

TITLE I

THE CITY RECORDER

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CHAPTER 1.02

THE OLDEST GOVERNMENT PROFESSION

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1.02.010 The History of the Profession. The profession of Municipal Clerk/City Recorder is a time-honored and historical one, extending to biblical times and beyond, and along with the tax collector, is one the oldest of public servants. The Old Testament of the English Bible (II Samuel, I and II Kings, Isaiah, and I and II Chronicles) called the Clerk the "Recorder," who was "one who caused to remember" or "called to mind." The New Testament refers to "Clerk" rather than "Recorder." The "Clerk" was among the highest of Court Officials -- the Chancellor who called the King's attention to important matters of state.

The Town Clerk was an official of varied powers and functions in different parts of the Greek world and was also recognized by the Romans in their colonial world. It was the Town Clerk who persuaded the rioting citizens of Ephesus to leave the followers of St. Paul unharmed and to return to their homes, thus preserving law and order (Acts XIX). Ancient Greece had a City Secretary who read official documents publicly. At the opening of a meeting, one of his duties was to read a curse upon anyone who should seek to deceive the people.

The early keepers of the archives were often called Remembrancers, and before writing came into use, their memory was the public record. The title as we know it is derived from the middle ages. A "Clerk" was any member of a religious order, a "Cleric" or "Clergyman." Since, for all practical purposes, the scholarship of the Middle Ages was limited to the Clergy, the name "Clerk" came to be synonymous with "scholar."

The Office of Clerk can be traced back to the year 1272 A.D. in the History of the Corporation of Old London. In the 1550's in England, there was not only the "Towne Clarke" but also the "Clerc Comptroller of the King's Honorable Household." In 1603, there was a "Clarke General of the Armie." King Henry the Eighth had a "Clarke of the Spicery" and King Charles had his "Clerk of the Robes."

When the early colonists came to America, they set up forms of local government to which they had been accustomed, and the office of Clerk was one of the first established. The colony at Plymouth, Massachusetts, appointed a person to act as a Clerk to keep all the vital records for birth, marriages and deaths for the church as well as other records of appointments, deeds, meetings and election of officers. They were aware of the importance of keeping accurate written records of their agreements and actions including grants of land, regulations governing animals, the collection of taxes and the expenditure of town funds. The Town Clerk of Middleboro, Massachusetts in the late 1600's or early 1700's was compensated with "one load of fish taken at the herring-weir and delivered to his house." Three centuries later, one of his seven great grandchildren served as City Recorder for the City of Newport, Oregon.

Over the years, Municipal Clerks/Recorders have become a major representative of government, the "hub of the wheel of local government," the direct link between the residents of their municipalities and their government. The Clerk/Recorder is the historian of the community, for the entire recorded history of the town and its people is in the Clerk's care. Of all the local government positions, the Office of the Clerk/Recorder has been preserved and may be found in virtually every unit of local government in the world.

The eminent political scientist, Professor William Bennett Munro, writing in one of the first textbooks on municipal administration, described the City Clerk/Recorder's position as follows:

"No other office in municipal service has so many contacts. It serves the Mayor, the City Council, the City Manager (when there is one), and all administrative departments without exception. All of them call upon it, almost daily, for some service or information. Its work is not spectacular, but it demands versatility, alertness, accuracy, and no end of patience. The public does not realize how many loose ends of city administration this office pulls together."

Those words, written 40 years ago, are even more appropriate today.

1.02.020 The History and Makeup of the Oregon Association of Municipal Recorders (OAMR). In 1981, City Recorder Mary Carder from Beaverton met City Clerk Marge Price from Kennewick, Washington. Marge told Mary about the Washington Municipal Clerks Association and offered to help Mary establish a similar organization for the Recorders in Oregon. From the meeting of those two individuals, OAMR roots began to grow. At the League of Oregon Cities Conference in 1982, Mary Carder met with a handful of other Recorders and began to plan and develop the organization we now know as The Oregon Association of Municipal Recorders (OAMR). Marge Price (now known as OAMR's "Founding Mother") convinced this small group of City Recorders that a statewide professional organization for Recorders would provide an invaluable networking system, the opportunity to share ideas statewide and a forum to keep City Recorders up to date on state laws affecting their positions and their municipalities. In 1983, goals and objectives, a mission statement and bylaws were adopted and officers were elected at the first OAMR Conference in Eugene.

