



Mastering Meeting Management:

Clerk Best Practices



A PICTURE IS WORTH A THOUSAND WORDS

This is my “Clerks are superheros we can get through anything face!!”





AGENDA

- Let's Talk Meeting Management
- Pre-Meeting Preparation
- Conducting Meetings
- Post-Meeting Follow-Up
- Leveraging Software & Apps
- Q&A

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Let's Talk Mtg Mgmt

The why?



The Why??

Clerks are not only superheroes, but also the gatekeepers of information for the community & staff!!

Goals:

- Transparency
- Efficiency
- Community Engagement

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Pre-Meeting Prep

Thinking through the full process



BIG CONCEPT

Prep as much as you can BEFORE the meeting!!



Be Prepared...

Define the Process

- Align process w/ Administration
- Make processes clear to staff
- Set hard deadlines & expectations

Never STOP Learning

- Be mindful of what works or what doesn't work
- Solicit feedback from staff
- Adjust process as needed

Produce A+ Materials

- Use your materials to educate
- Require clean, clear, & concise materials
- Agendas are permanent retention



LET'S REVIEW SOME AGENDA CONCEPTS

Public Comment

- Define in Code & on agenda
- PC specific email address
- Run timers

Finance Director's Report

Cool and effective concept for educating the public.

Consent Agenda

"Items listed on the Consent Agenda are approved with one motion; Items pulled by Council from the Consent Agenda for discussion are listed and voted on separately."

Executive Session

- Always list on the agenda in case something comes up
- Ensures OMA always met

Regular Agenda

- Presentation / Discussion items
- Outline presenter name, title, & speaking time

Reserved Discussions

Define when personal agendas / topics should be discussed



LET'S REVIEW SOME HELPFUL PRACTICES

Tracking Sheets / Memos

- What's coming? What's Next?
- Education / Full story
- Recommended motions

Signed Documents

Requiring documents to be signed by third parties BEFORE consideration is a GAME CHANGER!!

Memo Attachments

- Make templates available*
- Material continuity & familiarity*
- Include key items material to the ask*

Mayor's Script

- Ensures legal requirements met
- Reduces overall stress
- Keeps mtg on schedule

Submission & Distribution Timelines

Clearly define submission and review expectations, as well as when distribution will occur

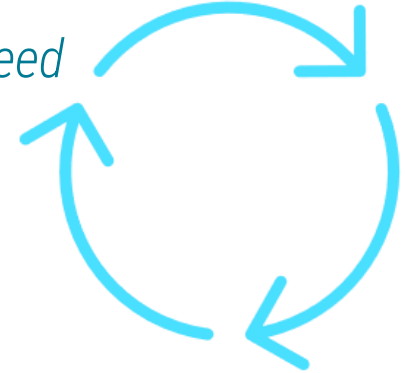
Create Attendance Notification Policy

- Who's going to be absent/remote?
- Plan ahead (votes & tech)



City Manager Updates

- *Email sent by City Manager once the agenda is out*
- *Includes highlights of key items & additional background*
- *Sent w/Board bcc'd to discourage replying all*
- *Allows City Manager insight to questions that might need addressed*
- *Makes Board members feel in the loop*
- *Can include other updates as well*
- *Full circle benefits*



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Conducting Mtgs

Lights, camera, action!!



Set the Tone & Ground Rules

Stay on Schedule & Topic

- Make sure everyone has a copy of the agenda
- Run timers

Electronic Voting

- Cuts back on influence
- Clear votes
- Free & Paid options
(*more to come*)

Take Notes

- Create a template
- Use for attendance
- Record motions/votes
- Track public comment

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Post-Mtg Follow-up

The mtg is over. Where do go from here?



What's next?

- Distribute documents needing executed
- Create a shared space for filing
- Use notes for minutes

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Leveraging Software & Apps

What can help me now? What's coming?



Surely there's an app for that!!!

- Document Creation: Microsoft Office Suite
- Form Mgmt: SeamlessDocs / Google Forms
- Agenda/Pack Mgmt: CivicPlus / Granicus / Peak / MinuteTraq
- Transcription / Recording apps: Otter / Zoom / Teams
- Electronic Voting: EZ Vote Connect
- E-Signatures: DocuSign / AdobeSign
- AI generation: CoPilot / ChatGPT

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Q&A

Skies the limit... Let's talk!!



THANKS

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