



Wednesday, February 21, 2024

Noon - 2:00 p.m.

Hosted by Shawn Campbell, City of Auburn

AGENDA

Lunch and Business Meeting

- A. Call to Order
- B. Welcome and Introductions
- C. Approval of February 15, 2023, October 18, 2023, and December 19, 2023, Meeting Minutes
- D. Approval of the Treasurer's Report
- E. Approval of the 2024 Budget
 - a. WMCA Conference Auction
- F. Scholarship Committee Appointments
 - a. Present the scholarship applications currently have
- G. 2024 Meeting Schedule and Proposed Speaker Topics
- H. Reminder: Dues due end of February
- I. WMCA and What It Is
- J. Next Meeting: April 17, 2024 – City of Sumner
- K. Adjournment

Please invite any colleges from Special Purpose districts, other non-members, and other organizations you feel would benefit from attending.

MEETING WILL BE HELD AT:

City of Auburn
25 W. Main Street
Auburn, WA 98001

Parking Passes will be sent to those who RSVP

Please RSVP with Sadie Schaneman @ schanemans@cobl.us and Shawn Campbell @ scampbell@auburnwa.gov

Lunch is TBD



PCCFOA

Pierce County Clerks' & Finance Officers' Association

MINUTES

Wednesday, February 15, 2023

City of Auburn

25 W Main Street, Auburn, WA

Members Present: Treva Percival (City of Buckley), Jessica Clark (City of Buckley), Michelle Converse (City of Sumner), Maria Parisot (City of Sumner), Kandice Besaw (City of Bonney Lake), Sadie Schaneman (City of Bonney Lake), Rachel Pitzel (City of Edgewood), Jill Schwetzler-Herrera (City of Edgewood), Nicole Schunke (City of Pacific), Katie Sorum (City of Auburn), Rebecca Wood-Pollock (City of Auburn), Brodie Rota (City of Fife), and Shawn Campbell (City of Auburn)

Call to Order:

Shawn Campbell called the meeting to order at 12:14 PM.

Welcome and Introductions:

Each member introduced themselves and the agencies that they represent.

Approval of February 2023 Treasurers Report:

Shawn Campbell moved to approve the treasurer's report of February 15, 2023. Seconded by Jessica Clark. Motion carried unanimously.

New Board Member Appointments:

Jill Schwetzler-Herrera moved to appoint Nicole Schunke as President, Jessica Clark as Vice President, Treva Percival as Treasurer, and Brodie Rota as Secretary. Sadie Schaneman seconded the motion. Motion carried unanimously.

Approval of 2023 WMCA Conference Donation:

Treva Percival moved to spend \$1,500 with \$500 going to the WMCA Scholarship Fund, \$500 going to an auction item from PCCFOA for the 2023 WMCA Conference, and \$500 to sponsor a break-out session snack at the 2023 WMCA Conference. Michelle Converse seconded the motion. Motion carried unanimously.

Electronic Records Management:

Megan Gregor did a presentation on Electronic Records Management.

Future Meeting Locations:

The 2023 meeting scheduled was passed around and the following cities signed up to host meetings:

- April – DuPont
- June – Sumner
- August – Bonney Lake
- October – Edgewood

Adjournment:

Meeting adjourned at 1:38 PM.



PCCFOA

Pierce County Clerks' & Finance Officers' Association

PCCFOA Business Meeting Minutes

October 18, 2023 – 12:00 PM

Edgewood City Hall, 2224 104th Ave. E., Edgewood, WA 98372

Members present: Nicole Schunke (Pacific), Rachel Pitzel (Edgewood), Jill Schwerzler-Herrera (Edgewood), Brodie Rota (Fife), Jessica Clark (Buckley), Treva Percival (Buckley), Kandice Besaw (Bonney Lake), Shawn Campbell (Auburn), Hannah Scholl (Auburn), Ryan Taylor (Auburn), and Rebecca Wood (Auburn).

a. Call to Order

President Nicole Schunke called the meeting to order at 12:05 PM.

b. Welcome and Introductions

Members took turns introducing themselves.

c. Approval of February 15, 2023 and August 16, 2023 Meeting Minutes

Shawn Campbell moved to approve the August 16, 2023 meeting minutes.

Seconded by Treva Percival. Voice vote was taken and carried 11-0.

Approval of the February 15th meeting minutes was postponed to a future meeting.

d. Approval of the October 2023 Treasurer's Report

Treva Percival reviewed the October 2023 treasurer's report highlighting revenue, expenses, and ending balance as of Sept. 30, 2023.

Shawn Campbell moved to approve the October 2023 treasurer's report as presented. Seconded by Rebecca Wood. Voice vote was taken and carried 11-0.

Shawn Campbell brought up the WMCA annual spring conference and PCCFOA's contribution to the event. Questions and discussion followed by the group.