The goals and objectives adopted in 1983 recognized the profession of the City Recorder position, the need to further the education of its members, and develop a mechanism for members to share information. The long distances between jurisdictions may have shrunk due to annexation, but Oregon still has a variety of demographics -- from the urban, highly developed areas of the metropolitan cities, to rural jurisdictions. Communication options have mushroomed. Technology has come a long way with the advent of personal computers, fax machines, satellites and the Internet. This technology has made it easier to communicate between Recorders across the state; but at the same time, it has challenged us to keep informed and up to date on advancements and seek training in new areas. The OAMR goals were revised in 2004 to:

- Promote OAMR Membership throughout the State of Oregon.
- Develop the incentive for professionalism through education of all members.
- Provide programs and activities that will assist in the welfare and positive progression of municipal government.
- Foster closer relationship between recorders in the State of Oregon, and promote the interchange of information between them.
- Promote OAMR among other professional organizations.

Over the years, Oregon Municipal Recorders have played an important role in developing procedures, manuals and training for its members throughout the state. Some of these include:

- Working with the State Elections Office to update the Contributions and Expenditures reporting procedures and forms, making election-related duties of the Recorder less complicated;
- Testifying and monitoring legislative bills that would impact or affect the Municipal Recorder;
- Working with the State Archives Division to develop a City Records Retention Schedule to serve as a basis for all cities in the state to follow, instead of each city developing its own schedule;
- Working with the State Archives Division to develop “Public Records A Manual for Creating a Disaster Preparedness and Recovery Plan” to serve as a guide for preventing an avoidable record disaster and minimizing damage to public records;
- Conducting day-long academy sessions on subjects that need more than a few hours to be addressed;
- Assisting the League of Oregon Cities in presenting "Newly Elected Officials Workshops" across the state to help newly elected officials understand the resource they have in their City Recorder; and
- Conducting “On the Road” workshops that allow recorders with specific expertise on topics of particular interest to recorders to bring timely presentations to groups around the state.

One of the most successful and beneficial training programs developed by the Recorders' Association is the OAMR Mentor Program. It was developed specifically because the organization recognized the need of newly appointed Recorders and Clerks to have professional resources and support available to them in the form of experienced people in similar positions. Mentoring is a way of sharing both the formal and informal knowledge necessary to achieve effective and efficient methods of performing professional duties and reaching personal and professional goals. New Recorders and Clerks interested in participating in the OAMR Mentor Program are matched with an experienced professional in a municipality located as close as possible and whose duties are similar. The Mentor provides advice, assistance and support to help the new Recorder to become strong and self-sufficient in the administration of his/her duties and to progress in his/her professional development. OAMR's Mentoring & Leadership Development Committee is responsible for this program.

OAMR is divided geographically into seven regions, with a Director elected to serve and lead the members of each region. The OAMR Executive Board consists of the President, 1st Vice-President, 2nd Vice-President, Secretary, Treasurer and the seven Regional Directors. OAMR has several committees that concentrate on a specific aspect of the goals and objectives of the organization.

Our list of committees includes:

- Audit Committee
- By-Law Committee
- Conference Committee
- City Recorder's Procedure Manual Committee
- Education Committee
- Historical Preservation Committee
- IIMC Conference Committee
- Internet Committee
- Legislative Committee
- Membership Committee
- Mentoring & Leadership Development
- Newsletter Committee
- Nominating Committee

- NW Clerks Institute Education Committee
- Professional Growth & Development Committee
- Records Management Committee
- Retired Clerks Committee
- Scholarship Committee
- Special Projects/Fundraising Committee

1.02.030 The International Institute of Municipal Clerks (IIMC). The International Institute of Municipal Clerks (IIMC), founded in 1947, is the professional association of 10,000 plus city, county, district, village, town and borough Clerks/Recorders in every U.S. state and Canadian province and in 15 other countries including Australia, Belgium, Bulgaria, England, Israel, New Zealand, Peoples Republic of China, South Africa, Switzerland, Taiwan, Thailand, The Netherlands, United Arab Emirates (UAE) .

