



---

# Office of The City Clerk

## Strategic Business Plan

Effective Date: July 1, 2018

### **Oklahoma City Vision**

Oklahoma City seeks to further progress as a vibrant, diverse, safe, unified and welcoming community

### **Oklahoma City Mission**

The mission of the City of Oklahoma City is to provide exceptional service to residents and visitors. We do this by ensuring the safety of the public, delivering quality services, and maintaining infrastructure to support the growth of the city.

### **Department Mission**

The mission of the Office of the City Clerk is to provide management of Council and Trust agendas, official records, and coordination of bidding and election services to city officials, departments and the public so they can receive information to successfully accomplish their goals.

## Table of Contents

<b>Issues, Strategies, and Results .....</b>	<b>3</b>
<b>Issue 1: Increasing Demand for City Clerk Services.....</b>	<b>3</b>
<b>Issue 2: Accessibility of Information .....</b>	<b>3</b>
<b>Issue 3: Maintenance and Preservation of Public Records .....</b>	<b>4</b>
<b>Accomplishments .....</b>	<b>5</b>
<b>Lines of Business and Programs .....</b>	<b>6</b>
<b>Department Organization.....</b>	<b>6</b>
<b>Administrative Line of Business.....</b>	<b>7</b>
Executive Leadership Program.....	8
<b>Official Records Line of Business .....</b>	<b>9</b>
Bid Management Program .....	10
City Clerk’s Information Program.....	11
Council Agenda Management Program .....	13
Election Management Program .....	14
Records Management Program .....	15

## Issues, Strategies, and Results

### Issue 1: Increasing Demand for City Clerk Services

The increasing demand for City Clerk services due to the continuing emphasis on economic development, growth in City services, and changes in State law, as well as a reduced ability to respond to requests due to loss of personnel in City departments, if not addressed will result in:

- Inadequate space to store and maintain records
- Delays in open record request responses
- Increased liability from untimely recording of land documents
- Increased operating cost for City and State mandated services

#### Strategies

- Provide City and trust records to departments and the public in a reasonable time period by making more records accessible online.
- Improve reporting services to City departments regarding open record request processing.

#### Strategic Results

Annually, City and public customers will benefit from improved customer service as evidenced by:

- 100% of land documents filed at county offices within 3 working days of Council approval
- At least 96% satisfaction rating from customer responses regarding open records requests.

### Issue 2: Accessibility of Information

The increasing demand for online information, coupled with the lack of technological resources to simplify access to information services, if not addressed, will result in:

- Lack of transparency
- Delays in responding to open records requests
- Limited records available online

**Strategy**

- Publish all public records maintained in the Office of the City Clerk online.

**Strategic Results**

By 2020, City and public customers will benefit from enhanced accessibility of official City records as evidenced by:

- 100% of ordinances will be available online
- 77% of City staff managed trust, board, commission, and committee meeting records will be accessible online

**Issue 3: Maintenance and Preservation of Public Records**

The continued inefficient use of space and resources as a result of decentralized records management, if not addressed, will result in deterioration and loss of public records, and a loss of public trust.

**Strategy**

- Provide information to the city departments so they can efficiently comply with record retention policy.

**Strategic Results**

The City and related trusts will benefit from a centralized records program as evidenced by:

- Annually, train 100 staff from City departments on records management policies and procedures

## Accomplishments

### **Agenda Management Program**

In order to advance accessibility to records of public meetings the Agenda Management Program has been working to replace the existing agenda management system with a new and more technologically advanced software solution. The needs of the program are being negotiated with developers to find the best solution to meet the requirements of recordkeeping for City staffed public meetings.

### **City Clerk's Information Program**

The Information Program has sent over 5,000 responses to requests for records in Fiscal Year 2017-2018. The number increases 30% each year and 91% of responses for records maintained by the City Clerk's Office are sent within 8 hours. Requests filled by records maintained in other departments receive 78% of their responses from the Clerk's Office within 7 business days.

