

**FY 2013**  
**Strategic Operating Plan**  
**Office of the City Clerk**  
**Stephanie C. Kelly, MMC**



**Executive Summary**

The Office of the City Clerk provides services that connect citizens to their government and maintains a recorded history of government actions. These services include:

**Mayor and Council Assistance**

- Record verbatim minutes of all Council meetings
- Process Requests for Council Action and other official documents
- Provide consultation on procedural matters, Council actions and other records

**Records Management and Research**

- Record and archiving of contracts, minutes, ordinances, resolutions, oaths and all official records; Records retention and disposition
- Publish legal advertisements
- Update City charter and code
- Research for City Council, staff and the public
- Annexations and recording of deeds
- Transfer of data to electronic format
- Administration and maintenance of the Digital Contracts Archive system

**Boards and Commissions**

- Administer appointment process for 38 advisory boards and commissions
- Provide staff support to Civil Service Board and Citizen's Review Board
- Administer oaths of office
- Prepare annual reports and attendance records for the Civil Service Board and Citizen's Review Board

**Customer Service**

- Create, maintain, and distribute the Citizen Speakers' List for all Council Meetings
- Publish records and documents on website and CNET
- Complete notarizations and attestations for all departments
- Issue going out of business licenses
- Accept and process applications for public monuments
- Complete requests for research and information
- Process Protest Petitions
- Receive and process Voluntary Annexation documents

## **Our Vision**

To connect Charlotte citizens with their government by professionally and accurately preserving Council actions and providing easy access to all records of the City of Charlotte.

## **Mission Statement**

Our mission is to provide high quality information and services to the public, City Council and City staff so that effective and responsible decisions can be made to govern the City of Charlotte. The City Clerk's Office preserves the integrity of the City's official records while striving for the highest degree of excellence and professionalism.

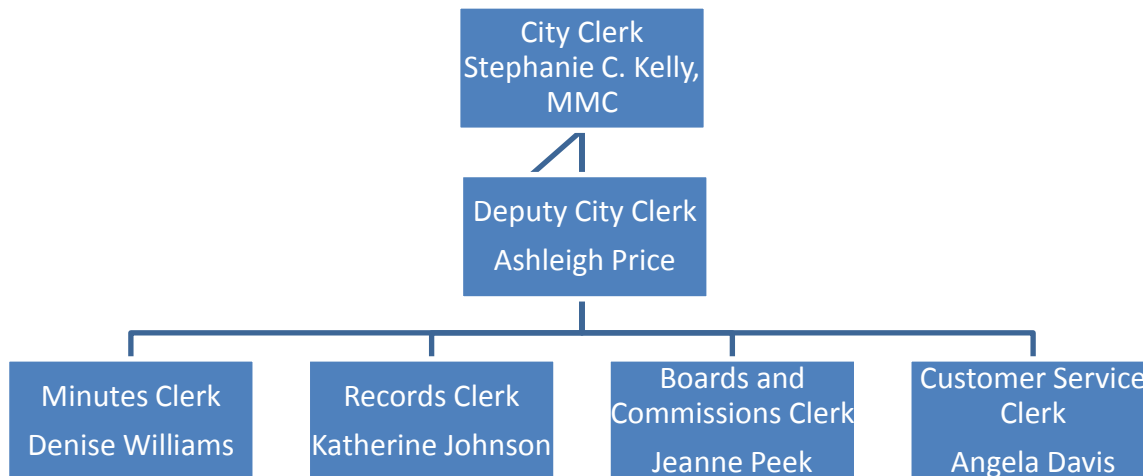
## **Needs and Challenges**

- Due to financial constraints, the City Clerk's Office does not offer a service that allows for searching across documents. Without the ability to search across multiple document types and date ranges, searches for records are time consuming and difficult for staff, citizens and Council. The City Clerk's Office has identified a vendor that allows us to provide a searchable document archive at minimal cost. The service with the new vendor will result in 75% reduction in total cost when compared to the rates paid to the former provider of this service. This service should be made available to staff and the public prior to the end of calendar year 2012.
- In an effort to keep costs low, the City Clerk's Office continues to use the services of a part-time, once retired clerk who administers the Council's 38 advisory boards and commissions. This flexible work arrangement provides for salary savings while maintaining service levels.
- The Clerk's Office uses the services of a second retired city employee, primarily during the spring to assist with transcribing minutes for budget retreats. Her services aid our department in achieving our goal of completing all verbatim minutes within 28 days.
- The Clerk's Office experienced significant staffing challenges in FY12 resulting in a backlog of minutes. After remaining vacant for half of FY12, a new minutes clerk has been hired and will work in conjunction with a retired minutes clerk to bring minutes up to date and to stay within established performance targets.
- There was a substantial increase in the amount of advertising/publishing required of the City Clerk's Office and year-end total for the line item exceeded the amount budgeted for FY12. Expenditures for this account are not controlled by the City Clerk's Office and all spending related to advertising/publishing is reactionary in nature. The FY13 budget has maintained funding levels for advertising/publishing; however, the City Clerk's Office has made changes to the publishing services provided by Municode that will decrease the costs for publishing changes to the city code. We also are able to use savings from other areas of our budget to help mitigate unforeseen expenses in advertising /publishing.
- Out of date technology at the dais makes some duties performed by the Clerk's Office more difficult. The City Clerk's Office plans to be involved in any future discussions surrounding changes to the dais and the technology used to manage

meetings. Some potential areas of improvement include – updated timer for speakers, electronic voting, and electronic distribution of speakers’ lists during meetings.

