



## EXECUTIVE COMMITTEE AGENDA

Thursday, June 11, 2015  
Fife City Hall at 1:00 PM

- 1. Call to Order**
- 2. Approval of Minutes** – Executive Committee Meeting Minutes of March 20, 2015..... 2
- 3. Treasury Related Reports**
  - a. Treasurer’s Report (Gina) ..... 9
  - b. World Points
- 4. New Business**
  - c. ICMA Conference 2015 (Virginia) ..... 22
  - d. IIMC Conference 2021 (Debbie B) ..... verbal
  - e. IACC Conference (Debbie B) ..... 23
- 5. Committee Business/Reports**
  - a. Audit (Diana) ..... 29
  - b. Awards (Diana)..... none
  - c. Budget (Shannon) ..... none
  - d. Bylaws (Christy)..... 30
  - e. Conference Planning (Paula)..... 31
  - f. Education (Shannon)..... 32
  - g. Education Coordinator (Debbie B)..... 33
  - h. Fundraising (Debbie J)..... 98
  - i. Historical (Jill) ..... none
  - j. Legislative (Christy) ..... 100
  - k. Membership (Kay)..... 101
  - l. Newsletter (Virginia) ..... none
  - m. Scholarship (Dee) ..... 109
  - n. Webmaster (Bobbie)..... 110
  - o. Archives Oversight (Jill) ..... none
  - p. Handbook (Jill) ..... none
- 6. Other Business**
  - a. Email Ratifications (Debbie)..... 113
  - b. President Award Presentation and Photo Opp (Debbie)
- 7. Good of the Order**
- 8. Next Meeting** - Friday, October 2, 2015 at 1:00 p.m. at the Spokane Red Lion  
Tentative Topics: AWC Conference Report, Ratify Fall Academy Scholarships
- 9. Adjournment**



**WASHINGTON MUNICIPAL CLERKS ASSOCIATION  
EXECUTIVE COMMITTEE MEETING**

Friday, March 20, 2015, 12:30 p.m.  
Hilton Hotel, Vancouver, WA

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**CALL TO ORDER:**

President Burke called the meeting to order at 12:40 p.m.

**ROLL CALL:**

President Debbie Burke, President-Elect Shannon Corin, Vice President Christy O'Flaherty (via telephone), Secretary Virginia Olsen, Treasurer Gina Anderson, and Boardmembers Jill Boltz, Debbie Jermann, Kay Kammer, Dee Roberts, Paula Swisher, and Bobbie Usselman, and Immediate Past President Diana Quinn.

President Burke welcomed Kay Kammer and Debbie Jermann to the Executive Committee and congratulated the newly elected members.

President Burke appointed Dee Roberts as Parliamentarian.

**APPROVAL OF MINUTES:**

Boardmember Usselman **MOVED**, seconded by Treasurer Anderson, to approve the Executive Committee meeting minutes for January 23, 2015. The motion **PASSED** 12/0.

**TREASURER'S REPORT:**

Treasurer Anderson provided a new WMCA credit card to President-Elect Shannon Corin.

Treasurer Anderson distributed a credit card report with the Bank of America points. There was discussion about uses for expiring points including gift cards that could be used for speakers, conference supplies, etc.

President-Elect Corin **MOVED**, seconded by Boardmember Swisher, to approve Treasurer Anderson moving forward in taking the points from Past President Passey's card and purchasing gift cards for WMCA expenses. The motion **PASSED** 12/0.

**NEW BUSINESS:**

IIMC Conference Update

President Burke distributed a flyer that was drafted to advertise the Region IX Reception at the IIMC Conference and asked for feedback. There was also discussion about how to collect payments for this event.

President Burke reported that the other states provided a combined \$1,250 and WMCA contributed \$1,000 toward the reception. She reviewed the expenses for this event.

Immediate Past President **MOVED**, seconded by President-Elect Corin, to approve the second down payment of \$2,250 for this event. The motion **PASSED** 12/0.

#### AWC Conference

President Burke stated that the AWC Conference would be June 23-26 in Wenatchee. Secretary Olsen and Boardmember Usselman expressed interest in attending. Immediate Past President Quinn said she would attend as a City Administrator. It was noted that Past President Karen Kuznek-Reese was also attending and may be able to help.

Secretary Olsen was asked to register and order 150 stress ball gavels for the booth give-way item.

Boardmember Boltz suggested a “Wordle” poster in front of the table. Boardmember Swisher suggested new colors and there was consensus to use the colors in our logo. Boardmember Boltz volunteered to work on this project.

President Burke also said there is an opportunity to present a session at the AWC Conference and there was consensus to look into it.

President Burke recessed the meeting for lunch at 1:07 p.m. The meeting reconvened at 1:28 p.m.

#### Ad Hoc Committee Certificates

Boardmember Boltz stated that she had asked if a certificate could be awarded for serving on an adhoc committee.

There was consensus to award certificates to the leaders of the handbook project and any other significant contributions such as the NCI Committee.

### **COMMITTEE REPORTS:**

#### Audit Committee

President Burke referred to the written report. Immediate Past President Quinn inquired about the term for the backup Treasurer. President Burke noted that we will need to appoint the backup Treasurer at next January board meeting as Immediate Past President Quinn would be rotating off of the Executive Committee.

#### Awards Committee

President Burke asked who would write the newsletter articles on Clerk of the Year and Boardmember Boltz said she would get the photos. Secretary Olsen volunteered to write the articles.

#### Budget Committee

There was no report.

### Bylaws Committee

There was no report. It was confirmed that Jody Schwinn is the new Chair of this committee.

### Conference Planning Committee

Boardmember Swisher reported that everything went really well regarding the hotel and staff at the conference. She noted that there were problems that occurred before the conference especially related to another group being favored over WMCA. She noted that the hotel booked up due to this double booking. Boardmember Swisher reiterated that she recommends not having conference center locations in the future because WMCA is not treated as well as other larger groups.

Boardmember Swisher stated she received input on possible locations from the membership. She said one new site has a casino that may be a good fit. Boardmember Swisher said it was separated from the conference facility and it only had a small smoking area. Boardmember Swisher asked if the Executive Committee had any concerns about a conference venue at a casino since they do not pay taxes.

There was direction to look into all locations that will meet WMCA's needs and then vet each of the locations based upon our criteria.

President Burke asked if someone would prepare a newsletter article and Secretary Olsen was asked to do this for an upcoming issue.

There was discussion about charging extra for spring academy since breakfast was included. It was noted there were 67 spring academy attendees.

Treasurer Anderson stated that the Education Coordinator wanted an accounting of fall and spring academies. There was direction provided to get an accounting of both fall and spring academies from the Education Committee Chair to see if costs were being covered. It was noted that it is a cleaner process to include breakfast so any onsite restaurant is not overloaded causing attendees to be late to the academy.

Boardmember Swisher asked the Executive Committee if her cost of fuel could be reimbursed when visiting potential conference sites.

Boardmember Usselman **MOVED**, seconded by Boardmember Boltz, to reimburse Boardmember Swisher for her fuel receipts to visit conference sites. The motion **PASSED** 12/0.

Immediate Past President Diana Quinn reported that her charity, Vida's Ark, had received \$100 in cash donations plus a number of very useful items. She said the organization was very pleased with our contributions. It was noted that some of the old clothes inventory from the WMCA store was donated.

Immediate Past President Quinn noted that member Debbie Kurdna had asked for refund due to a death in the family. President Burke stated the Executive Committee said there is a zero refund policy because we have to pay the hotel regardless. Immediate Past President Quinn stated she spoke to Debbie and she understood.

Secretary Olsen said she was very pleased that attendance was the highest since the recession hit. Boardmember Swisher said she should look at the room blocks in place with the next two conference locations to ensure there are enough rooms. Immediate Past President Quinn said that she believes the postcard mailing helped attendance.

#### Education Committee

President-Elect Corin said she would follow up with accountings of the academies. President Burke stated there was discussion about the roles of the new Education Coordinator and Education Committee Chair and stated that Vice President O'Flaherty would follow up with this task.

President Burke said that Education Coordinator Ali Spietz was working on an Education Committee survey with the NCI Committee.

#### Fundraising Committee

Boardmember Jermann stated that a member who is interested in chairing the committee will be shadowing her. She distributed a t-shirt that says "Clerk only because SuperWoman isn't an actual job title." Boardmember Jermann will be looking into having a contest for future t-shirt designs.

Boardmember Kammer said she would check with the 4Imprint about additional sweatshirt orders because there was more interest in the sweatshirts sold this year. Boardmember Jermann added that the Fundraising Committee would brainstorm new ideas for next year's store.

There was discussion about the offsite event and its impact on the live auction. Boardmember Jermann said that not everyone attended the event so we need to make sure everyone knows when it is being held. Further discussion ensued about the timing of the live auction.

#### Historical Committee

Boardmember Boltz said the disk from the photographer was received. She said she wanted to look at the Historical Committee job description and since a lot of the information is now on the website, it may need to be updated.

Boardmember Boltz said some of the old information including the Quill newsletters were scanned and transferred to the state archives, Puget Sound Region, and she's down to one tub and one tote.

Boardmember Boltz stated she is looking into digital scrapbooks. She said Shutterfly has them and you can take the photos directly. Secretary Olsen was asked to follow up and put the Facebook and Shutterfly information into the newsletter. Boardmember Usselman stated she would put buttons on the website and make these more prominent.

#### Legislative Committee

Vice President O'Flaherty said Past President Sandy Paul would Chair this committee next year. President Burke said she is working on a capitol tour for Committee members as well as the membership.

### Membership Committee

Boardmember Kammer said she would work as a liaison with Chair Smoot. Secretary Olsen asked how the Executive Committee thought the first-time attendee breakfast went.

There was discussion about the receiving line at the meet and greet, nametags, adding CMC and MMC nametags, corrupted nametag files, introduction of first-time attendees at the breakfast, having the NCI Director speak at the breakfast, survival bags, assigned seating and trivia.

Boardmember Swisher said that Chair Smoot had very positive feedback on the survival bags.

Boardmember Roberts said the room for the meet and greet on Tuesday night was very stark with water glasses and nothing else. She suggested having some cheese and crackers and making the room more welcoming. It was also suggested that the welcome bags be provided at this time. President Burke reminded the Executive Committee that outside food could not be brought in and must be ordered from the hotel.

President Burke stated that Chair Smoot would like to do something for new members at the fall academy. She asked Boardmember Kammer to follow up with Chair Smoot.

There was discussion about the low election turnout and the reasons why. Boardmember Usselman suggested the website login be changed to our phone numbers instead of a membership ID number since people know their phone number. The Executive Committee agreed and Boardmember Usselman stated she would look into other ways to improve this process.

It was noted that the postcard mailing was \$125 including postage and it is done via online mail merge. There was discussion about doing an election reminder via postcard because emails are often deleted and sometimes end up in spam or email filtered out.

### Newsletter Committee

President Burke said she would send a link to her city's constant contact template and Secretary Olsen would follow up with Chair Melody Valiant and the Newsletter Committee about using it to create the monthly newsletter. President-Elect Corin said she would continue to do the LOL page.

### Scholarship Committee

Boardmember Roberts asked what the goal of scholarships is and the overwhelming response was member education. Boardmember Roberts stated that she believes the scholarship process is complicated and convoluted the way it is done now. She spoke about the process of critiquing the answers on the scholarship application.

Boardmember Roberts said we have gotten to the point where we are stifling people so they do not apply for scholarships and we need to make the process more comfortable and clean. She reviewed her recommendation on how the process should work including an accountability piece for follow up afterwards. It was clarified that if the follow up piece was not done, the scholarship would not be reimbursed.

There was support for Boardmember Roberts' ideas including the follow up items.

Immediate Past President Quinn **MOVED**, seconded by Boardmember Swisher, to approve the proposed PD scholarship applications. The motion **PASSED** 12/0.

Boardmember Swisher **MOVED**, seconded by Immediate Past President Quinn, to reopen PD scholarships that were received. The motion **PASSED** 12/0.

The following scholarships were approved:

Chelsea Anthony, City of Montesano (PD I)  
Susan Haigh, City of Bonney Lake (PD I)  
Trish Summers, Town of Wilkeson (PD I)

Patricia Phillips, Adams County (PD II)

Renee Cameron, City of Bonney Lake (PD III)  
Laura Divis, City of Okanogan (PD III)  
Gretchen Sagen, City of Raymond (PD III) [Reimbursed by Code Publishing]  
Ashlee Sund, City of Montesano (PD III)

Gwen Robson, City of Orting (PD IV)

It was noted the deadline would be Friday, April 17 and there would be an eblast sent along with a newsletter article prepared by Boardmember Roberts.

Boardmember Roberts said she would prepare a process and plan to present at the June board meeting.

#### Webmaster Report

Boardmember Usselman stated she has a hard time keeping the committee sheets updated throughout the year with changes made. She asked that committee chairs send her the changes whenever they are made.

President Burke stated that Boardmember Usselman put the Executive Committee official guide online.

President Burke said that Past President Sandy Paul had retired and the bylaws do not address if an honorary member could chair a committee. It was suggested that she let someone shadow her if there was an interested member.

#### Archives Oversight Committee

There was no report.

#### Handbook Committee

There was no report.

## **OTHER BUSINESS:**

### Email Ratification

Boardmember Usselman **MOVED**, seconded by Boardmember Swisher, to ratify the March 4, 2015 vote to approve the agreement for the Region IX Director and authorize WMCA President to execute the agreement. The motion **PASSED** 10/0. (Boardmember Kammer momentarily left the room and Boardmember O'Flaherty left the telephone call at 3:35 p.m.)

### Job Descriptions

President-Elect Corin stated she would ensure all the updated job descriptions were sent to the Webmaster. President Burke stated the President-Elect would keep the updated paper versions.

President Burke stated the Vice President job description includes the NCI committee so that needs to be updated. President-Elect Corin said she would send that to Vice President O'Flaherty to update if it had not already been done.

President Burke said she was able to go to the Region IX conferences this year and she attended the AAMC conference last November in Immediate Past President Quinn's place. She asked if the Executive Committee approved of Treasurer Anderson attending the AAMC conference in her place this year and the Executive Committee responded affirmatively.

President Burke suggested forming a Past President Committee to track retirements and things of that nature. She said further discussion would happen at next meeting.

## **NEXT MEETING:**

It was suggested the next Executive Committee meeting be held at 9:00 a.m. on Monday, June 8 at University of Puget Sound (UPS) due to members attending the Master Academy at NCI. President Burke stated she would check with NCI Director Dema Harris to see if we could get permission from UPS or an alternate site.

## **ADJOURNMENT:**

President Burke adjourned the meeting at 4:04 p.m.

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Virginia V. Olsen, CMC, Secretary





TO: WMCA Membership  
FROM: Gina Anderson, Treasurer  
DATE: May 29, 2015

Attached are the following reports for the fiscal year ending April 30, 2015:

- Balance Sheet
- Profit & Loss Budget vs. Actual
- Checking Register
- Savings Register
- Scholarship Register

Dues for the 2015-2016 fiscal year are coming in fast and furious!

As of May 29, 2015, our bank accounts show a total of \$ 113,727.52:

\$ 17,937.45	Checking
\$ 86,316.54	Savings
\$ 9,473.53	Scholarship

**WMCA**  
**Balance Sheet**  
**As of April 30, 2015**

**Assets**

**Current Assets**

Checking	13,686.00
Savings	86,309.71
Scholarship	9,473.16
Total Cash	<u>109,468.87</u>

<b>Accounts Receivable</b>	69.00
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<b>Total Current Assets</b>	<u>109,537.87</u>
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<b>Total Assets</b>	<u><u>109,537.87</u></u>
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**Liabilities & Equity**

**Liabilities**

**Current Liabilities**

Deferred Revenue	1,937.79
<b>Total Current Liabilities</b>	<u>1,937.79</u>

**EQUITY**

Opening Balance Equity	97,385.88
Retained Earnings	19,596.45
Net Income	(9,382.25)
<b>Total Equity</b>	<u>107,600.08</u>

<b>Total Liabilities &amp; Equity</b>	<u><u>109,537.87</u></u>
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**WMCA**  
**Profit & Loss Budget vs. Actual**  
**May 2014 through April 2015**

	<u>Actual</u> <u>May '14-Apr '15</u>	<u>Budget</u> <u>May '14-April '15</u>	<u>\$ Under/Over</u> <u>Budget</u>	<u>% of Total</u>
<b>Income</b>				
Advanced Academy	14,900.00	12,750.00	2,150.00	1.17
Conference	64,441.45	44,000.00	20,441.45	1.46
Dues	24,525.00	23,250.00	1,275.00	1.05
IIMC President's Reception	3,000.00	0.00	3,000.00	0.00
Money Market Savings Interest	85.96	0.00	85.96	0.00
Region IX Dinner	945.00			
Scholarship Income	11,633.71	11,802.75	(169.04)	0.99
<b>Total Income</b>	<b>119,531.12</b>	<b>91,802.75</b>	<b>27,728.37</b>	<b>130.20%</b>
<b>Expense</b>				
Academy Sessions	11,713.94	10,000.00	1,713.94	1.17
Annual Conference	69,339.06	53,875.00	15,464.06	1.29
Board Expenses	14,976.94	15,785.00	(808.06)	0.95
Communication Expenses	1,152.39	1,480.00	(327.61)	0.78
Contingency	0.00	500.00	(500.00)	0.00
Future Conference Site Deposit	0.00	5,000.00	(5,000.00)	0.00
IIMC	5,785.00	1,875.00	3,910.00	3.09
Miscellaneous Expenses	6,808.23	7,015.00	(206.77)	0.97
Scholarship Expenses	19,137.81	27,000.00	(7,862.19)	0.71
<b>Total Expense</b>	<b>128,913.37</b>	<b>122,530.00</b>	<b>6,383.37</b>	<b>105.21%</b>
<b>Net Profit (Loss)</b>	<b>(9,382.25)</b>	<b>(30,727.25)</b>	<b>21,345.00</b>	<b>30.53%</b>

**WMCA**  
**Profit & Loss Budget vs. Actual**  
**May 2014 through April 2015**

	Actual May '14 - Apr '15	Budget May '14 - Apr '15	\$ Under/Over Budget	% of Total
<b>Income</b>				
Advanced Academy				
Fall	6,250.00	6,375.00	(125.00)	98.04%
Spring	8,650.00	6,375.00	2,275.00	135.69%
Total Advanced Academy	<u>14,900.00</u>	<u>12,750.00</u>	<u>2,150.00</u>	<u>116.86%</u>
Conference				
Donations	9,500.00	4,000.00	5,500.00	237.50%
Exhibitors	5,500.00	7,500.00	(2,000.00)	73.33%
Meals	3,891.45	2,500.00	1,391.45	155.66%
Registrations	45,550.00	30,000.00	15,550.00	151.83%
Total Conference	<u>64,441.45</u>	<u>44,000.00</u>	<u>20,441.45</u>	<u>146.46%</u>
Dues	24,525.00	23,250.00	1,275.00	105.48%
IIMC President's Reception	3,000.00	0.00	3,000.00	
Money Market Savings Interest	85.96	0.00	85.96	
Region IX Dinner	945.00			
Scholarship Income				
Auction	4,918.00	4,000.00	918.00	122.95%
Donations	1,010.00	800.00	210.00	0.00%
Interest	4.71	2.75	1.96	0.00%
Product Sales	1,430.00	2,000.00	(570.00)	71.50%
Raffle	4,271.00	5,000.00	(729.00)	85.42%
Total Scholarship Income	<u>11,633.71</u>	<u>11,802.75</u>	<u>(169.04)</u>	<u>98.57%</u>
<b>Total Income</b>	<b><u>119,531.12</u></b>	<b><u>91,802.75</u></b>	<b><u>27,728.37</u></b>	<b><u>130.20%</u></b>
<b>Expense</b>				
Academy Sessions				
Fall	4,356.64	5,000.00	(643.36)	87.13%
Spring	7,357.30	5,000.00	2,357.30	147.15%
Total Academy Sessions	<u>11,713.94</u>	<u>10,000.00</u>	<u>1,713.94</u>	<u>117.14%</u>
Annual Conference				
Audio Visual	6,939.12	2,500.00	4,439.12	277.56%
Conference Photographer	500.00	500.00	0.00	100.00%
Decorations	1,495.26	2,000.00	(504.74)	74.76%
Drawings/Door Prizes	300.00	500.00	(200.00)	60.00%
Hospitality Expenses (WMCA)	3,266.21	4,425.00	(1,158.79)	73.81%
Meals	47,223.57	30,000.00	17,223.57	157.41%
Printing/Postage	0.00	2,500.00	(2,500.00)	0.00%
Recognition Awards	274.33	750.00	(475.67)	36.58%
Refunds	0.00	200.00	(200.00)	0.00%
Speakers	6,484.77	7,000.00	(515.23)	92.64%
Special Entertainment	450.00	2,000.00	(1,550.00)	22.50%
Supplies	2,405.80	1,500.00	905.80	160.39%

**WMCA**  
**Profit & Loss Budget vs. Actual**  
**May 2014 through April 2015**

	Actual	Budget	\$ Under/Over	%
	May '14 - Apr '15	May '14 - Apr '15	Budget	of Total
Total Annual Conference	69,339.06	53,875.00	15,464.06	128.70%
Board Expenses				
Board Meetings	921.84	800.00	121.84	115.23%
Education Coordinator	1,116.60	0.00		
Executive Committee Travel				
AWC Conference	1,490.80	2,000.00	(509.20)	74.54%
Total Executive Committee Travel	1,490.80	2,000.00	(509.20)	74.54%
NCI Director Travel				
Northwest Clerks Institute	753.00	0.00	753.00	
IIMC Conference	0.00	500.00	(500.00)	0.00%
WMCA Conference	1,213.64	800.00	413.64	151.71%
Total NCI Director Travel	1,966.64	1,300.00	666.64	151.28%
Officer's Board Travel				
President				
Alaska Conference	1,068.17	1,600.00	(531.83)	66.76%
BC Conference	982.85	1,300.00	(317.15)	75.60%
CA Conference	1,060.14	1,275.00	(214.86)	83.15%
IIMC Conference	2,445.73	2,150.00	295.73	113.75%
OR Conference	763.96	1,135.00	(371.04)	67.31%
WMCA Conference	(2.24)	300.00	(302.24)	-0.75%
Total President	6,318.61	7,760.00	(1,441.39)	81.43%
President Elect				
ICCTFOA Conference	0.00	1,275.00	(1,275.00)	0.00%
IIMC Conference	2,809.70	2,150.00	659.70	130.68%
WMCA Conference	352.75	500.00	(147.25)	70.55%
Total President Elect	3,162.45	3,925.00	(762.55)	80.57%
Total Officer's Board Travel	9,481.06	11,685.00	(2,203.94)	81.14%
Total Board Expenses	14,976.94	15,785.00	(808.06)	94.88%
Communication Expenses				
Voting Software	0.00	80.00	(80.00)	
Survey	0.00	200.00	(200.00)	0.00%
Website M&O	1,152.39	1,200.00	(47.61)	96.03%
Total Communication Expenses	1,152.39	1,480.00	(327.61)	77.86%
Contingency	0.00	500.00	(500.00)	0.00%
Future Conference Site Deposit	0.00	5,000.00	(5,000.00)	0.00%
IIMC				
IIMC President's Reception	4,000.00			

**WMCA**  
**Profit & Loss Budget vs. Actual**  
**May 2014 through April 2015**

	Actual	Budget	\$ Under/Over	
	May '14 - Apr '15	May '14 - Apr '15	Budget	% of Total
MCEF Donation	75.00	75.00	0.00	100.00%
Outgoing Reg IX Dir Gift	0.00	100.00	(100.00)	0.00%
Reg IX Assessment	1,710.00	1,700.00	10.00	100.59%
<b>Total IIMC</b>	<b>5,785.00</b>	<b>1,875.00</b>	<b>3,910.00</b>	<b>308.53%</b>
<b>Miscellaneous Expenses</b>				
501C(3)	770.00	775.00	(5.00)	99.35%
Bank Charges	0.00	40.00	(40.00)	0.00%
Condolences	0.00	150.00	(150.00)	0.00%
Credit Card Fees (PayPal)	797.00	550.00	247.00	144.91%
Gambling/Alcohol License	196.00	300.00	(104.00)	65.33%
Insurance	1,366.00	1,400.00	(34.00)	97.57%
Office Supplies	2,985.72	2,500.00	485.72	119.43%
Other	273.70	500.00	(226.30)	54.74%
Postage	419.81	300.00	119.81	139.94%
Support for AWC Basic Training	0.00	500.00	(500.00)	0.00%
<b>Total Miscellaneous Expenses</b>	<b>6,808.23</b>	<b>7,015.00</b>	<b>(206.77)</b>	<b>97.05%</b>
<b>Scholarship Expenses</b>				
AWC Scholarship	0.00	0.00	0.00	#DIV/0!
Conference Scholarships	2,400.00	3,000.00	(600.00)	80.00%
Grand Raffle	2,491.73	0.00	2,491.73	
Margery A. Price Scholarship	650.00	3,000.00	(2,350.00)	21.67%
NCI Scholarships	12,575.00	16,000.00	(3,425.00)	78.59%
Raffle - Auction	176.88	2,500.00	(2,323.12)	7.08%
Scholarship Items for Sale	844.20	2,000.00	(1,155.80)	42.21%
<b>Total Scholarship Expenses</b>	<b>19,137.81</b>	<b>26,500.00</b>	<b>(7,362.19)</b>	<b>72.22%</b>
<b>Total Expense</b>	<b>128,913.37</b>	<b>122,030.00</b>	<b>6,883.37</b>	<b>105.64%</b>
<b>Net Profit (Loss)</b>	<b>(9,382.25)</b>	<b>(30,227.25)</b>	<b>20,845.00</b>	<b>31.04%</b>

