, Idaho**

#### **August 2014 – May 2015 - School Bus Operator**

Provide school bus transportation for Blaine County School District children. CDL for Passenger Transportation and Air Brakes.

**CITY OF HAILEY, Hailey, Idaho** *Municipality consisting of 7,200 citizens and 65 employees*

#### **February 2012 – May 2014 - Deputy City Clerk**

Public Works; responsibilities include processing utility billing for 3,600 utility customers per month including delinquents, shutoff's, collection and reporting. Provide daily customer service face to face and by phone including cash handling for receipts of utility and permit payments, balancing of cash drawer. City Clerk; process biweekly payroll in Caselle for 65 employees, reconcile and remit city taxes and benefits in accordance with Idaho State and Federal Laws, including Persi Public Retirement. Administrative support; processing purchase orders, accounts payable, accounts receivable and service orders, including grants administration for Tiger II and EPA grants.

#### **August 2009 – October 2009 - Deputy City Clerk/Treasurer**

This was a temporary position to help during vacations

#### **December 1999 – September 2005 - Deputy City Clerk/Treasurer**

Supervised three employees in daily cash handling, payroll, accounts payable, accounts receivable, service orders, customer service and utility billing. Processed utility billing for 3,600 utility customers monthly including balancing and reporting. Processed bi-weekly payroll. Reconciled and remitted city taxes and benefits in accordance with Idaho State and Federal Laws. Balanced general ledger monthly and provided financial statements to the City Treasurer for presentation to Departments, Mayor and Council. Assisted the City Clerk/Treasurer in budgeting. Deposited city revenues and expenditures including bank reconciliation. Oversaw the maintenance of the City's financial software Caselle and trained city employees on the modules, created procedures and policies to insure internal controls. Assisted the City Clerk/Treasurer in preparing the budget and budget reporting and audit.

**Aston Hotels, Sun Valley, Idaho**

#### **December 2009 - February 2012 - Accounting Office Manager**

Managed and oversaw short term, long term and management only units accounting, including daily cash deposits, owner statements, reimbursements, financial reporting to owners and our corporate office. Provided full-charge bookkeeping tasks for local Wood River Valley Homeowners and HOA's, including payroll.

**Sawtooth (Sun Valley) Board of Realtors, Blaine County, Idaho****October 2009 - January 2010 - Director Community Holiday Basket Food Program**

Supervised the process of food/gift/clothing baskets for Christmas 2009, provided a director's procedure manual. This program served 435 families and 869 children in Blaine County who were in need.

**CITY OF MERIDIAN, Meridian, Idaho** *Municipality consisting of 72,000 citizens and 450 employees***April 2008 – April 2009 - Utility Billing Manager**

Managed the daily activities of the Municipal Utility Billing System which included the supervision of six staff members' responsibilities. We as a team provided daily balancing of three cash drawers, credit cards, lockbox, depositing revenue and the reconciliation of the utility bank account. Managed and performed the disconnection of past due utility customers of approximately 500 to 700 per month which included handling angry customers on a regular basis. Processed billing for 27,000 utility customers bi-weekly. Implemented a program named Meridian Cares to assist customers in need with the payment of their monthly utility bills, this program is still in place.

**CITY OF GARDENA, Gardena, California** *Municipality consisting of 60,000 citizens and 420 employees***September 2005 – April 2008 - Deputy City Treasurer**

Managed the daily activities of the Treasurers Department which included the supervision of two staff members. Provided daily balancing of six department cash drawers, including credit cards, and check 21. Processed daily deposits of the utility revenue and reconciled the city bank accounts. Managed the cash flow and investment portfolio of approximately thirty million dollars, which included the distribution of the city payroll checks and warrant checks.

**Education:**

Idaho Municipal Clerks/Treasurers Institute, Certified CMC 1999-2020

Association of Idaho Cities Education 1999-2020

Government Finance Officers Association Conference California (2007) Public Funds Investment Certification

California Municipal Treasurers Association Investment Training and Conference

Supervisor Development Training, Unocal Corp

El Camino College, Torrance, California

**Memberships:**

Association of Idaho Cities

Idaho Municipal Clerks Association

Government Financial Officers Association

California Municipal Treasurers Association 2005-2008

Association of Public Treasurers of US & Canada 2006-2020

**Computer Programs:**

Caselle Clarity, Caselle Document Management (efiles), Miexcel, Cale Parking Enforcement, OmniPark Parking Notice, Chase Paymentech/Sympro, Xpress Bill Pay, Civic plus website and Microsoft products.