Frances Kersey, City Clerk, received the Oklahoma Sunshine Award that recognizes a public official or governmental body that has shown a commitment to freedom of information. Given annually by the Freedom of Information Oklahoma, Inc. commends the City Clerk's Office for assisting the residents of Oklahoma City by processing public records requests.

### **Records Management Program**

The Records Management Programs project proposal for a central facility for City-wide records management was approved by public election on September 12, 2017. The new facility will provide timely access to records, ensure record retention and destruction are performed as provided by law, and provide a secure, controlled environment for records.

## Lines of Business and Programs

### Department Organization

#### **Administrative Line of Business**

- Executive Leadership Program

#### **Official Records Line of Business**

- Bid Management Program
- City Clerk's Information Program
- Council Agenda Management Program
- Election Management Program
- Records Management Program

## Administrative Line of Business

The purpose of the Administrative Line of Business is to provide leadership, support and information to the Department so it can achieve its strategic and operational results.

### Programs and Key Measures

Executive Leadership Program

 % of key measures and strategic results achieved

## Executive Leadership Program

The purpose of the Executive Leadership Program is to provide planning, management, administrative and reporting services to department employees and City leaders so they can achieve strategic goals and key results.

---


Program Manager: Frances Kersey

---

Program Budget: \$207,574 (FY19)

---

- Program Services:
- Agenda Items / Packets
  - Audit Responses
  - Budget Proposals
  - Citizen Responses
  - Continuity of Operations Plan
  - Contract Compliance Reviews
  - Contracts, Leases, and Agreements
  - Executive Reports:
    - Ad Hoc Reports
    - City Manager Reports
    - Performance Reports
    - Special Project Reports
  - FMLA Authorizations
  - Grant Applications
  - Grant Status Reports
  - Grievance Resolutions
  - Internal Investigation Reports
  - Legislative Recommendations
  - Needs Analyses
  - Open Records Responses
  - Personnel Transactions
  - Plans (i.e., Strategic Business Plan)
  - Policies and Procedures
  - Presentations
  - Project and Financial Impact Analyses
  - Union Negotiations and Recommendations
- 

Family of Measures	
Results	 <b>% of key measures and strategic results achieved</b>
	% of performance evaluations completed by the review date

---





## Official Records Line of Business



The purpose of the Official Records Line of Business is to provide record, agenda, bidding and election coordination services to City officials, departments and the public so they can receive and access official information in a central location.

### Programs and Key Measures

#### Bid Management Program

-  % of construction bids received that are qualified bids
-  % of users trained annually

#### City Clerk's Information Program

-  % of City Clerk records requests completed within 8 hours of request
-  % of requests for records and information maintained in other City departments completed within 7 working days

#### Council Agenda Management Program

-  % of City staff managed trust, board, commission, and committee meeting records online

#### Election Management Program

-  % of conflict of interest forms timely filed



#### Records Management Program

-  % of departments audited to determine centralized records management needs

### ***Bid Management Program***

The purpose of the Bid Management Program is to provide bid information, receipt, verification and training services to the City and its trusts so they receive qualified bids to award contracts for City programs and projects.

Program Manager:	Tresha Williams   Miki Graham
Program Budget:	\$117,540 (FY19)
Program Services:	<ul style="list-style-type: none"> <li>▪ Bidder Prequalification's</li> <li>▪ Bidding Document Reviews and Releases</li> <li>▪ Bid Receipts</li> <li>▪ Bid Tabulations</li> <li>▪ Bid User Training</li> </ul>

Family of Measures	
Results	 % of construction bids received that are qualified bids
	 % of users trained annually
Outputs	# of bidding documents reviewed and released
	# of construction bid receipts processed
	# of goods and services bid receipts processed
	# of proposal/qualification receipts processed
	# of users trained

## City Clerk's Information Program

The purpose of the City Clerk's Information Program is to manage receipt of official notices, process legal documents, provide open records request responses, publication and notification services to The City of Oklahoma City, City departments and the public so they can receive and access official information requested in a timely manner.

