



**CITY CLERK'S OFFICE ACCOMPLISHMENTS  
(JUNE 2023 TO MAY 2024)  
Ben Lane, City Clerk**

### Overview

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This self-evaluation covers the following goals for the June 2023 to May 2024 period:

- 1) Preparing for the July and November 2024 Mayor and Council Elections.
- 2) Implementing improvements to the City's Records Management Program.
- 3) Implementing computer-based training that provides an overview of board and commission liaison responsibilities for City staff.
- 4) Procuring an electronic Agenda Management System to replace a largely paper-based process.
- 5) Developing team members and representing the City Clerk's profession.

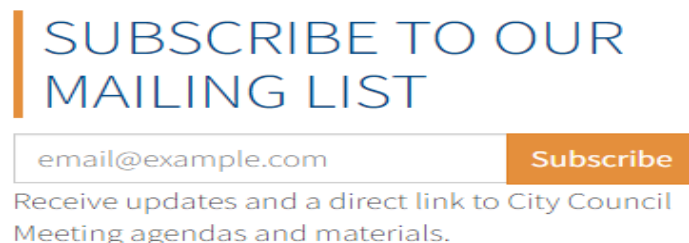
This report covers these and other areas in detail. I truly appreciate being able to serve as the City Clerk for Scottsdale.

### Innovations and Improvements

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Leveraging technology is key to improving our services for external and internal customers and making our operations more efficient. Additionally, I look for ways to make materials and information provided to the public, City Council, and others easier to understand and more transparent. In furtherance of these goals, the following innovations and improvements were done:

- **Online Agenda Sign Up** – Working with Information Technology (IT) staff, the City Clerk's Office implemented a solution allowing residents to sign up to receive email notifications when Council Meeting agendas (and amended agendas) are posted on the City's website by the City Clerk's Office (see screenshot below).



This subscription notification can be found on multiple City webpages making it convenient for individuals to sign up. The June 27, 2023 Council Meeting was the first agenda to use this new email list, which is managed by City Clerk staff. To date, a total of 988 email addresses have been added to receive these notices.

- **Website and Kiosk for Public Comments**

First implemented for the August 24, 2021 City Council Meeting, the use of an electronic kiosk for residents to sign up for public comment on agenda items continues to be well received. This system eliminated the need for paper comment cards. During Council Meetings, the kiosk is staffed by a City Clerk team member who helps residents fill out a request to speak, which, on average, takes about 30 seconds to complete. Several jurisdictions have implemented a similar system.

In addition to signing up to speak at the kiosk, residents can also sign up online ahead of the Council Meeting. Knowing partial speaker counts in advance of a Council Meeting helps us better plan to ensure adequate staffing levels and better estimate the number of meeting agendas to print for the public.

For this evaluation period, 145 speakers signed up in advance or provided a written comment using the website feature. For this period, 101 speakers signed up at the Council Meetings using the kiosk function.

## **Election Administration**

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During this evaluation period, City Clerk team members answered voter questions related to the November 2023 Scottsdale Unified School District Special Election and March 2024 Presidential Preference Election using a Frequently Asked Questions and Answers Guide that I developed. Additionally, we prepared for the upcoming 2024 Mayor and Council Election.

- **March 2024 Presidential Preference Election**

For the March 19, 2024 Presidential Preference Election (PPE), voters of a registered political party chose who they would like to be their presidential candidate for the November 2024 General Election. Party winners of the Arizona PPE are officially determined at the party's national convention.

The City Clerk's Office in City Hall served as a ballot drop-off site for this election. This was the first time in recent memory that City Hall served as a ballot drop-off site for a PPE. This customer service enhancement was appreciated by voters as City Hall is a convenient and well-known location. Over 850 ballots were dropped off at City Hall from February 21<sup>st</sup> to March 19<sup>th</sup>.