Through its Management Information Center, IIMC provides surveys, research, bulletins, case studies and ordinance compilations on a variety of subjects affecting the operations of the Municipal Clerk/Recorder's Office. The purpose of IIMC is to improve the administration of state, provincial, county and local government through officials and persons vested with the powers and duties commonly known as City Clerks, Secretaries or Recorders.

IIMC's primary goal is to actively promote the continuing education and professional development of Municipal Clerks' through extensive education programs, certification, publications, networking, annual conferences and research. As an educational catalyst, IIMC inspires Clerks/Recorders to expand and advance beyond their present levels of development.

IIMC also engages in municipal research administration, enhances critical professional skill development and fosters a spirit of mutual assistance and good fellowship among Municipal Clerks around the globe.

IIMC is divided into 11 geographic Regions. Oregon is in Region IX along with California, Washington, Alaska and Hawaii. Membership in IIMC is strongly recommended for every person in the Recorder's position. Membership fees are based upon the city's population. Additional Full Members and Associate Members are \$75.00 per year.

1.02.040 The IIMC Certified Municipal Clerk (CMC). One of the most vital services and opportunities provided to members of IIMC is the Professional Certification Program. This program was initiated in 1969 by the membership of IIMC to recognize those Clerks and Recorders who had achieved basic levels of professional competency. The NW Clerks Institute is conducted by Washington State University Center for Distance and Professional Education. The program consists of three Professional Development segments (PD I, II and III) of on-campus education held at the University of Puget Sound in Tacoma, WA. The education provided through this program is designed specifically for Municipal Clerks/Recorders and is unique to our profession. Upon completing all requirements of the program in the specific areas of education, experience and professional participation, the CMC award is granted and qualified Recorders earn the prestigious recognition of being "Certified" (through IIMC) to perform the duties and responsibilities of the office they hold. It is the belief of those who have completed this training that there is nothing that can compare to the value of this program -- this is highly specialized training that you cannot get from any other source. It will also help you realize just what an important position in local government Recorders hold. The program will instill in you, a degree of pride toward your profession that will leave you a much stronger, more professional and capable individual with a yearning to continue on to the next level of expertise.

In 2000, IIMC began the CMC Recertification Program. CMC's who are not pursuing entrance into the Master Municipal Clerk's Academy (covered in the next section) must go through the recertification program or their CMC designation will expire. Clerks must recertify every four years following the date of their original certification; IIMC will send a letter advising it is time to recertify. They must complete a minimum of ten (10) hours of education each year for four years. They then submit a recertification application, provide documentation of the 40 hours of education and pay a \$50 recertification fee.

1.02.050 The IIMC Master Municipal Clerks Academy (MMCA). Education through IIMC does not end with the Professional Certification Program. For those who seek further education and recognition, IIMC offers the Master Municipal Clerks Academy. This post-Certification program encourages those in our profession to continue their growth and development; it honors and salutes high-level achievement. The Academy's purpose is to promote, guide and recognize individual accomplishments in continued professional and personal development. It rewards personal efforts in advanced management and leadership education, participation in professional organizations and personal contributions that enhance the profession in significant ways. Once accepted into the Master Municipal Clerks Academy, applicants must attain 84 points in the education category and 20 points in the professional and social contributions category to attain their MMC. Every two to four years, members may apply for Membership to remain active. A recorder can apply for the Academy after receiving CMC Certification. The NW Clerks Institute offers a Master Academy conducted by the Washington State University Center for Distance and Professional Education. The program (PD IV) consists of an advanced educational opportunity held on-campus at the University of Puget Sound in Tacoma, WA. This academy is for:

