

Missouri City Clerks and Finance Officers Association

Mission Statement

The Missouri City Clerks and Finance Officers Association is a professional organization of municipal clerks and finance officers who have united together to assist members in the performance of their job responsibilities and promote the professional development of its members for the betterment of the public and municipalities they serve.

The Missouri CCFOA will provide its members on-going educational opportunities designed to assist members in the performance of their daily job responsibilities and equip them to face the future with confidence. The Missouri CCFOA will sponsor certification programs and provide support to its members to impart standards of quality and integrity to the profession and to improve the methods and procedures which meeting the needs of the public as efficiently and effectively as possible.

MoCCFOA Strategic Plan

Prepared Fall 2004

Adopted March 2005

1. All Missouri municipal clerks are active members of the MoCCFOA and pursuing state certification.

- A. Promote continuing education sessions, due to lack of college courses specific to the duties of City Clerks.
- B. Encourage active membership to increase recognition, respect, and professionalism of the City Clerk's position in municipal government.
- C. Encourage job descriptions for city clerks to include a requirement for State certification or the ability to obtain certification within "x" number of years.
- D. Encourage cities to require City Clerks to attend State, district, regional and/or international conferences.

<i>The Committee felt this was a challenging goal to meet, as it will be difficult to have that kind of control on individual municipalities. Recommendation was to develop an action plan to promote the objectives above through the various Association committees, possibly at the retreat proposed under Goal No. 7, with committee assignment(s) to be made by the president.</i>
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- E. Create a brochure for MoCCFOA, stating the benefits of belonging to the organization and the benefits of continuing education. Send the brochure and literature on sessions not only to City Clerks but also to the Mayor and/or City Administrator.

There is already a draft brochure available, which is available electronically. The Committee recommends assignment of this objective to the Membership committee, or a subcommittee thereof, with completion by the 2006 MML Conference on the above objective, assuming assignment was made at Spring Institute or the proposed summer retreat.

With this literature, City Officials would be made more aware of the benefits of allowing, or even requiring, their City Clerk to continue attending educational sessions in order to (1) learn new techniques, (2) hear about new State laws and requirements; and (3) keep up-to-date on technology and various methods to operate their office.

- F. Upon adoption, every city clerk should be familiar with the Mission Statement and Code of Ethics of the MoCCFOA.

Recommend assignment to the Newsletter committee, with immediate implementation upon assignment. The encompasses the first two objectives below. The Committee also recommended the President update his or her electronic letterhead (since there does not appear to be an official printed letterhead anywhere) to include the Mission Statement. Again, all we can do is provide the means to educate clerks on the information—publication in the Association's newsletter will be probably the primary way to do that.

- Include the Mission Statement in the newsletter and the official MoCCFOA letterhead.
- Make a banner and/or framed picture of the Mission Statement for display at various functions.
- Remind members of the importance of the Code of Ethics, which they sign when they apply for certification.

The Committee recommendation was to refer this third objective to the Education Committee and MLGP for implementation.

- Include the Mission Statement and Code of Ethics in any literature provided to city officials.

Recommendation was to direct the Membership Committee to include the Mission Statement and Code of Ethics in the brochure in order to accomplish this objective.

Note: the recommended timeline for this objective, although it is broken down somewhat was immediate, as the objectives relate to making information available to the membership and city officials.

- 2. The municipal clerk's position is recognized as part of the professional management team, working cooperatively with the city manager. Other professionals and council members place high value on municipal clerk certification.**

There was considerable discussion on this goal. Accomplishing it will require working closely with mayors and other elected officials to change attitudes and help some of them understand what the clerk is and what his or her duties are.

With regard to Objectives A and B, the Committee felt it would be important to get divisions involved. The Committee felt the first step was to find out who the small town clerks and elected officials are and to work with each division to see who is and is not participating to find a starting point.

Recommendation was to start with the divisions to get their Membership Committees involved, since they are more aware of what is occurring locally. The State Membership Committee would provide information brochures and assistance as needed. In order to accomplish this, division membership chairs would be included in the proposed retreat to provide training and direction on where to start. Some suggestions made by the Committee including extending invitations to division meetings to clerks who do not typically attend them, focusing on new clerks and reaching out to both new and non-involved clerks.

This will be an ongoing process, with implementation occurring starting Summer 2006.