Register: Chase Checking

From 05/01/2014 through 04/30/2015

Sorted by: Date, Type, Number/Ref

<u>Date</u>	<u>Number</u>	<u>Payee</u>	<u>Account</u>	<u>Memo</u>	<u>Payment</u>	<u>C</u>	<u>Deposit</u>	<u>Balance</u>
05/02/2014			-split-	Deposit		X	1,350.00	22,640.13
05/02/2014			-split-	Deposit		X	1,350.00	23,990.13
05/02/2014			-split-	Deposit		X	1,350.00	25,340.13
05/02/2014			-split-	Deposit		X	1,800.00	27,140.13
05/02/2014			-split-	Deposit		X	1,275.00	28,415.13
05/02/2014			-split-	Deposit		X	1,350.00	29,765.13
05/02/2014			-split-	Deposit		X	1,350.00	31,115.13
05/02/2014			-split-	Deposit		X	1,350.00	32,465.13
05/05/2014			-split-	PayPal		X	1,314.90	33,780.03
05/06/2014		Bank Of America	Board Expenses:Office...	Debbie Burke	576.00	X		33,204.03
05/07/2014			-split-	PayPal		X	744.87	33,948.90
05/08/2014			-split-	Deposit		X	1,350.00	35,298.90
05/08/2014	926	WSU - Conference ...	-split-	2014 PD Schol...	15,350.00	X		19,948.90
05/09/2014			-split-	PayPal		X	1,095.75	21,044.65
05/09/2014			-split-	Deposit		X	1,200.00	22,244.65
05/09/2014	927		Scholarship Expenses:...	Rosemary Mur...		X		22,244.65
05/09/2014	928	CCAC	Board Expenses:Office...		40.00	X		22,204.65
05/12/2014			-split-	PayPal		X	1,461.00	23,665.65
05/12/2014			-split-	PayPal		X	1,241.85	24,907.50
05/14/2014		Bank Of America	Board Expenses:Execu...	Sandy Paul	1,000.00	X		23,907.50
05/14/2014		Bank Of America	-split-	Debbie Burke	91.88	X		23,815.62
05/15/2014			-split-	PayPal		X	890.97	24,706.59
05/16/2014			-split-	Deposit		X	990.37	25,696.96
05/23/2014			-split-	Deposit		X	1,255.45	26,952.41
05/27/2014			-split-	PayPal		X	832.89	27,785.30
06/09/2014		Bank Of America	Board Expenses:Office...	Diana Quinn	680.67	X		27,104.63
06/17/2014			-split-	Deposit		X	1,830.00	28,934.63
06/20/2014		Bank Of America	ANNUAL CONFERE...	Paula Swisher	28.36	X		28,906.27
06/20/2014		Bank Of America	-split-	Debbie Burke	972.17	X		27,934.10
06/25/2014		Bank Of America	Board Expenses:Execu...	Sandy Paul	41.52	X		27,892.58
06/25/2014	929	Port Townsend	Dues 2014	Overpayment J...	75.00	X		27,817.58
06/25/2014	930	Joann Tilton	IIMC:Reg IX Assessm...		1,710.00	X		26,107.58
06/25/2014	931	Debbie Burke	-split-	May 2014 Exp...	109.23	X		25,998.35
06/25/2014	932	Diana Quinn	-split-		47.27	X		25,951.08
07/01/2014		Bank Of America	-split-	Diana Quinn	1,336.81	X		24,614.27
07/01/2014	933	City of Sequim	Communication Expen...		25.00	X		24,589.27
07/03/2014	934	Diana Quinn	Board Expenses:Office...		12.71	X		24,576.56
07/03/2014	935	City of Bellevue	Dues 2014		15.00	X		24,561.56
07/11/2014			-split-	PayPal		X	412.20	24,973.76
07/11/2014		Bank Of America	-split-	Debbie Burke	429.98	X		24,543.78

Register: Chase Checking

From 05/01/2014 through 04/30/2015

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
07/11/2014		Bank Of America	ANNUAL CONFERE...	Paula Swisher	108.95	X		24,434.83
07/11/2014		Bank Of America	Board Expenses:Execu...	Sandy Paul	9.84	X		24,424.99
07/15/2014	936	Diana Quinn	Board Expenses:Office...		189.28	X		24,235.71
07/15/2014	937	City of Vancouver	Dues 2014	Dues Overpay...	25.00	X		24,210.71
07/15/2014	938	Peggy Flynn	Board Expenses:NCI D...		670.10	X		23,540.61
07/16/2014		Bank Of America	Board Expenses:Office...	Diana Quinn	788.67	X		22,751.94
07/22/2014	939	Peggy Flynn	Board Expenses:NCI D...		82.90	X		22,669.04
07/22/2014	940	City of Tukwila	Dues 2014		75.00	X		22,594.04
07/23/2014			Dues 2014	Deposit		X	75.00	22,669.04
07/28/2014		Bank Of America	Board Expenses:Office...	Diana Quinn	4.90	X		22,664.14
08/15/2014			-split-	Deposit		X	669.00	23,333.14
08/19/2014			-split-	PayPal		X	770.82	24,103.96
09/02/2014			-split-	PayPal		X	902.85	25,006.81
09/04/2014			-split-	Deposit		X	625.00	25,631.81
09/05/2014		Bank Of America	Board Expenses:Office...	Diana Quinn	222.20	X		25,409.61
09/12/2014		Bank Of America	ANNUAL CONFERE...	Paula Swisher	17.41	X		25,392.20
09/12/2014		Bank Of America	ACADEMY SESSION...	Carol Etgen	318.00	X		25,074.20
09/15/2014			-split-	Deposit		X	925.00	25,999.20
09/15/2014	941	City of Snoqualmie	ADVANCED ACADE...	Overpayment	25.00	X		25,974.20
09/15/2014	942	The Center for Life C...	ACADEMY SESSION...	2014 Fall Acad...	2,000.00	X		23,974.20
09/19/2014			-split-	Deposit		X	450.00	24,424.20
09/19/2014			-split-	PayPal		X	585.60	25,009.80
09/27/2014			-split-	Deposit		X	600.00	25,609.80
10/03/2014			-split-	Deposit		X	775.00	26,384.80
10/06/2014			-split-	PayPal		X	488.10	26,872.90
10/29/2014			-split-	Deposit		X	247.00	27,119.90
10/29/2014		Bank Of America	Board Expenses:Office...	Debbie Burke	376.16	X		26,743.74
10/29/2014		Bank Of America	ACADEMY SESSION...	Carol Etgen	261.90	X		26,481.84
10/29/2014		Bank Of America	-split-	Gina Anderson	251.73	X		26,230.11
10/29/2014		Bank Of America	-split-	Diana Quinn	541.76	X		25,688.35
10/29/2014	943	Debbie Burke	Board Expenses:Office...	IIMC Region I...	40.00	X		25,648.35
10/29/2014	944	Liberty Mutual Insur...	Miscellaneous Expense...	General Liabili...	313.00	X		25,335.35
10/29/2014	945	"S" Enterprises	-split-	Ecpenses	228.55	X		25,106.80
10/29/2014	946	Dema Harris	-split-	Fall Academy	287.27	X		24,819.53
11/04/2014		Bank Of America	Miscellaneous Expense...	Scott Passey	98.00	X		24,721.53
11/04/2014	947	Alderbrook Resort &...	FUTURE CONFEREN...	2016 Conferen...		X		24,721.53
11/04/2014	948	Bannon, Carlson & ...	Miscellaneous Expense...		1,053.00	X		23,668.53
11/04/2014	949	Snohomish Health Di...	Dues 2014	Overpayment o...	25.00	X		23,643.53
11/07/2014	950	Alderbrook Resort &...	FUTURE CONFEREN...	Deposit 2016 C...	5,000.00	X		18,643.53
11/10/2014			-split-	Deposit		X	307.00	18,950.53



Register: Chase Checking

From 05/01/2014 through 04/30/2015

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Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
11/12/2014		Bank Of America	Board Expenses:Office...	Debbie Burke	148.49	X		18,802.04
11/12/2014		Bank Of America	Miscellaneous Expense...	Gina Anderson	1,432.95	X		17,369.09
11/12/2014		Bank Of America	Miscellaneous Expense...	Scott Passey	125.80	X		17,243.29
11/12/2014		Bank Of America	-split-	Paula Swisher	491.39	X		16,751.90
11/13/2014	951	JMA Graphic Design	Miscellaneous Expense...	Invoice #41411...	150.00	X		16,601.90
11/21/2014			Dues 2014	Deposit		X	75.00	16,676.90
11/21/2014		Bank Of America	-split-	Carol Etgen	1,647.98	X		15,028.92
12/05/2014		Bank Of America	ACADEMY SESSION...		0.64	X		15,028.28
12/17/2014		Bank Of America	-split-	Gina Anderson	1,127.39	X		13,900.89
12/17/2014		Bank Of America	-split-	Debbie Burke	703.91	X		13,196.98
12/18/2014			-split-	Deposit		X	207.00	13,403.98
01/15/2015			-split-	PayPal		X	3,957.60	17,361.58
01/20/2015			-split-	Deposit		X	750.00	18,111.58
01/23/2015			-split-	PayPal		X	4,739.40	22,850.98
01/26/2015			-split-	Deposit		X	3,634.00	26,484.98
01/26/2015			-split-	Deposit		X	4,525.00	31,009.98
01/26/2015			-split-	Deposit		X	3,015.00	34,024.98
01/28/2015		Bank Of America	Board Expenses:Office...	Debbie Burke -...	679.20	X		33,345.78
01/28/2015	952	Ctiy of White Salmon	-split-	Duplicate Pay...	425.00	X		32,920.78
01/28/2015	953	City Of Poulsbo	-split-	Cancellation	425.00	X		32,495.78
01/28/2015	954	C-Tran	ANNUAL CONFERE...	Meal Tickets	54.30	X		32,441.48
01/28/2015	955	David T Saathoff	Miscellaneous Expense...		760.00	X		31,681.48
01/28/2015	956	Diana Quinn	Board Expenses:Board ...		54.43	X		31,627.05
01/29/2015			-split-	PayPal		X	2,589.60	34,216.65
02/02/2015		Washington State Ga...	Miscellaneous Expense...	2015 Conferen...	196.00	X		34,020.65
02/06/2015			-split-	Deposit		X	3,150.00	37,170.65
02/06/2015			-split-	PayPal		X	3,004.65	40,175.30
02/07/2015			-split-	Deposit		X	2,386.00	42,561.30
02/07/2015			-split-	Deposit		X	850.00	43,411.30
02/09/2015			IIMC President's Rece...	Deposit		X	500.00	43,911.30
02/14/2015			-split-	Deposit		X	3,575.00	47,486.30
02/19/2015			-split-	Deposit		X	1,760.00	49,246.30
02/19/2015		Bank Of America	-split-	Debbie Burke	206.95	X		49,039.35
02/19/2015		Bank Of America	Miscellaneous Expense...	Gina Anderson	116.37	X		48,922.98
02/19/2015		Bank Of America	-split-	Paula Swisher	972.20	X		47,950.78
02/19/2015		Bank Of America	-split-	Diana Quinn	23.80	X		47,926.98
02/20/2015			-split-	Deposit		X	2,011.00	49,937.98
02/24/2015			-split-	PayPal		X	2,100.60	52,038.58
02/27/2015			-split-	Deposit		X	7,841.00	59,879.58
02/28/2015			-split-	Deposit		X	10,673.00	70,552.58

Register: Chase Checking

From 05/01/2014 through 04/30/2015

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02/28/2015			-split-	Deposit		X	3,711.00	74,263.58
02/28/2015			-split-	Deposit		X	668.00	74,931.58
03/02/2015			-split-	PayPal		X	951.15	75,882.73
03/05/2015	957	Micro Com Systems	CONFERENCE:Meals	03/19/15 Banq...	48.00	X		75,834.73
03/05/2015	958	Municipal Code	CONFERENCE:Meals	03/1915 Banqu...	48.00	X		75,786.73
03/05/2015	959	MMC Innovations	CONFERENCE:Meals	03/1915 Banqu...	48.00	X		75,738.73
03/05/2015	960	Vision Municipal Sol...	CONFERENCE:Meals	3 refunds for 0...	96.00	X		75,642.73
03/05/2015	961	Professional Credit S...	CONFERENCE:Meals	03/19/15 Banq...	48.00	X		75,594.73
03/05/2015	962	AWC Employee Bee...	CONFERENCE:Meals	03/19/15 Banq...	48.00	X		75,546.73
03/05/2015	963	AWC Risk Managem...	CONFERENCE:Meals	2 refunds for 0...	96.00	X		75,450.73
03/05/2015	964	Armada Corporation	CONFERENCE:Meals	03/19/15 Banq...	48.00	X		75,402.73
03/05/2015	965	YCCS	CONFERENCE:Meals	2 refunds for 0...	96.00	X		75,306.73
03/05/2015	966	AV Capture All	CONFERENCE:Meals	3 refunds for 0...	144.00	X		75,162.73
03/06/2015			-split-	Deposit		X	2,925.00	78,087.73
03/10/2015		QuickBooks Pro	Miscellaneous Expense...		82.03	X		78,005.70
03/11/2015		QuickBooks Pro	Miscellaneous Expense...		227.12	X		77,778.58
03/11/2015		QuickBooks Pro	Miscellaneous Expense...		36.85	X		77,741.73
03/14/2015		Bank Of America	-split-	Debbie Burke	719.50	X		77,022.23
03/14/2015		Bank Of America	Scholarship Expenses:...	Gina Anderson	844.20	X		76,178.03
03/14/2015		Bank Of America	-split-	Scott Passey	202.33	X		75,975.70
03/14/2015		Bank Of America	-split-	Paula Swisher	581.84	X		75,393.86
03/14/2015	967	Cash	-split-	2015 Conference	700.00	X		74,693.86
03/14/2015	968	City of Yakima	-split-	Conference Ov...	50.00	X		74,643.86
03/14/2015	969	City of Ferndale	CONFERENCE:Regist...	Conference Re...	300.00	X		74,343.86
03/14/2015	970	City of Fife	CONFERENCE:Regist...	Conference Ref...	300.00	X		74,043.86
03/16/2015	971	Void	ANNUAL CONFERE...	Void - Printer ...		X		74,043.86
03/16/2015	972	Void	-split-	Void - Printer ...		X		74,043.86
03/16/2015	973	Jessica Hanson	-split-	National Anthe...	100.00	X		73,943.86
03/16/2015	974	IAFF Local 452	ANNUAL CONFERE...	2015 Conferen...	50.00	X		73,893.86
03/16/2015	975	Daniel Jordan	ANNUAL CONFERE...	2015 Conferen...	3,000.00	X		70,893.86
03/16/2015	976	Patrick Ibarra	-split-	Academy & Co...	4,500.00	X		66,393.86
03/16/2015	977	Ryan Erlandsen Phot...	ANNUAL CONFERE...	2015 Conferen...	500.00	X		65,893.86
03/17/2015			-split-	Deposit		X	346.00	66,239.86
03/17/2015			-split-	Deposit		X	770.00	67,009.86
03/18/2015			-split-	Deposit		X	875.00	67,884.86
03/19/2015			-split-	Deposit		X	645.00	68,529.86
03/19/2015			-split-	Deposit		X	1,001.00	69,530.86
03/19/2015			-split-	Deposit		X	851.00	70,381.86
03/19/2015		Debbie J	-split-	\$750.00 Grand ...		X		70,381.86
03/20/2015			-split-	Deposit		X	1,318.00	71,699.86

WMCA

6/1/2015 3:49 PM

Register: Chase Checking

From 05/01/2014 through 04/30/2015

Sorted by: Date, Type, Number/Ref

Date	Number	Payee	Account	Memo	Payment	C	Deposit	Balance
03/20/2015			-split-	The Square		X	2,838.35	74,538.21
03/20/2015	978	Debbie Burke	Scholarship Expenses:...	\$500.00 Grand ...	500.00	X		74,038.21
03/20/2015	979	Joyce K Bielefeld	Scholarship Expenses:...	\$1,000.00 Gran...	1,000.00	X		73,038.21
03/23/2015			-split-	PayPal		X	585.90	73,624.11
03/28/2015			-split-	Deposit		X	290.00	73,914.11
03/30/2015			-split-	Deposit		X	1,396.00	75,310.11
04/07/2015			-split-	Deposit		X	333.00	75,643.11
04/07/2015	980	Hilton	ANNUAL CONFERE...	Void - Printed ...		X		75,643.11
04/07/2015	981	Hilton	-split-	2015 Conference	49,218.56	X		26,424.55
04/07/2015	982	Allison Spietz	Board Expenses:Educa...	IIMC Airfare	541.60	X		25,882.95
04/07/2015	983	City of Mercer Island	Board Expenses:Educa...	IIMC	575.00	X		25,307.95
04/07/2015	984	Sandy Paul	ANNUAL CONFERE...	Copies & Eval...	126.47	X		25,181.48
04/07/2015	985	Pat Mason	ANNUAL CONFERE...		169.50	X		25,011.98
04/07/2015	986	Jill Boltz	ANNUAL CONFERE...		222.22	X		24,789.76
04/07/2015	987	Dema Harris	Board Expenses:NCI D...	WMCA Confer...	649.24	X		24,140.52
04/10/2015			-split-	Deposit		X	1,965.00	26,105.52
04/13/2015			-split-	Deposit		X	140.00	26,245.52
04/21/2015	988	The Society Room of...	IIMC:IIMC President's...	IIMC Incoming...	4,000.00	X		22,245.52
04/23/2015			-split-	Deposit		X	455.00	22,700.52
04/23/2015			-split-	Deposit		X	70.00	22,770.52
04/27/2015			-split-	Deposit		X	140.00	22,910.52
04/29/2015			-split-	Deposit		X	490.00	23,400.52
04/29/2015			-split-	Deposit		X	115.50	23,516.02
04/30/2015			-split-	Deposit - The S...		X	38.45	23,554.47
04/30/2015			-split-	PayPal		X	1,562.79	25,117.26
04/30/2015		Bank Of America	-split-	Shannon Corin	2,085.78			23,031.48
04/30/2015		Bank Of America	-split-	Carol Etgen	284.27			22,747.21
04/30/2015		Bank Of America	-split-	Debbie Burke	859.95			21,887.26
04/30/2015		Bank Of America	-split-	Diana Quinn	49.23			21,838.03
04/30/2015		Bank Of America	ANNUAL CONFERE...	Gina Anderson	79.99			21,758.04
04/30/2015		Bank Of America	-split-	Paula Swisher	7,933.59			13,824.45
04/30/2015	989	City of Woodland	-split-		138.45	X		13,686.00

Register: Chase Savings

From 05/01/2014 through 04/30/2015

Sorted by: Date, Type, Number/Ref

<u>Date</u>	<u>Number</u>	<u>Payee</u>	<u>Account</u>	<u>Memo</u>	<u>Payment</u>	<u>C</u>	<u>Deposit</u>	<u>Balance</u>
05/31/2014			Money Market Savings...	Interest		X	7.06	86,230.81
06/30/2014			Money Market Savings...	Interest		X	7.30	86,238.11
07/31/2014			Money Market Savings...	Interest		X	7.30	86,245.41
08/31/2014			Money Market Savings...	Interest		X	6.83	86,252.24
09/30/2014			Money Market Savings...	Interest		X	7.53	86,259.77
10/31/2014			Money Market Savings...	Interest		X	7.30	86,267.07
11/30/2014			Money Market Savings...	Interest		X	6.59	86,273.66
12/31/2014			Money Market Savings...	Interest		X	7.77	86,281.43
01/31/2015			Money Market Savings...	Interest		X	7.07	86,288.50
02/28/2015			Money Market Savings...	Interest		X	6.60	86,295.10
03/31/2015			Money Market Savings...	Interest		X	7.54	86,302.64
04/30/2015			Money Market Savings...	Interest		X	7.07	86,309.71

Register: Chase Scholarship

From 05/01/2014 through 04/30/2015

Sorted by: Date, Type, Number/Ref

<u>Date</u>	<u>Number</u>	<u>Payee</u>	<u>Account</u>	<u>Memo</u>	<u>Payment</u>	<u>C</u>	<u>Deposit</u>	<u>Balance</u>
05/31/2014			Scholarship Income:Sc...	Interest		X	0.39	9,468.84
06/30/2014			Scholarship Income:Sc...	Interest		X	0.40	9,469.24
07/31/2014			Scholarship Income:Sc...	Interest		X	0.40	9,469.64
08/31/2014			Scholarship Income:Sc...	Interest		X	0.37	9,470.01
09/30/2014			Scholarship Income:Sc...	Interest		X	0.41	9,470.42
10/31/2014			Scholarship Income:Sc...	Interest		X	0.40	9,470.82
11/30/2014			Scholarship Income:Sc...	Interest		X	0.36	9,471.18
12/31/2014			Scholarship Income:Sc...	Interest		X	0.43	9,471.61
01/31/2015			Scholarship Income:Sc...	Interest		X	0.39	9,472.00
02/28/2015			Scholarship Income:Sc...	Interest		X	0.36	9,472.36
03/31/2015			Scholarship Income:Sc...	Interest		X	0.41	9,472.77
04/30/2015			Scholarship Income:Sc...	Interest		X	0.39	9,473.16

ICMA Volunteer Coordination  
May 4, 2015

Task	Coordinator 1	Coordinator 2	Volunteers Need
Bag Stuffing	Tiah Branson, Snoqualmie		50
Opening Session and Event	Lindsay Ohab, Seattle U		8
Field Demos	Autumn, Issaquah		7
5K Race			18
Golf Tournament	John Caulfield, Lakewood - waiting to hear from John		6
Bowling	Don Moritz, Lakewood		4
Yoga Assistant	Joe Gall, Sherwood, OR		4
Welcome Center	Diane Carlson	John Starbard	35
Hotel Welcome Desk	John Backman, King County	John Starbard	80
Aiport Greeter	Seatac Coordinating		13
ICMA University Registration	Tamara Schaps, Evans School		8
Aquarium Reception	Marie Jensen, Kirkland		5
Volunteer Appreciation Event	Leslie Lavoie, Mt. Lk. Terrace	Amy Bolen, Kirkland	
Volunteer Handbook	Logan Bahr, Evergreen State College		
Volunteer Orientation	Patrick Tefft, Kirkland		
Volunteer T-Shirts	Tiah Branson, Snoqualmie	Intern, Snoqualmie	
Volunteer Name Tags	Amy Bolen, Kirkland		
EMP Social Event	Marie Jensen, Kirkland		20
Volunteer Hospitality and Floaters	Nadia Chandler Hardy, Tacoma		36
VIP Shuttle	Mariynne Beard, Kirkland		
Web registration	Patrick Tefft, Kirkland		

## Debbie Burke

---

**From:** Dunn, David (ECY) [DADU461@ECY.WA.GOV]  
**Sent:** Monday, May 04, 2015 5:01 PM  
**To:** Debbie Burke  
**Subject:** RE: Infrastructure Assistance Coordinating Committee  
**Attachments:** Save the Date - Email Graphic.jpg; IACC\_Brochure\_2014.pdf  
  
**Categories:** Clerks Assoc

Yes please!

The focus of the conference is public infrastructure (water, sewer, roads, etc.) and especially public grant and subsidized loan funding for infrastructure projects. The IACC conference brings together state regulatory and funding staff, engineering consultants, and staff from local jurisdictions. The majority of the people attending from local jurisdictions are public works staff, but we get a fair number of clerk-treasurers and elected officials too.

There are several ways WMCA might be able to take advantage of our conference:

- Many of your members could benefit from attending. (Certainly those from communities facing a large infrastructure project in their future.) If you have a mailing list (or similar) and could distribute our save the date card that would be great.
- Your organization could sponsor a booth at the conference. I'm not sure how actively you recruit for new members, but AWC always gets a booth just to talk with folks about what they do.
- If you had a presentation or training you wanted to share, we have an audience that is likely to be interested. We have an attendance of about 350 people each year. If anyone were interested, I'd need an abstract and speaker bio by June 26.

For information, here is link to last year's conference web page: <http://www.infracunding.wa.gov/conference14.html>

Last years brochure and the powerpoint slides from last year's technical sessions are still up. You could browse through them to get a feel for the types of presentations we typically have.

Thank you so much. If you have any questions, I'd love to talk.

David Dunn P.E.  
 Washington State Department of Ecology  
 Water Quality - Financial Management  
[David.Dunn@ecy.wa.gov](mailto:David.Dunn@ecy.wa.gov)  
 360/407-6503

---

**From:** Debbie Burke [<mailto:DebbieB@CI.NORMANDY-PARK.WA.US>]  
**Sent:** Friday, May 01, 2015 2:57 PM  
**To:** Dunn, David (ECY)  
**Subject:** FW: Infrastructure Assistance Coordinating Committee

Hi Dave,

Do you want to send me the information to share with our Executive Board? We meet next in June and can back to you with a response after that meeting.

Thanks,  
Debbie.

Debbie Burke, MMC

City Clerk  
 Phone: 206.248.8248  
[www.normandyparkwa.gov](http://www.normandyparkwa.gov)



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**From:** Passey, Scott [<mailto:Scott.Passey@edmondswa.gov>]  
**Sent:** Friday, May 01, 2015 2:50 PM  
**To:** Debbie Burke  
**Cc:** 'david.dunn@ecy.wa.gov'  
**Subject:** Infrastructure Assistance Coordinating Committee

Debbie Burke, President  
 Washington Municipal Clerks Association

Hi Debbie,

Dave Dunn of Dept. of Ecology is on the Infrastructure Assistance Coordinating Committee (focused on municipal infrastructure), and each year they have an annual fall conference. Anyway, Dave says that they get a fair number of clerks attending the conference and he's wondering if there might be a way to advertise it through the WMCA. I let him know I would pass along his request to you and the Executive Committee, and you can take it from here. He's copied on this email, so I'm sure he can tell you more. I don't think I need to be involved beyond this point.

Thanks!  
 Scott

Scott Passey, MMC | City Clerk  
 City of Edmonds | 121 5th Avenue North, Edmonds, WA 98020 📞 425.775.2525 | [edmondswa.gov](http://edmondswa.gov)

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## Who is IACC?

IACC is a partnership of state, federal and local government, and tribal organizations. This is a unique organization that enhances the relationships between government agencies and communities in the state of Washington. We've provided solutions to infrastructure problems for more than 25 years.

### Associations

Association of Washington Cities  
Washington State Association of Counties  
Washington Public Utility District Association  
Association of Water and Sewer Districts

### Federal Agencies

USDA Rural Development  
Environmental Protection Agency  
Indian Health Services

### Organizations

Evergreen Rural Water of Washington  
Rural Community Assistance Corporation  
Municipal Research Service Center

### Boards

Community Economic Revitalization Board  
Public Works Board  
County Road Administration Board  
Transportation Improvement Board

### State Agencies and Offices

Department of Archaeology & Historic Preservation  
Department of Commerce  
Department of Ecology  
Governor's Office of Regulatory Assistance  
Department of Health  
Department of Transportation  
Recreation & Conservation Office

### Contact Us

[www.infracfunding.wa.gov](http://www.infracfunding.wa.gov)



Together  
We Build  
Infrastructure

# The Infrastructure Assistance Coordinating Council (IACC) consists

Of membership from federal, state, non-profit, associations, and tribal organizations committed to the development, improvement, and maintenance of local infrastructure. We help communities save time, money and solve the problem of tracking down available technical expertise and funding options for their infrastructure projects.



The IACC provides services such as:

Technical Assistance

Project Coordination

Infrastructure Funding Coordination

Annual Conference



25 years of experience in funding and developing solutions to infrastructure challenges. How can we help you?

IACC can help bring your infrastructure visions to reality. We have worked with these types of projects and more:

- Drinking Water Protection
- Wastewater Treatment
- Rails, Roads, and Bridges
- Solid Waste Management
- Stormwater Management
- Telecommunications
- Community Facilities

## Successes

- City of Aberdeen's Solid Waste Facility
- Okanogan County's Broadband Expansion Project
- Town of Coulee City's Water Purification System
- City of Sultan Road Realignment and Pedestrian Bridge
- City of Camas Pedestrian Trail and Water Improvements
- Kettle Falls Wastewater Treatment Facility
- Lincoln County Fire District #1 Regional Emergency Response Center
- Confederated Tribes and Bands of the Yakama Nation Parker Water Project

## What IACC customers are saying

“For us, the Tech Team was of great value as we were able to share information regarding our infrastructure needs and receive valuable input from various funding sources in one time and place.”

*Mayor, Town of Coulee City*

“I'd be happy to be your poster child for IACC Tech Team Success Stories.” Quote referring to the US 2 and Sultan Basin Road Realignment and now moving forward on the Pedestrian and Bicycle Bridge.

*Fund Coordinator, City of Sultan*

“It was tremendous to be able to meet together with the team members to gain their insight and advice. We took ample notes and plan to continue our follow-up.”