- Recorders who currently possess their CMC or MMC designation
- Those who have completed a CMC Institute (PD I, II and III)
- Those who have met the CMC education requirements through a college degree
- Those who are working on or who have achieved their MMC

CHAPTER 1.04

PROFESSIONAL MANAGEMENT OF THE RECORDER'S OFFICE

Sections:

1.04.010	Fundamental Principles
1.04.020	Functional Divisions
1.04.030	Planning
1.04.040	Organizing
1.04.050	Staffing
1.04.060	Directing
1.04.070	Controlling
1.04.080	Management Summary
1.04.090	Office Notebook--Contents

1.04.010 Fundamental Principles. The office of Recorder has many varied functions and responsibilities among Oregon cities. The multiple roles of the Recorder are discussed in Chapter 1.10. Regardless of the “number of hats” we each wear, all our offices should be professionally managed to efficiently accomplish our responsibilities. There are fundamental principles that apply equally. This Chapter outlines basic procedures to assist new and experienced Recorders who are seeking to upgrade office operations.

1.04.020 Functional Divisions. Management may be conceptually divided into five functions: planning, organizing, staffing, directing and controlling. Often, more than one of these concepts is operable simultaneously in our work, but it helps to separate them when thinking about how we do our jobs and how we could improve.

1.04.030 Planning. The old adage, "Plan your work and work your plan." was never more appropriate than in today's rapidly changing world. Without a basic plan of operation, a Recorder is ill-equipped to deal with an emergency or a demand for special service or assistance. It is vital to reserve time to review procedures, study new methods and plan for the future.

Planning is simply a matter of determining in advance what will need to be done. Planning in the municipal field takes many forms, including deciding how to obtain additional revenue, how to meet the demands of expanding service areas, how to manage public information programs and how to meet existing service requirements. The Recorder must decide what is going to be done, when the tasks will be undertaken and when they are expected to be completed.

There has been much discussion recently about establishing goals and “managing by objectives.” “Goals” may be thought of as visions for a better product, program or process for doing things. Your goals as a Recorder should be consistent with the goals of your city, whether stated by the Council, your Mayor or your Manager/Administrator. You should, however, also have a personal conviction (a “vision”) in the goals for your office or department. If goals assigned to your office or department seem unrealistic or inappropriate to you, remember that effective Recorders strive to influence their supervisors to work with them to set more realistic or appropriate goals.

Once your goals are set, you can break them down into measurable objectives, for which you can plan. Planning to meet your objectives involves budgeting funds, planning the timeframe and staffing for the project, purchasing needed supplies and making contacts to obtain the necessary information you need.

1.04.040 Organizing. Organizing is the answer to "How will the work be divided and accomplished?" If you supervise people, delegation is a very important part of the organizing function. Delegation involves assigning duties, granting the authority to accomplish the tasks and allowing subordinates to assume responsibility for the tasks. Delegation does not mean that the supervisor has given away the ultimate responsibility, but that the work for which he/she is responsible is being accomplished through other people.

Even if you do not supervise others in your office, organization is still essential. In order to organize your work, you need a complete list of work details, including the time required for each task. The inventory must include all functions, regardless of the degree of importance, and should be prepared by the person performing the work.

Once aware of the work details that comprise your objectives, you can distribute the work over time and personnel. Distribution includes scheduling of work by priorities, as well as assignment of personnel to specific duties. Certain functions, such as publishing and mailing legal notices, have inherent deadlines and demand higher priorities than indexing, filing, miscellaneous correspondence, etc., which, although important, may be done during less critical time periods. A degree of flexibility must be maintained in any work schedule to allow for unexpected interruptions or unusual requests. If staff allocation permits, it is desirable to assign definite responsibilities for certain functions to those employees who appear to have aptitudes and interests in specific areas. This promotes a sense of identity through specialization and encourages pride of position. Care should be taken to cross train employees to substitute in the event of illness, vacation or resignation.