- A. City Clerks will make every effort to work cooperatively with the City Administrator/Manager and other members of the management team.
- City Clerks will conduct themselves in a manner that will exemplify a high level of professionalism.
 - City Clerks must strive to be people-oriented. They serve as the ambassador for the City.
- B. City Clerks need a broad understanding of city laws, functions, finances, procurement policies, personnel policies, and benefit packages for employees. Such understanding is facilitated by attending educational sessions targeted for City Clerks through the MoCCFOA.

In looking at Objectives C - D - E below, the Committee recommended assigning these to the Mentoring Committee to develop an action plan and recommendation to help clerks publicize the benefits of education and certification and/or share information with their elected officials. Recommendation for completion of the action plan was 2007 Institute after assignment was made.

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- C. Certification by the MoCCFOA is the most reliable indicator that a Municipal Clerk has mastered the wide variety and scope of knowledge and duties inherent with this position.
 - D. City Clerks will use appropriate opportunities to educate the administration of their city about the certification process.
 - E. City Clerks will share information learned from educational opportunities to illustrate the value of education to their city.
 - F. Actively seek participation by MML staff in MoCCFOA functions, which will provide more awareness of the organization's importance and plans for the future.
 - G. Look for every opportunity to showcase city clerks through MML, i.e., continue announcing the names of those who attained State certification during the MML conference and those who attained MPCC status to stand. Include more pictures and news items about city clerks in MML newsletter and web site.
 - H. The MoCCFOA liaison to the MML Board is good representation. There should be more opportunity for communication between the MML representative and members of the organization, perhaps through the MoCCFOA newsletter, meetings and/or web site. Encourage clerks to become more active in MML's various committees to increase exposure of the organization and enforce the importance of the Clerk's role to other municipal officials.

With regard to Objectives F, G, and H, the Committee recommended these be assigned to the Association's MML representative for implementation. Education Director Jim Kaatz would assist with MML participation (F) by inviting MML staff to Regional Institutes. Committee assignments for each objective would also likely need to be made by the President, with the appropriate committee working with the MML representative.

- I. Continue to keep the MoCCFOA State web site up-to-date.
 - Another committee could be created or the function of an existing committee be expanded to help the University keep this web site current.
 - Research web sites from other states to see the type of information they include on their site.

Recommendation was to assign Items I and J to the Newsletter Committee, possibly increasing its size, and/or creating a Technology Committee. Jim Kaatz advised he did have someone on the faculty to work on updating the website.

- J. The Yahoo! web site is an important tool for networking. Inform new clerks about signing on to the site. Advertise in the MoCCFOA and the MML newsletters to let city officials know this is a way for their city clerk to obtain information that is valuable not only to the city clerk position but to the city as a whole.

- K. Campaign for equal pay. Conduct a salary survey of city clerks within the state and certain comparable states. Make the information available to city clerks and to city officials.

Dr. Kaatz advised he could do a salary survey to help campaign for appropriate compensation with comparable positions. It would entail surveying clerks, plus five to other similar positions (human resources, finance director, etc.) and look at metro areas versus rural area, small versus large cities. There would be costs involved for the Association.

3. The MoCCFOA provides affordable, high quality education to municipal clerks in all size cities, including specialized training based on individual responsibility.

- A. Offer additional scholarships.

Recommend assignment to the Scholarship Committee and include promoting scholarships available and requirements at the division level, as well as through MCEF (IIMC).

- B. Inquire by survey of the City Clerks as to the type of specialized training needed.
- C. Provide sessions to address different size cities.
- D. Encourage divisions to provide educational opportunities at their monthly or quarterly meetings.
- E. Provide only one motivational speaker at each conference, and ensure that all other sessions are on the “nuts and bolts” of City Clerk duties.

Objectives B and C should be referred to the Education Committee, including conducting a survey by the 2006 MML conference (where the results would be made available) to determine if educational needs are being met. This would provide direction to the Education Committee in planning future educational sessions. Objective E would also be referred to the Education Committee.

With regard to Objective D, the Committee recommended encouraging division education chairs to network with each other, MLGP and the State Education Director to come up with programs for their local meetings. The Committee felt an idea exchange/session be provided for the division Education Chairs at the proposed retreat.

Most of the objectives under Goal No. 3 can be implemented immediately.

4. The MoCCFOA equips municipal clerks to embrace change and to grow professionally.

The recommendation was for A, C, and D to be referred to the Mentoring Committee, with Objective B referred to the Education Committee, to develop an action plan for implementation. These were all seen as ongoing objectives. We need a method to accomplish and implement them. Assignments should be made at the proposed retreat, with reports due by the 2006 MML Conference.