- In FY10 the CCO collaborated with BSS to implement a digital contracts scanning and archives process (DCA), which eliminated the need for contracting with an outside vendor for scanning and storage. This endeavor saved money and allowed for a temporary solution to contract management. ERP will discontinue the need for the DCA when it is implemented in 2014. The City Clerk’s Office is working with the ERP team to be strategic in making decisions about the switch from the DCA to the ERP system. The switch to the ERP system for contracts will be a welcome change because the DCA has surpassed its intended capacity and runs slowly resulting in decreased productivity in each department.

### Organizational Chart



### Strategy and Planning

#### Accomplishments

- Staff has provided verbatim minutes for all Council meetings, workshops, and budget retreats as well as recordings and minutes of required closed sessions. Though the Clerk’s Office did not meet the minutes performance target, we made every effort to complete special requests for draft excerpts so that no government business would be interrupted.

- Clerk's Office staff continues to add new ordinances, resolutions and other records to the City network for access by staff. Agenda and attachments for council business meetings, workshops and zoning meetings are made available on the website by the close of business on Thursdays or earlier prior to meetings. We take pride in our online presence and continue to add to the records available online each year.
- City Clerk's Office successfully conducted a selection and hiring process for a new minutes clerk.
- The Clerk's Office conducted a salary / position study during FY12 that resulted in one job reclassification from an OAIIV to an OAV and two market rate adjustments. These actions allow us to retain talented employees and meet Human Resources standards for compensation of employees.
- The Office conducted regular staff meetings as well as special meetings in order to form a collaborative Balanced Score Card for FY12-13.
- The Clerk's Office participated in an office retreat in the spring of 2012. During this retreat department leadership re-established expectations for staff and engaged in team building exercises to foster trust and increase moral.
- Worked with Corporate Communications to create a branded and updated Boards and Commissions application document and vacancies document.
- Staff made great contributions to our community by conducting a pizza fundraiser to benefit United Way, a hot dog sale and cornhole tournament to benefit the Arts and Science Council and by sponsoring a Salvation Army Angel Tree that encouraged City staff to purchase holiday gifts for 75 local children in need.
- The City Clerk's Office attended and completed all FEMA COOP training classes and the COOP for the Department.
- The City Clerk's Office now offers an online speaker sign up option that allows citizens to sign up to speak to Council at an upcoming City Council meeting 27/7 through our website. This service brings us in line with industry best practices and better meets the needs of the community. The service went live in early FY12 and has been met with positive feedback from citizens.
- The Clerk's Office continues to utilize unpaid interns from local universities in order to digitize records previously available only in hard copy format. The Clerk's Office now provides minutes back to 1963 on the website. By the end of this calendar year, resolutions and ordinances back to 1963 will also be provided on the website. The department will continue to seek out unpaid interns in order to slowly break down the backlog of projects.

### **Links to Corporate Strategy**

In carrying out our duties as official historians, researchers and record keepers for City government, our office focuses on the overall corporate strategy of customer service. The City Clerk's Office is committed to providing excellent service to our internal and external customers. We strive to find new forms of efficiency and effectiveness in our service delivery through the appropriate investment of resources.

- Develop Collaborative Solutions/Optimize Business Processes/Enhance Customer Service to provide easily accessible and searchable records for City staff and the public. To some extent, this is possible through the digital contracts archive, the S Drive, the City Clerk's website, and CNET. We continue improving in this area as technology becomes more available and affordable.
- Enhance Customer Service by completing verbatim minutes, posting agendas and minutes and processing RCAS and other official documents in a timely manner. We make these documents easily accessible on CNET and our website.
- Enhancing Customer Service by working with Council to improve the policy and reporting process for volunteer boards and commissions and by conducting meetings to update staff advisors to these boards, as needed.
- Optimize Business Processes by promptly and consistently coordinating the appointment process, attendance records and annual reports for 38 boards and commissions.

### **Strategic Initiatives**

- Streamline the application process for volunteer boards and commissions by developing an online application form and submittal process.
- Make all City records archived by the City Clerk's office easily accessible and searchable to staff and the public.
- Work with the ERP team on the transition around the DCA.
- Pull and convert older records that are only available on one computer and back each record up on the City Clerk G Drive and in paper format when appropriate.

### **Service Delivery**

The majority of City Clerk's Office services are mandated by the City Charter or by North Carolina General Statute or policy provision. We strive to maintain our current level of service, which is based upon the needs of Council, staff and the public. At the same time we continue to look for efficiencies wherever possible.