*Economic Development Director, City of West Richland*



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- First Quarter Report (June Mtg)
- Second Quarter Report (Oct Mtg)
- Third Quarter Report (Jan Mtg)
- Year-End Report (Mar Mtg)

**TO:** WMCA President and Executive Committee

**FROM:** Cindy Marbut, Chairperson

**COMMITTEE:** Audit Committee

**DATE:** May 26, 2015

**SUMMARY OF ACTIVITIES:**

The Committee met on May 20, 2015 in Fife to conduct an audit of financial records for the period of January thru April as part of the first quarter reporting. The committee conducted a complete review of the financial and corporate records for the period beginning January 1, 2015, and ending April 30, 2015.

The committee found both financial and corporate records to accurately reflect the activity for each time period. Spending appears to be well within the adopted appropriations for the time period. The audit included a review and balance verification of the WMCA, Checking, Savings and Scholarship accounts, support documentation and verification of the appropriateness of payments.

The committee also reviewed the Executive Committee minutes to confirm all authorized spending was handled within authorized amounts.

**ACTION REQUESTED:**  YES  NO

**RECOMMENDATION:**  
None at this time

**FISCAL IMPACT:**  
None at this time

**ACTION REQUESTED:**  YES  NO

**RECOMMENDATION:** Approve the Audit Report at the June Business Meeting.



- First Quarter Report (June Mtg)
- Second Quarter Report (Oct Mtg)
- Third Quarter Report (Jan Mtg)
- Year-End Report (Mar Mtg)

**TO:** WMCA President and Executive Committee

**FROM:** Jodee Schwinn, CMC

**COMMITTEE:** Bylaws Committee

**DATE:** June 1, 2015

**SUMMARY OF ACTIVITIES:** The Bylaws Committee has been established for 2015. The Chair of the Committee has sent welcome correspondence to all members. As of this time, there is nothing to report.

**ACTION REQUESTED:**  YES  NO

**RECOMMENDATION:**

**ALTERNATIVES:**

**FISCAL IMPACT:**

Revenues:	Budgeted Amount	Revenues Generated
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
Expenditures:	Budgeted Amount	Amount encumbered & expended
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____



- First Quarter Report (June Mtg)
- Second Quarter Report (Oct Mtg)
- Third Quarter Report (Jan Mtg)
- Year-End Report (Mar Mtg)

**TO:** WMCA President and Executive Committee

**FROM:** Paula Swisher, Chair

**COMMITTEE:** Conference Planning

**DATE:** 5/27/2015

---

**SUMMARY OF ACTIVITIES:** After recovering from another successful conference it is on to planning the next one and getting a revised RFP out to hotels to not only find the 2018 venue but to find the venues for multi-year contracts going forward.

From our conference at the Hilton I made a great contact, Alix Mendonca, Director of Sales for the Hilton hotels state associations, he has let me pick his brain and given me some insights into the hotel industry to hopefully get us the best deals possible at our future locations.

I will be sending out the RFPs within the next week or two and plan to make trips to the locations throughout the summer and possibly into September if necessary to find the best locations for our conference.

I've had a few recommendations from people around the state and will consider each location based upon location and ease of transportation to get there, cost of food and AV, accommodations both hotel rooms and conference rooms and willingness to guarantee for a multi-year contract.

My goal is to come to the October meeting with the 2018 location in hand and possibly a contract that has been negotiated, this will also be the location for the 2022 conference so I hope that is ready to go as well. If all goes well I should have the 2019, 2020 and 2021 conference venues as well but possibly not the contracts.

One of the great tricks my new found friend Alix taught me was to hold the contract until as late in the year as possible because the hotels always have a push to get more contracts signed and will bargain more to get our business solidified before the end of the year.

**ACTION REQUESTED:**  YES  NO

**RECOMMENDATION:**



- First Quarter Report (June Mtg)
- Second Quarter Report (Oct Mtg)
- Third Quarter Report (Jan Mtg)
- Year-End Report (Mar Mtg)

**TO:** WMCA President and Executive Committee

**FROM:** Carol Etgen, MMC, Chair  
Shaunna Lee Rice & Brenda Martinez, Co-Vice-Chairs

**COMMITTEE:** Education Committee

**DATE:** March 9, 2015

---

**SUMMARY OF ACTIVITIES:** According to the evaluations, the 2015 Conference educational sessions were a success. We anxiously await the refined results from the NCI Survey to begin working on the 2016 Conference. We would like to express our immense gratitude to Ali Spietz who has taken over as WMCA's Education Coordinator - she will work closely with the NCI Director on the Academies, which will allow our Committee to focus on speakers for Conference.

**ACTION REQUESTED:**  YES  NO

**RECOMMENDATION:**

**ALTERNATIVES:**

**FISCAL IMPACT:** Below you will find speaker costs for educational sessions, including direct payment and gift card costs for Conference. Treasurer Gina Anderson will be able to provide specific hotel, meal and mileage costs.

Dan Jordan - \$3,000 (AWC sponsorship - \$1,000) & \$224.27 copy costs, 3 hotel nights & conference meals  
Ali Spietz - \$20 gift card  
Linda Clark – CIAW sponsored  
Pat Mason – Mileage & Meals  
Kyle Stannert – Mileage & Meals & 2 hotel nights  
Darla Reese - \$20 gift card  
Jeff Myers & Mike Connelly – WCIA sponsored, up to 2 hotel nights & meals  
Carol Wilmes – AWC Sponsored  
Patrick Ibarra - \$3,000 (WCIA sponsored \$2,000), 1 hotel night  
Jim Quintana - \$20 gift card





- First Quarter Report (June Mtg)
- Second Quarter Report (Oct Mtg)
- Third Quarter Report (Jan Mtg)
- Year-End Report (Mar Mtg)

**TO:** WMCA President and Executive Committee

**FROM:** Ali Spietz, WMCA Education Coordinator

**COMMITTEE:** n/a

**DATE:** 6/1/2015

---

**SUMMARY OF ACTIVITIES:**

The last few weeks have been very busy for education for WMCA, NCI and IIMC. Below are updates on the many areas I am working on at this time:

**SPRING 2015 ACADEMY**

The spring 2015 academy was “Write to be Understood & Speak to be Heard” taught by Mr. Patrick Ibarra, from the Mejorando Group. Mr. Ibarra was well-received by the 62 attendees and evaluations indicated that the topic was useful and that his understanding of the role of the clerk was appreciated. Attached as Exhibit A is the evaluation summary. The spring 2015 academy costs are as follows:

Revenue/Registrations	\$8,650 (62x\$125 and 6x\$150, 6 no-shows)
Expenditures	\$7,232 (speaker fee, meals, room rental, etc)
<b>Net Income</b>	<b>\$1,418</b>

**FALL 2015 ACADEMY**

Institute Director Dema Harris and I are working securing the speaker for the fall 2015 academy. We are a little behind in this process, but have the wheels in motion. Education Committee Chair Carol Etgen has suggested holding the academy at Hal Holmes Center in Ellensburg again as it is a central location and the logistics are relatively easy there. The available dates at this time are September 4, 11, October 2, 23, and 30. As soon as the speaker is confirmed we will set a date and get the information out to the EC and the membership.

**FALL ACADEMY ATTENDANCE AND COSTS SINCE 2007**

The Executive Committee has requested data on fall academy attendance and costs over the past few years. Attached as Exhibit B is a summary of fall academies since 2007. The locations have been divided up into east side, central and west side to give a better idea of attendance based upon location. In 2008, 2009, and 2010, two academies were held on the same topic with the same speaker, one on the west side and one on the east side. This was done to facilitate smaller sessions with more potential for group activity and interactions; and make the academy accessible to more members by eliminating the potential for overnight travel.

As reported above, the fall 2015 academy is tentatively scheduled be held in Ellensburg, but I am open to any input regarding next year's location and whether the EC would like to have one on the east side and one on the west side again. I would also suggest that an option could be to rotate the fall academy and have it on the opposite side of the state from the conference that just preceded it.

**Decisions for the EC:**

- Does the EC want to have an east side and west side fall academy next year?
- Does the EC want to rotate the fall academy and have it on the opposite side of the state from the conference that just preceded it?

**JOB/COMMITTEE DESCRIPTIONS REVISIONS**

Attached as Exhibits C and D to this report are proposed edits to the Education Committee Description and the Education Coordinator Job Description. These edits eliminate responsibilities of securing a speaker for the spring and fall academies from the Education Committee and add it to the Education Coordinator's list of responsibilities. The Education Committee will continue to support the Education Coordinator with logistics (meeting room, food, etc) for the spring and fall academies. Also, the duties for Athenian Dialogues have been added to the Education Coordinator's description with logistic support from the Education Committee.

**Decisions for the EC:**

- Approve the proposed edits to the Education Committee Description and the Education Coordinator Job Description

**2016 ATHENIAN DIALOGUE**

I have been working with President Burke to coordinate the first Athenian Dialogue for WMCA. We have decided that it will be held at the 2016 conference during concurrent sessions on Thursday (9:00 am to 5:00 pm). For the attendees not in the Dialogue, they will have the choice of two, rather than three, session to attend in the morning, early afternoon and late afternoon (see attached Exhibit E).

The minimum number of attendees is 10, the maximum is 35. We will need to work out the logistics for members to secure their spot for the Dialogue, but I think it should be a first come, first served basis. Each attendee is responsible for purchasing the agreed upon book and reading it in advance of the class.

President Burke requested Mary Lynne Strata as the Facilitator for the Dialogue and she has accepted. Her costs will be airfare, hotel, and meal tickets for breakfast, lunch, and banquet on Thursday. She is not charging a fee. President Burke would like a book on Eleanor Roosevelt or something that aligns with her conference theme of "Your Attitude is Your Altitude." We will be working with Mary Lynne to choose the book.

I have concurred with Education Chair Carol Etgen and Conference Planning Chair Paula Swisher regarding the conference schedule change and room logistics for holding the Dialogue as part of the conference.

**Decisions for the EC:**

- Does the EC want to collect an additional registration fee for the Dialogue? President Burke has suggested not charging attendees an additional fee so we can gauge the interest of WMCA members.

## NCI UPDATE

Institute Director Dema Harris reports that the number of attendees registered for the 2015 Institute is as follows:

PD I: 46

PD II: 46

PD III: 44

PD IV: 48

In late April, Dema expressed concern that there only 22 people registered for PDIV and at least 30 were needed to make the course financially feasible. The NCI Committee got to work putting the word out through email, phone calls, and social media and were able to get an additional 26 people to register.

Over the next few months, the NCI Education Committee will be addressing the contract with WSU which expires at the end of 2015 and the anticipated increase in Institute Director travel costs.

## EDUCATION SURVEY

This spring the NCI Education Committee conducted an education survey of AAMC, OAMR and WMCA members. There were 156 WMCA members that responded to the survey. 48 member of AAMC and 89 member of OAMR also responded. These results will help the WMCA Education Committee in planning session for next year's conference and will also help state Education Coordinators, the NCI Education Committee, and Institute Director understand why members do not attend advanced education opportunities. We are hoping that we can continue to tailor Institute classes and state education sessions with this feedback.

Below is a quick synopsis of the answers to each of the questions. I have also attached the summary of results as Exhibit F. If you would like a copy of the full exported results, please let me know.

### **Attending next state conference.**

50% of respondents will be attending next year's conference. Of those who are not (or not sure) if they will attend, the majority stated that **cost** and not being able to be **out of the office** were the main reasons.

### **Attending academy at conference.**

31% of the respondents will be attending academy at next year's conference. Of those who are not (or not sure) if they will attend, the majority stated that **cost** and not being able to be **out of the office** were the main reasons.

### **Attending mid-year academy.**

16% of the respondents will be attending mid-year academy. Of those who are not (or not sure) if they will attend, the majority stated that **cost, distance** and not being able to be **out of the office** were the main reasons.

### **Attend PD IV.**

9% of the respondents will be attending PD IV this summer. Of those who are not (or not sure) if they will attend, the majority stated that **cost**, and not being able to be **out of the office** were the main reasons.

### **Attend Athenian Dialogue**

18% of the respondents would attend an Athenian Dialogue if offered, 23% would not. The Majority of the respondents were in favor of the Athenian, but the topic, when it is offered and the cost would be factors in determining if they would attend. A few other noted the location as being a reason to not attend. *50% of those who responded would like it to occur separate from conference at a different time of the year. Another 35% would like it to occur during the conference, during concurrent sessions.*

Below are highlights from the open-ended questions. I have included the most popular answers, but there are many more that you can read on the full results.

### **What are the two things at work that stress you out the most? (96 responses)**

1. Time Management/Workload/Deadlines (38)
2. Co-Workers (37)
3. PRA/Public Records Requests (30)
4. Records Management (13)
5. Elected Officials (10)

### **Name two topics that you would like to see classes on at conference. (81 responses)**

1. Records Management (17)
2. Public Records Act (14)
3. Dealing with Difficult People (9)
4. Human Resources (9)
5. Workplace Improvements (9)
6. Meetings/Agendas/Ordinances/Minutes (8)
7. Communication (8)
8. Finance/Treasurer/Payroll (6)
9. Stress Management/Wellness (5)
10. Project Management (5)
11. Writing (5)
12. Supervising (5)

### **Name one topic would you like to see presented at an advanced academy (60 responses)**

1. Project Management (5)
2. Supervisor/Management (5)
3. Professional Development (5)
4. Communications (5)
5. Working with Elected Officials (4)
6. Motivation/Inspiration (4)
7. Leadership (4)
8. Grammar and Writing (4)
9. Interpersonal/Intrapersonal (4)

The results from the education survey the NCI Committee conducted has shown that we have a lot of members who do not understand all of our terms for the different education opportunities. I am going to work on an article for the newsletter and a page on the website that details all of the opportunities and what they are called. I am hoping to create some consistency and help newer clerks understand what sessions and classes they should and can attend.

If you have any questions about any of these topics or issues or have additional direction or feedback, please do not hesitate to contact me. Thank you for this opportunity to serve WMCA and our members.

## EXHIBIT A

### WASHINGTON MUNICIPAL CLERKS ASSOCIATION 2015 CONFERENCE EVALUATION

#### Advanced Academy - Write to be Understood and Speak to be Heard

Tuesday, March 17, 2015

Presenter: Patrick Ibarra

**Please evaluate the questions below according to the following:** 4 =Strongly Agree, 3 =Agree, 2 =Disagree, 1 = Strongly Disagree

	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
<b>The instructor was fully knowledgeable in the subject</b>	48	3	1	
<b>The instructor related course content to the work of the clerk</b>	43	9	1	
<b>I would take another course from this instructor</b>	43	6	4	
<b>The course provided me with information I can use right now</b>	42	10		1
<b>The course gave me new ideas to make my job easier</b>	35	17		1

**Please share any comments you have about the session. ALL are appreciated!**

- It was nice that he understood the role of the clerk and that he gave examples that were relevant. I appreciated that.
- Thank you!
- Appreciate the fact that Patrick has experience with city government so he can related to the job of a city clerk
- I found the second half of the presentation very useful
- Felt you were very knowledgeable about subject matter. Kept audience engaged!
- Loved the humor and examples. Very knowledgeable. Left feeling positive about the subject matter
- He used a lot of interesting stories that stick in your mind
- I look forward to seeing you in Seaside, OR – Thank you!
- Love this speaker!
- Great tips and tricks! Very engaging and knew his stuff and could actually relate to our responsibilities
- There was a good balance of presentation, exercises and opportunities for clerk interaction. Side conversations were kept at a minimum because there were good activities.
- Great insight on how to organize my thoughts before writing documents.
- Kept the topic entertaining and interesting!
- Great presenter! Little slow at first, but definitely picked up. Tons of valuable information I can take back and put to use.
- Love hearing about public speaking! I have to do this soon!
- Patrick is a great speaker! I appreciated his perspective and insight, and humor! Thank you!
- Very good information
- Great presenter with applicable material!
- Enjoyable breakout session. Learned a lot. Thank you.
- Upbeat, message delivered and entertaining!
- Excellent! Could/would attend more session presented by Patrick Ibarra
- Excellent presentation. Patrick was very knowledgeable, entertaining and engaging.
- Great! Informative, funny. Room was a little cold
- The humor is very appreciated!

- Very much enjoyed this class. He kept me engaged and interested and I learned a lot about a subject I thought I was pretty good at!
- Learned a lot. Great information to use right away.
- Excellent!
- Patrick, I know you're joking a bit, but I think there was a little too much self-promotion with all due respect. Enjoyed your humor and examples as well as the group exercises
- LOOK AT 37
- I really enjoyed the presentation
- Enjoyed the session!!!
- To be honest the first two hours was too boring and did not engage. The afternoon was much better. I do like the takeaways that he did.
- Very good speaker. Very knowledgeable. Loved the public speaking portion of the day.
- Great infusion of humor – kept us engaged.
- 1) Too many alcohol related jokes; 2) Could use more relevance to younger members of his audience; 3) His presentation just missed the mark for me, not sure how to quantify it except perhaps to balance professionalism with engagement of the audience; 4) Repeat the answers/questions from the audience. Not all of us can hear people whose voices are quiet and whose backs are turned to some of the audience; 5) He says he believes in answering/addressing questions as they arise, but he doesn't practice it.
- Handout is not user-friendly. Some inappropriate jokes. Great energy. Bio is poorly written. Good transitions. Not the most updated material related to psychology, learning and brain development.
- Very good presenter. Thoroughly enjoyed.
- A little but all-over-the-board. No clear beginning-middle-ending.
- Great speaker!! Thanks
- In the afternoon session I felt a bit shouted at...volume/tone was not quite as pleasant and engaging as the morning session. I enjoyed the group work – felt it was helpful. Lots of ideas/takeaways for the workplace
- Good pointers
- The content may have been easier to learn/benefit from if more applied to clerk responsibilities.

**Please share any ideas for topics for future sessions as well as any potential speakers you may know from around the state.**

- Whatever topic he might speak on. Pencils? 😊
- I'd like to see sessions on:
  - Building trust with council and staff
  - Talent management/succession planning
  - Turing your organization into a talent magnet and details of writing & marketing for hiring & retaining quality employees
- Topic: Colors training
- More like this. LOVED IT!!!
- Would love to bring back Deb Sofield. She spoke in 2009
- Emotional intelligence. Instilling professionalism into the workplace / Etiquette. Teamwork – Building strong workplace teams.

**FALL ACADEMY ATTENDANCE AND COST DATA**

	2007	2008	2009	2010	2011	2012	2013	2014
<b>EASTSIDE</b>								
Registrations		Moses Lake 34		Richland 25				
Income		\$4,325		\$3,200				
Expenses		\$2,600		\$2,999				
<b>Net Eastside</b>		<b>\$1,725</b>		<b>\$201</b>				
<b>CENTRAL</b>								
Registrations	Wenatchee 75		Wenatchee 24		Ellensburg 62	Yakima 49	Ellensburg 42	Ellensburg 41
Income	\$9,700		\$3,000		\$7,675	\$7,575	\$6,400	\$6,250
Expenses	\$6,987		\$2,882		\$5,288	\$3,829	\$3,566	\$3,978
<b>Net Central</b>	<b>\$2,713</b>		<b>\$118</b>		<b>\$2,387</b>	<b>\$3,746</b>	<b>\$2,834</b>	<b>\$2,272</b>
<b>WESTSIDE</b>								
Registrations		Bremerton 52	DuPont 27	Edmonds 43				
Income		\$7,050	\$3,400	\$5,375				
Expenses		\$5,053	\$2,198	\$2,495				
<b>Net Westside</b>		<b>\$1,997</b>	<b>\$1,202</b>	<b>\$2,880</b>				
<b>Total Registrations</b>	<b>75</b>	<b>86</b>	<b>51</b>	<b>68</b>	<b>62</b>	<b>49</b>	<b>42</b>	<b>41</b>
<b>Total Net Income</b>	<b>\$2,713</b>	<b>\$3,379</b>	<b>\$1,319</b>	<b>\$3,081</b>	<b>\$2,387</b>	<b>\$3,746</b>	<b>\$2,834</b>	<b>\$2,272</b>

Dema's negotiation skills and knowledge of what speakers are paid by other organizations is very helpful in keeping costs down along with the use of public facilities.

YEAR	SPEAKER	BUSINESS	COURSE TITLE	HOURS
2014	Sheila Sheinberg	Center for Life Cycle Sciences	It's All About You - Emotional Intelligence and Your Authentic Self	6.5
2013	Janice Corbin	Sound Employment Solutions, LLC	When the Roles of Advisor and Decision-Maker Intersect	6.5
2012	Jordan Peabody	Peabody Communications	Writing Policies and Procedures	6.5

<b>2011</b>	Sari de la Motte		Don't Shoot the Messenger (Part 1), Nonverbal Intelligence aka "Cats and Dogs" (Part 2)	6.5
<b>2010</b>	Jim Webber		Performance Management in the Real World: Practices that Meet the Legal Tests	6.5
<b>2009</b>	Michael Shadow		Storytelling: A Communication Tool for Improving Your Organization's Image	6
<b>2008</b>	Michael Buschmohle		Managing Meetings and Handling Tough Situations	6
<b>2007</b>	Richard Baron		Responsive Management Core Competencies	6
<b>2006</b>	Mimi Welch		It's Not About Making More Time, It's About Maximizing Your Energy	6



## Education Committee

**A. General Responsibilities:**

The Education Committee works to promote continuing education for WMCA. ~~The Committee is responsible for locating and contracting with speakers for the Annual Conference. The Committee provides support to the speakers and communicates with the Conference Planning Committee to ensure speakers have the appropriate equipment and handouts for their classes. In conjunction with the WMCA Education Coordinator, and NCI Director, the Committee coordinates the facility and meals for the Fall Academy, Spring Academy and Athenian Dialogues. In conjunction with the WMCA Education Coordinator, and NCI Director, the Committee prepares the education program for the Annual Conference.~~

**B. General Organization and Tasks:**

1. The President of WMCA will appoint a Committee Chair who has general oversight of the committee and will serve as the liaison between the Education Committee and the Executive Committee. The Chair will serve a minimum of two years in the position.
2. The Chair will also serve on the Northwest Clerks Institute (NCI) Education Committee and will be responsible for keeping current on educational issues affecting Municipal Clerks and will work with the Executive Committee to keep the members informed regarding educational issues.
4. The Chair will work closely with the WMCA Education Coordinator on all aspects of education for WMCA.
4. The Chair will attend WMCA Executive Committee meetings and special meetings as requested by the President.
5. The President will appoint as many committee members as necessary to accomplish the tasks of the committee.
6. In addition to the duties described below, the committee shall be responsible for developing and coordinating other training opportunities throughout the year, with the intent of providing appropriate training sessions at a reasonable cost to WMCA members on each side of the State.
7. At the President's request, the Committee Chair will submit a written report for inclusion in the Executive Committee meeting packet.
8. All invoices for this Committee shall be submitted to the Executive Committee Liaison for sign-off prior to being submitted to the WMCA Treasurer for payment.
9. The Committee Chair will be responsible for sending all pertinent educational materials to the Chair of the Historical Committee for insertion into the WMCA educational records and scrapbooks.
10. The Committee will produce and update an annual calendar of educational events, including those sponsored by regional clerk associations. This calendar will be provided to the Executive Committee Liaison for inclusion in the Executive Committee Monthly Reports and the Webmaster to add to the website.

**C. Conference Education Program Organization and Tasks:**

1. The Committee shall begin finding potential speakers and facilitators for the Annual Conference, beginning no later than May. The Committee may solicit ideas from the Executive Committee, conference evaluation forms, the general membership and the

- NCI Director regarding what should be emphasized in the education program of the Annual Conference.
2. The Committee Chair and WMCA Education Coordinator shall submit their recommendations for speakers and topics to the Executive Committee for approval of the conference schedule no later than the October meeting.
  3. The Committee works with the Conference Planning Committee to ensure that the site and rooms for the Annual Conference meet the needs of the education program.
  4. The Committee prepares information for the preliminary schedule of education sessions and the Spring IIMC Certification Academy for the “Call to Conference” and submits it to the President by December 1<sup>st</sup>.
  5. The Committee Chair has the authority to sign contracts for speakers, facilitators, etc. for the education program of the Annual Conference. The Chair is responsible for sending copies of the contracts to the Treasurer.
  6. The Committee is responsible for preparing and distributing the evaluation(s) for the annual conference. The Committee has two options:
    - a. Prepare an evaluation with questions about each educational session and work with the Conference Planning Committee to determine general conference questions that should be included in the evaluation; or
    - b. Prepare an evaluation with questions about each educational session or individual evaluation forms for each educational session, if the Conference Planning Committee decides to conduct an online survey after the conference.
  7. The Committee must stay within the budget set by the President and approved by the general membership at the previous Annual Conference.
  8. The Committee is responsible for purchasing gifts for unpaid speakers, approximately \$25.00 per gift or in accordance with the budget.
  9. The Committee is responsible for copying and distributing all educational materials provided by any speakers to the conference attendees.

**D. IIMC Certification Academies, Athenian Dialogues and Other Training Sessions Organization and Tasks:**

- ~~1.~~ To arrange and organize the logistics (meeting room, food, etc) for the Spring and Fall IIMC Certification Academies (academy), Athenian Dialogues, and any other stand-alone educational/training sessions within the limits of the approved budget, the Committee shall follow the following guidelines
  - ~~a1.~~ The ~~Committee Chair and~~ WMCA Education Coordinator and NCI Director will keep the Committee Chair informed of work closely with the NCI Director to determine the speaker and course content (ultimately, the NCI Director is responsible for choosing and securing the speaker no later than six (6) months prior to the date of the academy).
  - ~~b.~~ ~~The Committee, Committee Chair, and WMCA Education Coordinator evaluate possible speakers and subject matter as put forth by the NCI Director.~~
  - ~~c2.~~ For the Spring academy (and possibly an Athenian Dialogue), in conjunction with the Annual Conference, the Committee Chair works closely with the Conference Planning Committee to coordinate meeting space and meals at the Annual Conference location.
  - ~~d.~~ ~~The Committee Chair is responsible for collecting academy or training session evaluation forms, tabulating the responses and forwarding the evaluations and results to the NCI director.~~

~~e. The Committee Chair is responsible for preparing IIMC approved certificates of completion for all academy or training attendees for the NIC Director to sign.~~

## Education Coordinator

### The duties of the Education Coordinator shall:

1. Serve as liaison between the WMCA Executive Committee, the Education Committee, and the Northwest Clerks Institute Director to review and coordinate educational programs in accordance with IIMC.
2. ~~Work closely with the NCI Director This will include all IIMC applications and educational programs to be approved on behalf of WMCA for IIMC certification points, to determine speaker and course content for the such as~~ Spring and Fall Academy sessions.
  - a. ~~Inform the Education Committee Chair of the speaker and course content and work together on logistics (meeting room, food, etc) for the Academy sessions.~~
  - b. ~~Promote the Academy sessions through the WMCA Newsletter and email blasts.~~
  - c. ~~Prepare sign in sheets for Academy sessions.~~
  - d. ~~Prepare IIMC approved certificates of completion for all Academy attendees for the NCI Director to sign.~~
  - e. ~~Prepare and collect Academy evaluation forms, tabulating the responses and forwarding the evaluations and results to the NCI Director and Education Committee Chair.~~
3. ~~Work closely with the Executive Committee to determine if and when an Athenian Dialogue will be held and follow IIMC's Athenian Leadership Society Dialogue Policy:~~
  - a. ~~Procure a facilitator~~
  - b. ~~Require each participant to purchase his or her own book~~
  - c. ~~Schedule the Dialogue for 6.0 hours in length (excluding any breaks)~~
  - d. ~~Seek pre-approval from IIMC for the facilitator and book (if facilitator or book is not on IIMC approved list)~~
  - e. ~~If the Dialogue will be held during, before or after the annual conference, work with the Education Committee Chair and Conference Planning Committee on logistics.~~
  - f. ~~Prepare assessment form for each attendee and require completion of the form to earn IIMC education points~~
  - g. ~~Prepare IIMC approved certificates of completion of the Dialogue, signed by the facilitator or association president and distribute certificates once the assessment forms have been submitted~~
  - h. ~~Ensure that facilitator has send copies of Dialogue agenda and assessment to IIMC~~
24. Work closely with the Chair of the Education Committee on all aspects of WMCA education.
65. Serve as a member of the Northwest Clerks Institute (NCI) Committee as outlined in the NCI Education Committee description.
46. Keep current on educational issues/changes from IIMC work with the WMCA Executive Committee to distribute information to the Association.
57. Provide quarterly reports to the WMCA Executive Committee at their quarterly meetings.
78. Attend the IIMC Conference and Education Colloquium.

