



OFFICE OF THE CITY CLERK

2019-2020
Annual Report



A Message from the City Clerk

It is my distinct pleasure to present the 2019-20 Annual Report for the Office of the City Clerk.

Our Annual Report looks back on our past year's performance during what was one of the most challenging years in recent history due to COVID-19. As our Office drastically shifted operational protocols, transitioned to a remote work environment, and blazed the trail for the adoption of virtual public meetings, we never lost sight of our purpose to serve the residents and stakeholders of the City of Margate.

This commitment to excellent customer service defines our office and sets us apart from other agencies. The COVID-19 global pandemic changed our entire country and I am proud that our Office demonstrated resilient adaptability and versatility to continue to get the job done while not risking the health of our staff.

We are proud of our past and excited for the future. By collaborating with the City Commission, City Manager, City Attorney and all Department Heads, the only limit to the height of our goals is our willingness to strive for them.

Sincerely,

Joseph J. Kavanagh, City Clerk



Table of Contents

Office of the City Clerk	Cover Page
A Message from the City Clerk.....	2
Table of Contents.....	3
Mission Statement.....	4
Background	5
City Clerk’s Responsibilities.....	7
Fiscal Year 2019-2020 Budgetary Information.....	8
Office of the City Clerk Team	9
Office of the City Clerk Organizational Chart	10
COVID-19 Response.....	11
Annual Goals And Objectives.....	12
Goal 1: Respond To Legislative Needs Of The City Commission And Their Constituents.....	12
Goal 2: Administering Municipal Elections And Serving As Both The Qualifying Officer And Filing Officer For The City Of Margate.....	12
Goal 3: Administer Cost-Effective Records Management Program For The City Of Margate	13
Goal 4: Deliver Consistent, Excellent Customer Service	13
Goal 5: Support The City Of Margate Vision Of “Together, We Make It Great!” Every Single Day	14
Goal 6: Utilize Technology And The Best Business Practices In Effective Service Delivery	14
Goal 7: Ensure That All Members Of The Team Perform Ethical and Honest Work. 15	
Goal 8: Ensure Compliance With Legal Mandates Through Resource Management And Transparency	15
Fiscal Year 2019-2020 Accomplishments	16
Training	19
Office of the City Clerk Staff.....	20
Records Filing & Coding System.....	21
Laserfiche Electronic Records Management	22



Mission Statement

It is the mission of the City Clerk's Office to provide accessibility to information, protect the transparency of government processes, and provide an impartial, independent and accurate voice regarding the business of government. The City Clerk is a Charter officer directly accountable to the City Commission as a representative of the legislative branch of government. The Clerk's Office serves as a liaison to bridge the gap between the City Commission, City staff, and the public. It is the mission of the City Clerk's Office to establish trust and confidence in City government, and to provide high quality, effective and efficient public service.



Background

In May of 1955, Margate came to life as a Town and then on June 22, 1961, Margate became incorporated as a City. At that time, Margate had a Mayor/Council form of government. Margate has grown considerably since the earlier 1960's when there were approximately 5,700 residents. As of July 1, 2019, there are an estimated 58,796 residents living in Margate.

In March of 1977, the form of government changed to City Manager/Commission. With this form of government, the City Manager is the chief administrative officer of the City and is responsible for administering the affairs and the day-to-day operation of the City. Our City Manager is responsible to the City Commission and carries out the policies set by the Commission.

The City Commission is the legislative body of our government and is comprised of five (5) members who are elected "at large" by the voters of Margate. Our Commissioners serve a four-year term of office. Starting in 2012, the City elections were held in the month of November, in conjunction with Broward County elections. On the third Wednesday of each November, the five (5) Commissioners elect from among themselves a Mayor and a Vice Mayor to serve a one-year term. The Mayor serves as the ceremonial head and as the Chairman of the City Commission for their meetings. Both the Mayor and Vice Mayor have full voting powers on the Commission.

