



Oregon Association of Municipal Records

STRATEGIC PLAN

2022-2027

The OAMR logo is a large circular emblem with a teal border. Inside the circle, a quill pen is depicted with a yellow and red feather. The letters "OAMR" are written in a bold, black, sans-serif font across the middle of the quill.

OAMR

**SETTING THE
AGENDA FOR
SUCCESS**

Prepared By :



SSW CONSULTING

PO Box 82318
Portland, OR 97282
www.sarasingerwilson.com

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Introduction

The Oregon Association of Municipal Recordors (OAMR) started nearly 40 years ago as a grass-roots organization led by volunteers to support municipal recordors across the state. Over the years, we have offered professional development opportunities and networking events to support our members as well as welcome those new to the profession. The organization has operated with the support of many member volunteers and has seen tremendous growth in membership and the professional development opportunities provided. From statewide conferences to in-person and virtual training opportunities offered throughout the year, OAMR has supported and connected professional municipal recordors for the last three decades.

As the OAMR Board has reflected on these accomplishments, there is a great sense of pride for all that has been done and a desire to consider how to best support professional recordors into the future. The Board continues to see changes in technology, local government services, the role of the municipal recorder, the workplace, and more. The Board recognizes the challenges of growth as well as the exciting opportunities on the horizon. In an effort to ensure this profession is ready to adapt to the rapidly-changing environment and best serve Oregon communities, the Board decided to develop the first strategic plan for our organization.

The Strategic Plan is an exciting milestone and will help OAMR be more strategic and focused, make the most of volunteer resources, and explore ways to expand professional development opportunities. It will also help reconnect our diverse membership after two unprecedented years of the COVID-19 pandemic. Most importantly, this Strategic Plan is designed to serve you, our valued members, as you grow and develop in your careers.

We have envisioned the future together and we cannot accomplish it alone. We need your continued engagement and support to make it happen. We will present the Strategic Plan to members across the state through a series of "on-the-road" trainings so that all members have the opportunity to learn about the OAMR mission, our collective vision for the next five years, and how to get involved in achieving these goals together.

Thank you for sharing your ideas, needs, and priorities for the future. We look forward to working together to bring this vision to life!

- The OAMR Board + Strategic Planning Task Force



OAMR Team

OFFICERS

Cathy Nelson, President

Karin Johnson, First Vice President/Conference Committee Chair

Nanci Sandoval, Second Vice President/Special Projects and Fundraising

Kimberly Wollenburg, Secretary

Melissa Thompson-Kiefer, Treasurer

Angie Lanter, Immediate Past President

REGION DIRECTORS

Stephanie Borst, Region 1

Scott Stauffer, Region 2

Alex McHaddad, Region 3

Kitty Vodrup, Region 4

Melissa Huhtala, Region 5

Kayla Duddy, Region 6

Donna Biggerstaff, Region 7

Ruth Post, IIMC Region 9 Director

STRATEGIC PLANNING TASK FORCE

Lilly Alarcon-Strong

Stacie Cook

Lisa Figueroa

Nicole Morris

Cathy Nelson

Jakob Wiley

Kimberly Wollenburg

SSW CONSULTING TEAM

Sara Wilson, Principal/Owner

Ashley Sonoff, Associate



Purpose

The Oregon Association of Municipal Recorders (OAMR) began as a volunteer-led organization in 1983 with a mission to enhance the quality of the municipal recorder office, encourage dedication to the profession, and provide high quality educational experiences to equip members and advance their professional careers.

As the organization and municipal recorder profession continues to grow and take on additional duties to meet the evolving demands of communities in Oregon, OAMR embarked on its first Strategic Plan for the organization. The Strategic Plan serves as a collective roadmap with defined goals and actions to guide the organization over the next five years. The strategic planning process also resulted in an action plan to reach these goals together and measure progress. Rooted in OAMR's mission, vision, and values, the Strategic Plan will shape the way the organization will look, feel, and support members for years to come. It will influence the structure of the organization, the training opportunities provided, the design of conferences and other events, and how the municipal recorder role is perceived in government organizations across Oregon and beyond.

The goals of the project include:

- 1** Enhance member engagement through the inclusion of new OAMR members as well as reengage existing/long-time members.
- 2** Identify current and future member education needs.
- 3** Examine the current governance needs of the association, and propose actions that will improve member engagement at all levels of governance (i.e. committee structure, roles of board and committee members, etc.).



