EBOOK

What a Good Clerk Knows:
Knowledge Recipes for Your Best Work

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Introduction:
Ingredients for a Happy Clerk

As a clerk, you're on the frontline of public service work. In addition to being your community's historian, the keeper of the records, and the organizer of meetings and special sessions, your role now includes identifying, selecting, implementing, and managing the tech stack needed for community transparency, document collaboration, and recordkeeping compliance.

You control the health of your workflows, department, and the larger civic experience and resident satisfaction. Thankfully, you don't have to do this alone, nor should you.

The team at CivicPlus has been sharing resources with clerks for years, but never in one easy cookbook. We hope you're hungry for brain food, because there are plenty of tips, hacks, and information snacks in these perfect recipe for achieving optimal clerk efficiency and performance.

Main Courses

Blue Ribbon Resources

Knowledge is the secret to success for clerks in the digital transformation age. Sprinkle in advice from peers, add a dash of education, and top it all off with a heaping scoop of technical support, and you have the foundational knowledge needed to continue refining your processes and tech stack as the needs of your community evolve. Here is our recipe for Blue Ribbon Resources that every clerk should have.

- ½ tsp information-filled case studies to learn best practices from peers

- 2/3 cup blog reading to stay informed of new tech and top trends

- ½ cup self-guided demos so you can explore commitment-free time-saving solutions
  - CivicPlus Agenda and Meeting Management
  - Municode Codification
  - CivicPlus Municipal Websites

- ¾ cup Stevie Award-winning customer service that acts as the extension of your office

- 2 cups of one-on-one demos for times when you have questions and want to learn more about solution customizations
  - NextRequest Open Records Requests
  - CivicPlus® Social Media Archiving

- A dash of the City Clerk Café Facebook Group (go lighter or heavier on participation based on your preference for social interaction)

- 1 1/3 cup 50 Tips to Become the Best Municipal Clerk in Your State eBook

- 3 tbsp social media support for networking and community building
  - Facebook
  - Twitter
  - LinkedIn

- 1/4 tsp Integrate your Agenda and Meeting Management Solution with your Codification Process Factsheet

- 1 cup benefits of CivicPlus Agenda and Meeting Management, Municipal Websites, and Municode Codification Integration
  - Stew on it a bit, and then for richer understanding, book a 1:1 demo to learn more about our integrated search functionality between CivicPlus Municipal Websites and Online Code of Ordinances solutions

- 3 tbsp of high-quality clerk community resources
  - International Institute of Municipal Clerks (IIMC)
  - Municipal Clerk State Associations
  - Master Municipal Clerk (MMC) program

Agenda and Meeting Management

The constant cycle of preparing for meetings and documenting follow-ups, in addition to all the other routine expectations of clerks, means that repeatable, scalable, efficient processes are critical to time management.

At one time, every aspect of a clerk's agenda responsibilities meant paper, paper, and more paper. Today, thanks to the digital transformation of local government, clerks can leverage technology to automate aspects of the agenda and meeting minutes documentation processes — reducing paper and time spent at the printer. What makes for the perfect agenda and meeting management recipe? The following dish is perfect whether you are serving a community of 50 or 50,000.

Perfect-for-Any-Size-Crowd Agenda and Meeting Management

▶ 3 tbsp agenda and meeting management tips in this blog

▶ ¼ tbsp webinar and brochures resources

- 22 Questions To Ask When Shopping For Agenda And Meeting Management Software

- Choosing the Best Agenda and Meeting Management Software

▶ 1 cup inspiration case studies

▶ Sprinkle of self-guided demo

Municode Codification

At CivicPlus, we love a party, which is why we invited Municode to be a part of our integrated Civic Experience Platform. Experience the only solution to integrate your code of ordinances with your agenda and meeting management software and municipal websites. You and your staff will benefit from the convenience of fluid and consistent updates across digital platforms. Residents can trust that they always read the latest, most up-to-date ordinances. What about Municode's people, services, and solutions made us want to team up? Here's the perfect recipe for codification excellence.