39. Attend WMCA Executive Committee meetings and special meetings as requested by the President.

810. Perform such other duties and responsibilities as the President may prescribe

**Appointment:**

1. The President will recommend a candidate to appoint as Education Coordinator to the WMCA Executive Committee for approval.
2. The Education Coordinator candidate must have served a minimum of three years on the WMCA Executive Committee or two years as Education Committee chair.
3. The Education Coordinator's term shall be three years and he/she may serve for two consecutive terms.

**EXHIBIT E**

**THURSDAY, MARCH 17**

7:45 am – 9:00 am	<b>Breakfast &amp; Annual Business Meeting</b> <i>Location:</i>		
9:00 am – 9:15 am	<b>Exhibitor Viewing &amp; Break</b> <i>Location:</i>		<b>Athenian Dialogue</b>  <b>Class:</b> 9:00 am – 12:00 pm <i>(3 hrs)</i>
9:15 am – 12:00 pm <i>(break from 10:30 to 10:45 am)</i>	<b>Class:</b> Speaker: <i>Location:</i>	<b>Class:</b> Speaker: <i>Location:</i>	
12:00 pm – 1:00 pm	<b>Lunch</b> (Silent Auction Closes at 1 pm) <i>Location:</i>		<b>Lunch:</b> 12:00 pm – 1:00 pm
1:00 pm – 2:30 pm	<b>Class:</b> Speaker: <i>Location:</i>	<b>Class:</b> Speaker: <i>Location:</i>	<b>Class:</b> 1:00 pm – 2:30 pm <i>(1.5 hrs)</i>
2:30 pm – 3:00 pm	<b>Exhibitor Viewing &amp; Break</b> <i>Location:</i>		<b>Break:</b> 2:30 pm – 3:00 pm
3:00 pm – 4:30 pm	<b>Class:</b> Speaker: <i>Location:</i>	<b>Class:</b> Speaker: <i>Location:</i>	<b>Class:</b> 3:00 pm – 5:00 pm <i>(2 hrs)</i>
6:00 pm – 7:00 pm	<b>Vendors/Exhibitors Reception Social</b> <i>Location:</i>		
7:00 pm – 10:00 pm	<b>Annual Banquet</b> <i>Location:</i>		

**FRIDAY, MARCH 18**

7:30 am - 8:30 am	<b>Breakfast</b> <i>Location:</i>
8:30 am – 10:00 am	<b>Class: **</b> Speaker: <i>Location:</i>
10:00 am - 10:30 am	<b>Break</b>
10:30 am – 12:00 pm	<b>Class: ** (continued)</b> Speaker: <i>Location:</i>
12:00 pm	<b>Conference Adjourns / Grand Raffle</b>
12:30 pm – 5:00 pm	<b>Executive Committee Board Meeting</b> <i>Location:</i>

**EXHIBIT F**

**QUESTION #1**

**Are you a member of (check all that apply)?**

<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Alaska Association of Municipal Clerks (AAMC)	16.44%	48
Oregon Association of Municipal Recorders (OAMR)	30.48%	89
Washington Municipal Clerks Association (WMCA)	53.42%	156
International Institute of Municipal Clerks (IIMC)	43.49%	127
<i>answered question</i>		292
<i>skipped question</i>		0

**QUESTION #2**

**What certification do you have?**

<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
None	18.15%	83
Workign toward CMC	30.48%	89
CMC (Certified Municipal Clerk)	32.19%	94
MMC (Master Municipal Clerk)	18.86%	58
Not pursuing certification	3.42%	10
<i>answered question</i>		292
<i>skipped question</i>		0

**Other Responses**

SEE PDF

**QUESTION #2**

**What certification do you have? WMCA ONLY**

<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
None	12.82%	20
Workign toward CMC	35.90%	56
CMC (Certified Municipal Clerk)	35.26%	55
MMC (Master Municipal Clerk)	15.38%	24
Not pursuing certification	2.56%	4
<i>answered question</i>		156
<i>skipped question</i>		0

**QUESTION #3****Are you planning to attend the advanced academy before your next state conference?**

<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Yes	50.97%	79
No	19.35%	30
Not Sure	29.68%	46
<i>answered question</i>		155
<i>skipped question</i>		1

**QUESTION #4****Please choose a reason or explain why you are not (or not sure about) attending the mid-year advanced academy (check all that apply).**

<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Cost	37.33%	28
Distance	25.33%	19
Cannot be out of the office	33.33%	25
Already have MMC	1.33%	1
Sending Deputy or other staff member (not enough funds for both to go)	4.00%	3
Sending Deputy or other staff member (one person must stay at office)	14.67%	11
The advanced academies offered are too basic	5.33%	4
The advanced academies offered are not relevant to my job	5.33%	4
Other (please specify)	29.33%	22
<i>answered question</i>		75
<i>skipped question</i>		81

**Other Responses**

SEE PDF





**QUESTION #5**

**Are you planning to attend the advanced academy before your next state conference?**

<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Yes	31.82%	49
No	37.66%	58
Not Sure	30.52%	47
<i>answered question</i>		154
<i>skipped question</i>		2

**QUESTION #6**

**Please choose a reason or explain why you are not (or not sure about) attending the mid-year advanced academy (check all that apply).**

<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Cost	33.33%	33
Distance	18.18%	18
Cannot be out of the office	32.32%	32
Already have MMC	8.08%	8
Sending Deputy or other staff member (not enough funds for both to go)	2.02%	2
Sending Deputy or other staff member (one person must stay at office)	9.09%	9
The advanced academies offered are too basic	0.00%	0
The advanced academies offered are not relevant to my job	3.03%	3
Other (please specify)	38.38%	38
<i>answered question</i>		99
<i>skipped question</i>		57

**Other Responses**

SEE PDF

**QUESTION #7**

**Are you planning to attend the mid-year advanced academy?**

<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Yes	16.56%	25
No	30.46%	46
Not Sure	51.66%	78
<i>answered question</i>		151
<i>skipped question</i>		5

**QUESTION #8**

**Please choose a reason or explain why you are not (or not sure about) attending the mid-year advanced academy (check all that apply).**

<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Cost	34.19%	40
Distance	22.22%	26
Cannot be out of the office	30.77%	36
Already have MMC	5.98%	7
Sending Deputy or other staff member (not enough funds for both to go)	1.71%	2
Sending Deputy or other staff member (one person must stay at office)	8.55%	10
The advanced academies offered are too basic	1.71%	2
The advanced academies offered are not relevant to my job	5.13%	6
Other (please specify)	35.90%	42
<i>answered question</i>		117
<i>skipped question</i>		39

**Other Responses**

SEE PDF

### QUESTION #9

Are you planning to attend PD IV this summer?

Answer Options	Response Percent	Response Count
Yes	8.84%	13
No	78.91%	116
Not Sure	12.24%	18
<i>answered question</i>		147
<i>skipped question</i>		9

### QUESTION #10

Please choose a reason or explain why you are not (or not sure about) attending PD IV this summer (check all that apply).

Answer Options	Response Percent	Response Count
Cost	18.60%	24
Distance	5.43%	7
Cannot be out of the office	25.58%	33
Already have MMC	6.20%	8
Sending Deputy or other staff member (not enough funds for both to go)	3.88%	5
Sending Deputy or other staff member (one person must stay at office)	6.98%	9
Topics offered are not relevant to my job	0.78%	1
Attending the IIMC Conference	1.55%	2
Other (please specify)	52.71%	68
<i>answered question</i>		129
<i>skipped question</i>		27

#### Other Responses

Attending PD I, II, or III (33 responses)

Budget Issues (8 responses)

Timing (10 responses)

Need prior trainings/certification (6 responses) **This is where we need to educate members!**

Miscellaneous:

Just have not decided yet.

Not required for my position

I don't know what this is.

Still in discussion with my Mayor over if he feels the topic is a benefit to our organization.

Not pursuing certification

I will go in 2016

Don't know if I want to go and I am gone to too much training this year.

I chose not to attend this year, but that does not mean that I won't next year or in the future.

Changing

**QUESTION #11**

**Would you attend an Athenian Dialogue if/when offered by your state association (check all that apply)?**

<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Yes	17.90%	21
Maybe, depending on the topic	39.30%	46
Maybe, depending on when it is offered	39.30%	46
Maybe, depending on the cost	30.80%	36
No	23.10%	27
Other (please specify)	4.30%	5
<i>answered question</i>		117
<i>skipped question</i>		39

**QUESTION #12**

**When would you like it to occur?**

<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
The day before the master academy (before conference)	14.40%	14
The day before conference at the same time as the master academy	11.30%	11
During the conference (during concurrent sessions)	35.10%	34
The day after conference	5.20%	5
Separate from conference (a different time of the year)	49.50%	48
<i>answered question</i>		97
<i>skipped question</i>		59

**Other Responses**

Maybe, depending on location x 4

**QUESTION #13**

**What are the two things at work that stress you out the most?**

*Answered: 96 Skipped: 60*

**COUNT TOPIC**

**39 Time Management/Workload/Deadlines**

Too many priorities/not enough time to do everything well, therefore personal time suffers.

Time....it runs away from me!

Not having enough time in the day

Not enough time

Not enough time to do everything I need to get done.

Competing demands on my time.

Time restraints due to unforeseen issues/absences

Time

Too much work with too little time and resources to complete it.

Time restraint

Not having a enough time to get everything done.

Too many things to do in a short time.

Having due dates on more than one thing at the same time

Time management.

Not enough time to get things done.

Not getting enough time to get things done.

Time management with all the different things I have to do

Not enough time to do everything on my plate.

Workload and competing priorities

Too much work.

Workload

Too much to do with small staff and the ever increasing amount of things a clerk/treasurer has to know about in order to do the job effectively.

Having a deadline and being able to meet it is predicated by being provided work/documents from others and they are not timely with the information/work/documents to me.

Wearing so many hats

Staff's lack of consideration of my deadlines

Meeting deadlines.

Work Load

Not enough hours in the day to get everything done.

Interruptions and juggling multiple priorities

Handling multiple deadlines for multiple supervisors

Large workload

Workload

Not enough hours in the day

Deadlines

The tremendous workload

The non-stop demands

Getting everything done

Doing more with less - like everyone else!

Wearing multiple hats

**37 Co-Workers**

Unethical behaviors by other staff

Co-workers who gossip and have poor interpersonal skills.  
Dealing with my supervisor  
Working with disengaged employees.  
Lack of communication amongst departments  
Management who does not support my role of municipal clerk.  
Departments do not work well with each other - need leadership  
Office Politics  
Co-workers  
Lack of communication from coworkers  
Office politics  
Negative or bullying coworkers (not towards me, necessarily, but poor/tyraniccal behavior towards other staff members that's never called out or corrected by supervisors);  
Working with varied personality types  
Scheduling meetings.  
Small office politics  
Coworkers who stress constantly  
Out of control co-worker (and I avoid conflict - so I don't deal with it)  
Procrastinators;  
Tardiness  
The City Clerk  
Ineffective leadership  
Staff issues that I CAN'T control (other director's staff).  
My boss  
Coworkers who no matter how hard you try to help just do not get it  
Public works dept not taking the time to follow the proper process  
Public works Public works  
Our police department  
Employees not doing their jobs  
Work ethic of coworkers  
Employees accepting gifts from residents.  
Employees acting like policies and procedures don't adhere to them.  
Interoffice conflicts  
Lack of initiative to learn and advance by others.  
Low morale  
Managing people.  
Communication  
Staff oversight

**30 PRA/Public Records Requests**

Fulfilling public records requests with limited staff  
Difficult records requestors  
Public Records Request.  
Public Records request laws - public takes advantage

The main thing I stress about are public records request and the deadlines that have to be followed and all the legality behind them. There are so many unanswered questions and so many different scenarios that just make a person stress out.

Public Records Requests  
Public Records Requests  
Public Records



Public records  
PRRs/  
Public Records Requests  
Public records requests  
Records request  
Public records requests  
Public Records requests  
Complex public records requests  
Public Records Requests;  
Public Disclosure  
Public records  
Records requests  
Public Records  
Large records requests that require email archive searches, etc.  
Public Disclosure  
Difficult requestors of public records.  
Public Record Requests  
Public record requests  
Record requests - and we don't even get that many.....  
PDRs  
Public Records Requests  
Public disclosure

**13 Records Management**

The depth of records management (including email) needed at my agency and the staff to help make that happen.

Records Management  
Records Management  
City-wide records management policies & procedures  
Records management (electronic and paper) at a very old organization where staff has been in tenure for many years (very low turnover) and unwilling to change how they are filing/retaining.  
Records Management (specifically emails)  
Records Management  
Records Management  
Not enough time to do records management as well as I would like.  
Records retention  
Records Retention  
Electronic records management  
Understanding the Record Retention Schedule. I don't want to make a mistake and destroy something that should be a permanent record.

**10 Elected Officials**

Mayor  
Councilmembers with their own agendas who do not work collaboratively.  
dissent with council and how some members treat staff  
Dealing with Electeds  
Mayor/council and department head political issues.  
Council dysfunction  
Elected officials and their politics and grandstanding (at times)  
Out of control councilmembers.  
Demands from Elected Officials

- Lack of council participation and interest
- 7 Legal/Unfunded Mandates**
  - Not knowing the correct procedures/policies/laws/etc.
  - New OPMA requirements
  - Added mandates with no support
  - Defending the actions of the city government.
  - Compliance drivers (PRR fine potential)
  - Reporting, to so many agencies (state, federal & local) and only slotted for 16 hrs a week to do business.
  - Unfunded mandates
- 8 Customer Interactions**
  - Dealing with not nice customers.
  - Angry customers
  - Dealing with angry customers
  - Dealing with angry citizens.
  - Crazy people that come to meetings.
  - Handling difficult/needy citizens
  - Angry customers
  - Dealing with rude customers.
- 6 Staffing/Funding Issues**
  - Lack of help
  - Lack of funding to attend training and workshops
  - Limited staff development resources in house beyond municipal clerk training
  - Limited resources to provide the tools to keep up with technology and keep the Clerk's office up to date and moving forward.
  - Not enough help doing the daily functions.
  - A small staff means we have to learn everyone else's job in addition to our own so that we can cover the office during absences (vacation, illness, etc.)
- 5 Meetings/Agendas/Ordinances/Minutes**
  - Agenda Process
  - When I have to publish revised agendas or minutes (i.e. making mistakes on my agendas and minutes)
  - Transcribing and editing minutes.
  - Preparing minutes
  - Preparing staff reports for the council packet (do not receive reports in a timely manner from directors)
- 4 Project Management**
  - Project management in terms of approval with leadership and elected officials
  - Ineffective project management
  - Project management
  - Managing projects
- 3 HR/Personnel**
  - Supervision/management claims
  - Personnel Issues
  - Labor negotiations/issues
- 2 Personal/Emotional**
  - Not being able to manage emotions in confrontational situations.
  - Keeping it all together and moving forward.
- 2 Finance/Budget**
  - Budget items that I do not understand because I'm lacking training and experience.
  - The budget (lack of revenue)

- Taking on a new task, stress comes from the task being new and having to research and take the time to understand the new job and I want to make sure I do a great job.
- 1 Having to do tasks that we do so infrequently that we cannot remember the procedures, requirements, etc., i.e., "how we did it the last time."
- 1 Lack of signage to properly assist customers in getting them to the right department
- 1 Political intrigues
- 1 Public speaking
- 1 Job security (continual downsizing)
- 1 Annual Report
- Continual technological breakdowns (trying to finish work, but having software, PCs, programs, DVD burners, etc. malfunction)
- 1 Strategic planning
- 1 Making sure to give 100% customer service when dealing with the same stress / different day (staying engaged)
- 1 I do not allow stress to be in my life or a part of my vocabulary so I cannot name two things that stress me out.

## QUESTION #14

Name two topics that you would like to see classes on at conference.

Answered: 81, Skipped: 75

### COUNT TOPIC

#### 17 Records Management

Records Management Systems  
Records retention & management  
Records management  
Lawsuits affecting records management in the State of WA  
Advanced records management that are relevant to the legislative issues facing the State of WA  
Records retention  
Sharing records management tools and resources  
Records requests.  
Records Management solutions (without having to spend a lot of money on software/programs)  
Records Destruction & Documentation  
Records Archiving/Backup (i.e. scanning, microfiche, etc.)  
Records Retention Schedules and Organizing Files (hard copy documents)  
Records retention - that deals with County records. (Most of the conference relates to cities)  
Archival records / digital records - roundtable discussion style  
Records Management  
Archives  
Document retention/archiving policies and procedures

#### 14 Public Records Act

Managing public records & public disclosure as they relate to emerging technologies, i.e. texts, twitter, blogs, etc.  
Public records requests  
More in-depth Public Records class  
Classes that workshop exemptions and redactions (the difficult ones) for Public records act.  
More on public records request  
Public Records Requests  
Public Records Act  
Public Records - ways to do effective and efficiently (maybe things to help simplify)  
Records request law updates  
New laws in public records  
Public Records  
PRRs & PRRs :-)  
Advance PDR process-hands on class on exemption and the application of redactions,  
Tools for responding to and tracking public record requests.

#### 9 Dealing with Difficult People

Tips for dealing with difficult people  
Dealing with difficult team members/co-workers  
Dealing with difficult members of the public, and co-workers  
Dealing with unhappy citizens.  
Dealing with difficult customers.  
Dealing with co-workers.  
Dealing with Difficult People  
Working with difficult or manipulative colleagues  
Tools to deal with angry or disruptive customers.

## **9 Human Resources**

I know not everyone does HR but I would really love to see some HR topics because it is an additional aspect of my job and I just don't have the time or resources to go to both the clerks and human resource conferences.

HR

HR issues on how to remove/ discipline an employee legally  
Conducting performance evaluations and hiring the right people.

Performance Evaluations

Performance reviews.

Writing evaluations and holding an evaluation meeting

More on the health care changes that are upcoming

Recognizing and rewarding employees (with limited resources)

## **9 Workplace Improvements**

LEAN processes.

Bullying in the workplace - how to recognize and correct

Bullying - how to present information to leaders so that they understand how detrimental it is to an organization.

Professionalism in the workplace.

Building team moral

Maintaining a professional work environment (that doesn't come from an insurance provider's perspective)

Raising morale, how to team-build

How to create better intergovernmental (or interdepartmental) relations (city/county/PUD, etc) or work together to streamline processes between governments.

Creating a professional work environment

## **8 Meetings/Agendas/Ordinances/Minutes**

Drafting legislation

Agenda planning styles

Legalities of meetings, ordinances, etc.

The nuts and bolts: basic duties, deadlines, publications.

How other Cities are organizing their agendas and council committees and learn about consent agendas.

An in depth look at ordinances, resolutions, orders. I know we had an earlier class on this but the attorney who spoke offered many of his opinions about what should or shouldn't be reasons for ordinances, etc., and it became confusing for me since I would have to go back to my office and explained what I learned to admin staff.

Summarizing or paraphrasing lengthy audio (Our County has detailed minutes)

Separation of duties suggestions for two person office

## **8 Communication**

Communication strategies

Continued training on communications, relationship building, interpersonal skills. Everyone needs this!

Managing up communications

Communication

Importance of communication

How to report concerns to your boss without looking like a "tattle tale"

How to communicate importance of meeting deadlines

Verbal self-defense

## **6 Finance/Treasurer/Payroll**

Budgeting basics/refresher or something on Payroll. I have never attended a class covering payroll.

Payroll do and don'ts

Basic accounting classes

Treasurer related classes

Anything finance related for those of us that work in both departments

Purchasing and bidding.

**5 Stress Management/Wellness**

Stress management

Handling stress at work

How to better handle stress...after 25 years in this line of work I feel like I'm losing my edge!

Stress Reduction

Wellness for the Clerk

**5 Project Management**

Juggling projects and responsibilities

Project Management

Project management

Project management.

Small project management pertinent to projects a clerk's office might take on

**5 Writing**

Shorthand/Brief hand, how do clerks write up the minutes during a meeting before they type them up; how do they take notes during the meeting.

Writing

Writing Ordinances & Resolutions

Nitty Gritty on writing minutes (i.e. recording roll call, the proper format for recording a public hearing, motion, etc.)

Changes in professional writing style (keeping current with changes in business correspondence)

**5 Supervising**

A topic on being a successful supervisor and/or how to deal with your supervisor

Skills for a new supervisor

Supervision skills

Basics of Supervising or Dept. Head Training

Delegation skill directives and direction without attitude

**4 Clerk's Office**

How to assist other departments in understanding the role of the Clerk and the Clerk's needs

Small Cities/Towns, how to streamline office more.

How to organize a group of former/retired clerks who are willing to work as a temp for governmental agencies that need back up at meetings to take minutes.

I am delving into the City Clerk duties. I think a short class or roundtable that would provide insight as to resources or mentoring for Clerks would be great. We have many entities that set regulations that affect our day to day activities. For example, we roll along and assume we are handling a project to the best of our abilities and come to find out oops, there is a new regulation that changed that. How does a Clerk, Deputy or Admin ensure he/she is getting that information to perform duties as required by law? What are the BEST connections?

**4 Elected Officials**

Developing positive relationships with elected officials

Developing training for newly elected and appointed officials or something of that nature.

Dealing with difficult councilmembers

Teaming with City Managers to handle Council dynamics

**4 Future Planning**

Prepping for the future. Reimagining how we do business and preparing for it.

Planning, goal setting, and problem solving for a clerk's office,

Succession planning

- Succession Planning
- 4 Technology**
  - MS office handy tools, website formats
  - How to cut down on receiving solicitation emails
  - Opportunities to see demos of vendor software applications
  - Computer, network and email security
- 3 Leadership**
  - Collaborative Leadership
  - Leadership
  - Leadership
- 3 Parliamentary Procedure**
  - Parliamentary procedure
  - Parliamentary procedure.
  - Advanced parliamentary procedure.
- 3 Intrapersonal**
  - Managing Emotions
  - How to stay motivated in a chaotic world and chaotic workplace.
  - How to stay energized when you feel buried.
- 2 Community Engagement**
  - How to engage the community. Examples of what worked and what didn't.
  - Improving public processes, public engagement and input to provide a governing body relevant information as they consider and review public projects and costs.
- 2 Time Management**
  - Time management.
  - Prioritization and time management
- 2 Personality Tests**
  - Colors training. The "know your color" and what it means kind of thing.
  - Classes on either the colors, animals (like Myers-Briggs) etc. lately and I always seem to learn something new that helps me to better understand my staff and how to make the relationships the best.
- 2 OPMA**
  - Open public meetings/public hearings.
  - OPMA Requirements
- 1 Staff development resources**
- 1 Public speaking**
- 1 Grant Management**
- 1 Facilitation Skills**
- 1 Athenian dialogue**
- 1 Race and Social Justice**
  - How to prepare for an audit (SAO) and when can you tell the auditor to take a flying leap - or something to that effect. :-)
- 1 What to do in case of a natural disaster/fire. What check list can I get to prepare for this?**
- 1 Annual Report**
- 1 Performance measures**
- 1 Professional Development**
- 1 Working with the prosecutor's office**

## QUESTION #15

Name one topic would you like to see presented at an advanced academy.

Answered: 60, Skipped: 96

### COUNT TOPIC

- 5 Project Management**
  - Project management again.
  - Project Management
  - Project Management-Determining and tracking benchmarks and budget on various projects.
  - Project Management skills
  - Project management
- 5 Supervisor/Management**
  - Supervisor skills
  - Supervisor training
  - Transitioning from worker bee to supervisor with tact and respect
  - Managing Up
  - Management Roles
- 5 Professional Development**
  - professional development
  - Professional development & management roles
  - How to be professional yet still have fun at work.
  - Building your professional brand
  - Professionalism and creating a positive work environment.
- 5 Communications**
  - Winning arguments
  - Holding Difficult Conversations
  - Crucial Confrontations
  - Interpersonal/Communication training resources for MC staff
  - Communicating with Tact, Diplomacy & Professionalism or something along those lines
- 4 Working with Elected Officials**
  - Protocal for City Council Members
  - Dealing with difficult elected officials
  - Working with Elected Officals, and helping them to see the bigger picture, as well as helping them to see their role in government.
  - How to successfully interact with Elected Officials
- 4 Motivation/Inspiration**
  - Figuring out what feeds you at work so you stay motivated and fresh.
  - New Ways to do my Job after having been employed for a long time in the same position.
  - Keeping oneself motivated - open to new ideas, horizons, methods of accomplishing a task.
  - "Inspirational" type speakers and topics
- 4 Leadership**
  - Leadership Skills - I know this has been done but finding new presenters and ways to build those skills are always valuable.
  - Leadership vs. Management
  - Leadership
  - Leadership Development
  - Nothing on leadership or speaking - those have been way over done.
- 4 Grammar and Writing**
  - Grammar and Writing



Perhaps something on writing and grammar. Something that a speaker can teach us - not speak at us about lofty leadership ideals. it just doesn't work.

How to write minutes. Taking a 1-2 hour meeting and pairing it down to a 2-3 page document.

Writing clear & concise ordinances/resolutions

**4 Interpersonal/Intrapersonal**

Managing emotions

Dealing with co-workers.

Confidence building

How to advance in municipal government.