Organized work areas facilitate an efficient work flow. For maximum productivity and professionalism, work stations and facilities should be laid out to permit a smooth flow of work from person to person with easy access to machines, equipment, files and work areas. If space permits, there should be a conveniently located service counter for public use. The citizen coming to the counter must feel free to state requests or problems without distractions of employees moving around him/her or, even worse, being required to move aside to permit someone to enter or leave the area. Employees serving the counter should be located in reasonable proximity to avoid delay in service.

The operations of the City Recorder's department should be reviewed periodically, using the work inventory records described above, and, if possible, steps should be taken to simplify work. Even those functions dictated by legal requirements should be studied for any possibility of increasing efficiency insofar as the actual mechanics of operation are concerned. Review of operations may also disclose some practices that seem to have no reason for existence, other than custom. In considering elimination of any traditional function, however, the Recorder must carefully weigh anticipated timesaving advantages against possible negative response from the public. In addition, changes are sometimes difficult for other staff members. If you implement a change that affects other people in your department, it is a good idea to involve them in planning the change and to listen sincerely to their suggestions.

You may be able to streamline your workload with the use of form letters, personalized on a computer, for such matters as frequent communications to Council; notification of bid awards; notice to contractors to commence work; memos advising of Council action; and transmittal of requested information or copies of documents. Also, don't overlook use of the telephone in lieu of a written response; it takes less time than preparing a letter and offers the further advantage of a personal contact with the citizen. Preparation of "handout" material covering the most frequently asked questions is also helpful. Another time saver is the use of e-mail as a communication tool. As a communication tool, it is important to represent your agency in a professional manner and respond to email clearly and efficiently. An "E-mail Policy Manual for Local Government" has been

developed by the Oregon State Archives and OAMR. This manual serves as a tool to help local government agencies answer questions relating to e-mail.

1.04.050 Staffing. Staffing includes the selection of employees and determining whether there are qualified employees to fill the available positions. This involves preparing appropriate job descriptions, recruitment, orientation, training, evaluation procedures and guidelines for promotion and termination.

1.04.060 Directing. Directing includes guiding, teaching, motivating and supervising subordinates. Staffing involves training employees for particular jobs; directing is encouraging those same workers to perform their tasks better and more efficiently.

Employees may be motivated by a number of different factors, including achievement, recognition, interesting work, responsibility, growth and rewards. You may think that financial rewards and working conditions are the most important motivators of employees, but once people's "human needs" are adequately met, more complex needs tend to dominate as motivators.

Your employees will likely be motivated to perform their jobs efficiently when you utilize approaches to supervision which enhance the employee's job satisfaction. These approaches include:

- **Delegation with authority and responsibility:** The employee is given general directions to accomplish the task but is permitted to use his/her judgment in completing the task.
- **Job expansion and enrichment:** The employee is given the opportunity to grow in his/her job by assuming more responsibilities for the types of work that interest the employee. Cross-training is another way to enrich a person's job. As the employee learns to perform more duties, he/she becomes a valuable "back-up" to other employees.
- **Participation:** The employee's advice and suggestions are sought and used to improve the workflow, create a new assignment or develop new procedures. This helps make employees aware of the importance of their role in the department.

1.04.070 Controlling. Controlling means making certain that planned objectives are achieved. This brings us back to the original function of planning and completes the circle. This function establishes feedback on the plans implemented during the previous work cycle. It is recommended that you establish an annual self-evaluation to determine how well your department has accomplished its goals. Adjustments to the next work period's schedule can be based on the feedback you receive from this evaluation.

1.04.080 Management Summary. In summary, through planning, organizing, staffing, directing and controlling, the City Recorder can manage the functions of his/her office in the most efficient, productive, professional and satisfying way possible.

1.04.090 Office Notebook--Contents. Many questions of a general nature come through the City Recorder's office on a daily basis and can usually be answered by office staff. Questions requiring more than routine information may be forwarded to the specific department.