Our 70-Year-Old #CPFamily Codification Recipe

- ▶ 3 cups of the best legal editors, proofreaders, and code experts in the country

- ▶ 2 cups codification and supplementation blog

- ▶ 1 Online Code Hosting Solution (don't skip this ingredient)

- ▶ 2 Flexible payment plan options

- ▶ ¼ tbsp webinar and brochures resources

- ▶ ¾ cup case studies

- ▶ 1 tsp of self-guided demo
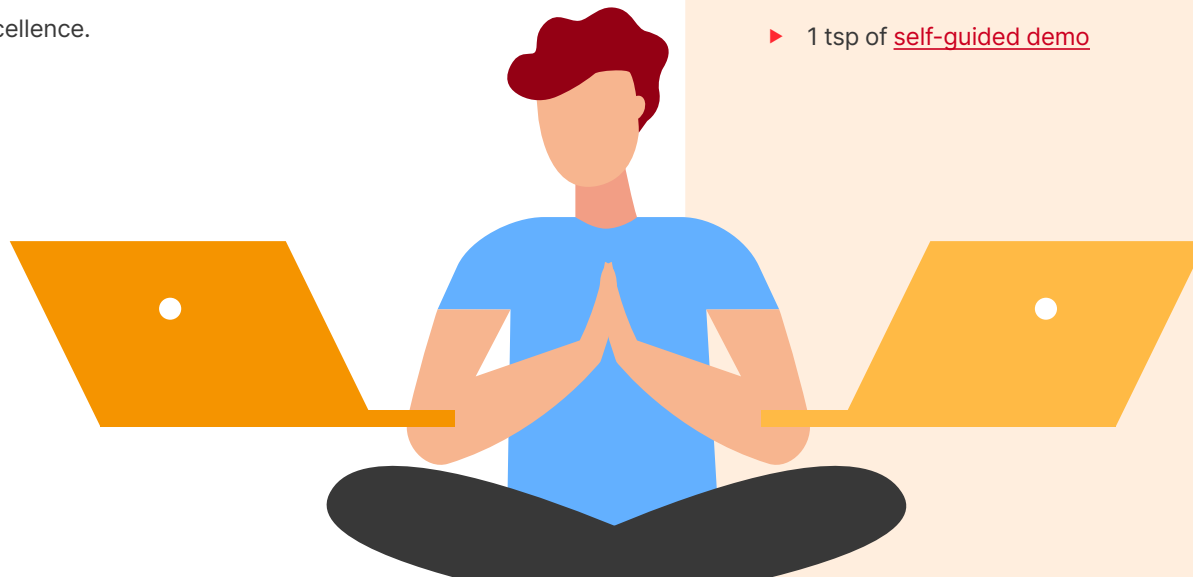
NextRequest Powered by CivicPlus

NextRequest, the leader in FOIA and request management technology, is now part of CivicPlus. Give your agency a boost in compliance regulations and laws. With NextRequest, you can rapidly respond to audits, examinations, and legal inquiries with our suite of compliance features. Easily track record requests, communications, and document production for proof of compliance. What's our secret sauce? Read on to find out. (P.S.: We don't keep our NextRequest solution a secret, so share it with fellow clerks who need technology to support their compliance and records retention needs).
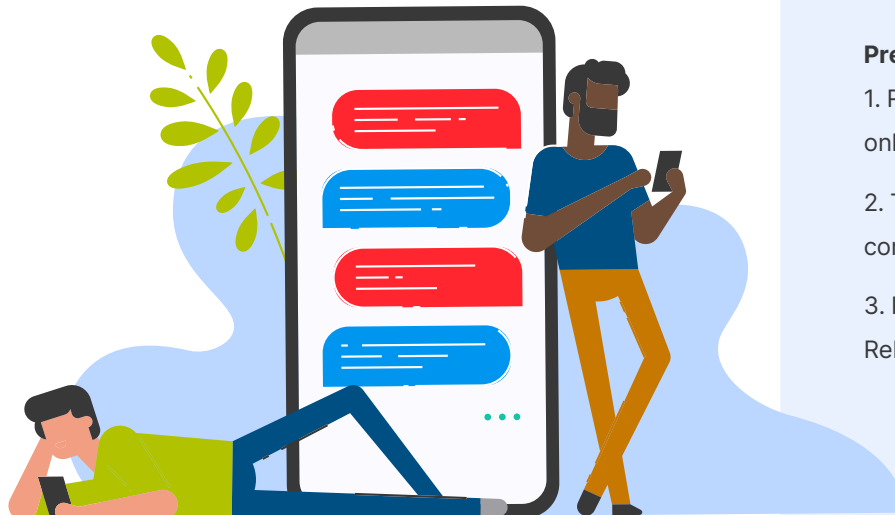
Records Request Secret Sauce

▶ 1/2 tbsp open records request blog

▶ 4 cups informative case studies

▶ 1 cup 1:1 software demo

▶ A heaping scoop each of:

- Reporting
- Payments
- Roles and permissions
- Audit trails
- Automated routing
- Message templates
- Email automation
- Time tracking

Preparation Instructions:

1. Receive requests. Accept requests through a modern online portal. Connect requesters with self-serve information

2. Track and process. Route to staff automatically. Maintain compliance with dashboards and audit trails

3. Release records. Send documents of any type or size. Release to an individual or the public at large.

CivicPlus Social Media Archiving

CivicPlus Social Media Archiving is also now part of our Civic Experience Platform. Without ArchiveSocial, complying with record retention laws could cost thousands a year and endless hours. However, managing your entire online presence doesn't have to be complicated. You'll never miss a post or comment by automatically capturing and preserving your data in one secure location with active social media archiving. You can quickly find and respond to records requests in your desired formats. CivicPlus Social Media Archiving helps you save dramatically on public records costs and increases your entity's transparency. How do you make an easy social media archiving strategy? With this reliable recipe:

Easy-as-Cake Social Media Archiving

▸ 3 cups Social Media Archiving blog

▸ 1 Reliable state-based FOIA regulation search tool

▸ 1 tbsp case studies

- The City Beautiful Serves Glowingly in the Sunshine State

▸ Dash of 1:1 software demo

Preparation Instructions

1. Connect directly to your social networks

2. Capture and preserve all the content your administration posts and engages with, in context and near-real-time

3. Easily manage your online communications and help your organization stay compliant with public records laws, regulations, and recordkeeping initiatives

4. Enjoy it with a worry-free night's sleep

CivicPlus Municipal Websites

Our suite of proven Municipal Website solutions offers scalability, integrability, and customer configuration capabilities to any size community, staff, and municipality. We have time-saving workflows, inter-departmental collaboration, and intuitive self-service functionalities residents can use to meet their needs online. Our websites are the solution that put CivicPlus on the map. The following recipe is an oldie but goodie that we've kept modern and refreshing.
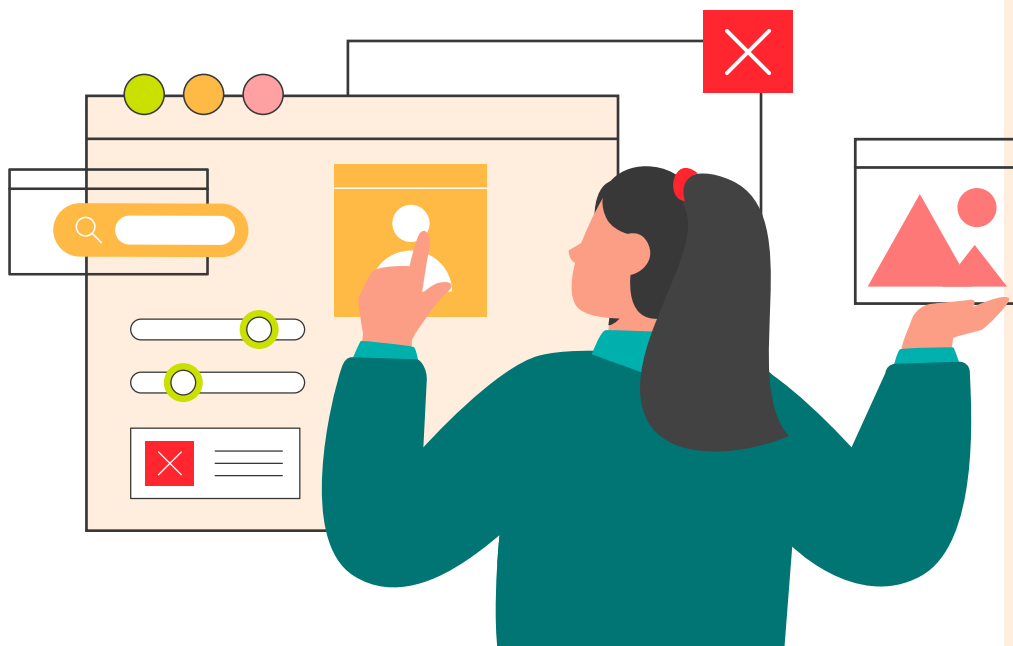
My Favorite Website Recipe

▶ Start by choosing from one of three scalable platform options

▶ 1 cup modern branded designs

▶ ½ cup of the broadest feature set in the public sector

▶ 1 tbsp mobile optimization

▶ 1 tbsp accessibility compliance

▶ 5 cups blog scrolling

▶ 2 tbsp case studies

- Dighton, MA Makes Strides in Website Accessibility Compliance With CivicPlus and AudioEye

▶ 1 marinated 1:1 software demo

▶ *Optional (but highly recommended) AI-powered chatbot

About the Author

CivicPlus is a technology company focused on building trust in government by fostering consistently positive digital experiences for residents and staff. With over 12,500 global customers, CivicPlus solutions are used daily by over 100,000 administrative staff members and over 340 million people in the U.S. and Canada alone. For more information, visit CivicPlus.com.