TOOLS AND TECHNOLOGIES FOR THE MODERN CLERK: Navigating the “Now” Normal
The Now Normal

- What is happening?
- How does that impact our roles as Municipal Clerks?
- What can do about?
- What tools are available to help?
Virtual Meetings/Events

- Allows for continued interaction with teams and the public
- For some, allows for more public participation/engagement than in-person meetings
- So many uses:
  - Council/Commission meetings
  - Swearing-In Ceremonies
  - Town Hall Meetings
  - Ribbon Cutting Ceremonies
  - Issuance of Nomination Papers
  - Press Conferences
  - Meetings with Applicants
    - Planning Department Applicant Meetings
    - Building Permit Applicant Meetings
  - Internal Team Meetings
  - Civil Marriage
- Vendors:
  - Zoom
  - Microsoft Teams
  - Webex
  - GoTo Meeting
Best Practices for Virtual Meetings/Events

Getting ready for your meeting or event

- Determine which platform meets the needs of your organization and is available to all attendees
- Determine type of Virtual Event – Meeting or Webinar
  - Different event types lend themselves to different meetings or events
  - Will you require registration
  - Review your event invite before sending
- Go through ALL back-end settings
- Practice, Practice, Practice
  - Get familiar with all the tools and settings
  - Setup practice events with teammates
  - Have a checklist
- Work with your IT team to understand your system and/or organizational limitations
- Reduce or eliminate other draws on your Wi-Fi signal; even better plug directly into your route
- Determine if you will be live streaming to social media
  - If yes, how or will you address comments made on social media
Best Practices for Virtual Meetings/Events Continued

Before and during your virtual meeting or event

◦ BE FLEXIBLE!!
  ◦ Things will go wrong, don’t panic
  ◦ Try to have a plan for how you will handle challenges

◦ Review your in-meeting settings
  ◦ Will you have chat on
  ◦ Will you use the Q&A feature
  ◦ Will you use polls?

◦ If you will be sharing your screen, have your presentation open and ready before you try to start sharing

◦ Assign a teammate as a co-host if you can

◦ Mute when not speaking and remind your participants to mute when appropriate

◦ Be aware of your surroundings, consider setting up a virtual background

◦ Consider your camera placement and lighting

◦ Have your camera on, it shows that you are engaged and participating
Electronic Campaign Finance Filing and Conflict of Interest Filing Systems

- Ease of access to all campaign finance and conflict of interest filings
  - Effective January 1, 2021 per AB2151, agencies must post campaign statements and reports on their agency’s website within 72 hours of each applicable filing deadline, if they are filed in paper format

- Ease of filing for all filers
  - Can file from anywhere online
  - Can save progress

- Keeps logs and reports of all filings, correspondence, positions, etc.

- Automatically sends 87200 filings to the Secretary of State’s office

- Reduces paper and physical storage needs

- Vendors that provide service:
  - Netfile
  - Granicus (Formerly SouthTech)
Public Records Act Software

- Ease of tracking of PRA progress
- Ease of access for public to submit requests
- Centrally managed process
- Automate actions/workflows
  - Manage deadlines
  - Audit trails (internal accountability)
  - Reporting
  - Cross departmental collaboration
- Reminders and alerts
- Flag or merge duplicate requests

- Vendors:
  - Just FOIA
  - Gov QA
  - Next Request
  - CivicPlus
Electronic/Automated Workflows

What is workflow automation?
Workflow automation, broadly described, refers to the processes and tools involved in developing a series of automated actions that make up the steps of a business process. As one automated action is completed, it triggers another, and so on, and so on, until an entire process has been executed.

- Save staff time and resources by eliminating manual processes
- Reduces “human” errors
- Provides opportunity to further improve processes
- Creates centralized document/record access
- Ease of access to records

Vendors:
- Laserfiche (ECS Imaging, Complete Paperless Solutions, etc.)
- CivicPlus
- Hyland (OnBase)
- NeoGov
Application/Form Submittals

- Online Job applications have simplified the recruitment process
- Volunteer and Commissioner applications can also be submitted electronically
- Allows for 24/7 submittal windows
- Takes the “post office ate my homework” out of the equation
- Simplifies the post application review of documents
- Online bids/RFPs save time and reduce errors

Vendors:
- NeoGov
- PlanetBids
- Quest
- One Solution
- Dayforce
Electronic Signatures

◦ Continuity of work in remote environment
◦ Staff time savings
◦ Easily track where documents are (no more losing documents on the City Attorney’s desk 😊)
◦ Many applications:
  ◦ Contracts
  ◦ Resolutions
  ◦ Ordinance
  ◦ Minutes
  ◦ Oaths of Office
  ◦ Applications
  ◦ Credit Card Statement

◦ Vendors:
  ◦ DocuSign
  ◦ Adobe
Electronic Plan Submittal/Permits/Plan Check

- Allows for continued forward progress among the development community
- Aids in the permanent retention of building plans without the added expense of digitization
- Automate actions/workflows
  - Manage deadlines
  - Audit trails (internal accountability)
  - Reporting
  - Cross departmental collaboration
- Staff time savings

Vendors:
- Bluebeam
- Plan Grid
- MyGov
- Fieldwire
Tools You Can’t Live Without (or Shouldn’t)

- Virtual Private Networks (VPNs)
- Webcam
- Microphone Headset
- Ring Light
- Professional Virtual Background
- Real Briefcase
- Home printer/scanner
- Reliable highspeed internet
- External hard drives
- Power Cells
Things That Cannot Be Done Remotely

Posting Physical Agendas

Virtual Notarizations:

*California* Law does not provide the authority for *California notaries* public to perform a remote online notarization. The personal appearance of the document signer is required before the notary public.
Did We Miss Anything?

- What technologies are you using that we didn’t discuss?
- Functions that can be automated in this now normal?
Any questions?
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