Treva Percival moved to donate \$500 from PCCFOA's account to WMCA for a scholarship and authorize Shawn Campbell to spend up to an additional \$500 on an auction item for the event. Seconded by Hannah Scholl. Voice vote was taken and passed unanimously (11-0).

e. Onboarding Councilmembers – Guest Speaker, Andrea Larson – City of Mercer Island

Andrea Larson, city clerk from the city of Mercer Island provided a detailed overview of the city of Mercer Island's onboarding process for new city councilmembers.

Andrea explained the four phases of their onboarding program:

- Phase I: Prospective Council Candidate
- Phase II: Council Candidate Orientation
- Phase III: Councilmember Elect Orientation
- Phase IV: New Councilmember Onboarding

Andrea reviewed each phase discussing important dates, timeline, candidate workshops, meetings held, roles & responsibilities, topics covered, resources, work plan, goals, processes, etc. Andrea shared resource templates and provided examples of materials to the group. Andrea noted prospective council candidate materials can also be found on the city of Mercer Island website;

<https://www.mercerisland.gov/citycouncil/page/serving-city-council>

Questions and discussion occurred throughout the presentation.

f. Adjournment

With no objection, President Schunke adjourned the meeting at 1:30 PM.

Nicole Schunke, President

Brodie Rota, Secretary



PCCFOA

Pierce County Clerks' & Finance Officers' Association

PCCFOA Business Meeting Minutes

December 20, 2023 – 12:00 PM

Virtual meeting via Zoom

Members present: Nicole Schunke (Pacific), Sadie Schaneman (Bonney Lake), Shawn Campbell (Auburn), Brodie Rota (Fife), Debbie McDonald (Bonney Lake), Kandice Besaw (Bonney Lake), Joshua Stecker (Gig Harbor), Tiffany Aliment (Gig Harbor), Treva Percival (Buckley), Hannah Scholl (Auburn), Michelle Converse (Sumner), Jessica Clark (Buckley)

a. Call to Order

President Nicole Schunke called the meeting to order at 12:04 PM.

b. Welcome and Introductions

Members took turns introducing themselves.

c. 2024 Officers

Discussion occurred regarding officers for the coming year. Nominations and volunteers were accepted.

Shawn Campbell moved to approve the following slate of officers for 2024:

Sadie Schaneman - President

Hannah Scholl - Vice President

Treva Percival - Treasurer

Brodie Rota – Secretary

Motion seconded by Joshua Stecker. Voice vote was taken and carried 12-0.

d. 2024 Meeting Schedule

Discussion occurred about the 2024 meeting cadence and location. The following draft meeting schedule was approved with meetings being held on the third Wednesday of every other month from 12 PM to 2 PM.

- Feb. 21, 2024: Auburn
- April 17, 2024: Sumner
- June 19, 2024: Gig Harbor
- Aug. 21, 2024: Buckley
- Oct. 16, 2024: Fife
- Dec. 18, 2024: *TBD*

e. Adjournment

With no objection, President Schunke adjourned the meeting at 12:25 PM.



PCCFOA

Pierce County Clerks' & Finance Officers' Association

Treasurer's Report

February 2024

Previous balance October 2023	\$9,838.87
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Credits:

	0.00
Total	<u>0.00</u>

Debits:

Check #2064 – WMCA (Scholarship Donation)	500.00
Check #2065 – Shawn Campbell (PCCFOA Auction Donation)	500.00

Total	<u>1,000.00</u>
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Ending balance January 30, 2024	<u>\$8,838.87</u>
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PCCFOA 2024 Proposed Budget

PROPOSED 1/1/2024- 12/31/2024	DESCRIPTION	Comments
\$8,838.87	BEGINNING BALANCE	
	REVENUES	
\$ 815.00	Membership Dues	2023 : 47 members from 18 agencies
\$ -	Training Registration	\$0
\$815.00	TOTAL REVENUES	
	EXPENDITURES	
\$ 100.00	Business Meetings	\$20x4 speakers budget, December room reservation
	Speaker/Training Fees	
	Training Refreshments	
	Training Supplies	name tags, certificates, copies
	Banking supplies/fees	checks if needed
\$ 500.00	WMCA Conference Donation	
\$ 500.00	WMCA Auction Item Donation	PCCFOA Auction Item for WMCA Conference
\$ 2,500.00	Scholarships	We currently have received 2 Scholarship Applications
	Business Mtg Lunches Paid	(We generally have members pay directly now.)
\$3,600.00	TOTAL EXPENDITURES	
(\$2,785.00)	EXCESS/(DEFICIT)	
\$6,553.87	ENDING BALANCE	



