

MN GFOA · THURSDAY, SEPTEMBER 24, 2026

AI in Local Government: Practical Workflows

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Capital Improvement
Planning Software

Following McKaia Dykema, League of Minnesota Cities: what AI is, legal risk, and the best-practices checklist. · DRAFT

Who We Are and Why We Are Here

- Plan-It Software: Shaylan Hurley, CEO, and Luke Hemken, COO. We build capital improvement planning software for local governments and municipalities.
- Our company has grown about five times with AI and no added headcount. That's why we have opinions, but not the reason you're here.
- McKaia's covered what AI is and where the legal lines are. We'll stay inside those lines and show you what the work actually looks like.

PART ONE

Think of an Agent as a New Hire

Luke Hemken

Think of an Agent as a New Hire

An agent is a coworker you brief, not a search box you query.

- A search box gets a keyword and returns a list. A new hire gets a briefing and returns finished work.
- Every good outcome starts with the same things you would give a new employee on day one: what the job is, how we do things here, and what this specific task needs.
- When the output is bad, the fix is almost never a better tool. It is a better briefing.
- Ask yourself before every prompt: would a smart new hire succeed with only what I just typed?

Instructions, Context, and Skills

Three ingredients. Missing any one of them produces a bad draft.

Instructions

What you tell it to do. The briefing you would give a new hire. The role, the job, what good looks like, and where to stop.

Context

What this task needs. The documents, the deadline, the audience. For a city, the public record. The folder you hand someone for this one project.

Skills

The instruction you keep. A written procedure, a required format, a checklist of what good looks like. The job description and the SOP binder.

Context Is the Whole Game

The output is only as good as what you hand it.

- Each piece of context you add makes the result stronger: the job description, the annual calendar, the adopted budget, the list of who to call.
- Leave a piece out and the tool does not stop. It fills the gap with a guess, and the guess sounds confident.
- The biggest upgrade most people can make is not a better prompt. It is handing over more of what they already have.
- For a city, the context you can safely hand over is the public record. That is a lot more than most people realize.

From SOP to Skill

A written procedure is already most of a skill. Here is the shape.

1**What the task is**

One paragraph a stranger could follow.

2**What good looks like**

A finished example, or a clear description of one.

3**What to never do**

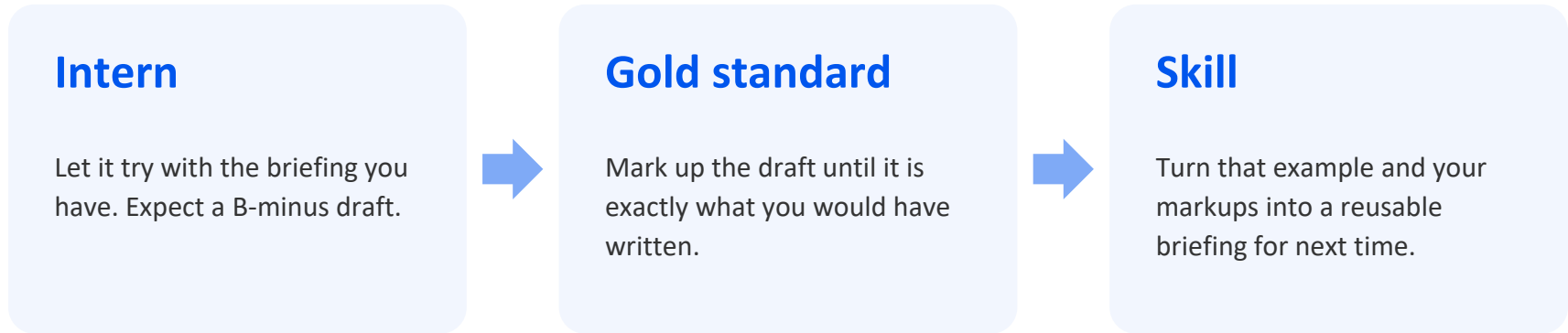
Never guess a number, a date, or a name.

4**What to hand back to a person**

The stopping rule. Who reviews, and when.

Intern, Gold Standard, Skill

The loop we used to build every internal workflow at Plan-It.