Each department of the City is managed by a Department Head who is responsible to the City Manager for the efficient management of their department. The City Manager, City Attorney, and the City Clerk report directly to City Commission. City laws are called Ordinances and are passed upon the approval of a majority of the City Commissioners at a public meeting. Ordinances require two (2) public hearings and are voted on at each of the two (2) meetings with a record being made of how each Commissioner votes on every item that comes before them. Per Florida Statute, meetings of City boards and the Commission require minutes be recorded and are available for public inspection.

The most important document concerning our City government is the "City Charter". The following is an example of what our Charter contains:

- Type of government
- Commission terms of office and filing requirements
- Duties of Elected Officials



- Duties of City Manager, City Attorney, and City Clerk
- Sets forth budget and fiscal requirements for the City
- Provides for certain City boards (volunteers who are appointed by the Commission)
- Contains City boundaries

The Regular City Commission meetings are held on the first and third Wednesday of the month at City Hall. The first meeting of the month starts at 6:30 PM and the second meeting starts at 7:00 PM. Special meetings are scheduled as needed. Historically, the City Commission goes on break in the summer and again for the winter holidays.

In order to meet the requirement of Section 3.17 of the Margate Charter to hold no less than two (2) City Commission meeting per month, the City Commission meets the first two (2) Wednesdays in July and the last two (2) Wednesdays in August. Likewise, the City Commission meets the first two (2) Wednesdays in December, and the last two (2) Wednesdays in January.

In November/December of each year, the City Commission schedule is approved by Resolution. A copy of the meeting schedule is posted on the bulletin board outside of City Hall and on the City's website.

The City Commission also has Workshop Meetings to discuss specific items when more time needs to be devoted to special matters.

All the City meetings (City Commission, Boards, and Committees) are open to the public with legally sufficient notice being provided by posting all meeting notices on the bulletin board located on the front of City Hall and on the City website.

In Florida, we have a law known as "THE SUNSHINE LAW" that requires open meetings where proper notice must be given by governmental agencies. We welcome your attendance at any of our meetings and encourage you to see your government at work.



City Clerk's Responsibilities

The Office of the City Clerk is responsible for the following:

1. Maintaining records of all proceedings of the City Commission and providing information to the public on request from these records.
2. Maintaining all official documents of the City and providing information to the public upon request of these documents.
3. Directing the records management program for all City records and acting as the Records Management Liaison Officer for the City.
4. Assisting all persons, upon request, in accessing nonexempt City records, regardless of actual custodian of said City records, in conformance with the State of Florida Public Records Law, Chapter 199, Florida Statutes.
5. As per Section 3.12 – City Clerk of the City Charter - “The City Clerk shall give notice of meetings of the City Commission, shall keep the minutes of its proceedings, shall authenticate by signatures on record in full in the book, or another acceptable permanent record format, kept for the purpose of recording ordinances and resolutions of the Commission, shall be the custodian of the seal and of all official City records, [shall] conduct City elections, and shall perform such duties as shall be required by this Charter, by City ordinance or by the City Commission.”



Fiscal Year 2019-2020 Budgetary Information

The Fiscal Year 2019-2020 budget for the Office of the City Clerk was \$1,011,060. The budget for Personal Services is \$734,010 and the budget for Operating Expenses is \$277,050. The department has seven (7) positions, the same as Fiscal Year 2018- 2019.