Process Overview

The strategic planning process included three phases:

1. Member outreach to gather ideas
2. Developing the mission, vision, values, goals, and actions
3. Member review and Board adoption of strategic plan

Member Outreach

March - May 2022

- Project planning
- Member survey
- Strategic planning workshop

Strategic Plan Development

June - August 2022

- Review member ideas and identify priorities
- Focus groups
- Draft mission + vision + values + goals + actions

Plan Adoption

September 2022

- Member review
- Finalize strategic plan
- Board adoption



The project began in March 2022 with the Strategic Planning Task Force kick-off meeting to establish the project goals and timeline, identify key stakeholders, and discuss opportunities for member engagement. The Task Force was comprised of members representing varying levels of experience in the municipal recorder role and a variety of local government sizes and locations across Oregon.

Together with the consulting team, the Task Force developed an inclusive communication and engagement strategy with supporting materials to gather a broad set of experiences and ideas for the resulting mission, vision, values, goals, and actions to be reflective of the diverse and growing membership. The strategy followed the guiding principles of the project to be inclusive and fun to encourage as many members as possible to engage with the process in a variety of ways with the intent to develop a broadly-supported and celebrated Strategic Plan. A variety of engagement methods were used to gather input from members throughout the process, including:

- **Key messaging and branding**
- **Fact sheet**
- **Online member survey**
- **Interviews with Board members**
- **Strategic planning workshop**
- **Focus groups**
- **E-blasts**
- **Updates in the quarterly newsletter**
- **Project information page on the OAMR website**

BY THE NUMBERS

- 1 fact sheet
- 6 board interviews
- 80 survey responses
- 13 workshop participants
- 5 focus groups
- 40 focus group participants
- 3 newsletter updates
- 2 e-blasts
- 2 social media posts

Members of the Board, various committees, and the Strategic Planning Task Force gathered on Friday, May 20th to connect on the strategic planning process, review the current context of the organization, and identify focus areas for the next five years. Workshop participants worked closely to assess the current context of the organization and the upcoming challenges and opportunities that should be considered in developing the Strategic Plan. The resulting vision themes and idea proposals developed in the workshop were cataloged alongside the information gathered in the member survey to ensure a holistic view of member priorities and develop a shared and supported vision for the future.

Following the membership outreach, the Task Force conducted an analysis of the outreach data to understand the interests, desires, ideas, and challenges of members as they consider the next five years of OAMR.



As common themes and proposed actions began to emerge, these priority areas were explored in greater detail through a series of five focus groups with members in June.

Focus groups provided an opportunity to ensure the information gathered through the member survey, interviews, and workshop accurately reflected the needs and desires of members for the organization. It was an opportunity to share the results of the outreach data analysis and ask questions such as, “Did we hear the membership correctly? What are we missing?” Throughout the five focus groups, over 40 members shared feedback on the emerging themes and refined the proposed ideas for the Strategic Plan.

Following the focus groups, the Task Force developed the draft mission, vision, values, goals, and actions for the organization. All members were invited to review and provide comments. The resulting feedback was integrated into the final version of the Strategic Plan, which will be brought to the Board for adoption at the OAMR Annual Conference.



Context

As OAMR looks ahead, it is useful to explore the current context of the organization and consider both internal and external factors that will affect the future of the organization. The SPOT analysis (Strengths, Problems, Opportunities, and Threats) aims to capture where the organization currently is before determining where it should be.

The information in the SPOT analysis is a result of the outreach data collected from members in the online survey, interviews with Board members, and a workshop participant survey conducted prior to the workshop. The graphic on the following page highlights the findings from the analysis and the resulting discussion during the workshop.

The strengths, problems, opportunities, and threats captured in the graphic are listed below:

Strengths

- Training opportunities to learn + grow, connect with others
- Supportive community
- Professional development
- Breadth of membership experience
- New members + new to role
- Informational resources
- Networking
- Lunch and Learns
- Listserv
- Certification
- Network of other state organizations
- Fun!

Problems

- Minority doing majority of work
- Difficult to get new people on boards + committees
- Difficult to get to know other members
- Old guard vs. new guard
- Resources for new recorders, new board members, etc.
- Training is not interesting/relevant
- Didn't know about opportunities
- Unclear on the time commitment to serve on board and/or committees



Problems, continued

- Feel overwhelmed by the volume of listserv emails, though appreciate the resource
- No long-term vision after 5 years
- No long-term vision of where OAMR is going to be
- Communication around scholarships
- Outreach and communication in general – do we need to invest in a better vehicle for that?
- Rising costs – speakers, conferences, tools + long-term impacts of how we fund our organization (based on fundraising)
- How do we measure success from year to year?

