



*Office of the Mayor*  
**MEMORANDUM**

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**To:** Honorable Mayor and City Council  
**From:** J.P. Twist, Chief of Staff  
**Date:** June 26, 2013  
**Re:** City Clerk Evaluation (July 1 and/or 2, 2013)

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Attached you will find the City Clerk's self-evaluation for the 4:00 p.m., July 1 and/or 2, 2013 Special Council Meeting.

**Special Council Meeting**

**3. City Clerk Evaluation**

**Request:** Discuss, consider, and take possible action regarding the employment, assignment, appointment, promotion, demotion, dismissal, compensation and benefits, disciplining, and/or resignation of the City Clerk.

**Staff Contact:** J.P. Twist, Mayor's Chief of Staff, 480-312-7806,  
[jptwist@scottsdaleaz.gov](mailto:jptwist@scottsdaleaz.gov)

**CITY CLERK SELF EVALUATION FORM (2013)**  
**(To be completed by the City Clerk)**

**Please complete this form and return it to the Mayor. Additional pages may be used if necessary.**

- 1. In addition to explicit goals and objectives of the Council, what goals have you set for yourself and detail progress in accomplishing these goals?**

The ongoing, annual goals of the Clerk's Office are:

- Support the Council Broad Goal of Open and Responsive Government by ensuring:  
(1) All required legal notices, including agendas, minutes, and marked agendas, are posted in compliance with State law and City policy; (2) accurate accumulation, preservation, and accessibility of official City documents and the City Code; (3) accurate and timely preparation of Council meeting minutes; (4) accurate recordkeeping and timely facilitation of the application and appointment process for the City's 30 appointed public bodies; and (5) administrative support to the Council.
- Support the Council Broad Goal of Open and Responsive Government by conducting the City of Scottsdale municipal elections; preserving the integrity of election procedures; encouraging participation in the democratic process; and serving as the campaign finance filing officer for all Scottsdale municipal elections.

As in prior years, all operational goals and statutory requirements were met, including: prepared and posted 1,109 legal notices; completed 63 sets of Council meeting minutes; collected, reviewed, distributed, and posted 533 Council reports on the City's website; scanned and posted 1,206 official documents (34,224 images) on the City's website; processed 266 legal filings; and conducted, without challenge, the 2012 Primary and General elections, including distributing more than 267,000 publicity pamphlets.

Below is a list of the Clerk's Office 2012/13 goals and a progress report for each:

- Conduct the November 6, 2012 General Election, which includes seating the new Council in January 2013.
  - The November 6, 2012 General Election was conducted without challenge and the newly-elected Councilmembers were seated on January 8, 2013.
- Prepare for the 2014 candidate elections.
  - Preparation for the 2014 candidate elections is well underway. The "2014 Candidate Handbook" has been drafted. Once the changes in State election law have been approved by the Governor and the U.S. Department of Justice, the handbook will be finalized, published, and posted on the City's website. By September, candidate packets will be completed and made available to the public.

- In early 2013, in partnership with City Attorney Bruce Washburn, bring forward proposed changes to the “Rules of Council Procedure” for Council consideration.
  - Collaborated with the City Attorney to draft proposed changes to the “Rules of Council Procedure.” The changes were presented to the Council at an April 30, 2013 Study Session. The Council accepted the changes and also directed two additional changes. The revised Rules are on the July 1, 2013 Council Meeting Agenda for formal adoption.
- Explore methods for improving the minute taking production process and related costs.
  - As part of our ongoing efforts to improve operational efficiency, the Clerk’s Office researched ways to reduce the cost and staff time required to prepare and maintain Council Meeting minutes. Our research indicated that action minutes are the most efficient and cost effective minutes to produce. As a result, the Clerk’s Office began the process of transitioning from summary minutes to action minutes, with a goal of completing the transition by the first meeting following the break (August 19, 2013).