- **July 2024 Mayor and Council Primary Election**

The 2024 Mayor and Council Primary Election (to elect a Mayor and three Councilmembers) will be held on July 30, 2024. A candidate packet was created and placed on our election website that provided information to interested residents about the requirements related to running for City Council. The PDF versions of the nomination petition forms were improved to allow for an auto-insertion of a candidate's picture.

Deputy City Clerk Victoria Roedig and I met individually with each prospective candidate to discuss the requirements related to running for office and to answer any questions. We met with a total of 18 individuals interested in running for either Mayor or Council. Out of that group, three residents filed the necessary paperwork to run for Mayor and nine residents filed the necessary paperwork to run for City Council.

On February 9, 2024, Governor Hobbs signed [House Bill 2785](#), which moved the Primary Election date from August 6<sup>th</sup> to July 30<sup>th</sup>. The Governor, Legislature, and election officials stated the emergency legislation was necessary to avoid missing federal deadlines to send ballots to military and overseas voters for the General Election and for the State of Arizona to send its votes to the electoral college for President of the United States. I updated the Council and candidates on this legislation as it progressed and worked to ensure that signatures gathered in hard copy or through the E-Qual system would not be affected by the date change.

A checklist was used for the candidate filing process. One or more City Clerk team members and I met with each candidate and used the checklist to ensure all documents, such as nomination petitions, declaration of candidacy, and financial disclosure statement, were filed in a timely manner. Team members met with at least one candidate. Having the team cross-trained in candidate filing procedures allowed us to meet with more than one candidate at a time if needed.

I worked closely with the Code Enforcement Team to address political sign issues throughout the City. Political signs could be placed in the City right-of-way (ROW) starting Monday, May 20<sup>th</sup>. With the support of the City Manager, I worked with the Code Enforcement Team to ensure any political signs that were placed in the ROW before Monday, May 20<sup>th</sup> were removed. I provided advance notice to mayor and council candidates about our enforcement efforts.

Regular emails were sent to candidates providing reminders about upcoming key dates, information from other departments that was provided to the Mayor and Council, and other relevant election information.

- **November 2024 Mayor and Council General Election**

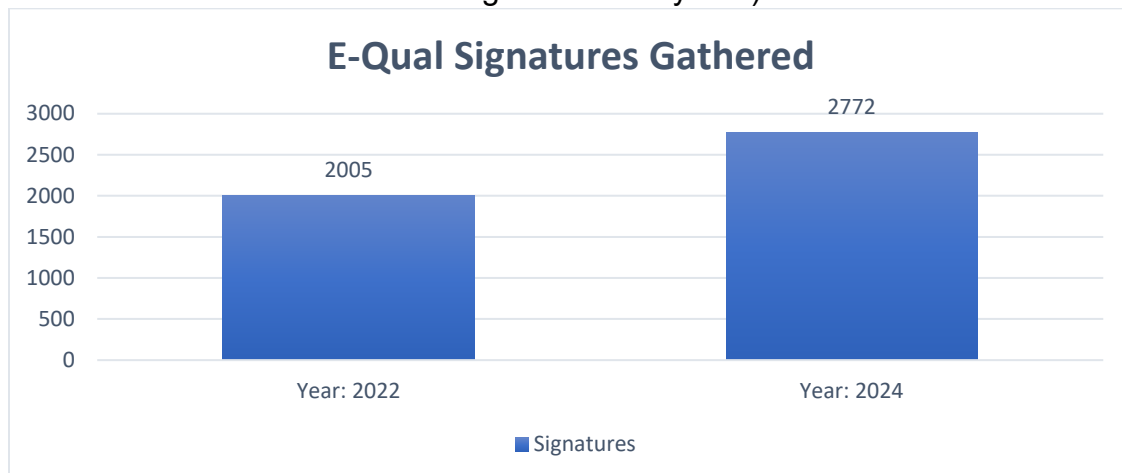
A General Election will be held on November 5, 2024 to elect any office that remains unfilled after the July 2024 Primary Election. The City Council also referred two items to the November ballot for Scottsdale voters to consider – a City proposal to replace and reduce an expiring sales tax, and an adjustment to the City's state-imposed spending limitation.