Opportunities

- Elevate + advocate for our profession
- More training options + resources
- Targeted training + resources for new recorders
- Different education tracks for new versus experienced recorders
- Communication
- Make OAMR more professional
- Restructure Board + Committees
- Outsource duties (bookkeeping, conference planning)
- Inclusive + welcoming
- More networking opportunities
- President personally reaches out to every new member, goes through new member information
- What are the opportunities for these next steps?
- Want to participate, but don't know commitment and don't want to fail or not come through for other members
- Highlighting meaningful experiences where we can make a difference
- Present at LOC or Oregon Mayor's Association to spotlight OAMR
- Temporary PR/Marketing for education within the organization and cities within the state
- President reaches out to City Manager to ask what they need and how they can support

Threats

- Reliance on volunteers - limited time and resources
- Organizational culture
- City leadership may not know/understand OAMR benefits
- No staff back-up at work
- Financial constraints
- Ongoing pandemic challenges
- Burnout
- Difficult to travel away from home
- One-person team at work



Threats, continued

- Hard to gauge success when you are a leader in an organization
- In-person gatherings can be challenging – location, travel, host cities
- Too many committees
- Our workload has increased in all cities, big and small
- The ability to take on role with current structure of board feels daunting - the 4-year commitment is a lot
- Board commitment is too much/too long – many people have signed up and had to stop – turnover
- Structure of organization and level of commitment
- 80/20 rule is challenging in all organizations
- Participation challenge
- Hesitancy to take on a role if we can't do it well
- We used to have more networking opportunities at conferences
- Used to have a presence at LOC – about OAMR, new member packets
- Used to provide trainings “on-the-road” to regions





4 SPOT Analysis

Member Survey: 80
Interviews: 6
Workshop Survey: 7

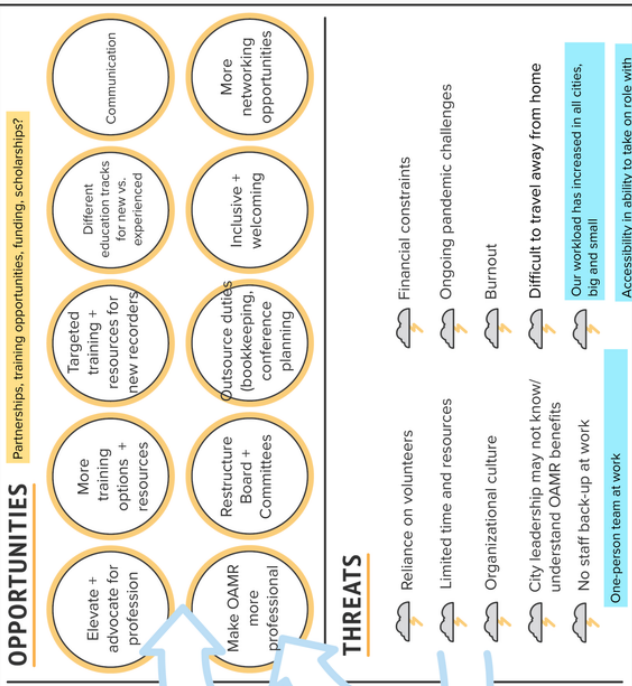
80 members (~35% of organization)
• 45.25% have been a member less than 5 years
• 35% have been a member 5-15 years
• 20% have been a member 15+ years

SPOT MATRIX

STRENGTHS	What do people like, what can we build on?
+ Training opportunities to learn + grow, connect with others	Networking
+ Supportive community	Lunch and Learns
+ Professional development	Listserv
+ Breadth of membership experience	Certification
+ New members + new to role	Network of other state organizations
+ Informational resources	Fun!

PROBLEMS	
- Minority doing majority of work	Training is not interesting/relevant
- Difficult to get new people on boards + committees	Didn't know about opportunities
- Difficult to get to know other members	Unclear on the time commitment to serve on board and/or committees
- Old guard vs. new guard	Feel overwhelmed by volume of listserv emails, though appreciate resource
- Resources for new recorder, new board member, etc.	No longterm vision after 5 years
- No long term vision of where OAMR is going to be	

how do we measure success from year to year?
 Communication around scholarships
 Outreach and communication in general - do we need to invest in a better vehicle for that?
 Rising costs - speakers, conferences, tools + long-term impacts of how we fund our organization (based on fundraising)



City personality
new members, goals
through new member
15 min conversation
means huge difference

Highlighting meaningful differences where we can make a difference

Temporary PR/marketing for the organization and cities within the state

President reaches out to CM with new CR to ask what they need, how they can support...