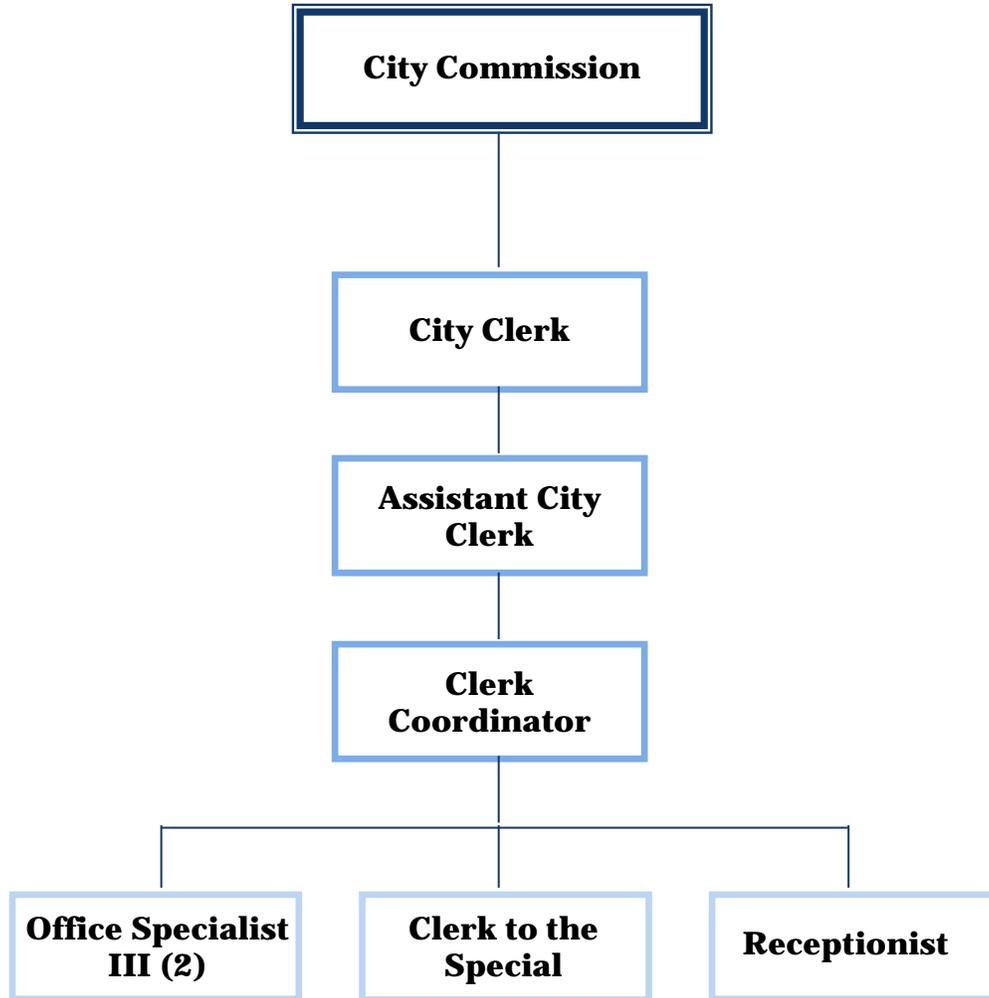
Office of the City Clerk Team

Joseph J. Kavanagh, MPA, MMC	City Clerk
Jennifer M. Johnson, MMC	Assistant City Clerk
Theresa Jones, FCRM	Clerk Coordinator
Carleen Steadman	Clerk to Special Magistrate
Salene E. Edwards	Office Specialist III
Isamar Viveros	Office Specialist III
Thomasina Perry	City Receptionist



Office of the City Clerk Organizational Chart

Seven (7) Full Time Employees





COVID-19 Response

The City Clerk's Office prepared for COVID-19 starting in March of 2020. We provided each staff member with a fully configured laptop with virtual private network access to the City network. We strategically staggered in-office staff and remote staff to continue office operations in a safe and responsible manner. The City Reception Desk transitioned from in-person call taking at the City Hall Reception desk to a menu system where callers are routed to each specific department based on their menu selection. We worked with the IT Department to provide virtual City Commission and Board meetings through Zoom.com.

As of today, nearly nine months later, our Office has continued to operate with approximately 40% of the office hours being worked remotely. We will follow the directives of the City Manager and the Fire Department as it relates to City protocols and procedures to manage COVID-19. Based on customer service feedback and the information contained in this report, we have not realized any reduction in office productivity or work quality due to COVID-19. In dealing with this unprecedented challenge, we came together to work smarter, more efficiently and focus on the needs of the residents who are dealing with COVID-19 each day.