For easy reference in answering routine questions, it is helpful to keep on hand a notebook, which contains information about your city and state. For example:

- Names, addresses, phone numbers and in-house phone numbers of city officials, City Manager and other department heads;
- Schedule of Council meetings, dates and time;
- List of city boards and commissions, dates and times of meetings, and names, addresses and phone numbers of the board/commission members;
- Phone numbers for emergency services;
- Name, address and phone number of your local school district and the names, address and phone numbers of school board members;
- List of local libraries and their business hours, addresses and phone numbers;
- Local voter information;
- State legislature phone listing;
- Directory of local public services;
- List of local clubs and community organizations
- E-mail addresses; and
- Web addresses of commonly used sites.

CHAPTER 1.06

POLICIES AND PROCEDURES

Sections:

- 1.06.010** **Definitions**
- 1.06.020** **Suggested Policies and Procedures**

1.06.010 **Definitions.**

- **Policy:** A plan or course of action of a government, political party, or business, designed to influence and determine decisions and actions; or a course of action or guiding principle, considered to be expedient, prudent or advantageous.
- **Procedure:** A particular way of accomplishing something; a series of steps followed in a regular definite order; or a traditional or established way of conducting the affairs of a business, legislative body or court of law.

1.06.020 **Suggested Policies and Procedures.** Following are listed activities for which policies and procedures should be established:

- Accounting, auditing and financial reporting for governmental entities (personalizing this for your city would be helpful for non-accountant people);
- Accounts payable and receivable;
- Adjustments, refunds, receipts and transfers;
- Bidding procedures;
- Boards and Commissions (by ordinance or resolution);
- Budget process;
- Code enforcement;
- Computer operations and equipment purchasing;
- Computer use;
- Credit card use;
- Debt management (payment of principal and interest, etc.)
- Deposits and collections;
- E-mail policy and retention;
- Expenditure reimbursements;
- Fees for services;
- Fixed assets and investments;
- Identity theft protection;
- Licenses and permits;
- Loans (interfund);
- Local improvement districts;
- Payroll and personnel;
- Petty cash and revolving funds;
- Postage meter records;
- Public disclosure;
- Public records requests;
- Purchasing;
- Real property management;
- Records management and retention;
- Risk management;

- Signatures - (warrants, checks, contracts, facsimile, agreements, leases, etc.);
- Telephone (personal use of, voice mail, etc.);
- Utility billing; and
- Vehicles - (personal use of city vehicles).

Sample policy and procedure manuals are available from the International Institute of Municipal Clerks. (www.iimc.com)

CHAPTER 1.08

FOLLOW-UP SYSTEMS

Sections:

1.08.010	Systems and Procedures
1.08.020	City Council Pending Items
1.08.030	Tickler System
1.08.040	Community Calendar
1.08.050	Internal Calendar

1.08.010 Systems and Procedures. An important function of the Recorder's office is to maintain a system or procedure for notifying persons of due dates of reports and expiration dates on various matters. Adopt a follow-up or tickler procedure that will work for you. This chapter gives suggestions for systems that can be adapted to your personal needs.

1.08.020 City Council Pending Items. A separate system should be maintained for all matters requiring the attention of the City Council. One suggestion would be to obtain an accordion-type file with at least 12 sections, labeled for the upcoming months or meeting dates and large enough to allow quite a bit of material to be placed in each section.

As possible agenda items come to the City Recorder, they could be placed in the appropriate month's section with a notation as to which meeting in that month the item is to be placed on the agenda. As public hearings are advertised, the affidavit of publication, case file, or backup material could be placed in the appropriate section. The Recorder can also write reminder notes for placement in the sections, of agenda items to be expected during that month. For instance, if your City Council does something at the same time each year, (for example: levying assessments for districts, or adopting a tax levy), you can keep a reminder in that month's section which will alert you each year to place the matter on the agenda. This also allows for an advance departmental reminder to avoid last-minute work.

If this type of system is utilized, when it comes time to prepare an agenda, the City Recorder would retrieve and sort the items from the appropriate month for the current agenda.

In smaller cities, a file labeled "Pending City Council Action" could be maintained and reviewed prior to the preparation of each Council meeting agenda.