**2 Human Resources**

HR related topics

Human Resources

**1 Athenian dialogue**

**1 Election Tasks**

**1 Parliamentary Procedure**

**1 Stress reliever course or humorous (chicken lips)**

**1 Race and Social Justice**

**1 Mastering Adobe Acrobat to include creating fillable forms**

**1 Organizational psychology**

**1 Public Hearing and Quasi-judicial matters - Clerk's role in recording**

**1 How to capture social media for records management**

**1 OPMA**

**1 Persuasive public speaking**

**1 Public Records Requests**

**1 Promoting your city to the public to keep it positive during difficult times**

**1 Customer Service**

**1 I like the records training we received last year**

**QUESTION #16**

Please provide the names of any speakers or instructors that you have seen at other conferences or trainings that you think would be great for your conference, advanced academy or PD

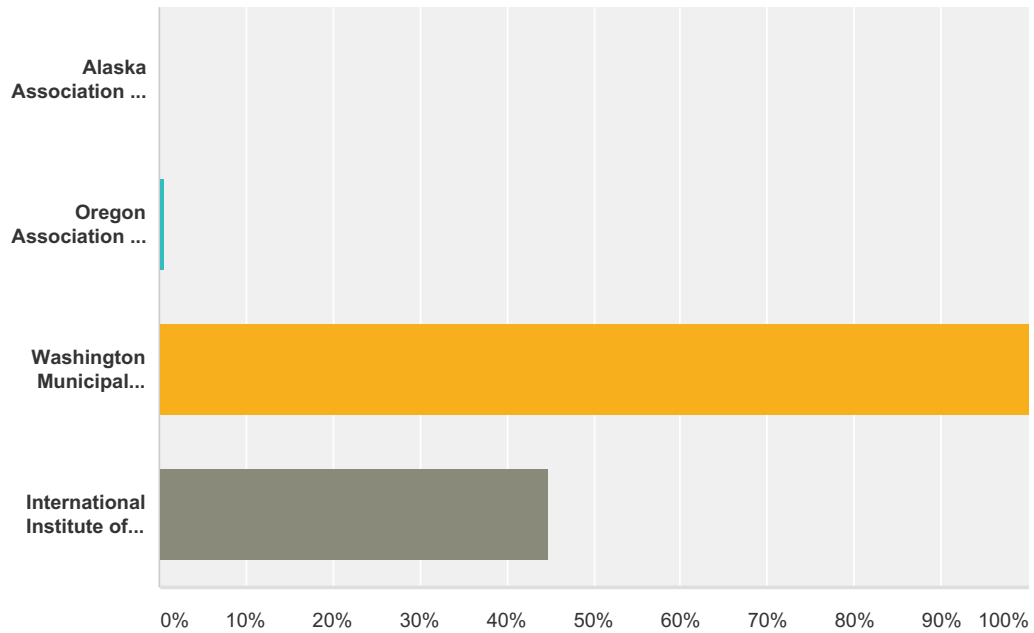
IV.

Answered: 38, Skipped: 118

COUNT	NAME	TOPIC
4	Patrick Ibarra	
3	Connie Poulsen	records management, professional development & education
3	Kyle Stannert	
3	Marilyn McCabe-Love	
2	David Rabiner (Rabiner Resources)	
2	Sara di Vittorio, Snohomish County Prosecuting Atty	PRA
	Anne MacFarlane	
	Bob Jean Consulting	
	Brian Kathenes	Course at IIMC: Negotiating Secrets Every Municipal Clerk Needs to Know Good
	Brian Mark Seaward	
	Butkus Consulting	
	Carolyn McManus, Swedish Medical Center Rehabilitation Services	Mindfulness Based Stress Reduction
	Cheryl Beyer, Attorney at Weed, Graafstra and Benson	PRA
	Chicken Lips	
	City of Seattle's Race and Social Justice training	
	Connie M. Deford, CMC	Course at IIMC: Robert's Rules in the Clerk's World
	David Rabiner (Rabiner Resources)	
	Deb Sofield	
	Dr. Michael Shadow	
	Edge Consulting and their "RESPECT" Training	
	Faith Wood	Course at IIMC: Cutting Through the Social Media Muck Good
	Gordon Graham - Leadership Training	
	Jan Dwyer Bang	
	Jeff Myers	PRA
	Jim Webber	
	John Morgan, Chinook Institute (out of Keizer)	
	Lee Williams	
	Marcia Clifford	Course at IIMC: Making Your Code More Enforceable in an Evolving Digital Government
	Margery Price	
	Michael Buschmohle - Applause Associates	
	Mike Bolasina	
	Monica Dixon, PhD	
	Ramsey Rammerman	PRA
	Robin Rose	
	Sarah Gibson	Course at IIMC: Writing for Impact
	Scott Boggs	Course at IIMC: Cloud Computing and Virtualization in the Public Service Environment Good
	Scott Marquis	
	Sheila Sheinberg	
	Wendy Fraser - Fraser Consulting	

**Q1 Are you a member of (check all that apply)?**

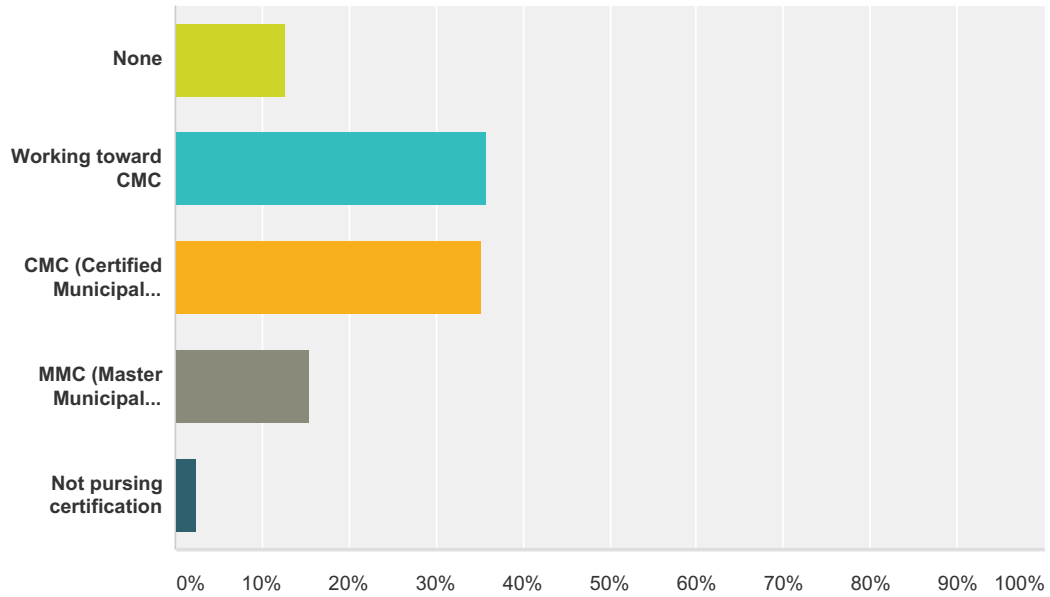
Answered: 156 Skipped: 0



Answer Choices	Responses
Alaska Association of Municipal Clerks (AAMC)	0.00% 0
Oregon Association of Municipal Recorders (OAMR)	0.64% 1
Washington Municipal Clerks Association (WMCA)	100.00% 156
International Institute of Municipal Clerks (IIMC)	44.87% 70
<b>Total Respondents: 156</b>	

## Q2 What certification do you have?

Answered: 156 Skipped: 0



Answer Choices	Responses
None	12.82% 20
Working toward CMC	35.90% 56
CMC (Certified Municipal Clerk)	35.26% 55
MMC (Master Municipal Clerk)	15.38% 24
Not pursuing certification	2.56% 4
<b>Total Respondents: 156</b>	

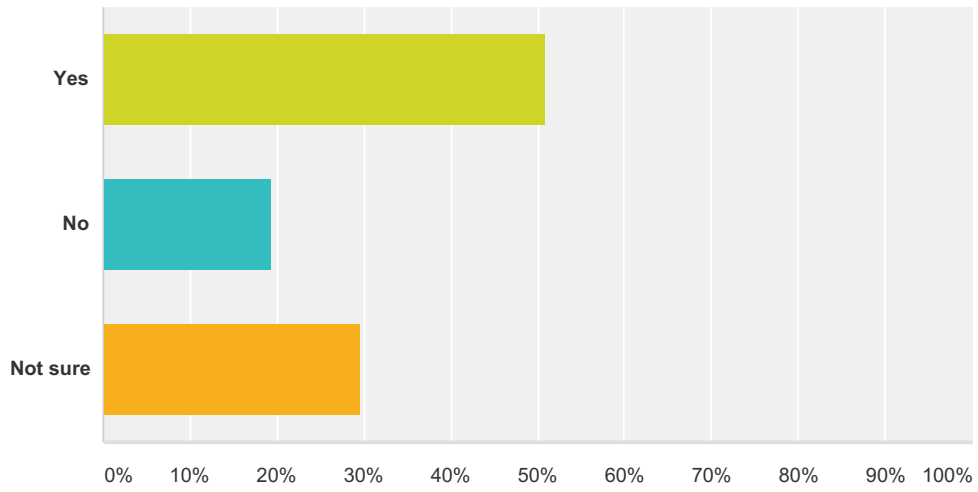
#	If you are not pursuing certification, why?	Date
1	There is not any advantage at my job to having the certification.	4/20/2015 11:58 AM
2	20+ years ago when I became involved with WMCA and IIMC transit clerks were not eligible for certification. I have still enjoyed and reaped the benefits of membership, attending conferences and seminars. However, I am just a few years away from retirement so certification is not a big consideration for me. But, I am happy to know that whom ever is my replacement at my transit agency, after I retire, will have the opportunity to become certified.	4/20/2015 11:25 AM
3	Short staffed in our office, no time to dedicate towards pursuing certification.	4/20/2015 10:58 AM
4	No opportunity to travel for training.	4/20/2015 10:20 AM
5	Will be retiring in the next 2 years	4/15/2015 2:04 PM
6	Lost certification materials in a move. Desire to obtain.	4/15/2015 11:01 AM
7	Would like to pursue MMC, but do not have the support of my employer.	4/15/2015 9:56 AM
8	Went through all the classes but never applied for certification. Politics at my City.	4/15/2015 9:49 AM
9	To set a higher standard for the next clerk.	4/15/2015 9:42 AM

## 2015 NCI Education Survey

10	It is not required for my position. I am also fairly new to my position.	4/15/2015 9:41 AM
11	Didn't really think it was necessary	4/13/2015 8:04 AM
12	too close to retirement	4/10/2015 11:03 AM
13	Too close to retirement.	4/10/2015 9:19 AM
14	Too close to retirement.	4/9/2015 3:25 PM
15	To become a Certified Municipal Deputy Clerk	4/9/2015 2:23 PM
16	I would like to pursue certification but am not allowed to be more than associate member of IIMC. It's a catch 22 situation wherein if I don't have the experience or hold the title City Clerk, I am unable to get certified and I am not able to get certified unless I already perform the duties of a City Clerk position. Because of this I will not likely renew my membership in IIMC this year.	4/9/2015 1:57 PM

**Q3 Are you planning to attend your next state conference?**

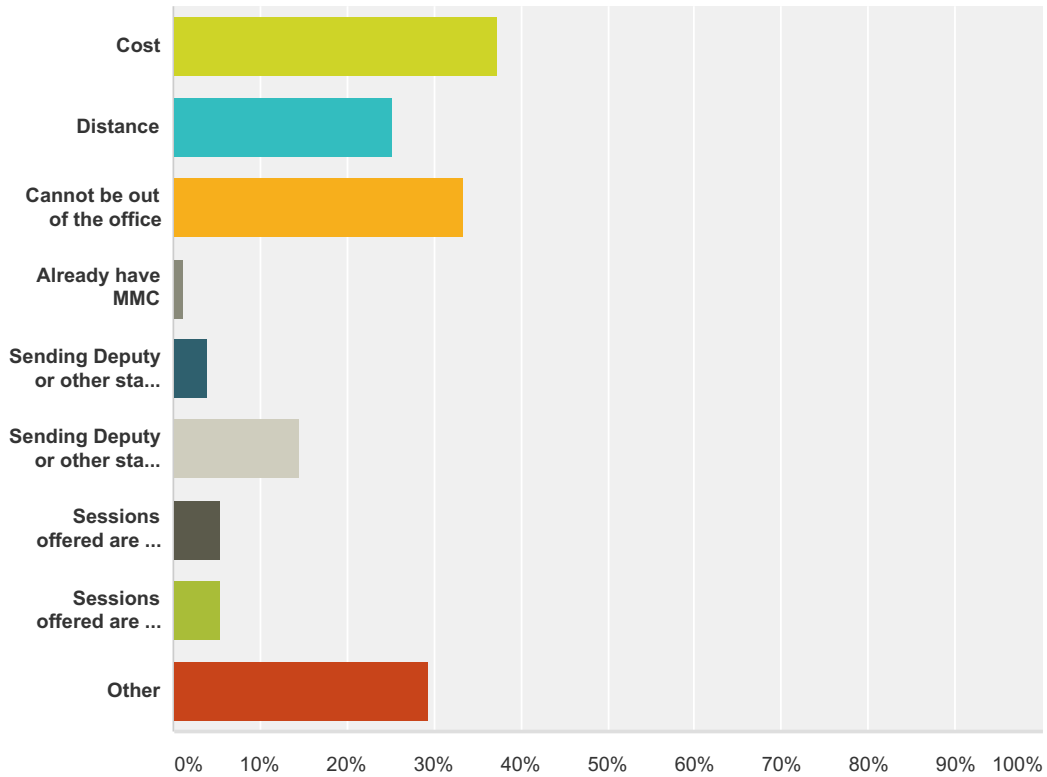
Answered: 155 Skipped: 1



Answer Choices	Responses
Yes	50.97% 79
No	19.35% 30
Not sure	29.68% 46
<b>Total</b>	<b>155</b>

**Q4 Please choose a reason or explain why you are not (or not sure about) attending your next state conference (check all that apply).**

Answered: 75 Skipped: 81



Answer Choices	Responses
Cost	37.33% 28
Distance	25.33% 19
Cannot be out of the office	33.33% 25
Already have MMC	1.33% 1
Sending Deputy or other staff member (not enough funds for both to go)	4.00% 3
Sending Deputy or other staff member (one person must stay at office)	14.67% 11
Sessions offered are too basic	5.33% 4
Sessions offered are not relevant to my job	5.33% 4
Other	29.33% 22
<b>Total Respondents: 75</b>	

#	Other	Date
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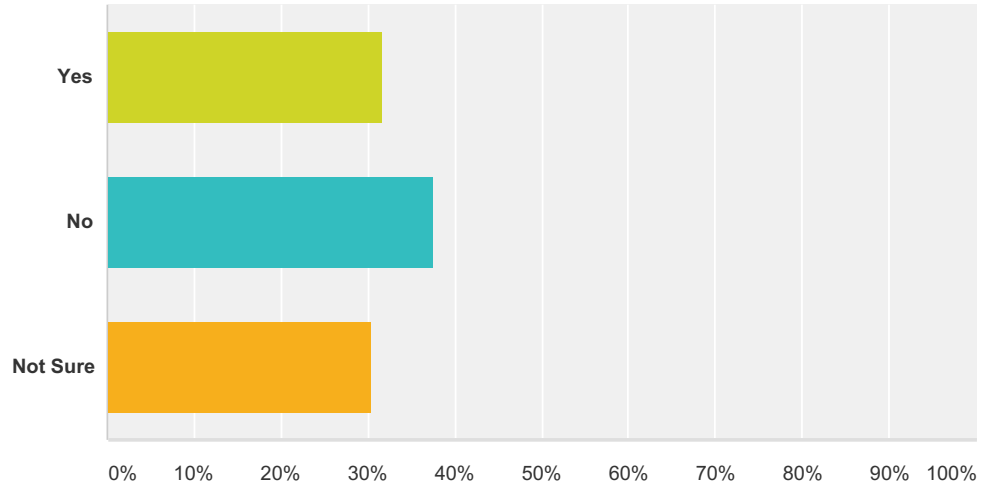
## 2015 NCI Education Survey

1	personal reasons - needed at home	4/20/2015 12:04 PM
2	Small office; too busy	4/16/2015 7:53 AM
3	The Clerk and Office Assistant are going, one person must stay at the office, and that is me next year.	4/15/2015 10:33 AM
4	My employer does not support my municipal clerk endeavors, as it's felt they are not relevant to my current/revised job description (despite my continued duties performing OPMA requirements, agendas, minutes, records management, and public records requests). Sadly I cannot justify taking vacation time and spending money out of my pocket to attend.	4/15/2015 10:03 AM
5	Retiring	4/15/2015 9:51 AM
6	2015 conference did not provide training I needed.	4/15/2015 9:44 AM
7	Current City Clerk will be retiring and not sure what the climate in the office will be.	4/13/2015 8:50 AM
8	Have to choose for limited time and funds. Usually go to Treasurer's conference.	4/10/2015 9:20 AM
9	Requesting to attend the May 2016 IIMC Conference and cannot do both.	4/10/2015 7:55 AM
10	The amount of training/information sharing is minimal in relation to the amount of time away from the office. I understand the need for socializing, but I can't justify the time and expense when it boils down to just a few useful breakout sessions.	4/9/2015 4:39 PM
11	Retiring in June.	4/9/2015 3:25 PM
12	Not currently serving in Clerk capacity	4/9/2015 3:01 PM
13	Starting a Masters Degree program and the timing will not work out for 2016.	4/9/2015 2:32 PM
14	Most of the small cities in Washington State are Clerk/Treasurer positions. There used to be more diversified training to cover both sides of our positions, however in recent years they have begun to concentrate their training strictly on the Clerk side. Our time and budgets are so restrictive that the "fluff" classes that are now generally offered to do justify the cost or time away from the office. I want to know how to do my job, not interview better when looking for another job or be happy at work - - I want to know HOW to do my work better and more efficiently.	4/9/2015 2:27 PM
15	Not sure where it is located next year. Don't know any other clerks personally; so feel isolated.	4/9/2015 2:23 PM
16	I haven't been treated very well at the conferences. I struggle to fit in.	4/9/2015 2:21 PM
17	I don't want to go so far as to say the sessions are either too basic or not relevant - but many are somewhat less than necessary. Generic leadership and character development and personality profiles - it's more abstract than I find valuable. I understand the challenge to find things that will garner the approval of the certification association. But practical what-to-do-when-this-happens kind of sessions, as well as how to do things that are sometimes OUTside the typical job scope, would be helpful. In small jurisdictions, clerks will often do city administrator/manager tasks including understanding and writing code language, agenda bills, and ordinances; contracts; basics of how to negotiate; writing effective job reviews; setting up HR files; identification and discussion of the RCWs that are most relevant to the majority of clerks; explanation of regional legislative bodies and review committees; proper navigation of state legislature. Those are things that, even with a CMC, I've had to learn to sink-or-swim, and my mayor has wondered what I learned at all my trainings if not exactly how to do these tasks.	4/9/2015 2:17 PM
18	I have been using budgeted travel funds for CMC training and will then travel to state conferences.	4/9/2015 2:15 PM
19	depends on how many want to go, distance and available funds	4/9/2015 2:09 PM
20	If the conference is in eastern WA in 2016, I won't be able to go until 2017. It would be nice if the conference was offered in both western and eastern WA each year.	4/9/2015 1:58 PM
21	If I am able to fly to Spokane, I will go. If I have to drive there in March....I may not go.	4/9/2015 1:56 PM
22	Change of employment	4/9/2015 1:55 PM



**Q5 Are you planning to attend the advanced academy before your next state conference?**

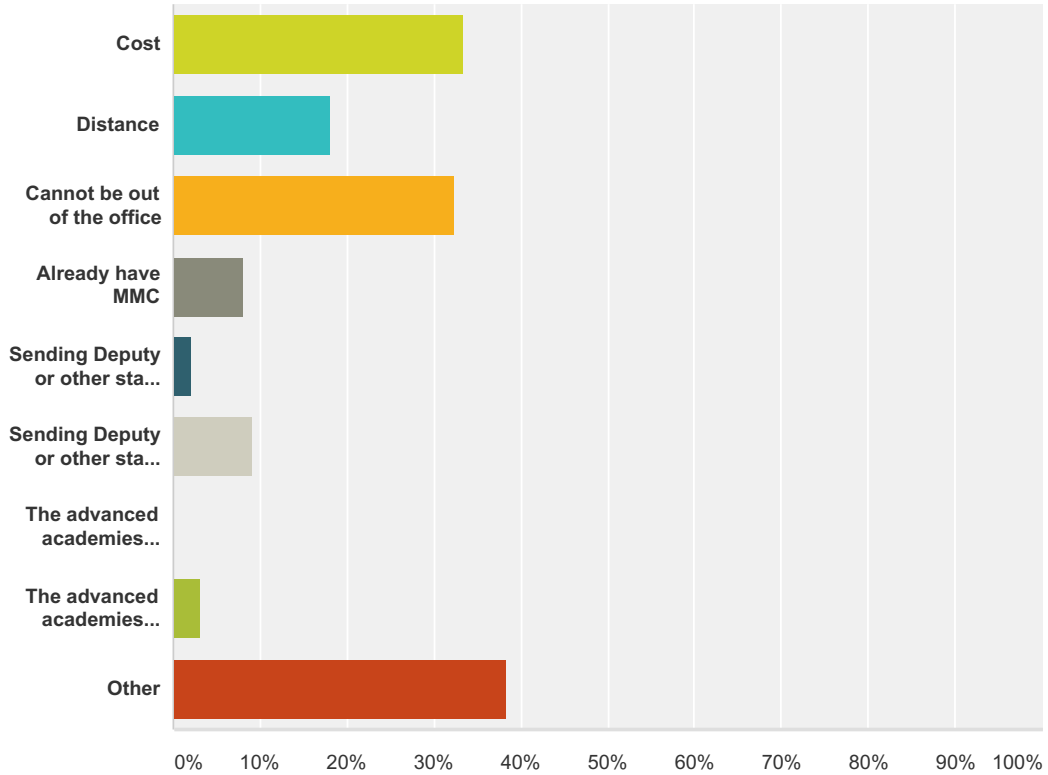
Answered: 154 Skipped: 2



Answer Choices	Responses	Count
Yes	31.82%	49
No	37.66%	58
Not Sure	30.52%	47
<b>Total</b>		<b>154</b>

**Q6 Please choose a reason or explain why you are not (or not sure) about attending the advanced academy before your next state conference (check all that apply).**

Answered: 99 Skipped: 57



Answer Choices	Responses
Cost	33.33% 33
Distance	18.18% 18
Cannot be out of the office	32.32% 32
Already have MMC	8.08% 8
Sending Deputy or other staff member (not enough funds for both to go)	2.02% 2
Sending Deputy or other staff member (one person must stay at office)	9.09% 9
The advanced academies offered are too basic	0.00% 0
The advanced academies offered are not relevant to my job	3.03% 3
Other	38.38% 38
<b>Total Respondents: 99</b>	

#	Other	Date
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## 2015 NCI Education Survey

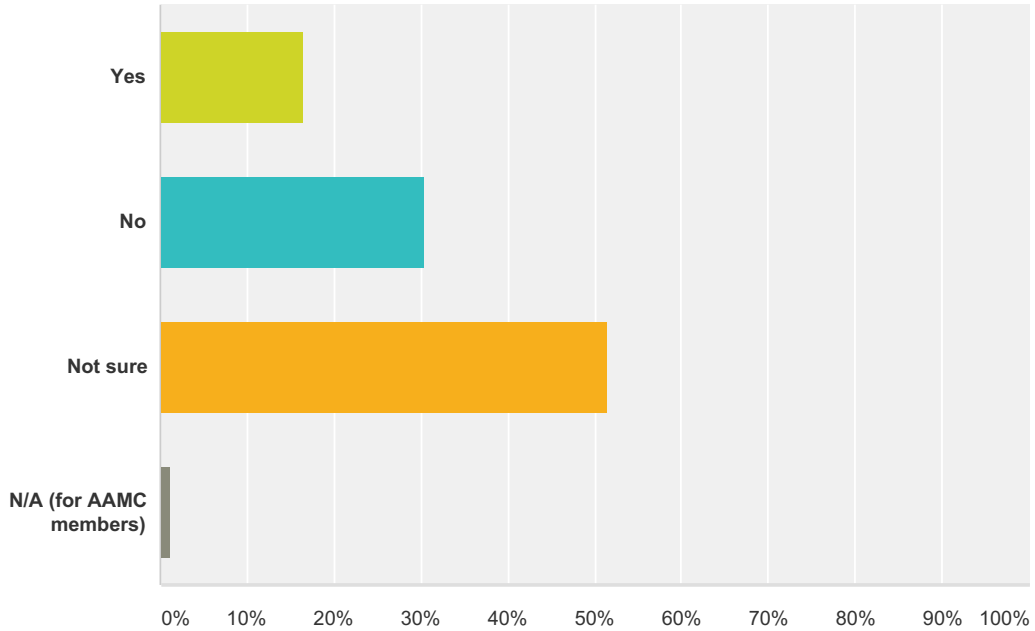
1	the additional time out of the office. the conference is always scheduled during a Council meeting week and somebody has to be here on that Tuesday night to staff it.	4/20/2015 3:23 PM
2	Personal reasons - needed at home	4/20/2015 12:04 PM
3	Not applicable to me.	4/20/2015 11:59 AM
4	Need to see the topic before we can decide to allocate the extra funds for Academy.	4/20/2015 9:29 AM
5	May be in conflict with IIMC obligations	4/16/2015 5:17 PM
6	I was told the advanced academy are only for those Clerks with CMC certification.	4/16/2015 8:34 AM
7	Small office; too busy.	4/16/2015 7:54 AM
8	Not going to state conference.	4/15/2015 10:34 AM
9	Same reason for not attending annual conference.	4/15/2015 10:04 AM
10	need to relax, final prep, and get settled to perform as president ;-)	4/15/2015 9:53 AM
11	Retiring	4/15/2015 9:52 AM
12	Don't have CMC	4/15/2015 9:49 AM
13	It is up to my supervisor if it is a benefit for me to attend	4/15/2015 9:47 AM
14	I will be retiring in 2 yrs, cost would be a problem also for the City. I would hope when a new Clerk is hired to replace me, she will be younger and want to do the training. Wish I was a little younger, I would have liked to have gotten my certification.	4/15/2015 9:45 AM
15	Not sure of the dates and whether I can attend.	4/15/2015 9:45 AM
16	Deputy Clerk attending PD II at same time PDIV is occurring. Cannot be out of the office at the same time.	4/15/2015 9:43 AM
17	Will be attending PD III this year. May attend advanced academy in the future.	4/15/2015 9:37 AM
18	I have not approached my City Clerk to find out if funds are available AND if this is something she will approve.	4/13/2015 8:51 AM
19	The advanced academies offered are too general in nature. I'm really looking for technical help with what I do. Then it would be worth taking another day away from the office.	4/13/2015 8:34 AM
20	I am not sure what is offered at the advanced academy or whether it applies to my job or not	4/10/2015 9:55 AM
21	Depends on the topic being offered	4/9/2015 5:17 PM
22	Depends on the location and the topic.	4/9/2015 4:44 PM
23	Unsure	4/9/2015 3:52 PM
24	Depends upon the timing of the conference and my job responsibilities.	4/9/2015 3:47 PM
25	Retiring	4/9/2015 3:26 PM
26	Difficult to be absent from work and home and have it pile up while I'm gone. Also attend my Wash Association of Clerks to Commissions and Council, so I take time away for that as well.	4/9/2015 3:15 PM
27	We budget for one advanced academy and one conference attendance per year. I attend the conference and my deputy attends the Fall Academy so we are not both out of the office at the same time.	4/9/2015 3:13 PM
28	Not currently serving as Clerk	4/9/2015 3:02 PM
29	Same answer as before, attending Masters program and timing will not work out.	4/9/2015 2:34 PM
30	The training needs to be more specific to our jobs and not the "feel good fluff" classes that are now offered.	4/9/2015 2:28 PM
31	I don't know where it will be held and what the topic will be.	4/9/2015 2:23 PM
32	not sure	4/9/2015 2:22 PM
33	We are in the process of building a new facility. The move in date has been scheduled for June 15, 2015. I plan to complete my third year of training next year.	4/9/2015 2:19 PM

