



City of North Port
INTEROFFICE MEMORANDUM
Office of the City Clerk

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To: Commission
From: Heather Taylor, Interim City Clerk *HT*
Date: February 5, 2020
Re: First Year Game Plan for City Clerk Position

On September 24, 2019, City Commission requested I provide a 60, 90, and 180-day goals and objectives plan for the position of City Clerk. Commission also requested I provide a professional development plan.

I have been the Deputy City Clerk with the City for a year and have spent 7 months of that time as the Acting or Interim City Clerk. I feel my actions/work performance during that time covers how I would have approached the first 60, 90 and 180 days so I wanted to provide you a summary of my first year here, as well as my future goals should I be selected for the City Clerk position.

MONTHS 1-3

During the first three months with the City, I spent time shadowing staff in the department, learning what their job tasks were, their procedures for completing those tasks and discussed improvements that could be made to make their jobs easier and more productive.

I familiarized myself with the software systems that the department uses, such as Laserfiche and Legistar. I recognized areas of those systems that were not being utilized to their fullest potential. I used my experience with Legistar to make workflow adjustments which enhanced the Commission agenda process and allowed for all City Advisory Boards to utilize the system for agendas and minutes and for these documents to be stored in a centralized location for public access on the City's webpage. I established procedure that increased the distribution of agendas from the 48 hours required per code, to 7 days in advance of regularly scheduled meetings. Upon reviewing the departments process for management of Advisory Board applications and board member terms, I suggested an addition to the budget for the purchase of the Boards and

Commissions module for Granicus that will allow for online management of board memberships and online application submittal.

During this time, I obtained my National Association of Parliamentarian Certification, attended City Sponsored webinars, completed FEMA training, and was on the Relay for Life Committee.

MONTHS 3-6

After learning more about the staff within the department and their tasks, I felt that it was important to empower them by allowing them to grow in their jobs, take on more responsibility, and receiving their input on how their duties could be more streamlined and efficient. I spent time training the Recording Secretaries in Legistar and slowly started transferring the task of agenda creation over to them with the goal of them creating agendas for all the advisory boards and having them posted a week in advance of the meeting. I made the recommendation to IT to modify the setup of Laserfiche to be more in line with the needs of the department with a goal of having documents available to the public and was successful in getting more rights to the system for our Records Management Liaison Officer.

Another accomplishment during this time was the implementation of the kiosk for public access of agendas and back up material for Commission and Advisory Board meetings. The City already had the kiosk, so there was no additional cost and a savings to the city by no longer printing full agenda packets for the public. The department has had minimal requests to print out back up material during meetings.

During this time, I attended the IIMC Annual Conference in Alabama, completed all available online Intermediate FEMA training, attended City Sponsored Webinars and attended various educational webinars.

MONTHS 6-9

With the revamping of job duties within the department, it was important to get staff' job descriptions in line with those tasks that best serve the City. This was done collaboratively with me, staff and Human Resources. As a result, job titles were also modified to change the Executive Assistant positions to Recording Secretaries and to change the Records Management Liaison Officer position to a Records Management Administrator. The goal was to ensure job descriptions were relative to the daily tasks, to allow for accountability and clearer competencies for performance evaluations. It was also important that staff be involved with making sure the job descriptions were accurate depictions of their tasks and the needs of the City.

As a group, the department met with Human Resources regarding changes that have been made in the department regarding structure and Supervisor/Staff interaction, as well as changes they would like to see in the future. It was agreed upon by Staff to not conduct official team building

training with Human Resources or an outside agency at this time but to internally focus on growth as a team.

During this time period, we received the draft Records Management Plan from the consultant. I took this time to review the plan and familiarize myself with the history of the project and better understand the direction the City desired.

During this time, I attended the FACC Fall Academy and attended City Sponsored Webinars.

MONTHS 9-12

With the resignation of the City Clerk, these months were very busy for me. I created all City Commission meeting agendas, reviewed all City Commission and Advisory Board minutes, attended almost all City Commission meetings, created election packets, managed the receipt of all election campaign reports, worked with the Records Management Consultant, and carried out day to day tasks.

I provided Commission with a presentation regarding Public Records Requests, Records Management Plan, and Clerk Staffing. This resulted in direction to develop and adopt a Records Request Policy and a reclassification of our Public Records Tech I position to a Public Records Tech II. In working with the records consultant, I have met with the IT department to start the process for email and other electronic retention policies. We have also planned for an annual records disposal event for records that have met their retention, along with scheduled training for department Records Coordinators.

Creating policies for the City is a priority and during these months I started the process of more than five policies. The Public Records Request Policy was our number one priority, which was recently approved.

I have worked with IT staff to develop plans of action for GovQA, Laserfiche and scheduled a kickoff meeting for the Boards & Commissions module. I have met with Finance regarding the implementation of online payments within GovQA and have scheduled training/testing for online payments.

The Clerk's office started having monthly department lunches to build relationships amongst one another. This have been very well received. We have held weekly staff meetings to keep the department informed. One of my goals is to not only get people to work with one another as a team but to hold everyone accountable for their choice of behaviors towards one another.

For the department, it is a goal of mine to create Standard Operating Procedures (SOP) for the department functions. I have asked all staff to develop SOP's by February 15, 2020. Starting in

March, once a month, we will be paired up and another staff member will use an SOP to ensure they were able to follow from beginning to end to ensure accuracy, should anyone with minimal knowledge have to cover that task. I have also encouraged staff to research training opportunities that would make them more efficient in their tasks.

During this time, I attended the IIMC Region III Conference, obtained my Bachelor of Science Degree, and attended various user trainings for the administrative side of GovQA. I also applied for and received a \$100 grant towards IIMC training.

YEAR 1-2

Should I be appointed as the City Clerk by Commission, I would continue to strive towards a cohesive work environment in the department by encouraging monthly lunches, team building activities, weekly team meetings, and ensuring my team is treated fairly and equally. It is important that everyone is held accountable for their work and behaviors. We will continue the process of growing as an office. I will continue to lead by example, work hard, and support those who work alongside me.

Goals that I see for the Clerk's Department for 2020 would be:

1. Complete all outstanding Commission directives including policy for ceremonial items, meeting decorum and minutes, promotional items, use of the city seal, etc.
2. Review the Code of the City of North Port regarding Advisory Boards and Committees to find ways to increase membership and increase board proficiency
3. Implement deflection and online payments for GovQA
4. Transfer all files from Alchemy Migration to Laserfiche and allow for public facing Ordinances, Resolutions and Minutes
5. Work with Staff to determine options for job growth and professional development
6. Continue to determine cost saving options for the department
7. Implement Boards & Commissions for online board applications and appointment management
8. Continue to work with departments and the consultant to develop policy and procedures as part of a cohesive Records Management Plan

Professional Development Goals that I see for myself for 2020 would be:

1. Continue to attend IIMC and FACC conferences to obtain points towards my Municipal Clerk Certification
2. Attend ICS 300 and ICS 400 courses as recommended for Emergency Management Certification
3. Take at least 4 IIMC offered courses

4. Request budgeting to enroll in the High-Performance Leadership Academy
5. Become involved in one or two local community organizations

Please let me know if you have any questions.

Thank you.
Heather