1.08.030 Tickler System. An effective tickler system is a good method to track follow-up items, such as agreements with termination dates, insurance certificates, leases, contracts, commission/committee term expirations, special events, documents to be recorded, etc. This system can be in a number of forms, such as a file containing month and day guides where note cards are placed within the file at the specified date.

It may be appropriate to have the note cards in duplicate so that when reminder time comes, you need only pull off the duplicate and forward it to the appropriate person or department. It should be noted that some items, such as leases, insurance certificates, and some agreements may need as much as a three-month lead time to negotiate new ones.

Word processing and data base management of the "tickler system" is very helpful. With the "Search" mode of a computerized system, items can be found by due date, date adopted, date

requested, etc. One program found to be useful to many Recorders is called "Clerks Index," designed by MuniMetrix Corporation.

The systems mentioned in this Chapter are suggestions and can be modified to meet individual needs. Any system should be kept simple and workable, and everyone in the City Recorder's office should be knowledgeable about the system so it will work in the Recorder's absence.

1.08.040 Community Calendar. In some cities, the Recorder maintains a community calendar as a public service. This type of calendar could have all meetings and events of community-wide interest, such as meetings of the City Council, School Board and Chamber of Commerce, and any event of interest to the general public. The community calendar should be given to the press for publication in the newspapers and posted in various places in the city. It could also be included with other city mailings.

In some cities, this type of calendar is maintained and distributed by the Chamber of Commerce or other community organization.

1.08.050 Internal Calendar. In many cities, the Recorder maintains an internal calendar for Councilors and city departments. This type of calendar should list all City Council and board/commission/committee meetings, as well as outside meetings Councilors or Department Heads might be interested in attending. The internal calendar should also include other citywide events of possible interest to Councilors and others. This calendar may or may not be disseminated to the press, depending on the policy of individual cities.

CHAPTER 1.10

THE MULTIPLE ROLES OF THE RECORDER

Sections:

1.10.010	Statutory References to City Recorder
1.10.020	Clerk of the Council
1.10.030	Records Manager
1.10.040	Elections Officer
1.10.050	Treasurer/Finance Director/Auditor
1.10.060	Personnel Director
1.10.070	Municipal Judge
1.10.080	Risk Manager
1.10.090	Administrator/Manager
1.10.100	The Complexity of Our Position

1.10.010 Statutory References to City Recorder. The Incorporation Act of Oregon Law, 1893, required the election of a Recorder "to be Ex Officio Clerk of the Common Council." Today, very few Oregon Recorders are elected; most are appointed by the City Manager, Mayor or Council. Elected Recorders in the state include those in Ashland and Butte Falls.

1.10.020 Clerk of the Council. The most common role of the City Recorder is to act as the "Clerk of the Council." The elected officials of most cities have a close working relationship with the City Recorder. They depend on the Recorder to provide them with a Council Meeting Packet that contains sufficient information to help them make informed decisions on matters placed before them.

OAMR is no doubt the best resource for information on this primary function of our profession. Almost every annual conference offers one or more educational sessions on this aspect of our jobs. In addition, networking with other members is also beneficial and educational. The International Institute of Municipal Clerks (IIMC) has numerous resource materials on the multiple aspects of this. IIMC headquarters are located at 8331 Utica Avenue, Suite 200, Rancho Cucamonga, CA 91730; telephone 909-944-4162; fax 909-944-8545; message center 800-251-1639; email hq@iimc.com. Their web address is www.iimc.com.

1.10.030 Records Manager. Our title, "Recorder," reflects the importance of this aspect of our jobs. We are the historians of our cities as we help write the history, we record the history and we preserve and protect the history. That's a HUGE responsibility that we should all take very seriously! Recorders are typically responsible for all legal records of the city such as ordinances, resolutions, contracts, agreements, permits and licenses, deeds, easements, etc.

There is a Records Management Committee within OAMR. This committee has worked very hard to promote the records management role of the Recorder and has put many, many hours into our Records Retention Schedule and Records Management Manual. In one of the statutory references to City Recorder, you will find state law requires that every municipality appoint someone to act as its "Records Manager." Often the City Recorder is appointed as the Records Manager.