Annual Goals And Objectives

The Office of the City Clerk establishes goals and objectives to improve the overall management of the department and provides public records to the citizens of the City in a timely manner. The following are the 2020-2021 goals and objectives for the Office of the City Clerk:

Goal 1: Respond To Legislative Needs Of The City Commission And Their Constituents

The Office of the City Clerk works to meet the needs of the City Commission and the residents of Margate. By introducing technological advances such as Granicus video streaming, our mission is to provide access to legislative matters to as many residents as possible. Over the next one to two years, the Department will continue to accomplish this goal by focusing on the following objectives.

- Prepare and distribute agenda materials in a timely manner
- Effectively coordinate, administer, and publish public meetings
- Monitor feedback from residents on how to improve their experience with Margate government

Goal 2: Administering Municipal Elections And Serving As Both The Qualifying Officer And Filing Officer For The City Of Margate

Proper administration of the election process services the people's right to exercise their vote by ensuring an expeditious, complete process. Timely, accurate handling of disclosure documents serves the people's right to information by ensuring access to information. Over the next one to two years, the Department will continue to accomplish this goal by focusing on the following objectives.

- Effectively administer and coordinate municipal elections in partnership with the Broward County Supervisor of Elections (the next scheduled City of Margate General Election is Tuesday, November 8, 2022)
- Serve as Filing Officer by processing the City's campaign finance disclosure reports, lobbyist registrations and reports in a timely, effective manner
- Effectively support the election/appointment process for board and commission members
- Publish Campaign Treasurer Reports to the City website in a timely and consistent manner



Goal 3: Administer Cost-Effective Records Management Program For The City Of Margate

A viable records management program ensures that each department can maximize its operational goals by making information more readily available for service delivery. Consolidating responsibility for the City's Records Management Program increases accountability and ensures effective service delivery. Over the next one to two years, the Department will move toward accomplishing this goal by focusing on the following objectives.

- Maintain and preserve City Commission proceedings and related documents (e.g., Minutes, Resolutions/Ordinances, Contracts/Agreements)
- Manage an effective Electronic Records Management (ERM) system
- Transition towards the use of electronic records when practical and financially viable
- Continue to offer records training opportunities to employees, including training specifically for new employees in the City
- Utilize cost-effective, high quality off-site storage as needed to minimize the footprint of paper records on limited space in City facilities
- Research and utilize effective software systems to maintain relevant social media records
- Strategically implement LaserFiche software to provide a web-based platform to manage, archive, access and present City records

Goal 4: Deliver Consistent, Excellent Customer Service

The best customer service requires continuous improvement based on regular feedback and active benchmarking. Proper delivery of customer service serves the people by providing accurate information and maximizing access to municipal government in an efficient, professional, and courteous manner. Over the next one to two years, the Department will move toward accomplishing this goal by focusing on the following objectives.

- Utilize best business practices for customer management
- Respond efficiently and accurately to customer requests
- Provide current, comprehensive, and accurate information to meet customers' needs
- Strive to provide magical "concierge" customer service, which has been proven to strengthen employee focus, enhance employee performance, and positively impact customer satisfaction



Goal 5: Support The City Of Margate Vision Of “Together, We Make It Great!” Every Single Day

The Office of the City Clerk has a hand in almost every aspect of City business, bridging the legislative and executive sides of government. Over the next one to two years, the Department will move toward accomplishing this goal by focusing on the following objectives.

- Maintain easy access to needed points of contact across the City
- Effectively communication, collaborate and cooperate with City staff, stakeholders and residents
- Treat every customer as part of the City of Margate family

Goal 6: Utilize Technology And The Best Business Practices In Effective Service Delivery

Technology provides the vehicle for enhanced access to information. Over the next one to two years, the Department will move toward accomplishing this goal by focusing on the following objectives.