Then go around again. The second draft is a lot better than the first.

What Is Different for a City

A private company has more freedom than a city. We know that, and it shapes everything we show today.

- Plan-It can hand an agent almost anything about its own business. A city cannot, and should not, do the same.
- Everything in this session uses public information: adopted budgets, fee schedules, council calendars, posted job descriptions.
- If a document is not already published, it does not go into the tool. That is our rule for today, and McKaia's checklist governs everything beyond it.
- Anything that touches personnel goes to HR for review before anyone relies on it.



PART TWO

What This Looked Like for Us, and What It Looks Like for You

Shaylan Hurley

The Messy Spreadsheet

Our own version of the problem, told as a workflow story.

- A new customer sends us a spreadsheet. Inconsistent columns, half the fields blank, notes typed into cells that were meant for numbers.
- Turning that into a working setup used to take one person a day or two of careful, boring work.
- We wrote down how the experienced person did it, gave the agent the messy file plus that procedure, and marked up the result until it matched what the expert would have produced.
- Now the setup is finished before the invoice goes out. Same person, same standards, and the expert still signs off.



Your Version: Institutional Knowledge Walking Out the Door

- The finance director who has run the levy for 22 years is retiring in 60 days.
- The new hire starts in two weeks and has never seen your chart of accounts.
- The utility billing clerk is moving into a finance role, and nobody wrote down how the last one did it.
- In every case the knowledge lives in one head and a shared drive. The shared drive is not going to explain itself.

Brain Dump Plus Public Documents Equals an 80 Percent Draft

1

Brain dump

Ten minutes of talking in the voice of the person who is leaving.

2

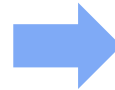
Public documents

Adopted budget, fee schedule, council calendar, posted job description.

3

A clear ask

A structured onboarding or exit package. Flag anything uncertain instead of guessing.



An 80 percent draft

The other 20 percent is the expert's review.

HR reviews anything that touches personnel before anyone relies on it.

The thin sections are not a failure. They are the interview questions for the person who is leaving.

Something You Can Use Today: Voice Capture

The brain dump does not have to be typed.

- Most people can talk through a year of institutional knowledge in ten minutes. Almost nobody will sit down and type it.
- Voice capture tools turn talking into clean text. One example is WisprFlow; your phone's built-in dictation also works.
- Record the retiring director answering questions in plain language. That transcript is context.
- Same rule applies: talk about public information and procedures, not about specific people or private data.



Live Demo

Take This With You: Two Prompts

PROMPT 1: THE REVERSE PROMPT

I am [role] at a city of about [size]. I want to build a 90-day onboarding guide for my replacement using only public documents and my own notes. Before you write anything, ask me the ten questions you would need answered to do this well. Ask them one at a time and wait for my answer.

PROMPT 2: ASK FOR A BETTER PROMPT

Here is a task I want help with: [describe the task in two sentences]. Write me a better prompt for this task. Include the role you should play, the inputs I should give you, the structure of the output, and an instruction to flag anything you are unsure about instead of guessing. Then tell me what I should review by hand before I use the result.

Take This With You: Three Rules

Light touch on purpose. McKaia's checklist is the full version.

1**Use public documents only.**

If a document is not already published, do not upload it. McKaia's session covers what counts as private under Minnesota law.

2**Treat every output as a draft.**

A person who knows the work reviews it and signs off before anyone relies on it.

3**Follow your city's AI policy.**

If there is no policy yet, start with the League of Minnesota Cities checklist from this session.

Q&A



TAKE THIS WITH YOU

A 45-minute whiteboard session on your knowledge-transfer situation

Free. A working session, not a sales call.

- Bring the role, the public documents you already have, and the person who is leaving if you can.
- We leave with a prompt, a document list, and a review plan you can run yourself.
- Everything we showed today stays inside McKaia's checklist. So does this.

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The logo features the text "Plan It!" in a bold, blue, sans-serif font. A small blue right-pointing triangle is positioned between the word "Plan" and "It!". The text is centered within a white circle, which is itself centered on a solid blue background.

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