



# PCCFOA

Pierce County Clerks' & Finance Officers' Association

**Wednesday, August 21, 2024**

**Noon - 2:00 p.m.**

**Hosted by Karri Muir & Marci Miess, City of Dupont**

## **AGENDA**

### **Lunch and Business Meeting**

- A. Call to Order
- B. Welcome and Introductions
- C. Approval of June 27, 2024, Meeting Minutes
- D. Approval of the August Treasurer's Report
- E. Scholarship Committee Report
- F. Other Discussion Items
- G. Round Table Discussion on Public Disclosures
- H. Next Meeting: October 16, 2024 – City of Fife
- I. Adjournment

### **MEETING WILL BE HELD AT:**

City of DuPont  
1700 Civic Drive  
DuPont, WA 98327

### **Parking:**

Plenty of free parking in the lot right outside the front door.

Please RSVP with Sadie Schaneman@ [schanemans@cobl.us](mailto:schanemans@cobl.us)

### ***Lunch is BYOL (Bring Your Own Lunch)***

*DuPont Clerks' Favorite Restaurants:*

- *Close to Exit 118:*
  - *McNarmara's Pub (good salads and sandwiches, among bigger meals)*
  - *Quiznos*
  - *Starbucks*
- *Close to Exit 119*
  - *Subway*
  - *Happy Teriyaki*
  - *Starbucks*



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**PCCFOA Meeting Minutes**  
**June 27, 2024 – 12:00 PM**  
**City of Gig Harbor – Community Rooms**  
**3510 Grandview Street, Gig Harbor, WA 98390**

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**Members present:** Josh Stecker (Gig Harbor), Tiffany Aliment (Gig Harbor), Michelle Converse (Sumner), Shawn Campbell (Auburn), Hannah Scholl (Auburn), Brodie Rota (Fife), Debbie McDonald (Bonney Lake), Treva Zumek (Buckley), Jessica Clark (Buckley), Paul Loveless (Steilacoom), and Dan Vessels (Puyallup).

**a. Call to Order**

Vice President Hannah Scholl called the meeting to order at 12:05 PM.

**b. Welcome and Introductions**

Members took turns introducing themselves.

**c. Approval of April 17, 2024 Meeting Minutes**

Shawn Campbell moved to approve the April 17, 2024 meeting minutes as presented. Seconded by Treva Zumek. Voice vote was taken and carried unanimously.

**d. Approval of the June Treasurer's Report**

Vice President Scholl reviewed the June 2024 treasurer's report. Treva Zumek moved to approve the June 2024 treasurer's report as presented. Seconded by Jessica Clark. Voice vote was taken and carried 11-0.

**e. Paid Educational Options for a 2024 Meeting**

Vice President Scholl reviewed the prior meeting's discussion around paid educational options and the survey results. Shawn Campbell discussed possible options, resources, and areas for focus. Shawn touched on goals, expectations, cost, and timeline. Treva Zumek moved to allow Shawn Campbell to sign a contract on behalf of PCCFOA with Janelle Tarasewicz for a training in November. Seconded by Josh Stecker. Voice vote was taken and carried 11-0.

**f. Other Discussion Items**

Vice President Scholl reviewed the PCCFOA SharePoint site discussion from the

prior meeting. Treva will continue work to set up the site and discuss progress made at the next meeting.

Other group discussion included large public records requests that appear to be research requests from law schools and media organizations and public record fees and what various municipalities are charging.

**g. Onboarding Training**

Shawn Campbell presented information on *Staff Onboarding, Training & Engagement*. Shawn discussed new hire onboarding checklists, preparing for day one, first impressions, facility tours, new hire resources, form of government, city organization, continued training, work plan education, and employee engagement programs. Group questions and discussion followed.

**h. Next Meeting**

Vice President Scholl noted the city of Buckley is unable to host the August meeting. An email will be sent out to the PCCFOA membership seeking a volunteer to host the next meeting on August 21, 2024.

**i. Adjournment**

With no objection, Vice President Scholl adjourned the meeting at 1:05 PM.