PCCFOA

Pierce County Clerks' & Finance Officers' Association

SCHOLARSHIP APPLICATION

Last Name	Miess	First Name	Marci		
Address	1700 Civic Dr.	Organization	City of DuPont		
City	DuPont	State	WA	Zip	98327
Phone	253-964-8121	Fax	253-964-3554		
Title	Deputy City Clerk	From	/ /12/2020	To	/ /present
Email	mmiess@dupontwa.gov				

Memberships: Please check all that apply:

WMCA Member

KCMCA Member

WAPRO Member IIMC Member

WFOA Member

PCCFOA Member

Since: 2021

PSFOA Member

Other Memberships: _____

Designations: Please check all that apply:

CMC

PFO

MMC

CPRO

If for WMCA, WFOA or IIMC conference, is this your first conference? Yes NoIf for WMCA Advanced Academy, is this your first time attending? Yes NoIf for NW Clerks Institute, is this your first time attending? Yes No

Have you previously been awarded a scholarship from PCCFOA?

 Yes No

If yes, what year(s)? _____

Training Course Title	Professional Development III	
Date(s) of Training	June 16-21, 2024	
Total Cost	\$1,400.00	
Other Funding Awarded	\$375 from RMSA	

How have you participated in PCCFOA in the past 12 months? (Attach additional paper if necessary.)

Paid member.

Do you meet the PCCFOA scholarship guidelines (see back page): Yes No

I hereby attest the above information is true and correct to the best of my knowledge

Signature		Date	1/22/2024
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SEE BACK FOR IMPORTANT INSTRUCTIONS

SCHOLARSHIP GUIDELINES:

Eligibility Requirements: All applicants must be PCCFOA members in **good standing** for the previous 12 months. All requests for scholarships must be for the purpose of further developing the applicant's abilities to perform in their position. Applicants must have requested their government agency to cover costs and been denied all or part of such funding. Applications can be submitted throughout the year for upcoming training events, allowing a minimum of three weeks for review and decision of the application(s).

Criteria:

- Scholarships may be awarded for tuition/registration and room and board for a qualifying training and are limited to one per applicant during any consecutive two-year period based on funding date.
- Applications will be considered by need and commitment to attend, with preference given to applicants who have not previously received a scholarship from PCCFOA, and applicants who demonstrate active participation in PCCFOA (meeting attendance, committee involvement, etc.).
- Scholarships are non-transferable, and recipients who are unable to utilize scholarship funds must notify the Scholarship Committee Chair immediately. Any cancellation fees shall be the responsibility of the recipient.

INSTRUCTIONS:

- Attach a copy of the registration for class, including costs and description of training with the application form.
- Any other documentation you feel may benefit the Committee when reviewing your application.
- **APPLICATION AND ATTACHMENTS MUST BE RECEIVED NO LATER THAN** a minimum of three weeks prior to the date of the conference/training date.
- **Reimbursement Procedure:** After you complete the training, please submit to the treasurer:
 - proof of attendance (e.g. certificate, etc.)
 - copy of the payment document(s) for the cost item(s) approved such as check/voucher stub, bank card statement, hotel invoice, etc.

NOTE: PCCFOA prefers to reimburse the member's agency

MAIL TO: **Treva Percival**, PCCFOA Treasurer
City of Buckley
PO Box 1960
Buckley, WA 98321

OR

EMAIL TO: tpercival@cityofbuckley.com



January 22, 2024

RE: Registration for Professional Development III

Dear PCCFOA,

Thank you for a scholarship opportunity for the final step in my CMC journey. I appreciate the tremendous work it takes behind the scenes to provide scholarships to deserving people.

I have completed Professional Development (PD) I and II through Washington State University's Northwest Clerk's Institute and have used the gained knowledge daily. The bonus from the sessions is the inspiration I gained to share my knowledge, enthusiasm, and importance of the clerk roll to my fellow teammates in the city. It has increased their trust in and respect for the work I do as the Deputy Clerk.

Due to budget limitations, this scholarship helps make attending PD III even possible. I have applied for all the scholarships available. IIMC said, *"For the first time ever, the Foundation had more scholarship applications than funding. Recipients were chosen by the Region Director ranking and random draw. Unfortunately, you were not selected for a scholarship this year."* RMSA and WMCA's scholarships are for registration only and I have confirmation will cover \$375 (their scholarships are only for ½ of any registration fee). WMCA will also only cover the registration fee and so I am still awaiting their decision. I am hoping that PCCFOA will be able to cover \$650 of the room/board portion and, if WMCA does not award a scholarship to me, the registration fee balance of \$375.

I understand a copy of my registration is requested with my application but since I will not be able to attend without scholarships covering all the expenses, my city can't have me register until I have all costs covered. In lieu of my registration, I have included the website information about the class and registration costs with my application.

Thank you, again, for believing in this scholarship program and for your consideration of my request. I look forward to hearing from you soon so I can quickly register and reserve a spot.