The sales tax measure was recommended by the Protect and Preserve Scottsdale Task Force. Along with the City Attorney, I presented to the Task Force at multiple meetings related to the drafting of ballot language, the City's partnership with Maricopa County Elections, key election dates, and the process for referring a measure to the ballot. I worked closely with the City Attorney's Office and outside legal counsel on drafting the ballot language for the sales tax and spending limitation measures and, along with the City Treasurer and City Attorney, made several presentations to the City Council on the two ballot measures.

- **E-Qual**

Starting in 2020, the Arizona Secretary of State's (AZ SOS) Office made its online nomination petition filing system (E-Qual) available to cities and towns. E-Qual allows candidates to gather nomination signatures from qualified electors using an online portal. In addition to the environmental benefits of minimizing the number of paper petitions needed, E-Qual also confirms the signer is registered to vote, lives in the correct jurisdiction, and has not electronically signed more than the maximum number of petitions allowed for that office.

I worked with the AZ SOS's Office to bring E-Qual to Scottsdale candidate elections. E-Qual was first used in the August 2022 Council Election by 8 candidates and again during the July 2024 Mayor and Council Election by 13 candidates. Over 2,000 E-Qual signatures were gathered by candidates in 2022 and over 2,500 signatures in 2024 (candidates had one less week to gather signatures as the election date was moved from August 6<sup>th</sup> to July 30<sup>th</sup>).



Per current [State law](#), E-Qual only allows candidates to obtain the minimum number of required signatures. With the Mayor and Council's support, I worked with Government Relations staff to add a buffer of ten percent above the minimum so that candidates could gather signatures completely in E-Qual without needing to gather additional hard copy signatures.

In June 2023, Government Relations Director Dale Wiebusch and I presented a related resolution for consideration to the Arizona League of Cities and Towns General Administration, Human Resources and Elections (GAHRE) Policy Committee, which unanimously advanced the proposal to the Resolutions Committee. In August 2023, the Resolutions Committee overwhelmingly supported the resolution, and it was added to the list of League supported resolutions. We worked closely with League staff to advance draft legislation, which resulted in the passage of [Senate Bill 1285](#) which provides for the ten percent buffer starting with elections held in 2025.

- **Campaign Finance**

Campaign Finance Reports were due on a regular basis during this evaluation period. I sent periodic email reminders to committees related to upcoming filing deadlines and called any committee that had not filed by the morning the reports were due. These efforts greatly increased compliance with the filing deadlines. During this evaluation period, 15+ candidate and political action committees filed over 30 campaign finance reports. City Clerk team members worked with the Arizona League of Cities and Towns to make the campaign finance report provided by the Secretary of State into a fillable PDF for use by other cities and towns.

## **Council Meeting Management**

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The City Clerk's Office provides administrative support to the six Councilmembers, including research requests and drafting remarks for events such as ribbon-cutting ceremonies. The Clerk's Office staffs the Council Meetings and drafts the minutes for each meeting.

Other significant accomplishments in this area include:

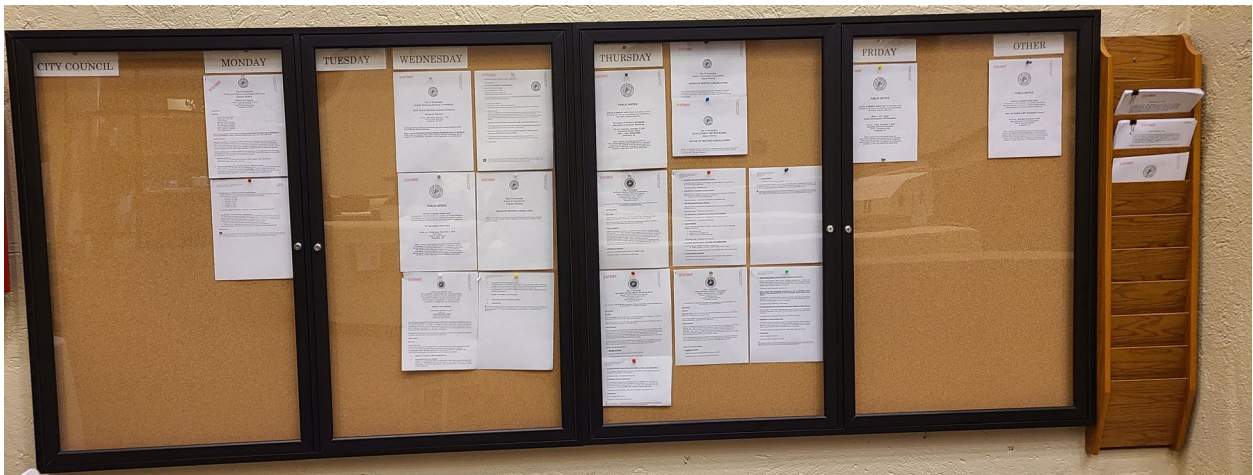
- **Agenda Management Software**

During a previous evaluation period, a Capital Improvement Project Request was approved by the City Council for an Agenda Management System software solution, which will help automate a largely paper-based process in terms of document routing, agenda creation and, possibly, meeting management. Additionally, requirements were developed that were needed for a procurement request and stakeholders from every City division were identified. The scope of the project was established, and possible vendors were identified. During this evaluation period, three vendors bid on the procurement, their responses were evaluated by a multi-

department team, and demonstrations were provided by the three vendors. The evaluation will be completed, and a vendor recommended in the next year.

- **Secure Posting Board**

I worked with the City Manager's Office to install a new posting board (where meeting notices are displayed behind locked clear plexiglass cabinets), which was completed in November 2023. A locking posting board is a best practice as it ensures that meeting notices remain in place and available to the public through the meeting date of the public body.



- **Statistics**

- 472 Council Reports were processed.
- 71 sets of Council Meeting Minutes were prepared.
- 32 ordinances were processed.
- 240 resolutions were processed.
- 1 training session related to Agenda and Council Report Processing was conducted with a total of 3 staff members in attendance.

## **Records Management**

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The City Clerk's Office provides administrative oversight of the City's records management program by ensuring departments properly maintain their records per the State's retention schedules.

Other significant accomplishments in this area include:

- **Online Training Portal**

An online training for departmental records officers was developed and implemented during this evaluation period. The training provides essential information related to staff duties and can be used as an initial training for new officers or as a refresher course for experienced officers.

- **Records Inspections**

City Clerk staff conduct records inspections of departmental records. Clerk staff meet with departmental records officers to review and discuss what electronic and paper records are being kept in the department and ensure the records are being kept for the appropriate length of time per the State's retention schedules.

- **Records Destruction Request Portal**

Before City staff can destroy records that have met their retention periods, the destruction request must be reviewed and approved by the Clerk's Office. This destruction request was a manual process with departmental staff either interofficing or emailing a request form. Working with Information Technology staff, we developed an online records portal to allow for the electronic submission of destruction requests by an approved departmental records officer. This allows for more efficient processing and tracking of requests.

- **Essential Records**

Every five years, the State of Arizona Library, Archives, and Public Records requires all municipalities identify essential records that would be needed in the first 72 hours of an emergency. The City Clerk's Office will be working with other City departments on updating the City's Essential Records Listing that is due to the State Library in December 2024.

- **Statistics**

- 32,268 images (pages) were scanned into our records database. These images came from a total of 1,321 documents.
- 2 records inspections were conducted.
- 46 destruction requests submitted through the online portal.

## **Boards and Commissions**

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The Clerk's Office processed almost 1,000 legal postings during this period. Legal postings include meeting notices, marked agendas, and meeting minutes, among other documents. Clerk staff work with staff liaisons to ensure items meet the State's Open Meeting Law requirements and Administrative Regulation 121 standards.