- Apply technology effectively to provide increased and improved access to materials online
- Research emerging technologies and trends to provide a more effective customer service experience
- Apply technology more effectively to increase staff’s ability to provide the most efficient service
- Ensure that the Department operates with fiscal responsibility
- Employ best practices for effective service delivery and resource allocation
- Research best practices to continue the effective use of virtual meeting software to allow the efficient facilitation of City business
- Realize efficiencies by coordinating activities and standardizing processes across the City



Goal 7: Ensure That All Members Of The Team Perform Ethical and Honest Work

The Office of the City Clerk is an independent department known for its impartiality and integrity. Over the next one to two years, the Department will move toward accomplishing this goal by focusing on the following objectives.

- Ensure a high level of integrity and honesty in performance of work duties
- Enable open and honest communication within the Department
- Rely and trust each other to accomplish Department goals

Goal 8: Ensure Compliance With Legal Mandates Through Resource Management And Transparency

The Office of the City Clerk ensures the City of Margate complies with applicable Florida Statutes for legal advertisement, public record requests, and record retention requirements. Over the next one to two years, the Department will move toward accomplishing this goal by focusing on the following objectives.

- Attend training opportunities that provide the most current information legal mandates
- Ensure that public record requests are being fulfilled in a reasonable, timely manner
- Apply best practices to records creation, retention and destruction per Florida Statute
- Continue using JustFOIA to manage all Public Records Requests



Fiscal Year 2019-2020 Accomplishments

FUNCTION	ACCOMPLISHMENT(S) AND METRIC/QUANTITY
Official Records	<ul style="list-style-type: none"> Maintained and managed City Commission records including Minutes and Excerpts (43), Ordinances (12), Resolutions (96), Meeting Packets (37), Agreements adopted by City Commission (34).
Code of Ordinances	<ul style="list-style-type: none"> Submitted Ordinances for codification (10). Maintained Code of Ordinances supplement subscriptions for all City departments (42).
Meeting Calendar / Meeting Setup	<ul style="list-style-type: none"> Maintained Commission Calendar (Daily). Posted and maintained records of all meeting notices/agendas (115). Prepared Commission Chambers for Workshops, Commission Meetings and Special Meetings (34). Meeting notices removed from City Bulletin Board within one (1) business day of end of meeting (156).
Meeting Packets	<ul style="list-style-type: none"> Trained and continued to provide daily support to the department in the process of uploading agendas and packets to the Granicus site for all board/committee meetings.
Legal Advertisement	<ul style="list-style-type: none"> Generated, proofed, and placed legal advertisements in the local newspaper as required by law (20).
Legislation Processing	<ul style="list-style-type: none"> Formatted, prepared and circulated Ordinances, Resolutions, and Agreements for signature (142). Submitted various documents for recording (6). Maintained follow-up files for documents until finalized (Daily)
Public Records/Records Management/Records	<ul style="list-style-type: none"> Maintained and monitored inventory for mandatory disposal of records. Coordinated approval by department directors and subsequently disposed of boxes of expired records in accordance with procedures and in compliance with Section 257.36(5), Florida Statutes and Rule 1B-24.003(9), Florida Administrative Code.