## 2015 NCI Education Survey

34	I haven't attended a state conference yet so I'm not familiar with the advanced academy to say whether or not I'd find it valuable.	4/9/2015 2:17 PM
35	I am a new member and taking PD 1 this year.	4/9/2015 2:17 PM
36	Those sessions tend to be more "self-improvement" type sessions.	4/9/2015 2:15 PM
37	Budget went to other conferences this year	4/9/2015 2:02 PM
38	Changing employment	4/9/2015 1:56 PM

**Q7 Are you planning to attend the mid-year advanced academy? (AAMC members can skip this question)**

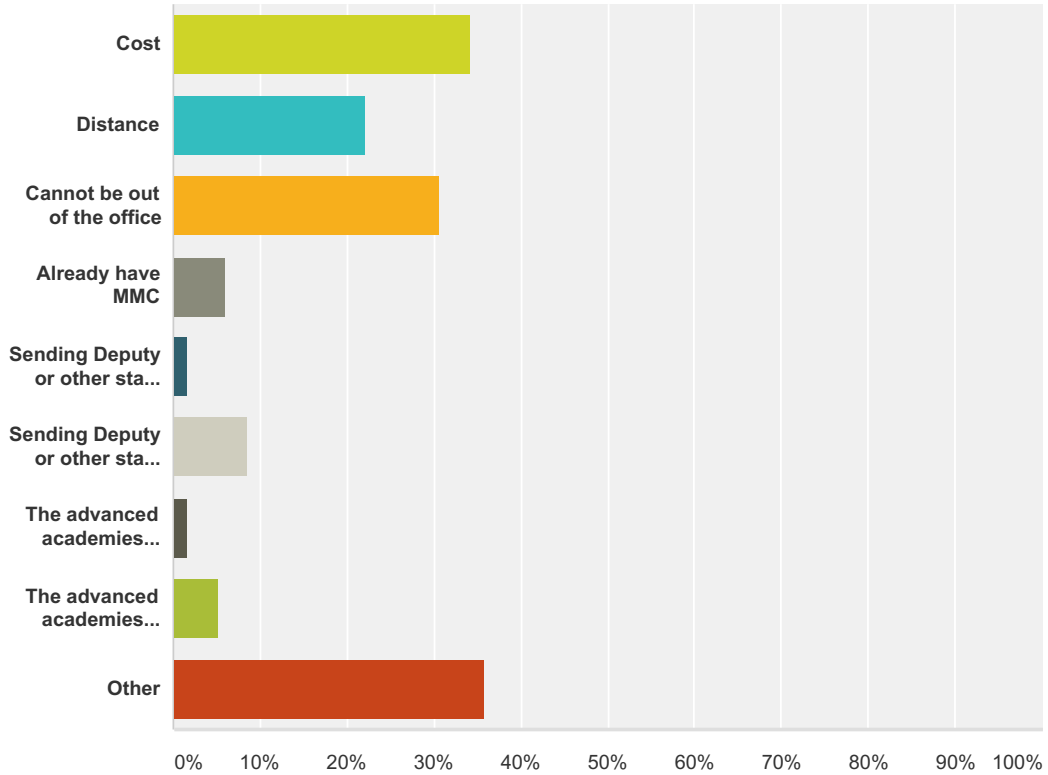
Answered: 151 Skipped: 5



Answer Choices	Responses
Yes	16.56% 25
No	30.46% 46
Not sure	51.66% 78
N/A (for AAMC members)	1.32% 2
<b>Total</b>	<b>151</b>

**Q8 Please choose a reason or explain why you are not (or not sure about) attending the mid-year advanced academy (check all that apply).**

Answered: 117 Skipped: 39



Answer Choices	Responses
Cost	34.19% 40
Distance	22.22% 26
Cannot be out of the office	30.77% 36
Already have MMC	5.98% 7
Sending Deputy or other staff member (not enough funds for both to go)	1.71% 2
Sending Deputy or other staff member (one person must stay at office)	8.55% 10
The advanced academies offered are too basic	1.71% 2
The advanced academies offered are not relevant to my job	5.13% 6
Other	35.90% 42
<b>Total Respondents: 117</b>	

#	Other	Date
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## 2015 NCI Education Survey

1	I'm not sure what is the mid year advanced academy? I usually go to the Fall academy if that's what you mean.	4/20/2015 3:25 PM
2	Personal reasons - needed at home	4/20/2015 12:06 PM
3	was not aware of class.	4/20/2015 11:01 AM
4	It might be during my maternity leave	4/20/2015 10:09 AM
5	do not know at this time	4/20/2015 10:05 AM
6	Conflicting obligations	4/16/2015 5:17 PM
7	It depends on the date because I have a planned vacation in late September. Otherwise, I would attend probably regardless of the topic. I believe fall academy is a good value and an opportunity to network with other members.	4/16/2015 3:50 PM
8	Small office; too busy.	4/16/2015 7:54 AM
9	If it new material not presented at WMCA, IIMC or OMRA	4/15/2015 1:25 PM
10	Don't know enough about it to say if attending.	4/15/2015 10:17 AM
11	See answer to #4.	4/15/2015 10:05 AM
12	Retiring	4/15/2015 9:52 AM
13	Clerks goes to all of these trainings so I cannot go.	4/15/2015 9:50 AM
14	It is something that would need to be discussed with my supervisor before decision is made	4/15/2015 9:48 AM
15	Not a memeber	4/15/2015 9:45 AM
16	Not sure of dates and whether I will be available to attend.	4/15/2015 9:45 AM
17	I am new to my position and I am not familiar with what the mid-year advanced academy is.	4/15/2015 9:43 AM
18	Not sure when it is.	4/15/2015 9:43 AM
19	Not time for me to attend the advanced academy yet.	4/15/2015 9:38 AM
20	I have not spoke with my City Clerk. We share a travel budget amongst four ladies and we all have the opportunity to get a couple trainings in per year.	4/13/2015 8:52 AM
21	If attending the advance academy helps to earn the MMC certification, I would go.	4/10/2015 9:56 AM
22	If the topic doesn't interest me or the speaker is not someone I enjoy I won't attend.	4/10/2015 9:45 AM
23	Depends on location and topic. The last academy was a topic that was covered heavily at PDII.	4/9/2015 4:45 PM
24	Unsure	4/9/2015 3:54 PM
25	Waiting to see what the topic is.	4/9/2015 3:54 PM
26	I'm not sure if I know about the mid-year advanced academy so I really can't answer.	4/9/2015 3:43 PM
27	Don't have CMC.	4/9/2015 3:15 PM
28	Depending on 2016 funding availability	4/9/2015 3:10 PM
29	Not currently serving as Clerk but if subject matter is relevant would consider attending.	4/9/2015 3:04 PM
30	I do not know the topic at this time, so i'm unable to make that decision.	4/9/2015 2:55 PM
31	Same as other responses	4/9/2015 2:29 PM
32	Not sure the difference between advanced academy and mid year advanced academy. Which one is which? I'm going to one of them.	4/9/2015 2:23 PM
33	It often is a bad time of year for me to be out of the office - October.	4/9/2015 2:18 PM
34	Unfamiliar	4/9/2015 2:17 PM
35	Don't know about it, not at advanced academy level yet.	4/9/2015 2:17 PM
36	They tend to be more self-improvement type sessions.	4/9/2015 2:15 PM

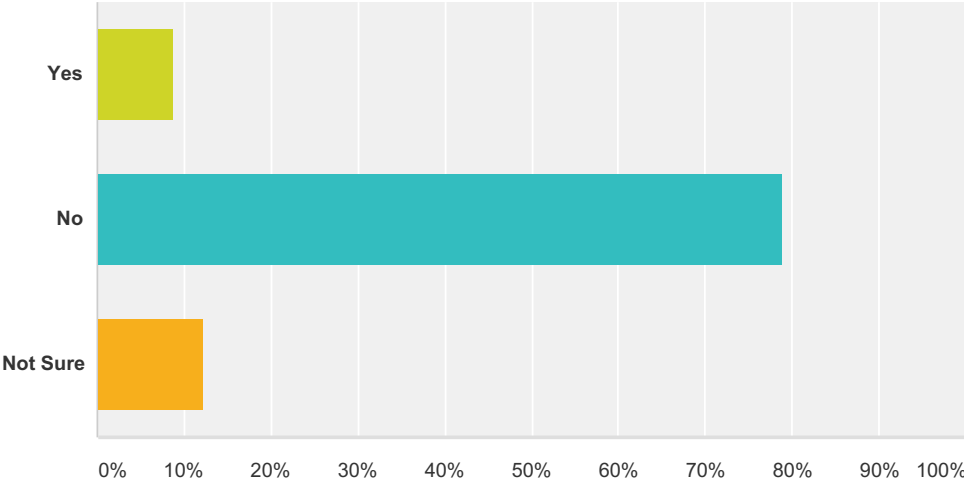
## 2015 NCI Education Survey

37	It depends on staffing and workload.	4/9/2015 2:15 PM
38	There are times that workload limits the ability to participate	4/9/2015 2:11 PM
39	If this is referred to as the Fall Conference, yes, I plan to attend.	4/9/2015 2:07 PM
40	Sometimes advanced academies not relevant to my job, otherwise I attend.	4/9/2015 2:02 PM
41	It depends on the location.	4/9/2015 1:59 PM
42	Changing employment	4/9/2015 1:56 PM



### Q9 Are you planning to attend PD IV this summer?

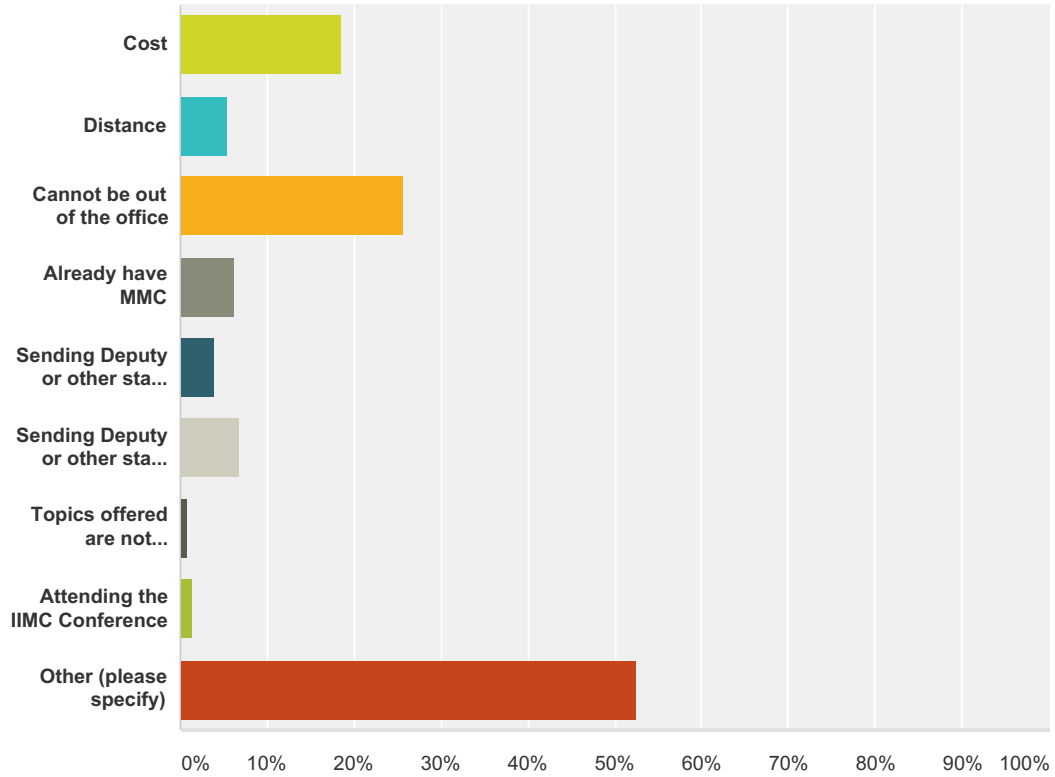
Answered: 147 Skipped: 9



Answer Choices	Responses	
Yes	8.84%	13
No	78.91%	116
Not Sure	12.24%	18
<b>Total</b>		<b>147</b>

**Q10 Please choose a reason or explain why you are not (or not sure about) attending PD IV this summer (check all that apply).**

Answered: 129 Skipped: 27



Answer Choices	Responses
Cost	18.60% 24
Distance	5.43% 7
Cannot be out of the office	25.58% 33
Already have MMC	6.20% 8
Sending Deputy or other staff member (not enough funds for both to go)	3.88% 5
Sending Deputy or other staff member (one person must stay at office)	6.98% 9
Topics offered are not relevant to my job	0.78% 1
Attending the IIMC Conference	1.55% 2
Other (please specify)	52.71% 68
<b>Total Respondents: 129</b>	

#	Other (please specify)	Date
1	I don't like having to purchase the commuter package (too expensive, not needed) or having to attend evening events during the week (since I would commute), but I'm thinking about it.	4/20/2015 3:27 PM

## 2015 NCI Education Survey

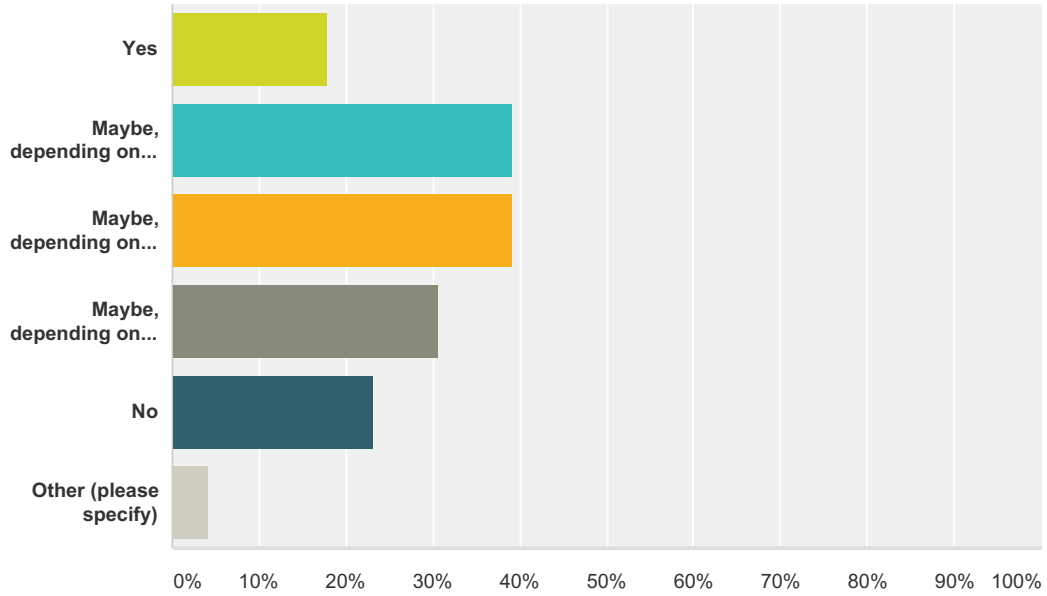
2	Personal reasons - needed at home	4/20/2015 12:07 PM
3	Need to complete PD III	4/20/2015 11:33 AM
4	I'm attending PD II	4/20/2015 10:54 AM
5	Attending PD II	4/20/2015 10:23 AM
6	Need to take PD I, II and III first	4/20/2015 10:09 AM
7	attending PDI	4/20/2015 10:06 AM
8	I am attending PD III in June.	4/20/2015 9:31 AM
9	I am only eligible for PD I	4/20/2015 9:27 AM
10	Conflicting obligations	4/16/2015 5:18 PM
11	Working on CMC Certification.	4/16/2015 8:34 AM
12	Will be attending PD II at that time	4/16/2015 7:56 AM
13	Just have not decided yet.	4/16/2015 7:55 AM
14	Attending PDII this year	4/15/2015 3:13 PM
15	not ready for IV yet...taking PD II this summer	4/15/2015 3:07 PM
16	I may be attending AWC Conference	4/15/2015 2:37 PM
17	personal	4/15/2015 2:06 PM
18	I would love to attend #4, I've wanted to for years...it's just not justifiable to my Mayor	4/15/2015 1:51 PM
19	Looking at calendar and budget	4/15/2015 1:27 PM
20	Attending PDII and III	4/15/2015 11:24 AM
21	Attending PD III	4/15/2015 10:41 AM
22	I am attending PD III.	4/15/2015 10:34 AM
23	See answer for #4.	4/15/2015 10:05 AM
24	I am working toward my CMC and am attending PD II this summer.	4/15/2015 10:02 AM
25	out of office for all conferences this year and a friends wedding in june, couldn't be out another week....	4/15/2015 9:54 AM
26	City would not send me.	4/15/2015 9:50 AM
27	Will be attending PD II this summer	4/15/2015 9:49 AM
28	I will attend PD 2 summer 2015	4/15/2015 9:45 AM
29	Deputy attending PDII - occurs at same time.	4/15/2015 9:44 AM
30	Attending PD II	4/15/2015 9:44 AM
31	Not required for my position	4/15/2015 9:43 AM
32	Will be attending PD I	4/15/2015 9:37 AM
33	Timing. Deputy attending PD I.	4/14/2015 6:08 PM
34	Attending PD III	4/13/2015 12:30 PM
35	Again, we need to choose one or two trainings per year to stay within our travel budget and this was not one I planned for.	4/13/2015 8:53 AM
36	attending PD3	4/13/2015 8:53 AM
37	Attending PD III	4/13/2015 8:38 AM
38	Taking PD 3 this year	4/13/2015 8:35 AM

## 2015 NCI Education Survey

39	Going to PD II	4/10/2015 2:40 PM
40	I don't know what this is.	4/10/2015 11:05 AM
41	I will be on vacation this year but I would love to go	4/10/2015 9:57 AM
42	Still in discussion with my Mayor over if he feels the topic is a benefit to our organization.	4/10/2015 9:46 AM
43	Not pursuing certification	4/10/2015 9:21 AM
44	Attending PD III	4/10/2015 9:20 AM
45	I'm going to PDIII	4/9/2015 4:45 PM
46	Hip surgery	4/9/2015 4:12 PM
47	I attending PD II	4/9/2015 3:55 PM
48	I'll be attending PD II	4/9/2015 3:43 PM
49	I may be out of town during that week helping family move.	4/9/2015 3:27 PM
50	Haven't completed CMC	4/9/2015 3:16 PM
51	Clerk is only paying through PD III	4/9/2015 3:02 PM
52	Awaiting notification of scholarship. If awarded, planning to attend.	4/9/2015 3:01 PM
53	I will go in 2016	4/9/2015 2:55 PM
54	I am attending PDII and III	4/9/2015 2:49 PM
55	I'm attending PDII	4/9/2015 2:35 PM
56	Attending PD III	4/9/2015 2:28 PM
57	Attending PD III this year. Am interested in attending next year but may not be able to due to cost and distance and being out of the office.	4/9/2015 2:25 PM
58	Don't know if I want to go and I am gone to too much training this year.	4/9/2015 2:22 PM
59	I chose not to attend this year, but that does not mean that I won't next year or in the future.	4/9/2015 2:21 PM
60	Not at this level yet.	4/9/2015 2:17 PM
61	Will just be returning from my granddaughter's graduation out of state.	4/9/2015 2:15 PM
62	I am attending PDII and III	4/9/2015 2:07 PM
63	Budget has gone to other conferences	4/9/2015 2:03 PM
64	I haven't completed the other classes yet.	4/9/2015 2:02 PM
65	I'm attending PDIII this summer	4/9/2015 2:01 PM
66	I am attending PD II.	4/9/2015 2:00 PM
67	I am attending PDII this year.	4/9/2015 1:57 PM
68	Changing employment	4/9/2015 1:56 PM

**Q11 Would you attend an Athenian Dialogue if/when offered by your state association (check all that apply)?(See description below)**

Answered: 117 Skipped: 39

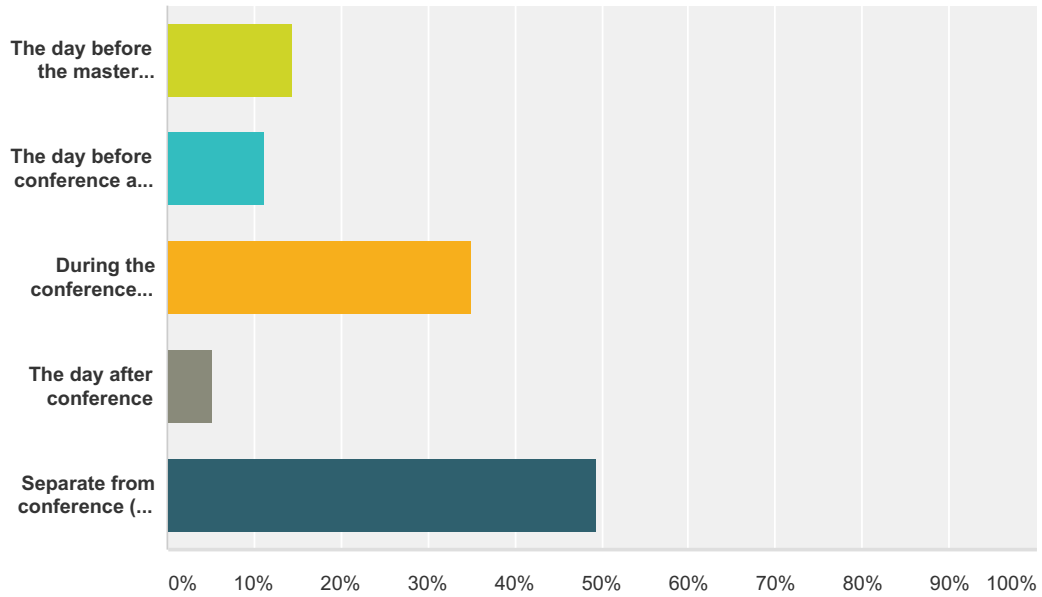


Answer Choices	Responses	
Yes	17.95%	21
Maybe, depending on the topic	39.32%	46
Maybe, depending on when it is offered	39.32%	46
Maybe, depending on the cost	30.77%	36
No	23.08%	27
Other (please specify)	4.27%	5
<b>Total Respondents: 117</b>		

#	Other (please specify)	Date
1	Maybe - depending on location and date	4/20/2015 12:07 PM
2	Location of class	4/15/2015 12:43 PM
3	yes x 10!	4/15/2015 9:54 AM
4	It would need to be near me like somewhere in Eastern Washington. Spokane would be great.	4/10/2015 9:55 AM
5	Also, depending on WHERE it's held.	4/9/2015 3:16 PM

### Q12 When would you like it to occur?

Answered: 97 Skipped: 59



Answer Choices	Responses
The day before the master academy (before conference)	14.43% 14
The day before conference at the same time as the master academy	11.34% 11
During the conference (during concurrent sessions)	35.05% 34
The day after conference	5.15% 5
Separate from conference (a different time of the year)	49.48% 48
<b>Total Respondents: 97</b>	

## 2015 NCI Education Survey

### Q13 What are the two things at work that stress you out the most?

Answered: 96 Skipped: 60

#	Responses	Date
1	too many priorities/not enough time to do everything well, therefore personal time suffers.	4/20/2015 3:42 PM
2	Fulfilling public records requests with limited staff	4/20/2015 12:08 PM
3	office politics	4/20/2015 11:37 AM
4	Time....it runs away from me!	4/20/2015 11:35 AM
5	Mayor/council and department head political issues. Budget items that I do not understand because I'm lacking training and experience.	4/20/2015 11:09 AM
6	Not having enough time in the day	4/20/2015 10:56 AM
7	Unethical behaviors by other staff Tardiness	4/20/2015 10:45 AM
8	Public speaking Job security (continual downsizing)	4/20/2015 10:24 AM
9	The depth of records management (including email) needed at my agency and the staff to help make that happen. Difficult records requestors	4/20/2015 10:21 AM
10	Records Management and dealing with not nice customers.	4/20/2015 9:40 AM
11	Workload and competing priorities	4/20/2015 9:31 AM
12	Staff oversight Project management in terms of approval with leadership and elected officials	4/20/2015 8:30 AM
13	ineffective project management limited staff development resources in house beyond municipal clerk training	4/16/2015 5:22 PM
14	Co-workers who gossip and have poor interpersonal skills. Councilmembers with their own agendas who do not work collaboratively.	4/16/2015 3:54 PM
15	PDRs Agenda Process	4/16/2015 8:36 AM
16	1) When I have to publish revised agendas or minutes (i.e. making mistakes on my agendas and minutes). 2) Dealing with my supervisor	4/16/2015 8:02 AM
17	Public Record Requests Records Management	4/16/2015 7:57 AM
18	not enough time	4/15/2015 3:21 PM
19	public record requests city-wide records management policies & procedures	4/15/2015 3:12 PM
20	Lack of help and public records	4/15/2015 2:39 PM
21	Too much to do with small staff and the ever increasing amount of things a clerk/treasurer has to know about in order to do the job effectively.	4/15/2015 2:02 PM
22	Workload and dissent with council and how some members treat staff	4/15/2015 1:34 PM
23	Political intrigues Angry customers	4/15/2015 1:13 PM
24	Personnel Issues and Dealing with Electeds	4/15/2015 11:48 AM
25	Working with disengaged employees. Too much work.	4/15/2015 11:09 AM
26	Having a deadline and being able to meet it is predicated by being provided work/documents from others and they are not timely with the information/work/documents to me. Wearing so many hats	4/15/2015 10:57 AM
27	Deadlines and procrastinators; lack of communication amongst departments	4/15/2015 10:46 AM
28	The tremendous workload The non-stop demands	4/15/2015 10:42 AM
29	Not enough time to do everything I need to get done. Public Records Request.	4/15/2015 10:36 AM