Additionally, the Committee discussed the importance of emphasizing there would be a LOT of work involved with the committees. With the Missouri certification program, members can now earn credit for committee participation. Future presidents will need to emphasize that active participation of all committee members is essential.

- A. Encourage all Clerks to attend the various trainings offered to them, educating them on the opportunities this allows for open networking that is most important to the growth of the Clerk and the municipality from the knowledge and experience of Clerk's from around the State.
- B. Through our education opportunities, strive to inform Clerks of the importance of growth and change within their municipal organizations via technology, networking, and training opportunities; and, provide them the tools and support to educate their co-workers and elected officials regarding the importance of change within their communities. Change promotes growth.
- C. Be more attentive to the inexperienced Clerk's needs. Strive to make one-on-one contact, explain the importance of certification and training. Educate them on the basics of the certification process, the steps to be taken from beginning to end, and the benefits achievable through this growth process.
- D. Encourage all Clerks to obtain their Certification, not only for personal satisfaction but to earn credibility and raise the bar for the City Clerk profession with fellow department heads and elected officials.

5. The MoCCFOA provides publications, literature, and research that supports members and educates other municipal officials throughout the state.

- A. Bring informative information to our Clerks regarding new legislation, the effects approval may have on our communities and/or City Clerk position and contacts to address if lobbying that particular legislation should or should not be passed.

Recommendation to refer to the Legislative Committee, with their assignment being to keep the membership updated rather than act as a lobbying group. The Committee felt we should work with MML on this objective to consider their stance. This objective should possibly be reassigned to Goal No. 6.

- B. Allow elected officials to see how powerful MoCCFOA can be as a whole and how educated we keep ourselves for the prosperity of our communities.
- C. Inform elected officials of our proactive will to seek education, allowing this knowledge and professionalism to be brought into our communities through the training of our city staff, elected officials and residents thus creating a stronger community.
- D. Continue to network through experiences from other cities in order to be better prepared for future happenings.

The recommendation for B, C, and D was to refer them to the Mentoring Committee. The group felt these objectives related back to assignments made in earlier goals and objectives already reviewed.

Recommendations to Achieve these Goals

Regarding the following items, some of these were already referred to in other areas, specifically to look at assignments made under Goal No. 2, related to the Newsletter Committee.

- Request a column in the Missouri Municipal League Newsletter
- Send specific articles to be printed in the Missouri Municipal League Newsletter or other area organizations such as St. Louis County Municipal League, MoCCFOA newsletter, Mid-America Regional Council, etc.
- Create more articles for SMS/Yahoo website
- Send articles to Board Members relating to “hot topics” they may want to address.
- Add a link from the MML web site to the MoCCFOA web site.

6. The MoCCFOA is effective in addressing legislation that impacts municipalities and the municipal clerk’s profession.

- A. Due to the varying job descriptions of City Clerks throughout the state, for a more meaningful working relationship with Missouri state legislators for the purpose of making them more aware of the needs of City Clerks, each City Clerk is encouraged to contact their state representative and state senator to form such a relationship.

Recommendation was to assign the above objective to the Legislative Committee the task of developing an action plan to develop method such as a teaching brochure or book to teach clerks how to contact or find their local legislators. Other states, such as Illinois, have materials available. The group suggested contacting other states for copies of their information to see what they provide to their clerks.

The Committee recognized active lobbying on the part of individual clerks could be a troublesome issue in some communities. It was felt this goal overall provided a good starting point and recommendations for the Legislative Committee. The Legislative Committee is relatively new and has suffered some uncertainty on what its responsibilities are.

The following were seen as a longer-term longer term goal. The recommendation was to have the Legislative Committee work with MML to come up with an action plan and long term plan for implementation.

- B. MoCCFOA has already initiated a Legislative committee with the purpose of safeguarding the interest of the Association and its member cities. This Committee includes duties as follows:
- Studying and evaluating proposed legislation that may affect city clerks, finance officers or municipalities.
 - Identifying and developing legislative positions on issues of concern to city clerks, finance officers or municipalities.
 - Monitoring legislative proposals on behalf of city clerks and finance officers.
 - Effectively lobbying on behalf of city clerks and finance officers including, upon approval of the Executive Board, appearing before legislative bodies in support of or in opposition to proposed or pending legislation; and
 - Working closely with the Missouri Municipal League in conjunction with the MoCCFOA representative to the MML Board.
- C. That the Legislative Committee contact all Division Directors of the Association when an issue of high municipal impact is pending in the legislature and encourage them to contact their members on such issue, encourage them to contact their legislators regarding said issue.
- D. Encourage the membership to contact the association liaison to the Missouri Municipal League so that the desire of the membership is passed on through the league to the state legislature.
- E. Following any vote of the state legislature for which the clerks have lobbied support, encourage the membership to thank their legislators for their consideration.
- F. If any city clerk observes an issue that may affect many other municipalities deemed worthy of legislative consideration that:
- 1) The city clerk should contact the Legislative Committee Chair of the Association.
 - 2) The Legislative Committee should then review the issue and, if the Committee agrees that the issue is of high impact to Missouri municipalities or the Association, poll the entire membership for opinion.
 - 3) If the membership seems to agree that the issue is of high impact to Missouri municipalities or the Association, the Committee shall forward the issue to the Executive Board.