Action minutes meet all statutory requirements and contain a list of the items considered; legal actions proposed, discussed, or taken and/or direction given; the names of the Councilmembers who proposed each motion (maker and second); and how each member voted. Persons making statements or presenting material to the public body are identified by name and, where applicable, whether they spoke in favor of or opposition to the issue under consideration. Action minutes do not include debate. Work Session action minutes contain a general listing of the issues discussed and any direction given to staff.

The primary goal in transitioning to action minutes was to maintain the level of service provided to our customers. To accomplish this goal, the Clerk’s Office partnered with the Communications and Public Affairs Office and, beginning with the January 8, 2013 meeting, began posting the Council Meeting closed caption transcripts on the City’s Council agendas and minutes webpage. A disclaimer accompanies each transcript to explain that the document has not been checked for completeness or accuracy and to provide links to the meeting’s Marked Agenda and digital video recording. In addition, digital video recordings of the Council meetings archived continue to be made available online.

It is estimated that the transition to action minutes will save the Clerk’s Office approximately eight to twelve man-hours per meeting.

- Focus efforts on improving efficiency and service delivery through technology (ongoing).
  - Early this year, the appointed public bodies database was completed. This project was ten years in the making and involved researching and documenting the City’s appointed public bodies (boards, commissions, committees, task forces, subcommittees, etc., including public bodies that are no longer active) and placing all of the data into a relational database. The database contains information on past and present membership; enacting legislation forming and/or dissolving the public body; bylaws; purpose, powers, and duties; and any other historic information that may be of interest to the public.

Before this project was initiated, none of the information on the City's appointed public bodies or their members had been preserved. If a public body's membership changed or the public body was dissolved, the information about the public body and its membership was lost. Now the information is stored in an Access database and the reports for all of the City's boards and commissions, as well as the City's other Council-appointed public bodies, past and present, are generated from a single source. Using a single database to manage the information helps maintain the integrity of the data and preserves the information for the future.

- Collaborated with the City Auditor to add the City Auditor's reports to the City's archived documents website to make it easier for the public to locate reports using the site's keyword search feature.
- Work on the City of Scottsdale Historic Information Project (ongoing).
  - This ongoing project has three major components:
    1. Maintain history webpages for all current and former Councilmembers.
    2. Maintain history webpages for current and former members of the City's appointed public bodies (boards, commissions, committees, task forces, subcommittees, etc., including public bodies that are no longer active).
    3. Research, document, and maintain the City's historic major events and items of interest webpages.
      - ✓ The Clerk's Office is currently researching Charter Officers' terms, vice mayor terms, and historic/significant events for placement on the City's historic webpages.

The history project is a work in progress, and, over time, it is my hope that additional information will be added so that Scottsdale's history can be preserved and shared with the public. The long-term goal is to have the project completed by January 2017.

- Develop and cross-train staff to ensure long-term sustainability of the Clerk's Office (ongoing).
  - Progress continues to be made on this important and ongoing project. As staff members become more confident in their primary jobs, we have been able to expand their training into other areas. For example, the Assistant Deputy Clerk is being cross-trained in budget preparation and maintenance and elections. The Deputy Clerk is learning agenda preparation and document management. We are also cross-training staff in records management, and two members of my staff will be accompanying me to elections training in July.

Staff members are encouraged to continually review and update the office processes and procedures for their respective areas of responsibility to ensure they are properly documented. These written procedures serve as an essential cross-training and reference

tool for the Clerk's Office staff. Currently, there are approximately 250 written procedures for the Clerk's Office.

- Continuous improvement, while maintaining or reducing the Clerk's base budget and sustaining or, when possible, increasing levels of service (ongoing).
  - The Clerk's Office has successfully met this goal for the past ten years. The Clerk's Office came in under budget for FY 2012/13 primarily due to election and agenda preparation cost savings. The FY 2013/14 budget was submitted with no proposed increases to contractual services or commodities.