	<ul style="list-style-type: none">▪ Disposed of 220.60 Cubic Feet of paper records and 106.11 GB of electronic files
Retention/Research	<ul style="list-style-type: none">▪ Cost avoidance estimate equals \$25.00 per Cubic Foot per year, (storage, supplies, etc.) which equals an approximate cost avoidance of \$5,515.00 for the year.▪ Prepared and submitted to the Department of State, mandatory Records Management 2019-2020 Compliance Statements.▪ Inputted, tracked and responded to 872 public records requests utilizing the public records tracking system database.▪ Assisted with staff research projects and microfilm/microfiche research (9).▪ Administered on-site storage center (located at 3rd floor).▪ Maintained microfilm inventory control.
City General Election	<ul style="list-style-type: none">▪ Coordinated and posted to the City’s website election documents for candidates and citizen’s information, including:<ul style="list-style-type: none">– All Candidate Forms.– Candidate Reports.– Election Calendar.– Legal Notices.– Election Polling Places and Precinct Map.– Sample Ballot.– Legal Advertisements.– Accepted documentation for Candidate Qualifying for seven (7) Candidates for City Commission Election in November 2020.
Boards/Committees	<ul style="list-style-type: none">▪ Coordinated eleven (22) appointments to boards/committees:<ul style="list-style-type: none">– Circulated memorandums of vacancies, as needed.– Maintained member database.– Responded to inquiries.– Prepared agenda backup documents.– Notified candidates of appointment process.– Provided membership updates to Florida Commission on Ethics.



	<ul style="list-style-type: none">– Administered oaths of office.▪ Maintained the online application for City board/committee vacancies located on the City Clerk’s webpage.
Miscellaneous	<ul style="list-style-type: none">▪ Provided customer service response and direction.▪ Provided notarization services to non-City stakeholders (22).▪ Proclamations prepared and presented (15).
Awards	<ul style="list-style-type: none">▪ Coordinated Athlete of the Month Awards (6).▪ Coordinated Student of the Month Awards (42).▪ Coordinated Teacher of the Month Awards (42).▪ Coordinated Home of the Month Awards (6).
Special Magistrate and Lien Inquiries	<ul style="list-style-type: none">▪ Received and Processed Lien Searches (2,012).▪ Conducted Special Magistrate Cases (530).▪ Recording of Liens and Releases (57/101).
Professional Development	<ul style="list-style-type: none">▪ Assistant City Clerk, Jennifer M. Johnson – Served as Florida Association of City Clerks (FACC) Awards & Scholarship Committee.



Training

City Clerk, Joseph J. Kavanagh, maintained his Master Municipal Clerk (MMC) designation from the International Institute of Municipal Clerks (IIMC) and continued to work towards his Certified Records Analyst (CRA) & Certified Records Management (CRM) certification. The CRM Certification requires passing a six-part examination. Parts 1 through 5 each consist of 100 multiple-choice questions. Part 6 is an essay question and requires a detailed response in a business case format.

Assistant City Clerk, Jennifer M. Johnson, maintained her Master Municipal Clerk (MMC) designation from the International Institute of Municipal Clerks (IIMC) and attended the Florida Association of City Clerks Fall Academy on October 13, 2019 - October 17, 2019.

Clerk Coordinator, Theresa Jones, maintained her Florida Certified Records Manager (FCRM) designation from the Florida Records Management Association.

City Clerk staff attended numerous professional development educational sessions throughout FY 19-20. These training opportunities are reported to the City Manager and published in the City Manager's Monthly Report to the City Commission. This information is available upon request. City Clerk staff also participated in virtual courses through Udemy.com that covered topics including leadership, management, emotional intelligence and customer service.

Additionally, we distributed information to the Department Record Coordinators, by email or in person, to keep them abreast of the latest developments in the world of municipal records. In working with Records Management Consultant Matt Daugherty of SML, Inc., we communicate with every Department to ensure compliance with Records Management law.



Office of the City Clerk Staff



(Left to Right: Thomasina Perry, Carleen Steadman, Theresa Jones, Joseph J. Kavanagh, Jennifer M. Johnson, Salene E. Edwards, Isamar Viveros)



Records Filing & Coding System





Laserfiche Electronic Records Management

Laserfiche is the leading global provider of intelligent content management and business process automation. The Laserfiche® platform enables organizations in more than 80 countries to transform into digital businesses. Customers in government use Laserfiche® to boost productivity, scale their business and deliver digital-first customer experiences. Electronic records management can help you handle an unexpected audit, improve ongoing compliance and reduce time-consuming tasks around records storage and retention.