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Hannah Scholl, Vice President

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Brodie Rota, Secretary



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## Treasurer's Report

August 2024

Previous balance June 2024	\$9,448.87
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### Credits:

2024 Membership Dues (Sumner)	20.00
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<b>Total</b>	<b><u>20.00</u></b>
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### Debits:

City of Bonney Lake Scholarship Reimbursement (Besaw)	750.00
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City of DuPont Scholarship Reimbursement (Miess)	650.00
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<b>Total</b>	<b><u>1400.00</u></b>
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Ending balance July 2024	<u>\$8068.87</u>
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# PCCFOA

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**TO:** PCCFOA President and Committee

**FROM:** Kandice Besaw, City of Bonney Lake and Kathy Linnemeyer, City of Yelm

**COMMITTEE:** Scholarship Committee

**DATE:** August 1, 2024

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## **SCHOLARSHIPS FOR 2024:**

Three scholarships have been awarded so far for 2024:

- Marci Miess, \$650 for PD III lodging package (March).
- Kandice Besaw, \$750 for PD 1 registration (March).
- Meagan Olds, \$300 WMCA Municipal Financial Bootcamp (April).

## **2024 ACTIVITIES/EVENTS/REQUESTS:**

- Emailed a flyer to all current member and some non-members promoting PCCFOA and the scholarships it provides.
  - We still plan to market through other communication channels.
- We updated the requirements and format of the scholarship application.
- We would like to review the budgeted amount that has been allocated to the scholarship committee. Our goal is to significantly inspire and motivate more people to pursue career-related higher education.

*We encourage everyone to share information about the PCCFOA with fellow clerks and Financial Officers.*



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## SCHOLARSHIP APPLICATION

<b>Last Name</b>		<b>First Name</b>			
<b>Address</b>			<b>Organization</b>		
<b>City</b>		<b>State</b>		<b>Zip</b>	
<b>Phone</b>			<b>Fax</b>		
<b>Title</b>		<b>From</b>	/ /	<b>To</b>	/ /
<b>Email</b>					

**Memberships:** Please check all that apply:

WMCA Member ☐ KCMCA Member ☐ WAPRO Member ☐ IIMC Member ☐

WFOA Member ☐ PCCFOA Member ☐ Since: \_\_\_\_\_

PSFOA Member ☐ Other Memberships: \_\_\_\_\_

**Designations:** Please check all that apply:

CMC ☐ MMC ☐ CPRO ☐ PFO ☐

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) & what amount(s)? \_\_\_\_\_

<b>Training Course Title</b>	
<b>Date(s) of Training</b>	
<b>Total Cost</b>	
<b>Other Funding Awarded</b>	

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

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Do you meet the PCCFOA scholarship guidelines (*see 2nd page*): ☒ Yes ☐ No

Have you reviewed the instructions (*see 2nd page*) and have all attachments: ☐ Yes ☐ No

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

<b>Signature</b>		<b>Date</b>	
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**SEE 2nd PAGE 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:**

- Must attach a copy of the registration for class, including costs and description of training with the application form.
- Attach any other documentation you feel may benefit the Committee when reviewing your application, such as a letter of support.
- **APPLICATION AND ATTACHMENTS MUST BE RECEIVED NO LATER THAN** a minimum of **three weeks** prior to the conference/training date.

**\*\*\* EMAIL COMPLETED APPLICATION TO:** [Besawk@cobl.us](mailto:Besawk@cobl.us) and [KathyL@Yelmwa.gov](mailto:KathyL@Yelmwa.gov)

### **AFTER COURSE COMPLETION:**

**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 OR EMAIL TO:**

**Treva Zumek**, PCCFOA Treasurer  
City of Buckley PO Box 1960  
Buckley, WA 98321  
[tzumek@cityofbuckley.com](mailto:tzumek@cityofbuckley.com)



# PCCFOA

Pierce County Clerks' & Finance Officers' Association

**"AN INVESTMENT IN KNOWLEDGE PAYS THE BEST INTEREST."**

## SCHOLARSHIP OPPORTUNITY

Need funding for Professional Development; perhaps there will be a conference soon; maybe there will be an additional training class held out of town?

*Submit a scholarship application today!*

### REQUIREMENTS

- ✓ All applicants must be PCCFOA members in good standing for the previous 12 months.
- ✓ All Applicants must meet all PCCFOA scholarship guidelines.

**NOT A MEMBER,  
BECOME ONE!**

✦ If you are interested in becoming a member, please email our Treasurer, Treva at [tzumek@cityofbuckley.com](mailto:tzumek@cityofbuckley.com)

**FOR MORE INFORMATION, CONTACT:**



[Besawk@cobl.us](mailto:Besawk@cobl.us)



[KathyL@Yelmwa.gov](mailto:KathyL@Yelmwa.gov)