Sincerely,

Marci Miess
Deputy Clerk



PROFESSIONAL DEVELOPMENT (PD)

NORTHWEST CLERKS INSTITUTE PROFESSIONAL DEVELOPMENT SERIES

Attend the 2024 Northwest Clerks Institute

register now

All successful professionals sharpen their skills on a regular basis. Your job is multi-faceted and changing. New citizen demands, legal changes in procedures and new information technologies have increased the pace of your work and require you to plan and expedite many different tasks at once. You are the citizen's first point of contact in your local jurisdiction, and your elected officials count on you to make sure that your public meetings, records, elections and other special projects operate smoothly.

The job of Clerk is not getting any easier and you know the importance of keeping abreast of the latest issues and trends. The best way to do just that is by investing in continuing education and obtaining certification as a CMC and MMC. The Northwest Clerks Institute provides a comprehensive curriculum in public administration management, technical skills and professional/personal development.

The Institute experience is a unique combination of state-of-the-art classroom training, high impact networking, and one-on-one mentoring with municipal leaders and instructors. The professional friendships you will develop at the Northwest Clerks Institute will prove invaluable over the course of your career.

Decide to make a difference in your organization, career and future. Join us at the Northwest Clerks Institute.

University of Puget Sound
1500 N. Warner St. #1093
Tacoma, WA 98416

Professional Development I: June 2-7, 2024

Professional Development II: June 9-14, 2024

Professional Development III: June 16-21, 2024

Professional Development IV: June 10-13, 2024

CONTACT

For questions regarding the institute, certification and courses, please contact Joann Tilton - Institute Director via email nwcidirector@gmail.com or at 209-456-7855.

INVEST IN YOUR FUTURE --- NORTHWEST CLERKS INSTITUTE

Located at the University of Puget Sound - Tacoma, Washington



All successful professionals sharpen their skills on a regular basis. Your job is multi-faceted and changing. New citizen demands, legal changes in procedures and new information technologies have increased the pace of your work and require you to plan and expedite many different tasks at once. You are the citizen's first point of contact in your local jurisdiction, and your elected officials count on you to make sure that your public meetings, records, elections and other special projects operate smoothly.

The job of Clerk is not getting any easier and you know the importance of keeping abreast of the latest issues and trends. The best way to do just that is by investing in continuing education and obtaining certification as a CMC and MMC.

The Northwest Clerks Institute (NCI) is a unique combination of state-of-the-art classroom training, high impact networking, and one-on-one mentoring with municipal leaders and instructors. The Institute provides a comprehensive curriculum in public administration management, technical skills and professional and personal development for municipal clerks in the states of Alaska, Oregon, and Washington.

Questions? Contact NCI Director Joann Tilton (<mailto:NWCIDirector@gmail.com>) or (209) 456-7855

[Letter of Agreement](#) between Alaska, Oregon and Washington Clerks Association regarding the Northwest Clerks Institute dated December 5, 2005.

[Professional Services Agreement](#) between WMCA and Northwest Clerk's Institute effective December 1, 2018.

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Northwest Clerks Institute

Municipal Clerks Certification and Professional Development

Invest in Your Future - Attend the 2024 Northwest Clerks Institute

June 2024
University of Puget Sound
Tacoma, WA

All successful professionals sharpen their skills on a regular basis. Your job is multi-faceted and changing. New citizen demands, legal changes in procedures and new information technologies have increased the pace of your work and require you to plan and expedite many different tasks at once. You are the citizen's first point of contact in your local jurisdiction, and your elected officials count on you to make sure that your public meetings, records, elections and other special projects operate smoothly.

The job of Clerk is not getting any easier and you know the importance of keeping abreast of the latest issues and trends. The best way to do just that is by investing in continuing education and obtaining certification as a CMC and MMC. The Northwest Clerks Institute provides a comprehensive curriculum in public administration management, technical skills and professional/personal development.

The Institute experience is a unique combination of state-of-the-art classroom training, high impact networking, and one-on-one mentoring with municipal leaders and instructors. The professional friendships you will develop at the Northwest Clerks Institute will prove invaluable over the course of your career.

Decide to make a difference in your organization, career and future. Join us at the Northwest Clerks Institute.

The Value of the Institute

Strong curriculum builds your management skills:

- Leadership development classes help you manage more effectively
- Practical courses target areas such as financial management, records management, legal issues, and other topics critical to your success

Learn from Professional Faculty:

- Local government leaders share their expertise
- Small class sizes enhance the interactive experience
- Dynamic speakers, trainers and consultants facilitate sessions and class discussions

Peer relationships are fostered:

- Participants make new connections and renew old ones, creating a strong professional support system
- Best practices and proven solutions are shared among participants and faculty.

The Institute focuses on issues critical to maintaining effectiveness in the public sector and the professional Clerk's role in those processes. Sessions will provide both overviews and in-depth examinations of issues in public administration, interpersonal communications, and special topics related to Clerk operations.