## 2015 NCI Education Survey

30	Competing demands on my time.	4/15/2015 10:20 AM
31	- Management who does not support my role of municipal clerk. (Please keep my survey responses confidential.) - Records management (electronic and paper) at a very old organization where staff has been in tenure for many years (very low turnover) and unwilling to change how they are filing/retaining.	4/15/2015 10:15 AM
32	Lack of initiative to learn and advance by others. Time restraints due to unforeseen issues/absences	4/15/2015 9:59 AM
33	record requests - and we don't even get that many.....	4/15/2015 9:58 AM
34	(Previous job) -Limited resources to provide the tools to keep up with technology and keep the Clerk's office up to date and moving forward. - Time and funding to attend training and workshops	4/15/2015 9:55 AM
35	Public Records request laws - public takes advantage departments do not work well with each other - need leadership	4/15/2015 9:54 AM
36	The main thing I stress about are public records request and the deadlines that have to be followed and all the legality behind them. There are so many unanswered questions and so many different scenarios that just make a person stress out.	4/15/2015 9:53 AM
37	Office Politics The CityClerk	4/15/2015 9:52 AM
38	Reporting, to so many agencies (state, federal & local) and only slotted for 16 hrs a week to do business.	4/15/2015 9:50 AM
39	Co-workers Dealing with angry customers	4/15/2015 9:47 AM
40	Not knowing the correct procedures/policies/laws/etc. And, too much work with too little time and resources to complete it.	4/15/2015 9:46 AM
41	Lack of communication from coworkers and dealing with angry citizens.	4/15/2015 9:44 AM
42	Public Records Request New OPMA requirements	4/15/2015 9:44 AM
43	Not being able to manage emotions in confrontational situations.	4/15/2015 9:43 AM
44	Public Records Requests Demands from Elected Officials	4/15/2015 9:41 AM
45	Records Management (specifically emails) and labor negotiations/issues	4/14/2015 11:20 AM
46	Public Records	4/13/2015 12:31 PM
47	Mayor and public records	4/13/2015 10:45 AM
48	For me personally, taking on a new task. And I think my stress comes from the task being new and I have to really research and take the time to understand the new job and I want to make sure I do a great job. 2. Understanding the Record Retention Schedule. I don't want to make a mistake and destroy something that should be a permanent record.	4/13/2015 9:14 AM
49	Public Records Requests Records Management	4/13/2015 8:47 AM
50	1. Managing people. 2. Transcribing and editing minutes.	4/13/2015 8:43 AM
51	Annual Report and time restraint	4/13/2015 8:07 AM
52	PRRs/Records Management	4/10/2015 3:04 PM
53	Preparing minutes	4/10/2015 1:57 PM
54	Since our city is so small, we frequently have to do tasks that are we do so infrequently that we cannot remember the procedures, requirements, etc. , i.e., "how we did it the last time." A small staff means we have to learn everyone else's job in addition to our own so that we can cover the office during absences (vacation, illness, etc.)	4/10/2015 11:08 AM
55	Our police department and not having a enough time to get everything done.	4/10/2015 10:02 AM
56	Too many things to do in a short time. Not enough help doing the daily functions.	4/10/2015 9:57 AM
57	Employees not doing their jobs Work Load	4/10/2015 9:22 AM
58	lack of council participation and interest Added mandates with no support	4/10/2015 9:22 AM
59	Public Records Requests Wearing multiple hats and having due dates on more than one thing at the same time	4/10/2015 8:56 AM



## 2015 NCI Education Survey

60	Lack of signage to properly assist customers in getting them to the right department and employees accepting gifts from residents. Also acting like policies and procedures don't adhere to them.	4/10/2015 8:13 AM
61	Crazy people that come to meetings. Not enough hours in the day to get everything done.	4/10/2015 7:58 AM
62	Keeping it all together and moving forward. Defending the actions of the city government.	4/9/2015 5:34 PM
63	Compliance drivers (PRR fine potential), time management.	4/9/2015 5:21 PM
64	The budget (lack of revenue) and managing projects.	4/9/2015 5:01 PM
65	Public records requests and handling difficult/needy citizens	4/9/2015 4:18 PM
66	Interruptions and juggling multiple priorities	4/9/2015 4:18 PM
67	Not enough time to do records management as well as I would like.	4/9/2015 4:14 PM
68	1) Records request, and 2) preparing staff reports for the council packet (do not receive reports in a timely manner from directors)	4/9/2015 4:14 PM
69	public records requests and supervision/management claims	4/9/2015 3:43 PM
70	Communication Public Records requests	4/9/2015 3:35 PM
71	Negative or bullying coworkers (not towards me, necessarily, but poor/tyraniccal behavior towards other staff members that's never called out or corrected by supervisors); continual technological breakdowns (trying to finish work, but having software, PCs, programs, DVD burners, etc. malfunction)	4/9/2015 3:27 PM
72	complex public records requests work ethic of coworkers	4/9/2015 3:20 PM
73	Public Records Requests; Staff's lack of consideration of my deadlines	4/9/2015 3:15 PM
74	Public Disclosure and records retention. Strategic planning and project management	4/9/2015 3:05 PM
75	Angry customers Interoffice conflicts	4/9/2015 3:04 PM
76	Out of control co-worker (and I avoid conflict - so I don't deal with it) Records Retention	4/9/2015 3:00 PM
77	handling multiple deadlines for multiple supervisors making sure to give 100% customer service when dealing with the same stress / different day (staying engaged)	4/9/2015 2:55 PM
78	1) Public disclosure; 2) working with varied personality types	4/9/2015 2:53 PM
79	Unfunded mandates Council dysfunction	4/9/2015 2:51 PM
80	Not enough time to get things done. Dealing with rude customers.	4/9/2015 2:45 PM
81	Records requests / Large workload	4/9/2015 2:40 PM
82	Not getting enough time to get things done. Scheduling meetings.	4/9/2015 2:38 PM
83	Public Records and getting everything done	4/9/2015 2:36 PM
84	1) Small office politics 2) Doing more with less - like everyone else!	4/9/2015 2:31 PM
85	co workers who no matter how hard you try to help just do not get it public works dept not taking the time to follow the proper process	4/9/2015 2:29 PM
86	public works public works	4/9/2015 2:24 PM
87	Elected officials and their politics and grandstanding (at times) Large records requests that require email archive searches, etc.	4/9/2015 2:20 PM
88	Coworkers who stress constantly and not enough hours in the day	4/9/2015 2:19 PM
89	Please see my long answer to an earlier question.	4/9/2015 2:18 PM
90	Public Disclosure Electronic records management	4/9/2015 2:18 PM
91	Low morale Ineffective leadership	4/9/2015 2:04 PM
92	I do not allow stress to be in my life or a part of my vocabulary so I can not name two things that stress me out.	4/9/2015 2:04 PM
93	Meeting deadlines. Out of control councilmembers.	4/9/2015 2:02 PM

## 2015 NCI Education Survey

94	Time management with all the different things I have to do and difficult requestors of public records.	4/9/2015 2:02 PM
95	My boss Workload	4/9/2015 2:02 PM
96	Staff issues that I CAN'T control (other director's staff). Not enough time to do everything on my plate.	4/9/2015 2:01 PM

2015 NCI Education Survey

**Q14 Name two topics that you would like to see classes on at conference.**

Answered: 81 Skipped: 75

#	Responses	Date
1	Prepping for the future. Reimagining how we do business and preparing for it. LEAN processes. Opportunities to see demos of vendor software applications	4/20/2015 3:42 PM
2	Managing public records & public disclosure as they relate to emerging technologies, i.e. texts, twitter, blogs, etc. Improving public processes, public engagement and input to provide a governing body relevant information as they consider and review public projects and costs.	4/20/2015 11:35 AM
3	Budgeting basics/refreshers or something on Payroll. I have never attended a class covering payroll.	4/20/2015 11:09 AM
4	Stress management working with the prosecutors office	4/20/2015 10:56 AM
5	How to report concerns to your boss without looking like a "tattle tale" Separation of duties suggestions for two person offices	4/20/2015 10:45 AM
6	Public speaking Anything finance related for those of us that work in both departments	4/20/2015 10:24 AM
7	Same as listed in Number 12	4/20/2015 10:21 AM
8	Project Management Communication strategies	4/20/2015 9:31 AM
9	Managing up communications Juggling projects and responsibilities	4/20/2015 8:30 AM
10	project management staff development resources	4/16/2015 5:22 PM
11	Conducting performance evaluations and hiring the right people. Continued training on communications, relationship building, interpersonal skills. Everyone needs this!	4/16/2015 3:54 PM
12	Advance PDR process-hands on class on exemption and the application of redactions,	4/16/2015 8:36 AM
13	1) I would love to see a colors training. The "know your color" and what it means kind of thing. 2) A topic on being a successful supervisor and/or how to deal with your supervisor	4/16/2015 8:02 AM
14	Records Management Systems	4/16/2015 7:57 AM
15	public records requests records retention & management	4/15/2015 3:12 PM
16	More in-depth Public Records class and records management	4/15/2015 2:39 PM
17	Advanced records management that are relevant to the legislative issues facing the State of WA Lawsuites affecting records management in the State of WA	4/15/2015 2:09 PM
18	Treasurer related classes and how to better handle stress...after 25 years in this line of work I feel like I'm losing my edge!	4/15/2015 2:02 PM
19	Recognizing and rewarding employees (with limited resources) Agenda Planning styles	4/15/2015 1:34 PM
20	Tips for dealing with difficult people Developing positive relationships with elected officials	4/15/2015 1:13 PM
21	Performance Evaluations and Grant Management	4/15/2015 11:48 AM
22	Facilitation Skills Collaborative Leadership	4/15/2015 11:09 AM
23	Writing evaluations and holding an evaluation meeting Bullying in the workplace - how to recognize and correct	4/15/2015 10:57 AM
24	Dealing with difficult team members/co-workers How to assist other departments in understanding the role of the Clerk and the Clerk's needs	4/15/2015 10:46 AM
25	Handling stress at work Maintaining a professional work environment (that doesn't come from an insurance provider's perspective)	4/15/2015 10:42 AM
26	PRRs & PRRs :-)	4/15/2015 10:36 AM

## 2015 NCI Education Survey

27	Records retention and performance reviews.	4/15/2015 10:20 AM
28	Prioritization and time management Delegation skill directives and direction without attitude	4/15/2015 9:59 AM
29	writing, ms office handy tools, website formats	4/15/2015 9:58 AM
30	Tools for responding to and tracking public record requests. Sharing records management tools and resources	4/15/2015 9:55 AM
31	Classes on purchasing and bidding. Classes that workshop exemptions and redactions (the difficult ones) for Public records act. Basic accounting classes	4/15/2015 9:54 AM
32	More on public records request	4/15/2015 9:53 AM
33	Small Cities/Towns, how to streamline office more.	4/15/2015 9:50 AM
34	Dealing with difficult people - Council, Members of the public, and co-workers Athenian dialogue	4/15/2015 9:47 AM
35	Open public meetings/public hearings. Records requests.	4/15/2015 9:46 AM
36	Professionalism in the workplace. Dealing with unhappy citizens.	4/15/2015 9:44 AM
37	Public Records Requests OPMA Requirements	4/15/2015 9:44 AM
38	Managing Emotions, building team moral	4/15/2015 9:43 AM
39	Public Records Act Parliamentary Procedure	4/15/2015 9:41 AM
40	Records Management solutions (without having to spend a lot of money on software/programs)	4/14/2015 11:20 AM
41	I am delving into the City Clerk duties. I think a short class or roundtable that would provide insight as to resources or mentoring for Clerks would be great. We have many entities that set regulations that affect our day to day activities. For example, we roll along and assume we are handling a project to the best of our abilities and come to find out oops, there is a new regulation that changed that. How does a Clerk, Deputy or Admin ensure he/she is getting that information to perform duties as required by law. What are the BEST connections?	4/13/2015 9:14 AM
42	Records Destruction & Documentation Records Archiving/Backup (i.e. scanning, microfiche, etc.)	4/13/2015 8:47 AM
43	1. Writing Ordinances & Resolutions 2. How other Cities are organizing their agendas and council committees and learn about consent agendas.	4/13/2015 8:43 AM
44	Annual Report	4/13/2015 8:07 AM
45	Drafting legislation; document retention/archiving policies and procedures	4/10/2015 3:04 PM
46	An in depth look at ordinances, resolutions, orders. I know we had an earlier class on this but the attorney who spoke offered many of his opinions about what should or shouldn't be reasons for ordinances, etc., and it became confusing for me since I would have to go back to my office and explained what I learned to admin staff. Shorthand/Briefhand, how do clerks write up the minutes during a meeting before they type them up; how do they take notes during the meeting. How to organize a group of former/retired clerks who are willing to work as a temp for governmental agencies that need back up at meetings to take minutes.	4/10/2015 1:57 PM
47	computer, network and email security	4/10/2015 11:08 AM
48	I haven't seen one of the classes on either the colors, animals (like Myers-Briggs) etc. lately and I always seem to learn something new that helps me to better understand my staff and how to make the relationships the best. I know not everyone does HR but I would really love to see some HR topics because it is an additional aspect of my job and I just don't have the time or resources to got to both the clerks and human resource conferences.	4/10/2015 10:02 AM
49	Dealing with difficult customers. Dealing with co-workers.	4/10/2015 9:57 AM
50	Public Records - ways to do effective and efficiently (maybe things to help simplify)	4/10/2015 8:56 AM
51	Race and Social Justice and Leadership	4/10/2015 8:13 AM
52	Succession Planning How to stay motived in a chaotic world and chaotic workplace.	4/10/2015 7:58 AM
53	How to engage the community. Examples of what worked and what didn't. How to create better intergovernmental (or interdepartmental) relations (city/county/PUD, etc) or work together to streamline processes between governments.	4/9/2015 5:34 PM
54	Teaming with City Managers to handle Council dynamics, parliamentary procedure.	4/9/2015 5:21 PM

## 2015 NCI Education Survey

55	How to prepare for an audit (SAO) and when can you tell the auditor to take a flying leap - or something to that effect. :-) Nitty Gritty on writing minutes (i.e. recording roll call, the proper format for recording a public hearing, motion, etc.)	4/9/2015 5:01 PM
56	Records Retention Schedules and Organizing Files (hard copy documents)	4/9/2015 4:18 PM
57	Skills for a new supervisor	4/9/2015 4:18 PM
58	Legalities of meetings, ordinances, etc.	4/9/2015 4:14 PM
59	1) How to Communicate importance of meeting deadlines 2) How to cut down on receiving solicitation emails	4/9/2015 4:14 PM
60	Leadership Communication	4/9/2015 3:35 PM
61	Verbal self-defense; working with difficult or manipulative colleagues	4/9/2015 3:27 PM
62	Supervision skills; creating a professional work environment	4/9/2015 3:15 PM
63	1) Project management. 2) Advanced parliamentary procedure.	4/9/2015 3:05 PM
64	It is always good to give clerks the tools to deal with angry or disruptive customers.	4/9/2015 3:04 PM
65	Records retention - that deals with County records. (most of the conference relates to cities) What to do in case of a natural disaster/fire. What check list can I get to prepare for this?	4/9/2015 3:00 PM
66	archival records / digital records - roundtable discussion style changes in professional writing style (keeping current with changes in business correspondence)	4/9/2015 2:55 PM
67	1) Small project management pertinent to projects a clerk's office might take on; 2) planning, goal setting, and problem solving for a clerk's office,	4/9/2015 2:53 PM
68	Succession planning Performance measures	4/9/2015 2:51 PM
69	Summarizing or paraphrasing lengthy audio (Our County has detailed minutes) and records request law updates	4/9/2015 2:40 PM
70	I have never added a conference because it is hard to get time away from work.	4/9/2015 2:38 PM
71	New laws in public records and if new ideas for time management.	4/9/2015 2:36 PM
72	HR Basics of Supervising or Dept Head Training	4/9/2015 2:31 PM
73	HR issues on how to remove/ discipline a employee legally More on the health care changes that are upcoming payroll do and donts	4/9/2015 2:29 PM
74	Stress Reduction or Wellness for the Clerk Dealing with Difficult People	4/9/2015 2:19 PM
75	Please see my long answer to an earlier question.	4/9/2015 2:18 PM
76	Records Management Professional Development	4/9/2015 2:18 PM
77	Raising morale, how to team-build Importance of communication	4/9/2015 2:04 PM
78	The nuts and bolts, basic duties, deadlines, publications.	4/9/2015 2:02 PM
79	Public Records, Archives.	4/9/2015 2:02 PM
80	Bullying - how to present information to leaders so that they understand how detrimental it is to an organization. How to stay energized when you feel buried.	4/9/2015 2:01 PM
81	Developing training for newly elected and appointed officials or something of that nature.	4/9/2015 2:00 PM

## Q15 Name one topic would you like to see presented at an advanced academy.

Answered: 60 Skipped: 96

#	Responses	Date
1	Keeping oneself motivated - open to new ideas, horizons, methods of accomplishing a task.	4/20/2015 11:35 AM
2	I don't know	4/20/2015 10:45 AM
3	Anything confidence building	4/20/2015 10:24 AM
4	Clerk's role in recording Public Hearing and Quasi-judicial matters	4/20/2015 10:21 AM
5	Project management again.	4/20/2015 8:30 AM
6	Interpersonal/Communication training resources for MC staff	4/16/2015 5:22 PM
7	It's been awhile since we had persuasive public speaking and I wouldn't mind having it again.	4/16/2015 3:54 PM
8	How to advance in municipal government.	4/16/2015 8:36 AM
9	1) Supervisor training.	4/16/2015 8:02 AM
10	?	4/16/2015 7:57 AM
11	public records requests	4/15/2015 3:12 PM
12	I don't know.	4/15/2015 2:39 PM
13	Protocol for City Council Members	4/15/2015 2:09 PM
14	Dealing with difficult elected officials and promoting your city to the public to keep it positive during difficult times	4/15/2015 1:34 PM
15	Crucial Confrontations	4/15/2015 1:13 PM
16	Harmoniously working with Elected Officials, and helping them to see the bigger picture, as well as helping them to see their role in government.	4/15/2015 11:48 AM
17	Project Management	4/15/2015 11:09 AM
18	HR related topics	4/15/2015 10:57 AM
19	Clear understanding of capturing social media for records management	4/15/2015 10:46 AM
20	Building your professional brand	4/15/2015 10:42 AM
21	Holding Difficult Conversations.	4/15/2015 10:20 AM
22	Transitioning from worker bee to supervisor with tact and respect	4/15/2015 9:59 AM
23	OPMA - customer service	4/15/2015 9:58 AM
24	I enjoy and also get a lot out of the "inspirational" type speakers and topics that are usually presenting the academy. It is a great way to kick off the conference and I always come home and back to work with a lot of take-aways.	4/15/2015 9:55 AM
25	Nothing on leadership or speaking - those have been way over done. Perhaps something on writing and grammar. Something that a speaker can teach us - not speak at us about lofty leadership ideals. it just doesn't work.	4/15/2015 9:54 AM
26	N/A	4/15/2015 9:50 AM
27	Writing clear & concise ordinances/resolutions	4/15/2015 9:47 AM
28	Anything to do with professionalism and creating a positive work environment.	4/15/2015 9:44 AM
29	Supervisor skills	4/15/2015 9:44 AM

## 2015 NCI Education Survey

30	grammar and writing, managing emotions.	4/15/2015 9:43 AM
31	Election Tasks	4/15/2015 9:41 AM
32	Leadership Skills - I know this has been done but finding new presenters and ways to build those skills are always valuable.	4/13/2015 9:14 AM
33	Human Resources	4/13/2015 8:47 AM
34	How to write minutes. Taking a 1-2 hour meeting and pairing it down to a 2-3 page document.	4/13/2015 8:43 AM
35	Parliamentary Procedure	4/10/2015 3:04 PM
36	Any of the subjects above.	4/10/2015 1:57 PM
37	Managing up is always a good one.	4/10/2015 10:02 AM
38	Dealing with co-workers.	4/10/2015 9:57 AM
39	Some type of stress reliever course or humorous for instance like the chicken lips guys	4/10/2015 8:56 AM
40	Race and Social Justice	4/10/2015 8:13 AM
41	How to be professional yet still have fun at work.	4/10/2015 7:58 AM
42	Project Management-Determining and tracking benchmarks and budget on various projects.	4/9/2015 5:34 PM
43	Mastering Adobe Acrobat to include creating fillable forms.	4/9/2015 5:01 PM
44	I cannot come up with a topic	4/9/2015 4:18 PM
45	Leadership	4/9/2015 3:35 PM
46	Organizational psychology	4/9/2015 3:27 PM
47	Project Management skills	4/9/2015 3:15 PM
48	1) Project management	4/9/2015 3:05 PM
49	How to successfully interact with Elected Officials	4/9/2015 3:00 PM
50	professional development	4/9/2015 2:55 PM
51	Leadership vs. Management	4/9/2015 2:53 PM
52	Winning arguments	4/9/2015 2:51 PM
53	Athenian dialogue	4/9/2015 2:40 PM
54	I have never attended the advanced academy because it is hard to get time away from work.	4/9/2015 2:38 PM
55	Please see my long answer to an earlier question.	4/9/2015 2:18 PM
56	Professional development & management roles	4/9/2015 2:18 PM
57	Dealing with out of control councilmembers.	4/9/2015 2:02 PM
58	Inspiration/New Ways to do my Job after having been employed for a long time in the same position.	4/9/2015 2:02 PM
59	Leadership development	4/9/2015 2:02 PM
60	Figuring out what feeds you at work so you stay motivated and fresh.	4/9/2015 2:01 PM

**Q16 Please provide the names of any speakers or instructors that you have seen at other conferences or trainings that you think would be great for your conference, advanced academy or PD IV.**

Answered: 38 Skipped: 118

#	Responses	Date
1	I don't remember	4/20/2015 10:45 AM
2	Kyle Stannert	4/20/2015 10:21 AM
3	I would like to see Sheila Sheinberg do another class. I attended the 2014 Fall Academy in Ellensburg, WA, where Sheila spoke. I like her style of teaching.	4/20/2015 9:40 AM
4	Patrick Ibarra	4/20/2015 8:30 AM
5	Loved Dr. Michael Shadow and would love to bring him back. Lee Williams in Tacoma was fun and offered a lot of other topics we could use. He's also inexpensive.	4/16/2015 3:54 PM
6	Anne MacFarland	4/16/2015 8:36 AM
7	Jan Dwyer Bang, I enjoyed Patrick Ibarra, I LOVE Marilyn McCabe Love.	4/16/2015 8:02 AM
8	?	4/16/2015 7:57 AM
9	None.	4/15/2015 2:39 PM
10	None, sorry...	4/15/2015 11:48 AM
11	Gordon Graham - Leadership Training	4/15/2015 10:57 AM
12	Brian Mark Seaward	4/15/2015 10:42 AM
13	Connie Poulsen, Mike Bolasina, Ramsey Rammerman.	4/15/2015 10:20 AM
14	Chicken Lips, Margery Price, Scott Marquis	4/15/2015 9:59 AM
15	butkus consulting, bob jean consulting	4/15/2015 9:58 AM
16	Jeff Myers is one of the best speakers I've had the opportunity to learn from. Cheryl Beyer, Attorney at Weed, Graafstra and Benson is also a great speaker and teacher on public records requests. She also has a ton of experience. Kyle Stannert, clerk of City of Bellevue is also very interactive and interesting. Not boring.	4/15/2015 9:54 AM
17	N/A	4/15/2015 9:50 AM
18	Patrick Ibarra	4/15/2015 9:47 AM
19	I like the records training we received last year	4/15/2015 9:43 AM
20	Patrick Ibarra	4/15/2015 9:41 AM
21	Michael Buschmohle - Applause Associates Marilyn McCabe-Love Jim Webber	4/14/2015 11:20 AM
22	Marilyn Love	4/13/2015 4:20 PM
23	Love Robin Rose! I think she gives a scientific reason on how the brain works, how to handle stress and when I had the opportunity to hear her at conference, it just made so much sense. I use her techniques often.	4/13/2015 9:14 AM
24	John Morgan, Chinook Institute (out of Keizer);	4/10/2015 1:57 PM
25	David Rabiner, Deb Sofield both great speakers and great presentations.	4/10/2015 10:02 AM



## 2015 NCI Education Survey

26	<p>All of these instructors were at the last IIMC Conference in Milwaukee, WI which I attended: Brian Kathenes Course: Negotiating Secrets Every Municipal Clerk Needs to Know Good: Overall I liked Brian as an instructor. He was very down to earth and welcomed questions. He really enjoyed teaching this course. Bad: He had a couple of mixed up slides in his presentation Faith Wood Course: Cutting Through the Social Media Muck Good: Was a good instructor Bad: Only touched a little on each of the items. I would of loved a course that focused more on items like Twitter, Facebook and the good and bad of each – my opinion Scott Boggs Course: Cloud Computing and Virtualization in the Public Service Environment Good: Funny and kept your attention Bad: A real computer “nerd” talked a lot in computer/technology terms Marcia Clifford Course: Making Your Code More Enforceable in an Evolving Digital Government Good: Was knowledgeable on the topic for a new clerk or someone new to codes Bad: Knew everything that she was already teaching having just gone through a major code update ourselves – class did not teach me anything new. Connie M. Deford, CMC Course: Robert’s Rules in the Clerk’s World Good: I loved this instructor! She taught me several things I had no idea about. Would definitely love her to come teach a course at our conference. Bad: Nothing bad to say about her. She is very easy to understand and is more in depth and speaks in a better manner than Anne MacFarlane = my opinion. Sarah Gibson Course: Writing for Impact Good: I learned new grammar rules and things that have changed recently. She was intergentic and fun to listen and learn from. I would definitely recommend Sarah for any future conferences as well. Bad: Had documents for sale but only had a limited supply – though I did manage to be one of the lucky purchasers.</p>	4/10/2015 8:56 AM
27	Edge Consulting and their "RESPECT" Training also the City of Seattle's Race and Social Justice training	4/10/2015 8:13 AM
28	Sara Di Vittorio, Deputy Prosecuting Attorney at Snohomish County. She does incredible training regarding public records requests.	4/10/2015 7:58 AM
29	Monica Dixon, PhD She lives in Sequim and has presented for Olympic Region Municipal Clerks Association.	4/9/2015 5:01 PM
30	David Rabiner (Rabiner Resources) www.rabiner.com - Really enjoyed attending one of his presentations.	4/9/2015 4:18 PM
31	Leadership	4/9/2015 3:35 PM
32	I don't have anyone at this time but if I get some recommendations, I will forward the information.	4/9/2015 2:55 PM
33	Connie Poulsen	4/9/2015 2:53 PM
34	Connie Paulsen	4/9/2015 2:40 PM
35	n/a	4/9/2015 2:38 PM
36	PD IV - Communicating with Tact, Diplomacy & Professionalism or something along those lines	4/9/2015 2:31 PM
37	Wendy Fraser - Fraser Consulting - <a href="http://www.wendyf.com/">http://www.wendyf.com/</a>	4/9/2015 2:18 PM
38	<p>Kyle Stannert, City of Bellevue (records management, professional development &amp; education) Sara di Vittorio, Snohomish County Prosecuting Atty (public disclosure) Carolyn McManus, Swedish Medical Center Rehabilitation Services (Mindfulness Based Stress Reduction - saw her at an AWC Wellness event a couple of years ago, a bit different but interesting and I kept my notes on this one!)</p>	4/9/2015 2:18 PM



- First Quarter Report (June Mtg)
- Second Quarter Report (Oct Mtg)
- Third Quarter Report (Jan Mtg)
- Year-End Report (Mar Mtg)

**TO:** WMCA President and Executive Committee

**FROM:** Debbie Jermann, Co-Chair and EC Liaison

**COMMITTEE:** Fundraising

**DATE:** June 1, 2015

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**SUMMARY OF ACTIVITIES:**

We would like to recommend a new fundraising idea for this year's annual conference: The name is "Heads or Tails". We sell tickets with the winner getting half of the cash prize (similar to the 50/50 Raffle we do at Fall Academy). Everyone who has bought tickets is asked to stand up and either touch their head for "heads" or grab their backside for "tails". We flip the coin and everyone who wins the flip remains standing. We continue until there is only one person remaining. This could be done at anytime during the conference, but might be a fun way to end the annual business meeting.

We recommend continuing to offer a cash prize for the grand raffle, maintaining the prize levels at \$1000, \$750, and \$500; and retain the number of tickets to be sold at 1,500 at \$5.00/ticket. We also would like EC approval to conduct the live and silent auctions at the 2016 Annual Conference.