Present at LOC or Oregon Mayor's Association to spotlight OAMR

Went to participate, don't know commitment and how to get in or not come through for other members

Structure of organization and level of commitment

80/20 rule is challenging in all organizations

Used to have presence at LOC about OAMR new member packets

Used to provide trainings "on the road" to regions

Participation challenge

Hesitancy to take on role if we can't do it well

© THE GROUP

Mission, Vision, Values, + Goals

OAMR

OREGON ASSOCIATION OF MUNICIPAL RECORDERS

MISSION

OAMR SERVES + EMPOWERS MEMBERS THROUGH EDUCATION, CONNECTION + PROFESSIONAL ADVANCEMENT

VISION

- ▶ PROFESSIONAL CITY RECORDERS
- ▶ DIVERSE TRAINING OPPORTUNITIES
- ▶ ENGAGED NETWORK
- ▶ TDP PROFESSIONAL RESOURCE

3 ENGAGEMENT

INCREASE MEMBERSHIP ENGAGEMENT + CONNECTION

GOALS

1 PROFESSIONAL DEVELOPMENT

SUPPORT THE ONGOING EDUCATION + PROFESSIONAL DEVELOPMENT OF THE MEMBERS

2 GOVERNANCE

REVIEW + UPDATE THE GOVERNANCE STRUCTURE TO FOCUS ON ELEVATING + PROMOTING OUR PROFESSION

VALUES

- ▶ INCLUSION
- ▶ PROFESSIONALISM
- ▶ EDUCATION
- ▶ CONNECTION

2022 - 2027 STRATEGIC PLAN

SETTING THE AGENDA FOR FUTURE SUCCESS

Mission

Why we exist...

OAMR serves and empowers its members through education, connection, and professional advancement.

Five-Year Vision

Where we are going...

PROFESSIONAL CITY RECORDERS

Strong membership of professional city recorders

DIVERSE TRAINING OPPORTUNITIES

Diverse training and professional development opportunities that serve members at every level of their career.

ENGAGED NETWORK

Record levels of engagement and membership

TOP PROFESSIONAL RESOURCE

A top professional resource for city recorders across the state.

Values

What will guide us in implementing our vision...

- *Inclusion*
- *Professionalism*
- *Education*
- *Connection*



Goals + Actions

How we will achieve our vision and fulfill our mission.

Goal 1: Professional Development

SUPPORT THE ONGOING EDUCATION AND PROFESSIONAL DEVELOPMENT OF THE MEMBERS

1. Expand training opportunities (lunch and learns, recorded webinars, on the road, virtual, in-person, hybrid)
2. Update the website to include easy-to-find resources (FAQs, archive of listserv information/resources, manuals and process guides from member cities)
3. Explore the development of a professional credentialing program (training tracks)
4. Foster partnerships with other professional organizations to expand training opportunities

Goal 2: Governance

REVIEW AND UPDATE THE GOVERNANCE STRUCTURE TO FOCUS ON ELEVATING AND PROMOTING OUR PROFESSION

1. Restructure the organization with the goal of streamlining the structure of the Board and committees
2. Create clear roles through the development of role descriptions and identify time commitments
3. Identify opportunities where the Board and members can advocate for the profession and OAMR membership
4. Explore securing organization staffing resources through an outside entity to support the administrative tasks of the organization (bookkeeping/accounting, conference planning, etc.)

Goal 3: Engagement

INCREASE MEMBERSHIP ENGAGEMENT AND CONNECTION

1. Redesign and expand the mentoring program
2. Restructure networking opportunities that focus on building relationships and being inclusive
3. Develop a marketing plan for OAMR with the goal of attracting new members, retaining members, and building awareness of the value of OAMR in the local government profession
4. Formalize the onboarding process for all new members



Implementation Structure

This section of the report describes the recommended approach for implementing the strategic plan. The OAMR values will serve as guiding principles as the organization pursues the goals and actions within this plan.

The Strategic Plan is not intended to be implemented solely by the Board. This is an organizational-wide effort and its implementation will require the coordinated efforts of its committees and membership.

It is recommended that the Board serve as the oversight body for implementation. Using input from the membership, the Board should proceed with prioritizing the actions to implement over a five year period based on available resources and a timeline to support the allocation of resources. The actions to be implemented in the first 1-2 years should be assigned to the existing OAMR committees to lead the implementation. Occasionally, the Board may need to assign an action to a special Task Force to guide its implementation.

Each assigned action "lead" should work with the Board, OAMR membership, and partners to develop a project game plan, progress indicators, and a communication and engagement strategy to guide their implementation efforts. Some actions may require several years to complete, however identifying and reporting on subsequent sub-actions will provide visible progress over time. Additionally, the implementation plan will include a structure for reporting progress on actions to support transparency and accountability.