Program Schedule

Note: All session times are in Pacific Time.

Professional Development I:

Sunday, June 2 - Friday, June 7

PD: \$750

Overnight: \$650

Commuter: \$325

Professional Development II

Sunday, June 9 - Friday, June 14

PD: \$750

Overnight: \$650

Commuter: \$325

Professional Development III:

Sunday, June 16 - Friday, June 21

PD: \$750

Overnight: \$650

Commuter: \$325

Professional Development IV:

Monday, June 10 - Thursday, June 13

PD: \$650

Overnight: \$475

Commuter: \$275



Northwest Clerks Institute

Municipal Clerks Certification and Professional Development

Professional Development III

June 16 - 21, 2024

PDIII begins Sunday afternoon at 1:00 p.m. Pacific Time. Attendees can choose to check in one night prior to the start of the program or the morning of. All attendees must be on site for each session during the entirety of the PD to earn their certificate of completion.

Schedule at a Glance

Sunday:

Registration opens at 10:00 a.m.

Sessions from 1:00 - 5:00 p.m.

Welcome Reception: 5:30 p.m.

Monday-Thursday:

Sessions from 8:00 a.m. - 5:00 p.m.

Thursday:

Banquet Dinner at 5:30 p.m.

Friday:

Sessions from 8:00 a.m. - 12:00 p.m.

Decision-Making

Participants will come away from this session with a better understanding of the process that leads to effective decisions. In addition, you will also learn to better communicate the process and consequently garner more support for your decisions.

Developing Effective Workplace Policies

Does your organization rely too heavily on the "institutional knowledge" of longtime employees? Do you struggle to get staff to read (or follow) your agency rules? Are your existing policies outdated? In this session, the trainer will provide you with critical tools for creating "reader-friendly" rules, such as:

- Learn what policies should (and shouldn't) include.

- How to plan policies before you write them.
- Editing policies for clarity & brevity.
- Formatting policies so they're easy to skim.

Purpose Driven Leadership

Understand how leadership affects your success. Assess your leadership strengths and how your leadership affects your work and decision-making. Discover what leadership is and isn't.

The Social Side of City Hall: Intro to Government & Social Media

Through social media, government agencies can engage directly with the communities we serve, exchanging dialogue, news, and information in real-time. But social media also presents unique challenges for government agencies. In this session, we will cover how to use social media at your organization, including:

- Who uses different social media platforms and why
- How to stay current with social media best practices and trends
- Why you should incorporate customer service into your social media strategy
- How to plan and create content for your channels
- What to know about the First Amendment and social media public records

In addition to social media fundamentals, we will participate in interactive exercises and a Q&A session.

Conquering the Workplace Bully

Workplace bullies create havoc in the workplace, oftentimes with little or no consequences. The bully's behavior is emotionally disruptive, poses potential risk of liability for the employer, and, if unchecked, will destroy the workgroup. Workshop participants will learn:

- Behavioral characteristics that may indicate a bully exists in the work environment
- Some of the reasons bullying behavior is mistakenly tolerated
- The impacts of bullying on individuals and the team
- The potential liability of the bully's behavior for the employer
- Common mistakes when dealing with the bully
- How to establish behavioral expectations that minimize the bully's behavior
- Other tips for stopping bullying behaviors

How Can I Help? De-escalation in the Workplace

As observations of escalated behaviors have increased, outward facing staff need fresh tools for realistic expectations, healthy boundaries, and authentic connection. In this highly interactive workshop, we look at the crucial role of purpose, keys to prevent power struggles, and what to do when you need to exit an interaction. This workshop focuses on escalation prevention, and mental health for staff and clients or patrons. This workshop does not address conflict that includes physical violence, but rather the cumulative weight of increased anger, outbursts, and anxiety in the public sector. At the end of this workshop participants will have practiced skills in the following areas:

- Reconnecting with the importance of purpose in seasons of high stress.
- Uncover what is at the root of most escalated interactions
- Use fresh language tools to circumvent power struggles
- Identify before, during, and after work practices for mental health support

Crisis Communications for Clerks

Earthquakes. Forest Fires. Citizen Protests. Cyber Attacks. Political Drama. Floods. Violence and Security Incidents. Public Health Emergencies. During crisis situations, Clerks/Recorders often become the spokesperson for their department, elected body, or even for their entire municipality. This session will provide the public information officer tools necessary to function in this often high-stress and high-visibility role. Participants will receive an introduction to

the Incident Command System (ICS), continuity of operations principles, and the appropriate roles a Clerk/Recorder might serve in the ICS structure. Role playing and interactive group activities will provide tools regarding how to write a press release or official statement, media relations and interview skills, a basic understanding of social media management during crisis, and records keeping concepts to document response efforts.