Program Manager: David Wrights | Angela Jones

Program Budget: \$377,793 (FY19)

### Program Services:

- Annual Meeting Filings
- Cash Handling Receipts
- City Clerk Online Land Document Locator Postings
- Code Book Issuances
- Conference Room Schedules
- Land Document Filings
- Legal Notice Mailings
- Legal Publications
- Meeting Notices and Agendas for Council, Trusts, Boards Committees and Commissions Postings
- Official Document Certifications
- Online Ordinance Postings
- Ordinance Roll Book Filings
- Petition to Release Abandoned Building Receipts
- Records Request Responses
- Scrapbooking City – related Newspaper Articles
- Tort Claims and Summons Receipts
- Wage Garnishment Petition Receipts

### Family of Measures

Results	 % of City Clerk records requests completed within 8 business hours of request
	 % of requests for records maintained in other City departments completed within 7 business days
	% of requests for Development Center records completed within 14 business days
	% of requests for records requiring legal review completed within 30 business days
	% of customer responses stating satisfaction with open records requests
Outputs	# of City Clerk historic ordinances indexed online
	# of meeting notices and agendas posted in accordance with State law



	# of request responses provided for external records maintained in other City departments
	# of request responses provided for internal City Clerk records
Demands	# of meeting notices and agendas requested to be posted
	# of record requests received

## Council Agenda Management Program

The purpose of the Council Agenda Management Program is to provide agenda oversight and coordination services to the City and its trusts so they can conduct official business and ensure the confidence and trust of the citizens of Oklahoma City.

---

Program Manager: Miki Graham | Dena Smiley

---


Program Budget: \$209,577 (FY19)

---

Program Services:

- Agenda Item Reviews
  - Agenda Packet Preparations
  - Agenda Preparation Meetings
  - Agenda Training Sessions
  - Council Agenda Publications
  - Council Agenda User Manuals
  - Council Meeting Video Minutes
  - Council Meeting Voting Records
  - Official Records Attestations
  - Trust, board, commission, committee membership records
- 

### Family of Measures

Results	 <b>% of City staff managed trust, board, commission, and committee meeting records online</b>
	% of agenda items submitted correctly
Outputs	# of agenda items corrected
	# of agenda items reviewed
	# of agenda users trained

## ***Election Management Program***

The purpose of the Election Management Program is to increase governmental transparency by providing public access to information on election reporting and provide education to candidates and City Officials so they can comply with City and State election laws.

---

Program Manager:	Frances Kersey   David Wrights and Tresha Williams
------------------	--

---


Program Budget:	\$212 (FY19)
-----------------	--------------

---

Program Services:

<ul style="list-style-type: none"> <li>▪ Campaign Contribution and Expenditure Reports</li> <li>▪ Compliance Trainings</li> <li>▪ Conflict of Interest Forms (Trust)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Election Proclamations</li> <li>▪ Election Result Reports</li> <li>▪ Financial Disclosure Forms</li> <li>▪ Gift Disclosure Forms</li> </ul>
---	--


---

Family of Measures	
Results	 % of conflict of interest forms filed in a timely manner
Outputs	# of conflict of interest forms timely filed
	# of gift disclosure forms filed
	# of proclamations and election results issued
Demand	# of conflict of interest forms distributed for filing

## Records Management Program

The purpose of the Records Management Program is to provide public record preservation and storage, advisory and regulatory compliance services to City departments, trusts and the public so they have convenient access to records.

Program Manager:	Jennifer Day
Program Budget:	\$141,858 (FY19)
Program Services:	<ul style="list-style-type: none"> <li>▪ Central Record Storage Units</li> <li>▪ Historical Outreach</li> <li>▪ Open Records Trainings</li> <li>▪ Record Catalogs</li> <li>▪ Record Management Consultations</li> <li>▪ Record Preservation Services</li> <li>▪ Record Retention Policies</li> </ul>

Family of Measures	
Results	 % of departments audited to determine centralized records management needs
	% of digitized records indexed
Outputs	# of digitized records indexed
	# of records added to the City Clerk’s record storage
	# of records maintained in the City Clerk’s record storage
Demands	# of digitized records to be indexed