Other significant accomplishments related to boards and commission include:

- **Online Training Portal**

An online training for board and commission staff liaisons was developed and implemented during this evaluation period. The training provides essential information related to staff duties and can be used as an initial training for new liaisons or as a refresher course for experienced liaisons.

- **Advertisement / Publicity**

We work with the Communications Office to better publicize board and commission recruitments using a combination of press releases, social media posts, and Fast Five video spotlights. Mayor Ortega spotlighted board and commission recruitments several times during his “Mayor’s Report” portion of City Council Meetings. Informational flyers related to upcoming vacancies were displayed at community centers, libraries, and council meetings. We staffed a booth at the City’s 2023 Juneteenth and November 2023 Dogs’ Day Out events, where we provided information on board and commission opportunities and upcoming City elections. In May 2024, Deputy City Clerk Rommel Cordova joined the City’s Podsdale podcast hosted by Public Affairs Supervisor Holly Walter to discuss the City’s boards and commissions program.

- **Vacancy Report**

As a process improvement implemented in 2021, a monthly report is provided to the City Council detailing members who resigned or were removed from their board or commission.

- **Statistics**

- 981 legal postings were processed.
- 158 board and commission applications were processed, and the Council made 69 appointments or reappointments to boards and commissions.
- 33 trainings related to attendance, Open Meeting Law, Ethics, and other requirements were conducted with a total of 49 newly appointed board and commission members in attendance.
- 6 trainings related to legal postings and other responsibilities were conducted with a total of 14 board and commission staff liaisons in attendance.

## **Budgeting**

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The City Clerk’s Office supports the Council goal of fiscal and resource management by proactively seeking ways to reduce operational costs while maintaining, or when possible, increasing service levels to internal and external customers. To further this goal, we have one of the lowest operating budgets in the City. Additionally, I track election costs on an individual invoice basis to be able to better budget for future elections.

## **Professional Development, Presentations, and Awards**

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I believe cross-training and professional growth are important components to having a strong staff. To further this effort, I worked with my team on questions related to the 2024 Mayor and Council Elections to ensure that answers were consistent among all team members through trainings and by developing a list of Frequently Asked Questions and Answers that could be referred to by staff.



- **Personnel**

Management Assistant Debbie Ginsburg was hired in July 2023. This position was previously vacant and assists the Office's supervisory positions. Debbie supports records management and council meeting functions, among other duties.

Deputy City Clerk Cathie Butteweg retired in August 2023. She started her Scottsdale career in December 2004 and was in the City Clerk's Office during her entire City tenure.

Rommel Cordova's position was upgraded from a City Clerk Supervisor to a Deputy City Clerk in August 2023.

Deputy City Clerk Victoria Roedig was hired in November 2023. This position oversees the City's records management program and assists with council meeting support and elections administration. Victoria left the City in May 2024 for a position that was closer to her home.

Johnny Olmo's position was upgraded from Technology Specialist to a Departmental Systems Analyst/Programmer I in December 2023.

- **Professional Development and Major Certifications, Appointments, or Awards**

At the July 2023 Annual Conference of the Arizona Municipal Clerks' Association (AMCA), Deputy City Clerk Cathie Butteweg was recognized with the AMCA President's Award of Distinction. This award is given to a member who has assisted with the AMCA's vision and mission. In explaining the award, AMCA Board President Darcie McCracken noted Cathie's lengthy involvement and dedication to the organization, specifically noting her involvement as the first chair of the Elections Committee and her long-standing service, including several years as co-chair of the Records Management Committee.

Senior Administrative Assistant Marilee Avina attended the Fall 2023 Scottsdale Insider Program. Scottsdale Insider is designed to give employees overview of our organization and the vast array of services the City offers. The goal of Scottsdale Insider is to provide professional development and foster a sense of community and collaboration among our workforce.