- 4) The Executive Board shall then forward the issue to an appropriate legislator for placement on the legislative agenda.

7. The MoCCFOA works closely with its divisions and established state committees to achieve open communication and understanding between the state association and its members.

This was really the “biggie” for the Committee, and many of the recommendations made under the previous goals relate back to the this. Jim Kaatz came up with the initial idea and the rest of the group ran with it—hold a retreat in June (CCFOA “mini camp”) for outgoing AND incoming officers, directors, and committee chairs. This team-building camp will allow for a smooth transition and help incoming members to know what their assignments and responsibilities are.

This will require the current and incoming president to work closely together to coordinate the “changing of the guard”—and get committee assignments done as quickly as possible after Spring Institute. This is not meant as a reflection on the current officers, but there has been some indication that there has not always been a good exchange of information between outgoing and incoming chairs and/or officers.

Most of the objectives listed under Goal No. 7 would be covered by the retreat. The retreat could be facilitated by past-presidents, past-chairs, etc. It would include information on how to be an officer, director, chair, etc. (i.e., what are the expectations for and responsibilities of the position), include assignments for the coming year, training, informational exchanges, answer questions, etc. Along with this, the various committee and officer books need to be tracked down and updated so they can be passed along to the appropriate person. The Committee recommended this (tracking down and updating the books) be assigned to the President-Elect in order that the information will be available to the incoming individuals in June.

Jim Kaatz will come up with a tentative agenda and budget, and check with the Lodge of the Four Seasons on hosting. In order to make this work, we obviously do not want a huge group, but we need to make sure the appropriate individuals are invited and encouraged to attend. This should be discussed in more detail at Spring Institute, as we are recommending the first such retreat occur in June 2006. Note: because we have been doing so well with our sponsorships, Jim felt there should be enough funds available in the Association’s account with the University to cover the cost of such a retreat.

Included in this would be inviting division presidents, education and membership chairs to the retreat to provide more assistance and resources to the divisions, as well as cover division assignments for the goals and objectives.

Comments on some of the individual objectives follow below.

- A. At the Executive Board meeting in March, include directors who will take office in July. Encourage them to report to their division all items that would affect them and to include information about the MoCCFOA and the certification program.

Recommendation, Objective A, was for immediate implementation by the President after elections are held at Spring Institute.

- B. Emphasize the importance of either the President or President-Elect attending all nine division meetings to explain the organization and what is offered to all clerks, especially the ones who have not been able to attend the conference.

The Committee felt this objective could be difficult, depending on costs involved and/or support of the officer's city. The recommendation was to ask the division what THEY would like to see done and possibly think of other ways to achieve this objective –such as inviting Jim Kaatz or others.

- C. Meet with all outgoing committee chairs to get their input on any way their committee could be improved. Encourage them to offer their assistance to the new chair, including any financial guidance they might have in regards to expenses that need to be budgeted.
- D. Keep an open dialogue between the Executive Board and all MoCCFOA members. This is their organization. Consider having a few minutes after the business meeting to allow members to ask questions of the Board.
- E. Encourage clerks to be more involved at the division level and the divisions encouraged to recruit new members.
- F. Divisions must be more involved in State functions and more recognition of divisions is needed by the State organization.
- Present annual award for the division that brings in the most new members, on a percentage basis.
 - Recognize division officers during State and/or MML functions.
 - Hold a contest for the most innovative idea from a division for either raising money, providing scholarships, recruiting new members, etc., and present an award to the winner.
- G. Divisions must require their elected director to be more informed on the duties and importance of the position. The division's representative must be able and willing to attend MoCCFOA Board meetings and other functions. Keeping divisions better informed and encouraging member participation is one of the most important functions of the director.