We recommend continuation of the \$1.00 Raffle to be drawn at the conclusion of the Friday a.m. session. No other items (i.e. smaller items donated for silent auction) would be included for the dollar raffle.

The committee also seeks approval to conduct the 50/50 raffles at the Fall Academy Sessions. This is a very easy fundraiser, with minimal interruption to the sessions.

I was also presented with an idea for an Executive Committee Fundraiser: Karaoke Fundraiser - we could rent the equipment for the Wednesday evening event/live auction; attendees would bid on EC members (by purchasing tickets and putting them in a jar with the Board Member's name; the member with the most tickets is the singer. Of course, participation would be voluntary by the EC.

Finally, we will be conducting the contest to design a T-Shirt that would be sold in the WMCA Store at conference, and also available for mail orders after conference. I will provide details of the contest at the June 11 meeting.

**ACTION REQUESTED:**  YES  NO

**RECOMMENDATION:** Provide approval to conduct the silent and live auctions at the 2016 Annual Conference; provide approval to conduct the dollar raffle and expenditure of \$100 prize; approval to conduct the Grand Raffle (\$5.00/ticket or 5 for \$20; prizes of \$500, \$750, \$1,000 to be drawn at banquet; 1,500 tickets to be sold); approval to conduct the 50/50 raffle at the Fall Academy Session; consider the Executive Committee participating in a fundraiser (i.e. Karaoke Raffle); approval to conduct the Heads or Tails fundraiser during the 2016 Annual Conference; and approval to conduct a contest for a T-Shirt design - contest guidelines to be provided at the meeting.

**ALTERNATIVES:**

**FISCAL IMPACT:** To Be Determined

Revenues:	Budgeted Amount	Revenues Generated
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
Expenditures:	Budgeted Amount	Amount encumbered & expended
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ 0 _____



- First Quarter Report (June Mtg)
- Second Quarter Report (Oct Mtg)
- Third Quarter Report (Jan Mtg)
- Year-End Report (Mar Mtg)

**TO:** WMCA President and Executive Committee

**FROM:** Sandy Paul MMC, Chair

**COMMITTEE:** Legislative Committee

**DATE:** June 1, 2015

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**SUMMARY OF ACTIVITIES:**

In 2014-2015 the WMCA Legislative Committee monitored work being considered and/or debated in cities and the WA State Legislature. Some of those include:

Exemption parent and guardian records for children in parks programs, HB 1554, passed unanimously out of the Senate and was signed by Governor Inslee. Our own Carol Etgen, aided by Doug Levy, and supported by the Kent City Attorneys, authored the bill.

Cost recovery for public information requests for commercial purposes remains a non-starter, as were other public disclosure issues this session in the Legislature.

With the Legislature busy working to resolve funding for education and transportation, and how to allocate additional sales tax and cannabis revenues, Clerks were very fortunate to make a small gain.

At the time of this report, the 2015 Legislature had not adjourned and haggling on key components of the biennial state budget remained in the balance. Any gains for our cities will be a gain for all Clerks.

As a result of such a late adjournment, the committee continues to hope for and work on a tour of the Legislative building and view, first hand, how our laws get made.

**ACTION REQUESTED:**  YES  NO

**RECOMMENDATION:**

**ALTERNATIVES:**

**FISCAL IMPACT:** none



**TO:** WMCA President and Executive Committee

**FROM:** Elizabeth M. Adkisson Smoot, Chair  
Darla Reese, Co-Chair

**DATE:** May 29, 2015

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**2015-16 MEMBERSHIP UPDATE:**

We have a total of NINETEEN (19) new WMCA members:

<b>Chelsea Anthony</b>	City of Montesano	<b>Tami Justice</b>	City of Rainier
<b>Carlye Baity</b>	Chelan County	<b>Pam Keyes</b>	City of Entiat
<b>Stephani Bowden</b>	Town of Coulee Dam	<b>Amber Long</b>	City of Port Townsend
<b>Judy Brown</b>	City of Bridgeport	<b>Tulika Makharia</b>	City of Puyallup
<b>Pamela D. Brown</b>	City of Lynden	<b>Linda Medley</b>	Pierce County Council
<b>Chris Chau</b>	City of Renton	<b>Kathy Pugh</b>	City of Lake Stevens
<b>Susan Driver</b>	City of Entiat	<b>Kym Smith</b>	City of North Bend
<b>Susan Haigh</b>	City of Bonney Lake	<b>Erika Sullivan</b>	City of Puyallup
<b>Kathy Horton</b>	City of Milton	<b>Kyle Welty</b>	City of Fife
<b>Beth Johnson</b>	Wahkiakum County		

As of May 29, 2015, the Washington Municipal Clerks Association is comprised of **280 members**; 271 active members, 1 associate member and 8 honorary members. The 2015-2016 membership renewal target date is May 31, 2015.

**WMCA CONFERENCE FIRST TIME ATTENDEES EVENTS/FEEDBACK**

There were 25 'First Time Attendees' at the 2015 WMCA Annual Conference. In an effort to gather information to improve upon the two first timer events held (Tuesday night meet and greet and Wednesday morning breakfast) and the 'Conference Buddies' concept, Membership Committee members and First Time Attendees were asked to provide feedback to the following questions

- Conference buddies – Did you enjoy having a conference buddy? Do you have any suggestions for the Membership Committee regarding this concept?
- First Time Attendee Meet & Greet (prior to the President's reception) – Did you have a chance to attend? How did you like the format of the event? Any suggestions for improving this event?

- First Time Attendees Breakfast -- Did you have a chance to attend? How did you like the format of the event (seating/agenda/etc.)? Any suggestions for improving this event?

Please see the attachment for responses received. Feedback received regarding the Breakfast and the 'Conference Buddies' concept is largely positive. The feedback on the Meet and Greet is mixed. Also included are comments received on the conference in general; and some suggestions for future events. The Membership Committee will utilize this information to assist in the planning of the 2015 events; along with President Burke. Any additional feedback/direction in this regard from the Executive Committee is welcome!

## **MEMBERSHIP COMMITTEE - SUB-COMMITTEES UPDATE**

The 2015-16 Membership Committee members have been asked to volunteer for the following positions/sub-committees:

- welcoming sub-committee – for welcoming new members to WMCA and to follow-up with these individuals a few times over the course of the year; TWO members of the committee are to be selected to lead the welcome effort (which is in addition to the MC Chair sending out the official new member packet, welcome letter, and noticing new members in the newsletter) – *volunteers: Peri Galucci, Scott Passey, and Jill Boltz;*
- recruitment sub-committee – recruiting new members by researching agencies in Washington, and reaching out to those persons that are not yet members; TWO members of the committee are to be selected to lead the recruitment effort – *volunteers: Trisha Summers, and Cindy Marbut;*
- elections sub-committee – to facilitate general and special elections; an Elections Officer and Elections Officer Assistant are to be selected – *volunteers: Leana Johnson, White Salmon, Elections Officer, and Ali Spietz, Mercer Island, Elections Officer Assistant;*
- Partnership Program sub-committee – to promote and facilitate the Partnership Program; TWO members of the committee shall be appointed to facilitate the program – *volunteers: Keri MacDonald, Trisha Summers, and Megan Gregor;* and
- conference first time attendees events subcommittee –for planning/facilitation of conference events for new attendees (possibly including a meet and greet with the President, a breakfast, and 'conference buddies'). *The entire Membership Committee will assist with the planning/preparation of these items; and all those MC members attending the annual conference will be expected to attend and assist with these items at the conference.*

Ms. Smoot will oversee the welcoming and elections sub-committees and Ms. Reese will oversee the recruitment and Partnership Program subcommittees. Updates on sub-committee activities will be included in the quarterly reports to the President and Executive Committee. Any additional feedback/questions in this regard from the Executive Committee is welcome!

## **PARTNERSHIP PROGRAM SUB-COMMITTEE UPDATE**

Two Partnership Program requests have been received; Ms. Reese and her sub-committee members will be working on selecting appropriate partners for the requesting clerks, per the program guidelines.

## **MISCELLANEOUS/SPECIAL PROJECTS**

In addition to the operating procedures of the Membership Committee, two additional projects have come forward, which the Committee will be looking into:

- 1) A review of Membership Committee Procedures/Description/Bylaws – each appropriate sub-committee will review the related procedures/etc. to bring them up-to-date with current practice; and make any proposed amendments to the EC or Bylaws Committee, as appropriate.
- 2) First Time Attendees Events at Fall Academy – ideas for the EC's consideration include:
  - A 'mini-version' of conference buddies for those who are first attending a Fall Academy; or the MC Chair/appointee can act as CB for all FTAs (if a small number).
  - Meet and greet/event at the hotel the night before academy for those staying overnight (budget?).
  - Mini-academy survival kit (budget?).
  - Registration form/page – in order to determine who may be a 'First Time Attendee' at the Fall Conference, the registration form/page will need to call this out specifically (box to check/etc?).

Any direction/feedback/questions regarding these two projects from the Executive Committee is welcome!

**ACTION REQUESTED:**  YES  NO

**RECOMMENDATION:** N/A

**ALTERNATIVES:** N/A

**FISCAL IMPACT:** NONE

**KEY – First Time Attendee (FTA); Membership Committee member (MC)****CONFERENCE BUDDIES**

I thought it was a great concept and very helpful to help navigate the conference. (FTA)

Yes, yes, and yes to your questions below!!! That was the first conference that I have ever been to that made the “first timers” feel so welcome upon arrival. (at least for me it did) It is usually the dreaded arrival that is so awkward, however, not at the WMCA Conference! You all did a great job, and were very helpful and accommodating. (FTA)

I was able to attend Wednesday and Thursday. My conference buddy, Randy Hinchcliff of Waitsburg was a great help, he was able to answer most of my questions. (FTA)

It was nice having a conference buddy, because it made me feel like I already knew someone. (FTA)

Having a conference buddy who was brand new, just like me, was great to meet up with. I didn't necessarily feel the need to also have a long-time attendee as our mentor. Just having someone else in my shoes to connect with was enough to give me the confidence to reach out to all the others. (FTA)

As a first time attendee, I felt that the breakfast and having a conference buddy were fantastic ideas. Both the event and the conference buddy system were organized incredibly well. (FTA)

I appreciated having someone I could communicate with directly prior to the conference. I think one thing that may help is to assign conference buddies and reach out to the first timers further in advance. Maybe try and get to know them a little so that when they arrive you know a bit about them and they know a bit about you....5 questions maybe?! May help break the ice a bit at the Meet & Greet. (FTA)

I didn't spend much time with my buddy – just a quick “nice to meet you.” I didn't feel neglected or anything, but I didn't need any special assistance. Also, I already knew quite a few of the clerks from Professional Development and other venues, so I wasn't a stranger. It's a nice idea for new clerks who don't have any contacts in the organization. (FTA)

I think all of the events at this year's conference were well executed and helpful. I think conference buddies are worthwhile, especially for getting new attendees to participate in activities they may otherwise be too shy to attend. (MC)

My experience was that the buddy system works, but not for very long. The newbies quickly ‘clump’ with each other and begin there forming their own networks. Let's keep doing it, because we send the message that ‘yes, we DO care if you are new and comfortable’ because we were there once and we didn't have that support. Except maybe the less long-term members did have that opportunity. (MC)



I had a conference buddy the year before. It was ok, but seemed a little strained in that once you give them the 5 minute run down about conference details, there really isn't much more to say without feeling like you are grilling them to keep talking. I did not hear anything back after other than a pleasant reply to an email I sent to thank them for coming and offering any other assistance. (MC)

I thought it went much better this year than the previous year. I was glad to see we had a good attendance at the first timer events. For me it helped that I knew my buddies beforehand, so talking to them and helping them navigate the conference was a little easier. If I was still on the membership committee I would do it again. I didn't mind having the buddy and I think it is a nice thing to offer to the first time attendees. I also think the service goes a long way to helping them feel welcomed at the conference. (MC)

I still like the conference buddy concept and believe it is worth doing again. I didn't receive a lot of feedback, but both buddies thanked me for contacting them. (MC)

I was not a conference buddy. It's a good idea. I enjoyed being a conference buddy before I was Treasurer. It is worth doing again. (MC)

### **FIRST TIME ATTENDEE MEET & GREET**

I did attend and appreciated the intention of the event. It was a little bit intimidating at first, but a good way to meet the committee members and conference buddy. (FTA)

I did attend the "First Time Attendee Meet & Greet". I enjoyed talking with some of the other gals that were also there for the first time also. It was also nice to meet some of the committee members, and being able to put a face with names from emails. Chairs would have been nice, even though I know that there probably weren't chairs at this event, so that people would move around and mingle. (FTA)

I attended the meet & greet and think this could be combined with the President's reception. (FTA)

The only format issue I had was with the Meet and Greet. I was confused as to why it wasn't held in the same place as the President's reception, where there were chairs and places to sit and talk. There wasn't very much time to get to know everybody and as just an awkward person in general, I felt extremely awkward standing at a table trying to get to meet people. (FTA)

I think this was a great opportunity to meet everyone and put names to faces for the first time. Very informal and laid back, it was a good way for all the newbies to meet each other and make connections. (FTA)

I was not able to attend. (FTA)

Both the meet and greet and the breakfast went well, although the new attendee turnout seemed low for the meet and greet. I'm not sure the reasoning for that. I had positive feedback from my conference buddies about the gift bags. (MC)

I loved the format of the meet and greet for first timers and the new member breakfast. Longtime members could get an up-close look and who they all were so when we say them later we could speak to them and check on how they were doing or if they needed anything. (MC)

I wasn't able to attend the meet and greet. (MC)

I attended the Meet & Greet. (It is mandatory for the EC.) It was definitely better than the prior year. The format was good. The reception line didn't work very well as EC was not all there when the event started. Not certain if it should be continued or not. I like the concept but it might be a little intimidating for newbies. Or not. (MC)

### **FIRST TIME ATTENDEES BREAKFAST**

This was really a nice way to welcome new people. The goody bags were awesome and so appreciated. The only thing I would improve is maybe not have so many facts that would only be known to the committee members, or long-time clerks/members of WMCA, for the trivia game. (FTA)

I did attend the "First Time Attendees Breakfast". This event was nice. And once again, it was nice to be able to put faces with more people from emails. (FTA)

The breakfast was a very nice touch! (FTA)

As a first time attendee, I felt that the breakfast and having a conference buddy were fantastic ideas. Both the event and the conference buddy system were organized incredibly well. (FTA)

I enjoyed this! Very welcoming and almost pep rally-ish. It was another good opportunity to put names with faces. I'd suggest possibly doing a seating chart by either region or population size. That way they can make connections with people in the same area or working for similar size entities. (FTA)

I thought the First Time Attendees breakfast was just fine, I like that you assigned seats so that forced me out of my comfort zone of sitting with people that I already know. The trivia game was a good ice breaker, conversation starter so that was a good idea. I really enjoyed the guest speakers that were there. (FTA)

Our table was very quiet. Perhaps an ice breaker type game at each table that is a little more engaging than just introducing yourself. (FTA)

Both the meet and greet and the breakfast went well, although the new attendee turnout seemed low for the meet and greet. I'm not sure the reasoning for that. I had positive feedback from my conference buddies about the gift bags. (MC)

I loved the format of the meet and greet for first timers and the new member breakfast. Longtime members could get an up-close look and who they all were so when we say them later we could speak to them and check on how they were doing or if they needed anything. (MC)

Great event and you are excellent as the casual narrator. Keep doing what you do!! (MC)

I did attend the breakfast. I thought the format was great. The game was a fun idea! (MC)

I attended the breakfast. (It is mandatory for the EC.)The format was good and the game was fun. I liked the WMCA info combined with the events. The gift bags were a hit and the lack of “others” was a good move. (MC)

### **GENERAL CONFERENCE FEEDBACK**

At the next conference, is it possible to have a large map in the reception area or one of the rooms? You meet so many people from different little towns throughout the State, it would be fun to get a visual of where they are located. (FTA)

I wasn't able to attend the Meet and Greet or First Time Attendees Breakfast, but did attend everything that I could that I knew would benefit me in my new position with the City of Prescott. Wish I could have attended more but it was not possible this year with my significant other in the middle of his chemo and my responsibilities at home and at work. Thought it was very well organized, had a great time meeting new people and learning new things. Look forward to next years conference!! (FTA)

The conference was good. The mingling part was hard for me, because I'm not out going, but that is one area these conference help with. (FTA)

Overall, the entire conference was awesome, and I appreciate the follow-up e-mails that have been sent to me from both my conference buddy and conference organizers. Thank you! (FTA)

I thoroughly enjoyed chatting with the other clerks and getting a feel for how other municipalities handle things. The magician was such a great inspirational speaker with tons of useful points and entertaining games. A few things that I did not enjoy, but I'm sure is necessary, were the WMCA business meetings that we sat through. They were a little painful. Thanks for all that you do. All in all, it was a great conference! (FTA)

**I thought the overall event and attention to detail at the conference was just amazing and I marveled how you all pulled it off at a distance.** Well done. (FTA)

The name badges being different is a great idea! (MC)

And maybe next year there will be a few other retired members there to send an even stronger message that 'Clerks matter'! I'm trying to get a few of them on-board, but as summer approaches, I find them to be busy travelling! (MC)

## **CONFERENCE IDEAS**

- Registration form/page -- call more attention to the area for checking that you are a FTA... we had quite a few that showed up to events that were not registered as FTAs (and did not have items prepared for their inclusion). Perhaps a more pronounced box to check? Or a different registration form?
- FTAs – send email out to entire group, with listing of all FTAs, give them the opportunity to reach out and connect with other FTAs.
- Conference Buddies – pair two first time attendees, and then assign one MC buddy as a touchstone.
- Conference Buddies – assign earlier (?); and have each fill out and share a brief survey (5 questions).
- Meet & Greet – same room as President's reception; or right next door?? Refreshments/appetizers?
- Meet & Greet – more formalized format? Some sort of meet & greet game?
- Meet & Greet 'speed dating' – have set cocktail tables, with EC/MC members assigned to each, and have FTAs rotate through each table; or vice versa (allow 2-3 minutes at each table, enough for a quick meet and greet with each E/MC member)
- Breakfast – keep trivia or utilize another table ice breaker/competition event
- Breakfast – presentations from WMCA President, NCI Director, and Conference Planning Chair (helpful tips; example: vendor cards)
- Breakfast – seating chart by region/population



- First Quarter Report (June Meeting)
- Second Quarter Report (Oct Meeting)
- Third Quarter Report (Jan Meeting)
- Year-End Report (Mar Meeting)

**TO:** WMCA President and Executive Committee

**FROM:** Melissa Collins, Chair

**COMMITTEE:** Scholarship Committee

**DATE:** June 1, 2015

**SUMMARY OF ACTIVITIES:**

One PD I scholarship, three PD II scholarships, one PD III scholarships were awarded during the second round of scholarships for a total of \$3,500.00. Two Marge Price scholarships were also awarded for a total of \$1,050.00.

I received many positive, appreciative comments from those that were able to attend the 2015 Annual Conference.

The next scholarship opportunity is the Marge Price scholarship for Fall Academy.

**ACTION REQUESTED:**  YES  NO

**RECOMMENDATION:** Information only.

**ALTERNATIVES:** N/A

**FISCAL IMPACT:** N/A

Revenues:	Budgeted Amount	Revenues Generated
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
<b>Expenditures:</b>	<b>Budgeted Amount</b>	<b>Amount encumbered &amp; expended</b>
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____



- First Quarter Report (June Mtg)
- Second Quarter Report (Oct Mtg)
- Third Quarter Report (Jan Mtg)
- Year-End Report (Mar Mtg)

**TO:** WMCA President and Executive Committee

**FROM:** Bobbie Usselman, MMC

**COMMITTEE:** Webmaster

**DATE:** June 1, 2015

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**SUMMARY OF ACTIVITIES:** WildApricot, WMCA's website provider, has made changes to its pricing plans, and has advised there will be an increase in the cost of website fees. They had not raised fees for 9 years.

We currently have a Professional Plan at \$100 a month. We get a 10% discount for paying in a lump sum and currently pay \$1,080. The new price for the Professional Plan will be \$130 per month (\$1,560 per year), or \$1,404 with the 10% discount for paying in a lump sum. We previously changed to the Professional plan because we needed more storage. The new plans all offer 2GB storage.

I recommend in November 2015 when we renew for the next year that we change our plan back to the Community Plan at a rate of \$70 per month. This provides 2GB storage and allows 500 members. See attached pricing sheet.

Because our renewal date is in November, if we changed to the Community plan now, we would not receive a refund of our payment made in November and would essentially lose money.

**ACTION REQUESTED:**  YES  NO

**RECOMMENDATION:** I request EC approval in November 2015 to change our plan back to the Community Plan at a rate of \$70 per month. This provides 2GB storage, allows 500 members, and saves WMCA approximately \$800 per year. See attached pricing sheet.

**ALTERNATIVES:**

**FISCAL IMPACT:** Instead of paying the annual fee of \$1,560 for the Professional plan, by changing to the Community plan, the annual fee would be \$840, less 10% lump sum annual payment of \$756, saving approximately \$800 annually.

Revenues:	Budgeted Amount	Revenues Generated
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

Expenditures:	Budgeted Amount	Amount encumbered & expended
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

Pricing Plan	Members & Contacts	Old Price	New Price	Added Functionality	More Storage	New Admin Limits
Group	250	\$25	\$40	Access to all functionality from Community and higher accounts except recurring payments.  New features: <ul style="list-style-type: none"> <li>• Discounts for events and membership applications</li> <li>• Capping event registrations</li> <li>• Access control for administrators</li> </ul>	Increased from 200MB to 2GB	5
Community	500	\$50	\$70	None	Increased from 400MB to 2GB	10
Professional	2,000	\$100	\$130	None	Increased from 800MB to 2GB	25
Network*	5,000	\$200	\$240	None	Increased from 1.6GB to 2GB	Unlimited
Enterprise	15,000	\$200	\$270	None	Increased from 1.6GB to 2GB	Unlimited



## Debbie Burke

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**From:** Paula Swisher [pswisher@ci.brier.wa.us]  
**Sent:** Monday, May 04, 2015 10:15 AM  
**To:** Dee Roberts; 'Bobbie Usselman'; 'Christy O'Flaherty'; 'Debbie Burke'; 'Diana Quinn'; 'Gina Anderson'; 'Jill Boltz'; 'Randy Hinchliffe'; 'Scott Passey'; 'Shannon Corin'; 'Virginia Olsen'  
**Subject:** RE: Scholarship Apps PD - Round 2

I second approval.

On a side note, when I emailed back my rating sheets to Melissa I let her know that I was really impressed with this group of applications. They had some fabulous answers and they answered the question. This was a nice batch to read through.

*Best regards,  
 Paula Swisher, CMC  
 City Clerk-Treasurer  
 City of Brier  
 425-775-5440*

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**From:** Dee Roberts [<mailto:dee.roberts@southbend-wa.gov>]  
**Sent:** Monday, May 04, 2015 9:02 AM  
**To:** 'Bobbie Usselman'; 'Christy O'Flaherty'; 'Debbie Burke'; 'Diana Quinn'; 'Gina Anderson'; 'Jill Boltz'; Paula Swisher; 'Randy Hinchliffe'; 'Scott Passey'; 'Shannon Corin'; 'Virginia Olsen'  
**Subject:** FW: Scholarship Apps PD - Round 2

Oh my goodness! I didn't pay any attention when I got this on Friday and made the fatal assumption that this was sent to you Debbie and to me! ☹ I am so sorry!

Here are the scholarships for review and approval. I respectfully request the EC review and approval all applications at their earliest convenience.

Dee

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**From:** Collins, Melissa [<mailto:MACollins@SNOPUD.com>]  
**Sent:** Friday, May 01, 2015 2:38 PM  
**To:** 'Dee Roberts'  
**Subject:** Scholarship Apps PD - Round 2

Happy Friday!

Here are the applications for PD round 2, and the scholarship applications.

Let me know if you need anything else. I will wait to hear if they are approved then I will get their letters out.

Have a good weekend!! Miss you ☺  
 M

**Melissa A. Collins, CMC** | Senior Deputy Clerk of the Board  
 Public Utility District No. 1 of Snohomish County  
 Tel: (425) 783-8616 | Fax: (425) 783-8335  
[macollins@snopud.com](mailto:macollins@snopud.com) | [www.snopud.com](http://www.snopud.com)

## Debbie Burke

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**From:** Dee Roberts [dee.roberts@southbend-wa.gov]  
**Sent:** Wednesday, May 13, 2015 1:51 PM  
**To:** 'Shannon Corin'; 'gina anderson'; 'Bobbie Usselman'; 'Christy O'Flaherty'; Debbie Burke; debbieJ@c-tran.org; 'Diana Quinn'; jboltz@kitsaptransit.org; kay.kammer@cityofbg.org; 'Paula Swisher'; 'Virginia Olsen'  
**Subject:** RE: PD Scholarships  
**Categories:** Clerks Assoc

Second

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**From:** Shannon Corin [<mailto:Shannon.Corin@ci.bremerton.wa.us>]  
**Sent:** Wednesday, May 13, 2015 1:49 PM  
**To:** 'gina anderson'; Bobbie Usselman; Christy O'Flaherty; Debbie Burke; [debbieJ@c-tran.org](mailto:debbieJ@c-tran.org); Diana Quinn; [jboltz@kitsaptransit.org](mailto:jboltz@kitsaptransit.org); [kay.kammer@cityofbg.org](mailto:kay.kammer@cityofbg.org); Paula Swisher; Roberts, Dee; Virginia Olsen  
**Subject:** RE: PD Scholarships

I move we pay the commuter package for \$150.00. We award room and board for PD I, I believe we should also pay the commuter package as well.

Best Regards,

*Shannon Corin, CMC*

City Clerk  
 City of Bremerton  
 (360) 473-5323

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**From:** gina anderson [<mailto:andersong@ci.woodland.wa.us>]  
**Sent:** Wednesday, May 13, 2015 1:43 PM  
**To:** Bobbie Usselman; Christy O'Flaherty; Debbie Burke; [debbieJ@c-tran.org](mailto:debbieJ@c-tran.org); Diana Quinn; gina anderson; [jboltz@kitsaptransit.org](mailto:jboltz@kitsaptransit.org); [kay.kammer@cityofbg.org](mailto:kay.kammer@cityofbg.org); Paula Swisher; Roberts, Dee; Shannon Corin; Virginia Olsen  
**Subject:** FW: PD Scholarships

Executive Committee,

Dema would like us to pay to the commuter package, \$150.00, for Susan Haigh. Susan's award letter is for registration only, \$600.00, for PD I. What is the wish of the board?

Gina

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**From:** Harris, Dema [<mailto:demah@wsu.edu>]  
**Sent:** Thursday, May 07, 2015 6:36 PM  
**To:** gina anderson  
**Subject:** RE: PD Scholarships

A little different. I would think you would also pay the commuter fee for Haigh. Also, please issue the check for Rebecca directly to the City of Othello. They paid before she knew she would receive a scholarship. Everything else looks great.

Dema

**From:** gina anderson [andersong@ci.woodland.wa.us]  
**Sent:** Thursday, May 07, 2015 6:17 PM  
**To:** Harris, Dema  
**Subject:** PD Scholarships

Hi Dema!

Please review the attached spreadsheet and tell me if our numbers and names match. I plan to write a check to WSU next week when I return to work.

Have a wonderful weekend!

Gina