During the last quarter of 2023, Rommel Cordova obtained his initial Certified Election Officer Certificate from the Arizona Secretary of State's Office (AZ SOS) and I obtained my recertification from the AZ SOS.

In March 2023, I was appointed to the Governor's Bipartisan Elections Task Force as the municipal government representative. The Task Force was charged with

making recommendations to Governor Katie Hobbs related to enhancing the accessibility and security of Arizona's elections. As part of this Task Force, I chaired the Election Administration Working Group and served on the Election Day and After Working Group. The Task Force completed its final report and made recommendations to the Governor in November 2023.

Chief Information Officer Bianca Lochner served as co-chairs for the City's 2023 Charitable Choices Campaign, which is the City's annual giving program that allows employees to donate to charitable organizations.

- **Presentations**

The following presentations were made during this evaluations period:

In October 2023, I briefly presented to the Scottsdale Leadership Class XXXVIII on the role of the City Clerk, prepared the script and served as the Clerk for their mock council meeting.

In November 2023, I presented to the Fall 2023 Scottsdale Insiders class on City Clerk functions, the importance of City elections, and assisted the class with their mock Council Meeting.

In December 2023, I co-presented with Lake Havasu City Clerk Kelly Williams on essential records (the records needed in the event of a disaster) during the Arizona Municipal Clerks' Association Fall Best Practices training.

In February 2024, I joined the Today and Tomorrow in Scottsdale Podcast hosted by Don Henninger and Kevin Maxwell to discuss the role and duties of the City Clerk.

In April 2024, I presented to the 2024 Scottsdale 101 class on City Clerk office functions, with an emphasis on the 2024 Mayor and Council Election. Deputy City Clerk Rommel Cordova presented on the City's boards and commissions program.

## **Clerks' Profession**

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Contributing back to the Clerks' profession is important to me as there are several current and former Clerks who provide guidance to me and I want to help other Clerks as well. The City Clerk's Office is heavily involved with the Arizona Municipal Clerks' Association (AMCA), which is a statewide group supporting the City Clerk profession.

The following was done in furtherance of this goal:

- I served as chair of the Arizona Municipal Clerks' Association (AMCA) Records Management Committee with Deputy City Clerk Victoria Roedig serving as the co-chair during this period.
- I served as a member of the AMCA Legislative Committee.

- Deputy City Clerk Rommel Cordova served as the chair of the AMCA Education Committee and the co-chair of the AMCA Handbook and Constitution Committee.

Additionally, the AMCA has a listserv where Clerks can pose questions and seek feedback from others. The City Clerk's Office responded to 204 requests for information on topics including council meetings, job descriptions, records management, boards and commissions, elections, city code provisions, and contracts.

### **Goals for the 2024-25 Evaluation Period**

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- 1) Successfully conduct the July and November 2024 Mayor and Council Elections, including:
  - a. Working with and providing information to candidates.
  - b. Drafting an informational pamphlet that will be mailed to almost 100,000 Scottsdale households with at least one registered voter.
  - c. Ensuring required campaign finance reports are filed timely and made available to the public.
- 2) Implement improvements to the City's Records Management Program, including:
  - a. Conducting a twice-yearly training program for records officers that includes more in-depth training related to physical and electronic records management.
  - b. Updating the City's Records Management Manual, which provides guidance to staff liaisons.
  - c. Ensuring the City's records inventory lists match State-issued retention schedules.
  - d. Updating departmental essential records lists (records needed in the event of a disaster) in advance of a December 2024 submission to the Arizona State Library and Archives.
- 3) Complete the procurement process and select an electronic Agenda Management System vendor. Begin the implementation process for the new system.
- 4) Continue working with the Arizona Secretary of State's Office to implement Beacon, the online campaign finance report filing system, for use by Scottsdale candidate and political action committees.
- 5) Continue staff development and onboard two new staff members (Deputy City Clerk and Senior Administrative Assistant).