Understanding Harassment, Discrimination and Retaliation

Even though harassment and discrimination laws have existed for several decades, there remains a lot of confusion regarding what behaviors are and are not acceptable under those laws. This interactive workshop will provide the attendee with a comprehensive understanding of the following:

- The impacts of harassment and discrimination on the work environment
- The federal laws governing workplace harassment, discrimination and retaliation
- The role of the supervisor in preventing harassment and retaliation
- The importance of not allowing emotions that may arise in response to a complaint to generate behaviors that may be retaliatory
- How to minimize and respond appropriately to complaints
- Other behaviors that may trigger complaints

Effective Presentation Skills: How to Engage Your Audience and Inspire Them to Action

This one-day interactive program will equip city clerks with practical strategies to enhance their skills and confidence in presenting material to others. Participants will walk away with techniques to overcome nervousness, learn a process to organize their presentation, and discover easy to implement tips to engage their audience. Participants will have the opportunity to practice in a comfortable setting and will receive feedback from the instructor and their peers with emphasis on what they are doing well with a few opportunities for improvement. After attending this workshop, clerks will be able to:

- Overcome nervousness and distracting body language
- Learn how to create a logical flow to their presentation
- Control their environment and manage group interaction
- Create and use visual aids
- Recognize strategies to engage their audience and inspire them to action

Note: This workshop will also help you practice in a safe and comfortable setting with others. Please come prepared with a presentation topic that you are familiar with to use for your practice. The topic can be personal or professional in nature but a topic that you are knowledgeable about is key.

Power Talk

You find yourself sitting at a table of clerks/recorders sharing work-related experiences. What questions would you like to ask your peers? Questions related to social media, software and tools used to increase work production and efficiencies, working with elected officials, supervision and motivation strategies, records requests and records management tools, other best practices in the world of Clerkdom? We have so much to learn from one another in spite of our diversity. In this session, we will Power Talk about these topics and more using a roundtable format. You will gain a fresh perspective on a variety of topics; and, you will walk away with a list of resources, contacts, tips and strategies to help you in your pursuit of excellence.



PCCFOA

Pierce County Clerks' & Finance Officers' Association

SCHOLARSHIP APPLICATION

Last Name	Besaw	First Name	Kandice		
Address	9002 Main Street East, Suite 300			Organization	City of Bonney Lake
City	Bonney Lake			State	WA
Phone	253.447.3109			Fax	n/a
Title	Records and Disclosure Coordinator			From	02 / 09 / 2022
Email	besawk@cobl.us			To	/ / Current

Memberships: Please check all that apply:

WMCA Member

KCMCA Member

IIMC Member

WFOA Member

PCCFOA Member

PSFOA Member

Other Memberships: MRSC, WCIA, NAGARA, & AWC.

Designations: Please check all that apply:

CMC
MMC

PFO
CPRO

If for WMCA, WFOA or IIMC conference, is this your first conference? Yes No

If for WMCA Advanced Academy, is this your first time attending? Yes No

If for NW Clerks Institute, is this your first time attending? Yes No

Have you previously been awarded a scholarship from PCCFOA?

Yes No If yes, what year(s)? N/A

Training Course Title	Professional Development I
Date(s) of Training	June 2, 2024 to June 7, 2024
Total Cost	\$1075.00
Other Funding Awarded	None at this time.

How have you participated in PCCFOA in the past 12 months? (Attach additional paper if necessary.)

I have attend all meetings and look forward to becoming more involved once a spot becomes available.

Do you meet the PCCFOA scholarship guidelines (see back page): Yes No

I hereby attest the above information is true and correct to the best of my knowledge

Signature 	Date <u>1/23/2024</u>
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SEE BACK FOR IMPORTANT INSTRUCTIONS

SCHOLARSHIP GUIDELINES:

Eligibility Requirements: All applicants must be PCCFOA members in **good standing** for the previous 12 months. All requests for scholarships must be for the purpose of further developing the applicant's abilities to perform in their position. Applicants must have requested their government agency to cover costs and been denied all or part of such funding. Applications can be submitted throughout the year for upcoming training events, allowing a minimum of three weeks for review and decision of the application(s).

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- Scholarships are non-transferable, and recipients who are unable to utilize scholarship funds must notify the Scholarship Committee Chair immediately. Any cancellation fees shall be the responsibility of the recipient.

INSTRUCTIONS:

- Attach a copy of the registration for class, including costs and description of training with the application form.
- Any other documentation you feel may benefit the Committee when reviewing your application.
- **APPLICATION AND ATTACHMENTS MUST BE RECEIVED NO LATER THAN** a minimum of three weeks prior to the date of the conference/training date.
- **Reimbursement Procedure:** After you complete the training, please submit to the treasurer:
 - proof of attendance (e.g. certificate, etc.)
 - copy of the payment document(s) for the cost item(s) approved such as check/voucher stub, bank card statement, hotel invoice, etc.