Annually, the Board should request progress updates from the action "leads" to determine the status of the actions, challenges that may need to be addressed, identify opportunities for advancing the goals and actions, and determine if actions or goals need to be updated. A regularly scheduled formal review process will ensure the plan remains relevant and responsive over time. The plan should undergo a comprehensive update every five years where the vision, goals, and values are also revisited.

The Board will track progress toward the Strategic Plan goals and provide members with regular communication on the status of the goals and actions. Members can expect to understand what OAMR is working on, how it benefits the organization, and how to get involved.



Appendix

The Appendix provides a more detailed matrix of the goals and actions with additional member comments to provide context. This context will be helpful for the Action Committees as they seek to understand community intent.

Goals	#	Actions	Implementation Notes
Support the ongoing education and professional development of the members	1	Expand training opportunities (lunch and learns, recorded webinars, on the road, virtual, in-person, hybrid)	Consider combining mid-year and annual conferences to one longer conference with more training opportunities. Offer two professional development tracks (early career and established) at conferences to provide relevant training. Athenian Leadership Dialogue is beneficial, but can feel restrictive due to size limitations. Redesign fundraising committee member duties at conference to allow for greater availability to attend trainings. Top requested trainings include: digital records management, working with elected officials, legal issues, presentation skills, leadership, ethics, and project management.
	2	Update the website to include easy-to-find resources (FAQs, archive of listserv information/resources, manuals and process guides from member cities)	Additional resources could include: hot topics section, a redesign and/or update to the city recorder manual designed for members new to the municipal recorder role, new member handbook, board meeting minutes, organization of information by size of city. Request to include date of last update on website.
	3	Explore the development of a professional credentialing program (training tracks)	This potential credentialing program could focus on county clerks and/or specialty tasks often associated with the city recorder role.
	4	Foster partnerships with other professional organizations to expand training opportunities	Potential partners include League of Oregon Cities, Oregon City/County Management Association, Oregon Mayors Association, Oregon Government Finance Officers Association, Risk Management Association, Oregon City Attorneys Association, Oregon Career Information System, Oregon Chapter of ARMA, Municipal Research and Services Center, and other state-affiliated municipal recorder organizations (Alaska Association of Municipal Clerks, Washington Municipal Clerks Association, City Clerks Association of California, etc.)



Goals	#	Actions	Implementation Notes
Review and update the governance structure to focus on elevating and promoting our profession	5	Restructure the organization with the goal of streamlining the structure of the Board and committees	Consider restructuring region directors to include two directors for larger regions or reduce size of regions to facilitate greater engagement and networking opportunities. Consider term limits for committee members/chairs. Audit duties of committees and board members to reduce redundancies (i.e., Reduce fundraising duties from second vice president role).
	6	Create clear roles through the development of role descriptions and identify time commitments	Develop orientation process and materials for committee chairs and members to include clarity on roles, time commitment, task checklists, communication, meeting management, etc. Develop orientation process and materials for board members.
	7	Identify opportunities where the Board and members can advocate for the profession and OAMR membership	Present at conferences, develop informational handout on benefits of OAMR membership, develop relationships with partner organizations to secure financial support for member scholarships, training opportunities, etc.
	8	Explore securing organization staffing resources through an outside entity to support the administrative tasks of the organization (bookkeeping/accounting, conference planning, etc.)	



Goals	#	Actions	Implementation Notes
Increase membership engagement and connection	9	Redesign and expand the mentoring program	Potential changes could include developing a list of mentors with their bios and allowing mentees to select their mentors based on shared interests, city size and/or location, etc.; mentoring groups; assign more than one mentee to a mentor; orientation materials outlining commitment expectations, how to maximize the experiences, suggested get-to-know-you questions, etc.
	10	Restructure networking opportunities that focus on building relationships and being inclusive	Top ideas included: regional quarterly lunches, structured networking events at conferences, list of new members or new member profile in newsletter/e-blasts.
	11	Develop a marketing plan for OAMR with the goal of attracting new members, retaining members, and building awareness of the value of OAMR in the local government profession	Some communication ideas from members included: e-blasts with birthdays, jobs, announcements, networking opportunities, member profiles; redesign newsletter to have more professional focus with skill highlights, member profiles, training opportunities, etc.; social media strategy; and website redesign. Establish service recognition awards.
	12	Formalize the onboarding process for all new members	Develop more resources for members new to the municipal recorder profession (handbooks, recorded webinars, videos, new member group, etc.). Match new member skills/interests with appropriate committee to facilitate connection, relationship-building, and succession planning.