Many Recorders also belong to ARMA (Association of Records Managers and Administrators, Inc.), which can be contacted at Oregon Chapter, PO Box 40004, Portland, OR 97240-0004. Their web address is www.oregonarmal.org.

1.10.040 Elections Officer. Although most election duties fall upon counties across the state, the Recorder is most often considered the "City Elections Officer." We are typically responsible for providing candidates for local elected office with information they need in order to comply with filing requirements and finance/campaign reporting requirements. We are also usually responsible for handling local initiative and referendum petitions. County Clerks across the state and the Secretary of State's Office assist Recorders with election-related questions. The Election Division of the Secretary of State's Office may be reached at 255 State Capitol St. NE, Suite 501, Salem, OR 97310, by phone at 503-986-1518 or by fax at 503-373-7414. Their web address is www.sos.state.or.us/elections.

1.10.050 Treasurer/Finance Director/Auditor. Many Recorders in the state also carry this title and perform the duties of Treasurer, Finance Director and/or Auditor. OMFOA (Oregon Municipal Finance Officers Association) is an excellent resource for Recorders involved in finance and budgeting. Their mailing address is PO Box 13308, Portland, OR 97213. Their web address is www.omfoa.org.

1.10.060 Personnel Director. Recorders who also have the responsibility of acting as Personnel Directors have an array of responsibilities including collective bargaining, employee benefits, payroll tax reporting, etc. Typically, people with this title also act as the city's insurance officer, ADA compliance officer, safety officer and union negotiator. A good resource for someone new to these responsibilities is LGPI (Local Government Personnel Institute), a branch of the League of Oregon Cities. LGPI may be contacted by writing to PO Box 908, Salem, OR 97308, by calling 503-588-2251 or by fax at 503-485-5900, email lgpi@callatg.com. Their web address is www.lgpi.org. There is also a national and state organization called PELRA, (National Public Employee Labor Relations Association), or ORPELRA for the Oregon Chapter that can be a helpful resource for personnel related tasks. Their web address is www.nperla.org.

1.10.070 Municipal Judge. In the late 1800's, and presently in some small cities, Recorders often acted as Municipal Judge. As Municipal Judge, Recorders are required to follow the laws prescribed for justices of the peace. The Oregon Municipal Court Judges Association and the Oregon Court Administrators Association serve as the primary educational resource for Recorders who also act as Municipal Judges.

1.10.080 Risk Manager. Some Recorders may act as their city's Risk Manager, or are a part of a Risk Management Team. This typically encompasses the study of potential risk of exposure to, and preventative steps against, any and all types of liabilities -- in every department. PRIMA (Public Risk & Insurance Management Association) provides educational training opportunities to those involved in this field. Their web address is www.orprima.org.

1.10.090 Administrator/Manager. A few Recorders in Oregon carry the title of City Administrator or City Manager.

1.10.100 The Complexity of Our Position. The position of City Recorder is one of the most complex professions in local government. We are expected to perform all the duties of the office stipulated by statute, ordinance or custom. The Recorder often relates daily to nearly every other city department. We also work with the elected and appointed officials, boards and commissions, county

and state offices and certain federal offices on a regular basis. Because we provide many different and complex services and our role "touches" so many, the way we provide these services is important. We must strive for professional delivery of quality services and we must be accessible to the citizens of our community.

Because we provide many different and complex services and our role "touches" so many -- the way we provide these services is as important as the services themselves. We must strive for a complete and fully-developed professional delivery of quality services. We must remember that we hold a very important public office -- one that is open to constant examination and scrutiny because as public servants -- we must constantly be accessible to the citizens of our community.

We are in a truly specialized field which places us in a special niche in society and thus part of a somewhat privileged and intellectual group. We must be masters of a wide array of necessary -- yet seldom understood -- services. We are consulted daily by both citizens and our fellow government officials -- serving them both, and even often working as a "buffer" between them. The degree of dedication we give to our position will not only reflect on the day-to-day professional management of our own office, but it will also serve to promote local government in general and the vitally important role within which Recorders have historically functioned.