NOTE: PCCFOA prefers to reimburse the member's agency

MAIL TO: **Treva Percival**, PCCFOA Treasurer
City of Buckley
PO Box 1960
Buckley, WA 98321

OR

EMAIL TO: tpercival@cityofbuckley.com



9002 Main St. E. • Bonney Lake, WA 98391
(253) 862-8602

February 12, 2024

RE: Registration for Professional Development I

Dear PCCFOA,

I am appreciative of the scholarship opportunity, as it will undoubtedly aid me in pursuing my CMC journey.

I earned my Certified Public Records Officer Certificate last year, and I've been working hard to meet the requirements needed to get my CMC. I also have high expectations of joining the NWWLA this year, and continuing to attend as many conferences and workshops as I can.

Although my attendance at the Professional Development (PD) I is a significant step toward achieving my goal, sadly it was not budgeted for and due to budget limitations, this scholarship is much required.

I've submitted applications for every scholarship that is offered in the hopes that I will be blessed. I'm excited about the knowledge I'll acquire and the opportunity to inspire and educate others around me.

Previously I submitted my application and registration, but with the news of this not being budgeted I wanted to reach out one more.

I thank you for your time and consideration.
I look forward to hearing from you.

Sincerely,

Kandice Besaw
Records and Disclosure Coordinator



Northwest Clerks Institute

Municipal Clerks Certification and Professional Development

Professional Development I

June 2 - 7, 2024

PDI will begin Sunday afternoon at 1:00 p.m. Pacific time. Attendees can choose to check-in one night prior to the start of the program or the morning of. All attendees must be on-site for each session during the entirety of the PD to earn their certificate of completion.

Schedule at a Glance

Sunday:

Registration at 10:00 a.m.
Session from 1:00 - 5:00 p.m.
Welcome Reception at 5:30 p.m.

Monday-Thursday:

Session from 8:00 a.m. - 5:00 p.m.

Thursday:

Banquet Dinner at 5:30 p.m.

Friday:

Session 8:00 a.m. - 12:00 p.m.

A Team Building Experience - The Problem Facing Municipal Clerks

This session begins the process of building the learning community for the week with our first-time attendees. Through a variety of interactive exercises, we learn who is in the room and participants begin to learn how they see themselves within the group (and their organizations) – supporting, directing, analyzing – and the importance of each of those styles within a team. The importance of clear communication is covered through many of the exercises. Also, through creative exercises,

participants learn there is more than one way to accomplish a task/assignment. Problem solving and negotiation skills come into play throughout the session. The most important take away from this session is the trust that is gained within the group which carries throughout the program.

Effective Business Writing – Writing Meeting Notes and Minutes

This session provides concise recommendations that help you reach your audience. Get an overview of how to layout memos, letters and other written communication pieces, including some changes in grammar that can make a big difference. Those who read meeting notes complain that minutes hide nuggets of action and decisions inside pages full of wordy, often useless text. In this session, you will learn how to condense meeting hours to minutes—minutes that meet the needs of today's reader-in-a-rush.

Legal Issues (by State)

This session provides an overview of current laws, revisions, rules and regulations that apply to the professional clerk. You will learn how to identify potential intended and unintended consequences of actions or inactions.

Parliamentary Basics

Often the Clerk's office is looked to as a resource – or expert – on parliamentary procedure for councils, boards or commissions. In this session, become familiarized with the role and purpose of parliamentary procedure to help meetings run more efficiently and smoothly. Learn how your agency's rules interact with parliamentary procedure, practice motions that you are likely to encounter, and become familiar with the rules for debate and voting. Come ready to interact, practice, and build tools to become a confidant parliamentary resource for your agency and elected officials.

Records Management

Records are a most vital resource. They enable effective business decisions, ensure accountability, and protect the rights of the public. This course provides an overview of proven records management practices including key concepts crucial for municipal records management.

Role of the Clerk

Explore the full spectrum of duties that are represented by the professionals we call clerks and discuss what it means to be a leader as the Clerk within your organization. This session will review the rich history of the clerk profession, as well as look to the future. Also, participants will learn the importance of advocacy for training and professional development opportunities.

Ethics – What Your Gut is Telling You

Most municipal clerks are ethically-driven professionals—that is what attracted them to the role of protecting democracy. Certainly, there are always outliers, but most municipal clerks have a trusted “gut feeling” of what is right or wrong. Occasionally, this moral intuition is tested, especially in the grey areas when one's gut is unsure which way to go. This session will examine where natural instincts come from—the moral theory behind ethical (and non-ethical) behavior. Applying the simple formula of moral reasoning + virtues = ethical behavior, participants will unravel real-life scenarios of ethical decisions gone wrong. Participants will learn how to identify their own moral reasoning—whether principle-based or consequential-based—and how to apply the reasoning to self-identified virtues for ethically-based decision making.