**2. What other accomplishments have you had?**

- Issued a written report on early voting trends, election costs, and the mail ballot election process.
- Updated Administrative Regulation 121 "Standards for Public Notices and Agendas, Marked Agendas, Minutes and Legal Publications."
- Updated the Campaign Finance Report forms in pdf and Excel formats to make them more user-friendly.
- Began work on the 2013 Records Management Manual.
- As indicated under Question 1:
  - Completed the appointed public bodies database.
  - Began posting the Council Meeting closed caption transcripts on the City's Council agendas and minutes webpage.

**3. What obstacles or setbacks did you encounter during the year and how effectively did you handle them?**

Managing workload and training staff to assume new responsibilities, while continuing to meet all statutory requirements and deadlines, is always the biggest challenge for any Clerk's Office. Some projects are being postponed longer than I would like, and quality control is always a concern as we rush to meet deadlines. In spite of these challenges, productivity continued to increase and all required deadlines were met. Operational efficiency also continued to increase as staff members gained experience and confidence in their jobs and were able to assume additional responsibilities.

Staff time, operating funds, and resources are almost entirely dedicated to our six core services. The increase in operational efficiency has allowed more time for projects and training. Our training budget remains at \$1,200, and, as a result, we primarily rely on cross-training and in-house training. This year, Human Resources added a course on developing business writing skills and two of our team members were able to attend the class. I have asked Human Resources to offer this course again so that all of the Clerk's Office staff can take advantage of this wonderful opportunity. As stated previously, three members of the Clerk's Office will be attending elections training this year.

**4. What do you see as your major goals for the next evaluation period, and how can the Council help you accomplish these goals?**

- Conduct the November 5, 2013 Special Bond Election without challenge.
- Continue work on the August 26, 2014 Primary Election and November 4, 2014 General elections.
- Complete and publish the 2013 Records Management Manual.
- Continue to develop and cross-train staff to ensure long-term continuity of the Clerk's Office (ongoing).
- Continue to work on the City of Scottsdale Historic Information Project (ongoing).
- Continue to focus efforts on improving efficiency and service delivery through technology (ongoing).

I have always enjoyed encouragement and trust from the Council, which provides the support I need to accomplish my goals.

**5. Do you think that you take direction readily from the Council or resist when you think that the Council is wrong?**

It is my duty to carry out the Council's policy decisions and to provide support in the accomplishment of the Council's mission and goals. As part of my responsibilities, I provide information and expertise to the Council regarding matters directly related to the Clerk's Office and City elections. Regardless of how the Council acts on the information provided, it is my job to carry out the Council's direction.

One of the unique requirements of the Clerk's Office is to assist the public with processes that are not always in line with Council policy and direction. To do this effectively, the Clerk's Office must maintain a neutral position, especially in matters relating to elections and public processes. The Council has always understood and supported this role, which makes my job easier and reassures the public that our processes are open and transparent.

**6. What suggestions do you have for improving the communication and relationship generally between you and the Council?**

Feedback, suggestions for improvement, and more frequent opportunities to communicate with the Council individually and as a whole are always welcome. Also, if members of the Council have questions or concerns about any aspect of the Clerk's Office, I would welcome the opportunity to meet to discuss the matter as soon as possible so the issue(s) can be addressed.

**7. Do you think you have adequate staffing to allow you to be an effective City Clerk?**

At the present time, I believe we have the right staffing to meet the Council's and the public's needs, to ensure all legal requirements incumbent upon our office are met, and to provide for the continuity of our office.

**8. Are there any other issues or comments you would like to share?**

I am privileged to work with a very talented, hard-working, customer service-oriented team. They do an outstanding job for the City and our citizens, and are directly responsible for the success of the Scottsdale City Clerk's Office. I am also fortunate to have an excellent working relationship with my fellow Charter Officers. It is truly a pleasure to work with all of them, individually and as a team.

Thank you for the opportunity to discuss and receive feedback on my performance so that I may better serve you, the City, and the citizens of Scottsdale.

  
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City Clerk's Signature

June 25, 2013  
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Date