Agenda and Meeting Packet Process: Working with the Management Team for an Efficient Process and Productive Meeting

As clerks we know that the decisions of our governing bodies set policies to guide the budget and actions of municipal staff throughout the year. It is in the interest of our citizens and officials that our public meetings are as productive as possible. To do that, it is imperative that we have an organized and purposeful agenda and packet creation process. This session will focus on working with the management team for an efficient and inclusive process, and establishing the timeline and steps in creating, reviewing, and approving agenda items. We'll discuss the clerk's role in being part of the conversation for policy matters going to the elected body, and in creating templates for legislation, contracts, reports, and agenda items.

Becoming the Advisor and Key Resource for Elected and Appointed Officials and Citizens

Municipal clerks are the hub between elected officials, staff, the media, and our citizens. This is a big charge and requires knowledge of current laws, regulations, and standards that apply to our officials and the public. This session will take the legal requirements to the next level by providing practical tasks and tools to help clerks become the key resource and the consistent piece that keeps the organization running smoothly. We will explore how to be effective with administrators, department heads, and community leaders. We will look at building successful working relationships with the officials and assisting them with the understanding of roles and responsibilities, and guidance for keeping them out of hot water. We'll talk about working productively with the media as part of the clerk's information team, and promoting citizen engagement to build trust in the profession and in local government.

Building Rapport through Excellent Customer Service

The private sector understands Customer Experience (CX)—it is the key to gaining a competitive edge. Unlike Customer Service, which focuses on a single transaction, CX considers the customer's entire end-to-end journey with the organization. It is what the customer feels and thinks throughout the duration of the relationship. By examining each customer touchpoint, public agencies can create a positive experience and build rapport. Rapport leads to support, which leads to funding, which leads to better staffing, technology, and facilities, which leads to a well-functioning government that meets (and often exceeds) its citizens' expectations. An important part of CX is effectively managing situations when things have gone wrong. Building rapport involves deftness in defusing tense situations, an openness to complaints, and a culture that is responsive to customer dissatisfaction. In this session, you will learn to gain the competitive edge, both at the individual level and at the organizational level, by building an outstanding public-sector CX.

Institute Wrap-Up

After a week full of learning, we will reflect on the new concepts and principles introduced to us and determine how best to utilize our new learning when we return to the workplace. This work will be done in groups and on an individual basis, providing an opportunity to practice presentation skills with our peers.

The “WHY” of Ordinance Codification

Ordinance codification. What is it? Why is it important for a municipality to codify ordinances? In this session, participants will learn how codifying laws can increase clarity and consistency, reduce the risk of legal disputes and conflicts, and promote transparency and accountability in local government. Additionally, common misconceptions about codification and how it can help a municipality achieve its goals will be explored. Participants will learn about the benefits of codification and will receive guidance on how to implement it in a way that best suits the needs and priorities of the municipality. This session will provide insights and strategies for participants who have an interest or hands-on experience in codification, or simply want to learn more about it.

Attendee Information**Reference Number** 80945901**Email Address** schanemans@cobl.us**First Name** Kandice**Last Name** Besaw**Job Title** Deputy City Clerk**Address Line 1** 9002 Main St E**Address Line 2** Ste 300**City** Bonney Lake**US State** Washington**Zip (Postal Code)** 98391**Country** United States**Mobile Phone** 12534473109

Attendee Selection

Selection

Attendee Category	Professional Development I	Cost
	PDI Commuter Package	\$ 750.00
		\$ 325.00

Total **\$ 1,075.00**

Transaction details

Transaction Type

Date	Transaction Type	Amount
01/17/2024	Transaction Amount	\$ 1,075.00
01/17/2024	Online Credit Card Payment(xxxxxxxxxxxx8313)	\$ -1,075.00
		Balance \$ 0.00

Close



PCCFOA

Pierce County Clerks' & Finance Officers' Association

2024 PCCFOA Business Meeting Speaker Topics & Training SAVE THE DATES!

Tentative

Date	Time	Topic	Location/ Host
February 21st	Lunch/Business Meeting Noon – 2:00 pm	WMCA-What Is It	City of Auburn/Shawn Campbell
April 17th	Lunch/Business Meeting Noon – 2:00 pm	Round Table Discussion	City of Sumner/Michelle Converse
June 19 th (25 th or 27 th)	Lunch/Business Meeting Noon – 2:00 pm		City of Gig Harbor/Josh Stecker
August 21st	Lunch/Business Meeting Noon – 2:00 pm		Possibly City of Buckley/Treva Percival
October 16th	Lunch/Business Meeting Noon – 2:00 pm		City of Fife/Brodie Rota
December 18th	Lunch/Business Meeting Noon – 2:00 pm		TBD

Business Meeting Suggested Topics:

- Round Table Discussion

Educational Training Suggestions: