



# King County

1200 King County  
Courthouse  
516 Third Avenue  
Seattle, WA 98104

## Meeting Agenda

### Employment and Administration Committee

*Councilmembers: Sarah Perry, Chair;  
Jorge L. Barón, Vice-Chair; Claudia Balducci,  
Rod Dembowski, Teresa Mosqueda*

*Staff: Stephanie Cirkovich, Chief of Staff (206-477-6023)  
Melani Hay: Committee Clerk (206-477-1025)*

2:00 PM

Tuesday, February 3, 2026

Hybrid Meeting

Hybrid Meetings: Attend the Employment and Administration Committee meetings in person in the Southwest Conference Room, 516 3rd Avenue in Seattle, or through remote access. Details on how to attend the meeting remotely are listed below.

#### CONNECTING TO THE WEBINAR

Webinar ID: 867 8846 4943

If you do not have access to the ZOOM application, you can connect to the meeting by calling 1 253 215 8782 and using the Webinar ID.

You have the right to language access services at no cost to you. To request these services, please contact our Equity and Social Justice Coordinator, Tera Chea at (206) 477 9259 or [Tera.Chea2@kingcounty.gov](mailto:Tera.Chea2@kingcounty.gov), three (3) days prior to the meeting.

Pursuant to K.C.C. 1.24.035 A. and F., this meeting is also noticed as a meeting of the Metropolitan King County Council, whose agenda is limited to the committee business. In this meeting only the rules and procedures applicable to committees apply and not those applicable to full council meetings.

1. Call to Order

To show a PDF of the written materials for an agenda item, click on the agenda item below.

2. Roll Call



Sign language and interpreter services can be arranged given sufficient notice (206-848-0355).  
TTY Number - TTY 711.  
Council Chambers is equipped with a hearing loop, which provides a wireless signal that is picked up by a hearing aid when it is set to 'T' (Telecoil) setting.



3. **Approval of Minutes of September 2, 2025 and December 2, 2025** pg 3

**Discussion and Possible Action**

4. Proposed Motion No. 2025-0355 pg 12

A MOTION confirming the appointment of \_\_\_\_\_ to the citizens' elections oversight committee as a representative of the Vietnamese-speaking community.

Sponsors: Perry

**Briefings**

5. **Meeting Materials Review** pg 19

*Jeana Kats, Clarity Consulting*

6. **Human Resources Update**

*Deandra Stanley, Human Resources Manager*

7. **Chief of Staff Update**

*Stephanie Cirkovich, Chief of Staff*

**Other Business**

**Adjournment**



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# King County

1200 King County  
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516 Third Avenue  
Seattle, WA 98104

## Meeting Minutes Employment and Administration Committee

*Councilmembers: Girmay Zahilay, Chair;  
Sarah Perry, Vice-Chair; Jorge L. Barón, Teresa Mosqueda*

*Staff: Stephanie Cirkovich, Chief of Staff (206-477-6023)  
Melani Hay: Committee Clerk (206-477-1025)*

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2:00 PM

Tuesday, September 2, 2025

Hybrid Meeting

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### DRAFT MINUTES

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#### 1. Call to Order

*The meeting was called to order at 2:19 p.m.*

*The Chair recessed the meeting at 2:23 p.m.*

*The Chair reconvened the meeting at 2:24 p.m.*

*The Chair recessed the meeting at 2:36 p.m.*

*The Chair reconvened the meeting at 2:38 p.m.*

2. **Roll Call**

**Present:** 4 - Zahilay, Perry, Mosqueda and Barón

3. **Approval of Minutes of July 1 and July 22, 2025**

*Councilmember Perry moved to approve the minutes of the July 1, and July 22, 2025, meetings as presented. Seeing no objection, the Chair so ordered.*

**Consent Item 4**

4. **Proposed Motion No. 2025-0258**

A MOTION confirming the reappointment of Hilary De La Cruz to the citizens' elections oversight committee as a King County registered voter.

**Sponsors:** Zahilay

**A motion was made by Perry that this Motion be Recommended Do Pass Consent. The motion carried by the following vote:**

**Yes:** 4 - Zahilay, Perry, Mosqueda and Barón

**Discussion and Possible Action**

5. **Proposed Motion No. 2025-0259**

A MOTION confirming the appointment of John Rodriquez to the citizens' elections oversight committee as a representative of the Spanish-speaking community.

**Sponsors:** Zahilay

*Erica Newman, Council Staff, briefed the Committee and answered questions.*

*John Rodriquez made remarks and answered questions.*

*Monique Cohen, Chief Legal Counsel, briefed the Committee and answered questions.*

*Councilmember Barón made an oral amendment to insert "John Rodriquez" on Lines 4, 18, and 22.*

*Councilmember Barón made an oral amendment to insert "King County Council's Employment and Administration Committee" on Line 4.*

*Councilmember Barón made an oral amendment to insert "John Rodriquez" on Line 1.*

**A motion was made by Councilmember Barón that this Motion be Recommended Do Pass Substitute Consent Expedited. The motion carried by the following vote:**

**Yes:** 4 - Zahilay, Perry, Mosqueda and Barón

6. **Proposed Motion No. 2025-0257**

A MOTION approving renewal of contract for chief legal counsel to the King County council.

**Sponsors:** Zahilay

*Stephanie Cirkovich, Chief of Staff, briefed the Committee and answered questions.*

**A motion was made by Councilmember Barón that this Motion be Recommended Do Pass Consent. The motion carried by the following vote:**

**Yes:** 4 - Zahilay, Perry, Mosqueda and Barón

7. **Proposed Motion No. 2025-0256**

A MOTION approving renewal of contract for assistant chief legal counsel to the King County council.

**Sponsors:** Zahilay

*Stephanie Cirkovich, Chief of Staff, briefed the Committee and answered questions.*

**A motion was made by Councilmember Barón that this Motion be Recommended Do Pass Consent. The motion carried by the following vote:**

**Yes:** 4 - Zahilay, Perry, Mosqueda and Barón

## Briefings

### 8. Meeting Materials Analysis

*Jeana Kats, Clarity Consulting, briefed the Committee and answered questions.*

*Melani Hay, Clerk of the Council, made remarks.*

*Jeff Muhm, Chief Policy Officer, made remarks.*

*Stephanie Cirkovich, Chief of Staff, briefed the Committee and answered questions.*

*Sam Porter, Council Staff, briefed the Committee and answered questions.*

**This matter was presented.**

### 9. Employee Engagement Survey Results

*Janine Weihe, Chief Operating Officer, briefed the Committee and answered questions.*

**This matter was presented.**

### 10. Human Resources Update

**This matter was not presented.**

### 11. Chief of Staff Update

*Stephanie Cirkovich, Chief of Staff, briefed the Committee and answered questions.*

**This matter was presented.**

## Other Business

## Adjournment

*The meeting was adjourned at 3:57 p.m.*

Approved this \_\_\_\_\_ day of \_\_\_\_\_

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Clerk's Signature



# King County

1200 King County  
Courthouse  
516 Third Avenue  
Seattle, WA 98104

## Meeting Minutes Employment and Administration Committee

*Councilmembers: Sarah Perry, Chair;  
Jorge L. Barón, Vice-Chair; Claudia Balducci,  
Rod Dembowski, Teresa Mosqueda*

*Staff: Stephanie Cirkovich, Chief of Staff (206-477-6023)  
Melani Hay: Committee Clerk (206-477-1025)*

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11:00 AM

Tuesday, December 2, 2025

Hybrid Meeting

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### **SPECIAL MEETING -DRAFT MINUTES-**

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**1. Call to Order**

*The meeting was called to order at 11:01 a.m.*

*The Chair moved the meeting into Executive Session to evaluate the qualifications of an applicant for public employment pursuant to RCW 42.30.110(g) at 12:08 p.m. for approximately 17 minutes, until 12:25 p.m.*

*The Chair reconvened the meeting at 12:25 p.m. and announced that the meeting would be recessed until after the Council meeting adjourns.*

*The Chair recessed the meeting at 12:28 p.m.*

*The Chair reconvened the meeting at 2:20 p.m.*

*The Chair moved the meeting into Executive Session to evaluate the qualifications of an applicant for public employment, review the performance of a public employee, and discuss with legal counsel legal risks of a proposed action when public knowledge regarding the discussion is likely to result in an adverse legal or financial consequence to the county under RCW 42.30.110 (1)(g) and (i) at 2:22 p.m. for approximately 18 minutes, until 2:40 p.m.*

*The Chair extended the Executive Session at 2:40 p.m. for approximately 10 minutes, until 2:50 p.m.*

*The Chair extended the Executive Session at 2:50 p.m. for approximately 10 minutes, until 3:00 p.m.*

*The Chair extended the Executive Session at 3:00 p.m. for approximately 5 minutes, until 3:05 p.m.*

*The Chair extended the Executive Session at 3:05 p.m. for approximately 5 minutes, until 3:10 p.m.*

*The Chair reconvened the meeting at 3:11 p.m.*

**2. Roll Call**

*Councilmember von Reichbauer and Councilmember Fain were also in attendance.*

**Present:** 5 - Balducci, Barón, Dembowski, Mosqueda and Perry



## Discussion and Possible Action

### 3. Proposed Motion No. 2025-0354

A MOTION confirming the appointment of Corin Goodwin to the citizens' elections oversight committee as a representative from the disability community.

**Sponsors:** Perry

*Corin Goodwin made remarks and thanked the Council.*

*Erica Newman, Council Staff, briefed the Committee and answered questions.*

*Councilmember Barón made an oral amendment to insert "Corin Goodwin" into the blanks on lines 4, 18, and 23. The motion carried.*

*Councilmember Barón made an oral amendment to insert "King County council's employment and administration committee", on line 4. The motion carried.*

*Councilmember Barón made an oral amendment to insert "Corin Goodwin" on line 1. The motion carried.*

**This matter was Recommended Do Pass Substitute Consent - Expedite**

**Yes:** 5 - Balducci, Barón, Dembowski, Mosqueda and Perry

### 4. Proposed Motion No. 2025-0355

A MOTION confirming the appointment of \_\_\_\_\_ to the citizens' elections oversight committee as a representative of the Vietnamese-speaking community.

**Sponsors:** Perry

*The Chair announced that Proposed Motion 2025-0355 was deferred.*

**This matter was Deferred**

5. **Proposed Motion No. 2025-0351**

A MOTION reappointing Kymber Waltmunson to the position of King County auditor.

**Sponsors:** Perry

*Stephanie Cirkovich, Chief of Staff, briefed the Committee and answered questions.*

*Kymber Waltmunson made remarks and answered questions.*

*The Chair moved the meeting into Executive Session to evaluate the qualifications of an applicant for public employment pursuant to RCW 42.30.110(g) at 11:51 a.m. for approximately 10 minutes, to 12:01 p.m.*

*The Chair extended the Executive Session at 12:01 p.m. for approximately 5 minutes, to 12:06 p.m.*

*The Chair reconvened the meeting at 12:06 p.m.*

**A motion was made by Councilmember Barón that this Motion be Passed Out of Committee Without a Recommendation. The motion carried by the following vote:**

**Yes:** 5 - Balducci, Barón, Dembowski, Mosqueda and Perry

6. **Proposed Motion No. 2025-0352**

A MOTION reappointing Tamer Abouzeid as the director of the office of law enforcement oversight.

**Sponsors:** Perry

*Stephanie Cirkovich, Chief of Staff, briefed the Committee and answered questions.*

*Tamer Abouzeid made remarks and answered questions.*

*The Chair moved the meeting into Executive Session to evaluate the qualifications of an applicant for public employment pursuant to RCW 42.30.110(g) at 3:41 p.m. for approximately 7 minutes, until 3:48 p.m.*

*The Chair extended the Executive Session at 3:48 p.m. for approximately 3 minutes, until 3:51 p.m.*

*The Chair reconvened the meeting at 3:51 p.m.*

**A motion was made by Councilmember Barón that this Motion be Passed Out of Committee Without a Recommendation. The motion carried by the following vote:**

**Yes:** 5 - Balducci, Barón, Dembowski, Mosqueda and Perry

## Briefings

**7. Human Resources Update**

*No update was given.*

**8. Chief of Staff Update**

*Stephanie Cirkovich, Chief of Staff, gave an update.*

## Adjournment

*The meeting was adjourned at 3:55 p.m.*

Approved this \_\_\_\_\_ day of \_\_\_\_\_

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Clerk's Signature



# KING COUNTY

1200 King County Courthouse  
516 Third Avenue  
Seattle, WA 98104

## Signature Report

### Motion

**Proposed No.** 2025-0355.1

**Sponsors** Perry

1 A MOTION confirming the appointment of \_\_\_\_\_  
2 to the citizens' elections oversight committee as a  
3 representative of the Vietnamese-speaking community.

4 WHEREAS, \_\_\_\_\_, has identified \_\_\_\_\_ to represent the  
5 Vietnamese-speaking community on the citizens' elections oversight committee, and

6 WHEREAS, King County is committed to conducting open, accurate and fair  
7 elections, and

8 WHEREAS, the citizens' elections oversight committee helps to ensure that  
9 accountability and performance of the department of elections is provided in a transparent  
10 manner that is meaningful to King County residents, and

11 WHEREAS, in accordance with K.C.C. 2.53.021, the employment and  
12 administration committee appoints members to the citizens' elections oversight  
13 committee, and

14 WHEREAS, in accordance with K.C.C. 2.53.021, appointments to the citizens'  
15 elections oversight committee are subject to confirmation by the full council by motion,  
16 and

17 WHEREAS, on December 2, 2025, in accordance with K.C.C. 2.53.021, the  
18 employment and administration committee will appoint \_\_\_\_\_ to the citizens'  
19 elections oversight committee to fill the vacant position for a representative of the  
20 Vietnamese-speaking community for the remainder of that position's three-year term, to

21 expire on December 31, 2026, and to a new three-year term, to expire on December 31,  
22 2029;

23 NOW, THEREFORE, BE IT MOVED by the Council of King County:

24 The appointment of \_\_\_\_\_ to the citizens' elections oversight committee  
25 as a representative of the Vietnamese-speaking community, for the remainder of that

- 26 position's three-year term, to expire on December 31, 2026, and to a new three-year term,  
27 to expire on December 3, 2029, is confirmed.

KING COUNTY COUNCIL  
KING COUNTY, WASHINGTON

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Sarah Perry, Chair

ATTEST:

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Melani Hay, Clerk of the Council

**Attachments:** None



## King County

# Metropolitan King County Council Employment and Administration Committee

### STAFF REPORT

<b>Agenda Item:</b>	4	<b>Name:</b>	Sherrie Hsu
<b>Proposed No.:</b>	2025-0355	<b>Date:</b>	February 3, 2026

### SUBJECT

The proposed motion would confirm an appointment to the Citizens' Elections Oversight Committee for a representative from the Vietnamese-speaking community for the remainder of a three-year term ending December 31, 2026, and then a new three-year term ending December 31, 2029.

### BACKGROUND

The current Citizens' Elections Oversight Committee (CEOC) was established by the King County Council in May 2006, under Ordinance 15453.<sup>1</sup> The mission, membership, responsibilities, and appointment process for the CEOC are outlined in King County Code (K.C.C.) chapter 2.53.

**Mission.** The mission of the CEOC is to "help King County maintain public confidence in elections." County code directs the CEOC to make recommendations to the Council to "improve performance of the King County elections division" and to "help ensure that accountability and performance of the elections division is provided in a transparent manner that is meaningful to the residents of King County."

**Membership.** The CEOC includes 16 positions that represent named types of organizations or sectors of the community, including two at-large King County registered voters, and one ex-officio, nonvoting member representing the Secretary of State's office.

The membership composition was last updated in September 2018,<sup>2</sup> when Council increased the membership from 14 members to 16 members and changed the composition of the CEOC membership.

**Responsibilities.** The responsibilities of the CEOC are to review reports on elections and recent legislation affecting elections; conduct oversight of the implementation of new standards or procedures for elections; monitor elections and canvassing board

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<sup>1</sup> Previously, Council had created a CEOC in July 2003 (Ordinance 14711) and a CEOC in April 2005 (Ordinance 15157); each met for one year and produced a report with recommendations.

<sup>2</sup> Ordinance 18795

meetings; and submit a report to the Council on its observations, findings, and recommendations each year by February 1.

**Appointment process.** In case of vacancies, the Council Chair notifies all councilmembers of vacancies, and open positions are posted in the county's newspaper of record (other than the positions representing the King County Democratic Party and the King County Republican Party, as these positions are designated by the parties).

Appointments and reappointments to the CEOC are subject to review by the Employment and Administration Committee, who make a recommendation to the full Council for final confirmation, via motion.

**2024 Code Updates.** In June 2024,<sup>3</sup> Council made code changes that added requirements for King County Elections to notify the CEOC for observation opportunities; added a policy that the King County Democratic Party representative and the King County Republican Party representative would not be eligible to serve as chair of the CEOC; eliminated a requirement to post vacancies for the positions representing King County Democratic Party or King County Republican Party in the newspaper (these positions are designated by the parties); and added a requirement that CEOC members, except for the ex officio member, live in King County.

Table 1 lists the current membership of the CEOC and the organization or constituency they represent.

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<sup>3</sup> Ordinance 19823



**Table 1: CEOC Membership as of February 2026**

<b>Member</b>	<b>Organization/Constituency</b>
<b>Christopher Hays</b> Chair	Registered voters
<b>Mathew Patrick Thomas</b> Vice Chair, Election Monitoring	King County Republican Party
<b>John Rodriguez</b> Vice Chair, Best Practices and Participation	Spanish-speaking community
<b>Hillary De La Cruz</b>	Registered voters
<b>Mike Flood</b>	Representative sponsored by a nonpartisan organization active in King County that evaluates candidates and ballot measures, such as the Municipal League
<b>Hanna Floss</b>	King County Democratic Party
<b>Corin Goodwin</b>	Disability community
<b>Tyson Hartman</b>	Representative who has experience in technology
<b>Stuart Holmes</b>	Office of Secretary of State
<b>Julie Kang</b>	Korean-speaking community
<b>Jason Lambacher</b>	Representative sponsored by an academic institution and has knowledge of elections
<b>Latasha Mae</b>	Representative sponsored by a nonpartisan organization in King County that promotes equality and the advancement of Black or African Americans, such as the Urban League of Metropolitan Seattle
<b>Kathy Sakahara</b>	Representative sponsored by a nonpartisan organization active in King County that provides elections information to the public, such as the League of Women Voters
<b>Stanley Tsao</b>	Chinese-speaking community
<i>Vacant</i>	Vietnamese-speaking community
<i>Vacant</i>	Representative sponsored by either a junior taxing district or a city with a population under 20,000

**APPOINTMENT APPLICANT INFORMATION**

**Proposed Motion 2025-0355** would appoint a candidate to the CEOC as a representative of the Vietnamese-speaking community for the remainder of a three-year term ending December 31, 2026, and then to a new three-year term ending December 31, 2029. The position has been vacant since May 2022. The Council provided notice of the vacancy and accepted applications to fill the position from September 30, 2025 through October 28, 2025, and one application was received. The EAC intends to interview Minh Duc Nguyen at the February 3, 2026 meeting.

Minh Duc Nguyen is currently the Executive Director of Helping Link (Một Dấu Nối), where she helps Vietnamese American and immigrant refugee communities access information, understand their rights, and participate confidently in civic life.

### **ANALYSIS**

Staff has not identified any issues with the proposed appointment. It appears to be consistent with the requirements of the County Code.

### **AMENDMENT**

An oral amendment would be required to:

- insert the name of the appointee on line 4, 18, and 24 of the proposed motion,
- strike “December 2, 2025” and insert “February 3, 2026” on line 17 of the proposed motion, and
- insert “King County Council’s Employment and Administration Committee” as the governing body that identified the candidate on line 4 of the proposed motion.

An oral title amendment would be required to insert the name of the appointee on line 1 of the proposed motion.

### **ATTACHMENT**

1. Proposed Motion 2025-0355
2. Application materials for Minh Duc Nguyen (distributed separately)



# King County Council Meeting Materials Analysis

Background, Methodology, Findings, and Recommendations

Report Version 2, October 15, 2025



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## » 1. Executive Summary

### 1.1 Project Scope

King County Council engaged Clarity Consulting, with Stephanie Cirkovich, Melani Hay, and Jeff Muhm as project sponsors, to analyze meeting materials and corresponding processes. Initially focused on councilmember requests for more synthesized staff reports and enhanced visual elements, the analysis expanded to examine the complete ecosystem of stakeholder needs, operational and process requirements, and institutional objectives.

### 1.2 Methodology

The assessment took a comprehensive, multi-faceted approach to understand the full scope of stakeholder needs and process requirements. Research elements included:

- Stakeholder interviews and focus groups with councilmembers, personal staff, policy staff, and clerks
- Current state analysis of existing processes, workflows, and use of technology
- Direct observation of how meeting materials are used in meetings
- Benchmarking against five jurisdictions, with the caveat that while comparable jurisdictions were chosen, it was difficult to get to a true like-for-like comparison
- Best practices research on technology platforms, adult learning theory, report formatting, and visual literacy
- Document analysis of current meeting materials


The research was evaluated through the lens of four core design principles:

- **Usability:** Understanding who uses meeting materials, how they interact with them, and when they use them
- **Accessibility:** Evaluating how easily stakeholders can locate and access materials
- **Organization:** Assessing structure, naming conventions, storage, and retrieval systems
- **Transparency:** Measuring clarity and openness for the purposes of public engagement and accountability

**Critical Approach:** Working with project sponsors, Clarity Consulting deliberately adopted an evidence-based, forward-looking lens for this study. Given that current perspectives varied widely among stakeholders and recognizing that council dynamics and priorities will continue to evolve, recommendations included in this report are aimed to serve future councils rather than optimizing solely for current needs.

**Methodology Note:** Of the nine councilmembers invited to participate, three actively sought modifications, three were open to change but uncertain about specifics, and three did not participate. In contrast, policy staff showed great interest in the work and generally had consistent perspectives. Policy staff also infused historical knowledge of how processes and roles evolved the last three to five years. This input, combined with Clarity Consulting's direct observation, benchmarking analysis, and





best practices research, uncovered improvement opportunities extending far beyond the initial councilmember requests.

## **1.3 Recommendations**

The analysis revealed that improving meeting materials requires addressing both organizational alignment and technical implementation. The recommendations are organized into two interdependent themes:

### **1.3.1 Theme One: Stakeholder Alignment and Change Management**

**The Core Issue:** Policy staff, councilmembers, and personal staff hold divergent views on who meeting materials are for, what they should accomplish, and roles and responsibilities around the meeting materials process. These competing perspectives create design tensions that technical enhancements cannot resolve on their own.

**What's Needed:**

- Shared agreement on the audience(s) and purpose(s) of meeting materials
- Clear understanding of how different stakeholders use these materials
- Updated roles and responsibilities that reflect new approaches
- Development of organizational capabilities to support changes
- Stronger communication, training, and engagement processes

### **1.3.2 Theme Two: Strategic Document Framework Implementation**

**The Solution:** Benchmarking and best practices research identified a proven approach—transitioning from a single-document model to an integrated information system that serves multiple user needs simultaneously. This "Strategic Document Framework" includes:

- Improved templates with layered information design (executive summaries, comprehensive analysis, enhanced navigation)
- Standardized naming conventions
- Better navigation tools
- Stronger support for informed policy decision making
- Comprehensive analytical content
- Integrated system functionality



## **1.4 Implementation Approach**

Both themes must be considered. Technical improvements without stakeholder alignment and change management will fail to gain buy-in and may increase confusion. Stakeholder alignment and change management without technical implementation may frustrate those seeking tangible improvements. Success requires coordinated action on both fronts to create meaningful and sustainable organizational change.

## **1.5 Guide for Reading this Report**

This report provides comprehensive information on the impetus that led to this body of work, the methodology used to analyze the meeting materials and corresponding processes, and a visual process flow depicting the current state of the meeting materials process. Recommendations are presented in table summaries across thirteen key areas: five focused on stakeholder alignment and change management and eight addressing technical improvements. Most of the technical recommendations include short videos to aid in explaining implementation details. Additionally, the report provides a sample implementation plan for all suggested recommendations, with the caveat that implementation must consider resource and skill availability, IT dependencies, and an assessment of both ease and impact of implementation. The appendices at the end of the report include benchmarking results from five jurisdictions, mockups of possible enhancements for staff reports, and best practices sourcing.

## » 2. Background

### 2.1 Established Legislative Analysis Framework

The King County Council operates through a well-established legislative analysis process that has served the organization for decades. This comprehensive system produces multiple outputs, including staff reports, legislative documents, and formal presentations during meetings. Like processes used by other legislative bodies, the council and policy staff maintain exceptionally high standards for legislative analysis, prioritizing thoroughness, accuracy, timeliness, and unbiased and objective information delivery.

### 2.2 Current Information Management Practices

Given the complexity of legislation before the council, individual meetings routinely involve thousands of pages of information. The policy team synthesize this extensive material through various formats, most commonly through written staff reports that are presented verbally during meetings. This process enables councilmembers to engage directly with the policy team through questions related to both the legislation and staff presentations, ensuring comprehensive understanding of complex issues.

### 2.3 Post-Pandemic Operations and Role Shifts

In June 2022, the council adopted a hybrid meeting model that allow councilmembers and staff to participate both virtually and in-person. This shift permanently changed how meeting materials are handled—ending the pre-pandemic practice of hard-copy packets and physical binders in favor of digital-only materials accessed across multiple devices. Meetings are now broadcast and recorded through Zoom, which requires significant coordination among clerks, the policy team, KCTV, and other staff to manage the myriad of technical requirements.

Roles and responsibilities related to meeting materials were never formally reassessed during this transition to reflect changes. At the same time, the nature of workplace interaction shifted. Informal coordination—the "water cooler conversations" that once helped teams stay aligned—diminished as staff spent less time in the office. Meanwhile, new councilmembers and personal staff joined without exposure to previous practices, developing their own approaches. The result is a workplace operating with outdated structure while informal knowledge-sharing mechanisms have weakened, leaving newer staff to improvise.

### 2.4 Emerging Stakeholder Requests

In late 2024, some councilmembers expressed interest in receiving meeting information through more visual and simplified formats for their own use as well as for the sake of constituents. Specific requests included PowerPoint slide summaries, infographics, and enhanced screen sharing capabilities. These requests represent a notable departure from established legislative analysis processes and have raised important technical and operational questions that require careful exploration before implementation.

## » 3. Methodological Framework

### 3.1 Design Principles

At the beginning of this body of work, four core design principles were identified by the project sponsors:

- **Usability:** Understanding who uses meeting materials and how they interact with them
- **Accessibility:** Evaluating how easily stakeholders can locate and access meeting materials
- **Organization:** Assessing the structure, naming conventions, storage, and retrieval systems for meeting materials
- **Transparency:** Measuring the clarity and openness of meeting materials to support public engagement and accountability

### 3.2 Forward-Looking Approach

Council dynamics and priorities are inherently fluid. As councils change, so do their priorities regarding meeting materials—including their intended audience, purpose, and usage patterns. Working with project sponsors, an evidence-based, forward-looking lens for this study was adopted. Rather than optimizing solely for current needs, the recommendations in this report are designed to serve future councils, recognizing this ongoing evolution.

### 3.3 Research Methodology

The research took a comprehensive, multi-faceted approach to fully understand the scope of stakeholder needs and process requirements. Research elements included:

- **Design Principles:** As outlined in [Section 3.1](#)
- **Stakeholder interviews:**
  - Councilmember in-person focus group held during the retreat in February 2025
  - Four structured focus groups with volunteer participants held between February and June 2025
  - Eight in-depth interviews with volunteer participants held between February and June 2025
  - Meeting with members of KCTV
  - Meeting with Director of County Relations at the Executive Office
- **Project sponsor guidance:** Twice-monthly meetings with King County Council sponsors between January and June 2025
- **Observational research:** Direct observation of council proceedings via King County television

- **Document analysis:** Review of current meeting materials and any trainings or other documentation related to meeting materials
- **Benchmarking:** Five jurisdictions—City of Seattle, Pierce County, San Bernardino, Snohomish County, and State of Washington—were interviewed for this study (it is important to state here that each jurisdiction structures and approaches their work differently, making it difficult to get to get a like-for-like comparison)
- **Technology evaluation:** Assessment of current digital infrastructure and public-facing platforms
- **Best practices research:** Study of best practices in areas such as report formatting and templates, adult learning preferences, and technology platforms

### 3.4 Methodology Disclaimers

#### 3.4.1 Participation Patterns, Potential Bias, and Technical Reviews

All nine councilmembers were invited to participate in focus groups and follow-up interviews. Three councilmembers actively engaged and requested specific changes to current processes. Three expressed openness to change but were uncertain about what to suggest. Three did not participate. Because the most active participants were those seeking modifications, the findings bias toward areas for improvement while underrepresenting perspectives of councilmembers satisfied with existing processes. In contrast, the policy team expressed more uniform views in focus groups, mostly in support of existing processes.

It must be noted that the policy team expressed concerns after reading the first version of this report sent out in late August-early September. Their concern was they did not feel they were invited to the more in-depth round of 1:1 follow-on interviews after the focus groups and that their voice was not fully and accurately represented in the report. In response to the policy teams' concerns about the first version of this report, they conducted an independent technical review of the report and shared their findings with the project sponsors and Clarity Consulting. Clarity Consulting considered the input and updated the report (Version 2) to incorporate many of the inputs from the technical review. KCTV and the Office of the Clerks of the Council were also invited to conduct technical reviews; this report also reflects their feedback.

#### 3.4.2 Missing Constituent Perspective

One important perspective is absent from this report: constituents. After considering methods to collect representative constituent feedback, the project sponsors determined this would be too difficult to accomplish.



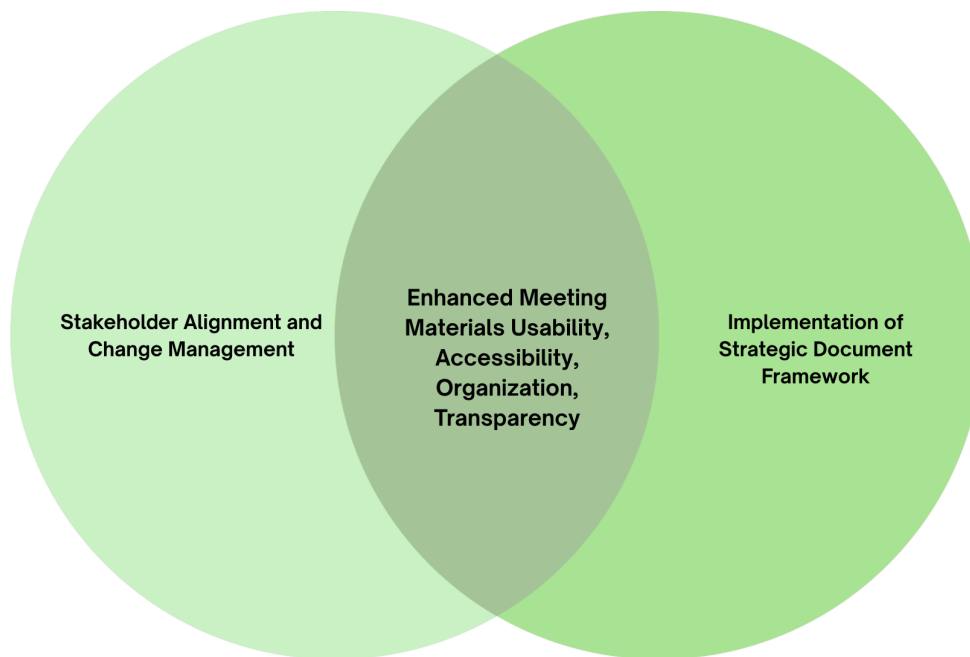
## » 4. Current State Process Flow

It was deemed important to start this work by understanding, documenting, and aligning on the current state of the meeting materials and the meeting materials process flow. To achieve this, Clarity Consulting worked with a subset of policy team members to document the process flow from initiation through post-vote activities. [See Appendix B](#) for a visual of the current state process flow.

## 5. Introduction to Findings and Recommendations

The **Stakeholder Alignment and Change Management** activities described in [Section 6](#) of this report and the **Strategic Document Framework** activities described in [Section 7](#) of this report are designed to work synergistically, with each element reinforcing the other to create meaningful and sustainable transformation.

### Reinforcing Implementation Cycles




*Figure 1: Reinforcing Implementation Cycles*

#### **Stakeholder Alignment and Change Management Ensures Strategic Document Framework Success**

- Audience, purpose, and role/responsibility clarity provides the design criteria needed for effective template development and promotes buy-in for any changes made to meeting materials and the meeting materials process
- Training and communication on the audience, purpose and role/responsibility clarity ensure greater alignment between the policy team, personal staff, and councilmembers and more consistent and accurate buy-in for technical improvements
- Regular business process management and continuous optimization practices strengthens feedback loops between clerks, the policy team, personal staff, and councilmembers

#### **Strategic Document Framework Enables Stakeholder Alignment and Change Management**

- **Template improvements** make stakeholder alignment discussions more concrete by providing visual examples of layered information design

- 
- **Document naming standards** reduce training complexity and accelerate staff adoption of new processes
  - **Enhanced navigation tools** demonstrate immediate value to skeptical stakeholders, building support for broader changes

Rather than considering and implementing these recommendations in isolation, coordinated deployment will create momentum and sustainability. Early technical wins (such as improved document access) build credibility for more complex organizational changes (such as stakeholder alignment activities), which in turn provide the foundation for comprehensive framework adoption.

This interdependency explains why addressing both technical and organizational dimensions simultaneously is essential for lasting transformation.



## » 6. Enabling Stakeholder Alignment and Change Management

Successful implementation of technical changes and refinements requires addressing foundational stakeholder alignment gaps and potential change management challenges.

The following sections examine organizational changes needed to support the adoption of the technical enhancements detailed in [Section 7](#) to ensure sustainable adoption and stakeholder buy-in.

### 6.1 Meeting Materials Audience and Purpose

Current misalignment between the policy team and councilmembers regarding the target audience(s) and intended purpose(s) of meeting materials creates competing design priorities that may undermine structural improvements. Establishing clarity on these foundational elements will be essential for successful framework adoption and implementation.

#### 6.1.1 Current Challenges

Focus group and 1:1 interview feedback identified multiple audiences for meeting materials:

- **Councilmembers:** Most participants emphasized materials should primarily serve councilmembers needs for decision making
- **Councilmembers' personal staff:** While personal staff roles are not consistent, most focus group and interview participants stated they are most likely to be the ones that read the reports as a way of preparing their respective Councilmember
- **Constituents:** Others, namely councilmembers, stated the public is a primary audience and that their accessibility and understanding of all materials must be prioritized
- **Policy team:** As legislative history record-keepers, the policy team can be viewed as an audience

Focus group and interview participants also expressed multiple views on the purpose of meeting materials:

- **Decision support:** Materials provide objective information to inform councilmember voting
- **Public education:** Materials educate constituents on issues and processes and possible impact
- **Documentation and posterity:** Materials serve as permanent legislative records

The varying views on the purpose of meeting materials result in the following challenges:

- **Competing design priorities:** Different audiences require different formats, detail levels, and presentation styles
- **Persistent dissatisfaction:** Without addressing alignment issues, current frustrations will continue regardless of process improvements
- **Implementation risk:** Future changes may lack stakeholder buy-in due to misaligned expectations
- **Inefficient resource allocation:** Policy team efforts may be misdirected without clear priorities

Based on an analysis of staff reports, stakeholder feedback, and benchmarking analysis, we have identified several opportunities for clarifying and aligning on the purpose and audience of meeting materials.

### 6.1.2 Recommendations

Area	Current State	Possible Changes	Benefits
Meeting materials audience and purpose	Misaligned, evolved, and/or siloed views of the audience and purpose of meeting materials	<p>Policy team, personal staff, and councilmembers meet to discuss and align on the purpose(s) and audience(s) of meeting materials</p> <p>Document results and include changes/updates in policy team, personal staff, and councilmember training and communication materials</p> <p>Use the results to help to guide discussion and alignment on roles, responsibilities, scope, and enhancements to meeting materials and corresponding processes</p>	<p>A shared “north star” for all future decisions around changes to meeting materials and corresponding processes</p> <p>Operational efficiencies</p> <p>Reduced frustration</p> <p>Increased collaboration</p>

*Table 1: Meeting Materials Audience and Purpose – Recommendations*

## 6.2 Roles and Responsibilities

Similar misalignment exists regarding roles and responsibilities. Establishing clarity on roles and responsibilities around all aspects of the meeting materials process is essential for successful adoption and implementation.

### 6.2.1 Current Challenges

Historical context is necessary to explain the current challenges. The pandemic forced change in operational practices without a formal review of how roles and responsibilities should adapt. As a result, longer-term staff have expectations that reflect outdated processes; newer councilmembers and their

personal staff lack knowledge of well-functioning pre-pandemic processes. Additionally, as the demographics of councilmembers evolves, the policy team members report growing inconsistencies in how councilmembers and personal staff approach their work. Long-time policy team members shared there is also a level of inconsistency with their own analysts that could use refinement.

**Three themes have emerged:** First, there is inconsistency in personal staff routinely reading staff reports and highlighting critical issues for their councilmembers—a task that historically was more consistently expected and performed. Second, some personal staff have shifted from speaking directly on their councilmembers' behalf during the drafting process to serving primarily as messengers who relay information between councilmembers and the policy team. Third, the policy team self-reported that they have some variance in how they approach their work and that improvements could be made to have more consistency in end products.

**These changes have created bottlenecks.** Drafting legislation and amendments now requires more back-and-forth communication and takes significantly longer. This delays the publication of meeting materials, frustrating everyone involved, and leaving councilmembers appearing unprepared for some meetings.

## 6.2.2 Recommendations

Area	Current State	Possible Changes	Benefits
Policy team, personal staff, and councilmember roles and responsibilities (possibly clerks and committee assistants as well)	Misaligned, outdated, and/or siloed views of roles and responsibilities around the meeting materials process	<p>Policy team, personal staff, and councilmembers meet to discuss, align on, and document the roles and responsibilities as it relates to the meeting materials process (consider including clerks and committee assistants where necessary)</p> <p>Integrate updated roles and responsibilities wherever appropriate (job descriptions, training materials, process documentation)</p>	<p>Clarity and consistency in roles and responsibilities</p> <p>Better decision making and increased buy in to changes to meeting materials and the meeting materials process</p> <p>Operational and communication efficiencies</p> <p>Reduced frustration</p> <p>Increased collaboration</p>

Table 2: Roles and Responsibilities – Recommendations

## 6.3 Readership

Meeting materials currently suffer from low readership rates among key stakeholders. Understanding the underlying causes of this challenge is critical for developing effective solutions. A collaborative effort between the policy team, personal staff, and councilmembers to analyze readership patterns will be necessary to create materials that serve all users' needs effectively.

### 6.3.1 Current Challenges

Research through focus groups and interviews revealed concerns about meeting materials readership. Several key issues emerged:

**Councilmember engagement:** Nearly half of councilmembers that participated in focus groups acknowledged rarely reading staff reports in their entirety, citing their dense format, excessive length, and inaccessibility. Many delegate this responsibility to their personal staff, who summarize or highlight key information. However, some personal staff also reported not reading the reports. Clarity Consulting observed multiple committee meetings where councilmembers appeared unfamiliar with the content.

**Policy team perspective:** The policy team endorses current report content and length in most instances, emphasizing that these documents serve as historical records requiring comprehensive detail to present all policy perspectives. They report regularly referencing past staff reports as foundational research, reinforcing their view that thoroughness is essential.

**Knowledge gap:** Constituent readership patterns remain unknown, representing a significant gap in this analysis.

### 6.3.2 Recommendations

Both councilmembers and the policy team involved in this study clearly articulated their requirements for meeting materials during focus group and follow-on sessions. These specifications are detailed in the [Strategic Document Framework](#) section of this report. The critical next step, after or perhaps in conjunction with, realigning on the meeting materials purpose, audience and roles and responsibilities involves facilitating dialogue between all parties to address their meeting material requirements and needs.

Notably, benchmarked jurisdictions reported no similar readership challenges. The key difference appears to be their approach of identifying councilmembers as the primary audience and designing materials specifically for councilmember informing and decision making.

Area	Current Practice	Possible Changes	Benefits
Councilmember and personal staff readership	Councilmembers and personal staff	Meeting materials include graphic summaries, increased	Increased councilmember

	do not consistently read meeting materials	use of tables, introduction of charts, graphs, and visuals  Effect Statements should be more granular (an example given was providing impact per district)	and personal staff readership and engagement with meeting materials  Improved councilmember decision making
Constituent readership	Unknown engagement levels	Conduct readership assessment	Established baseline for future improvements

*Table 3: Readership – Recommendations*

## 6.4 Business Process Management and Continuous Improvement

Continuing to build on the gaps in alignment of meeting materials’ audience, purpose, and roles and responsibilities around aspects of meeting materials, there is an “organizational glue” that could be strengthened.

### 6.4.1 Current Challenges

A lack of coordination mechanisms is preventing continuous improvement across functional roles. There does not appear to be structured methods for teams to communicate, share knowledge, and collectively improve performance toward aligned goals and success metrics.

This gap has created two distinct challenges. First, policy team members who experienced work processes pre- and post-pandemic, remember effective processes that have since deteriorated. They observe growing inconsistencies in how councilmembers and personal staff approach meeting materials and related workflows. Second, councilmembers and personal staff who joined during or after the pandemic lack institutional knowledge and are attempting to develop their own approaches in silos. These parallel experiences breed misunderstandings and unfounded assumptions about each other's work.

The missing element is organizational infrastructure for ecosystem-wide coordination. No processes or designated roles currently exist to oversee the full operational picture, establish regular feedback mechanisms, drive standardization where needed, and champion continuous improvement.

### 6.4.2 Recommendations

An obvious first place to start is more formally bringing back pre-briefing meetings. Pre-briefing meetings—defined as small gatherings of individuals who prepare for committee meetings by previewing legislation and answering councilmember questions—were held regularly pre-pandemic and were

viewed as an effective way to help councilmembers get a better understanding of legislation before discussing it in a public setting while also helping to prevent some of the late or last-minute changes to meeting materials. At present, the policy team states they are happy to offer pre-briefing meetings when asked. Yet councilmembers involved in this work did not seem to know pre-briefing meetings were an option.

Additional examples of infusing business process management and continuous improvement are provided in the recommendations table below.

Area	Current Practice	Possible Changes	Benefits
Pre-briefing meetings	Informal, ad hoc or non-existent	Bring back a more formal and standardized approach to pre-briefing meetings for substantive proposals (in adherence with the Open Public Meetings Act (OPMA))	Councilmembers get a better understanding of legislation before public meetings
Business process management and continuous improvement across functional areas	Informal, ad hoc or non-existent	A more structured approach to operational processes such as Kaizen, continuous improvement projects, enhanced IT and technology support, and establishing and tracking mutually developed success metrics	Enable a work culture focused on well-designed and well-executed processes  Ensure root cause issues are unearthed
Sync sessions	Informal, ad hoc, or non-existent	Organize regular cross-functional sync meetings between the policy team, personal staff, and councilmembers	Ensure bridges are being built and needs are being met across functions

*Table 4: Business Process Management and Continuous Improvement – Recommendations*

## 6.5 Communication and Training

Once alignment on the audience, purpose, and roles and responsibilities of meeting materials and corresponding workflows is clarified, communication and training will serve as critical change management and change adoption tools.

### 6.5.1 Current Challenges


A review of current training that touches meeting materials shows that while the content is extensive and detailed, the audience, purpose, and roles and responsibilities surrounding meeting materials could be more clearly articulated, once alignment happens. Training is also the right time to focus on “telling the story” of the significance of meeting materials, why the process looks like it does, why process adherence is critical, and why many hands contribute to preparing and delivering materials.

Note that additional refinement recommendations to training materials are suggested in the [Strategic Document Framework section](#) of this report.

### 6.5.2 Recommendations

Area	Current Practice	Possible Changes	Benefits
Onboarding and other training for clerks, committee assistants, the policy team, personal staff, and councilmembers	Onboarding training information is extensive yet does not properly set up the significance (think: “North Star”) of meetings materials and corresponding processes nor reflects the role and responsibility refinements that need to be considered to reflect the post-pandemic operational practices	Clarifications and enhancements to all existing training  1:1 training where a policy team member trains new councilmembers and personal staff specifically on the purpose and audience of meeting materials, how to navigate meeting materials, and how the policy team, personal staff, and councilmembers can effectively work together	Enhanced alignment between the policy team, personal staff, and councilmembers
Meeting materials audits	No formal or regularly scheduled audit process in place	Implement a regular audit process to assess clarity of content, possible updates needed, and process adherence	Added assurance of accuracy, reliability, and discovery of risks and weaknesses in established processes

Table 5: Communication and Training – Recommendations



Of the jurisdictions included in this study, San Bernardino County appears to be leading the way with their training practices. They offer 1: 1 training with the Board Services Supervisor and new Department Staff who are responsible for penning meeting materials. San Bernadino also offers refresh training five times annually which enables consistent refresh and alignment. They are currently in the process of converting some of their training into online training.



## 7. Strategic Document Framework

Through focus groups, follow-on interviews, and benchmarking analysis, a clear pattern emerged: King County's current approach attempts to serve multiple audiences and purposes through a single information delivery model.

Benchmark jurisdictions consistently demonstrate that successful meeting materials processes use layered information design to enable strategic content differentiation while maintaining comprehensive documentation. These jurisdictions have sought to balance the fundamental alignment gaps observed in King County by creating distinct information layers that serve different user needs and time constraints.

Stakeholder feedback and jurisdictional analysis reveal multiple interconnected opportunities that can be addressed individually or as part of a comprehensive approach.

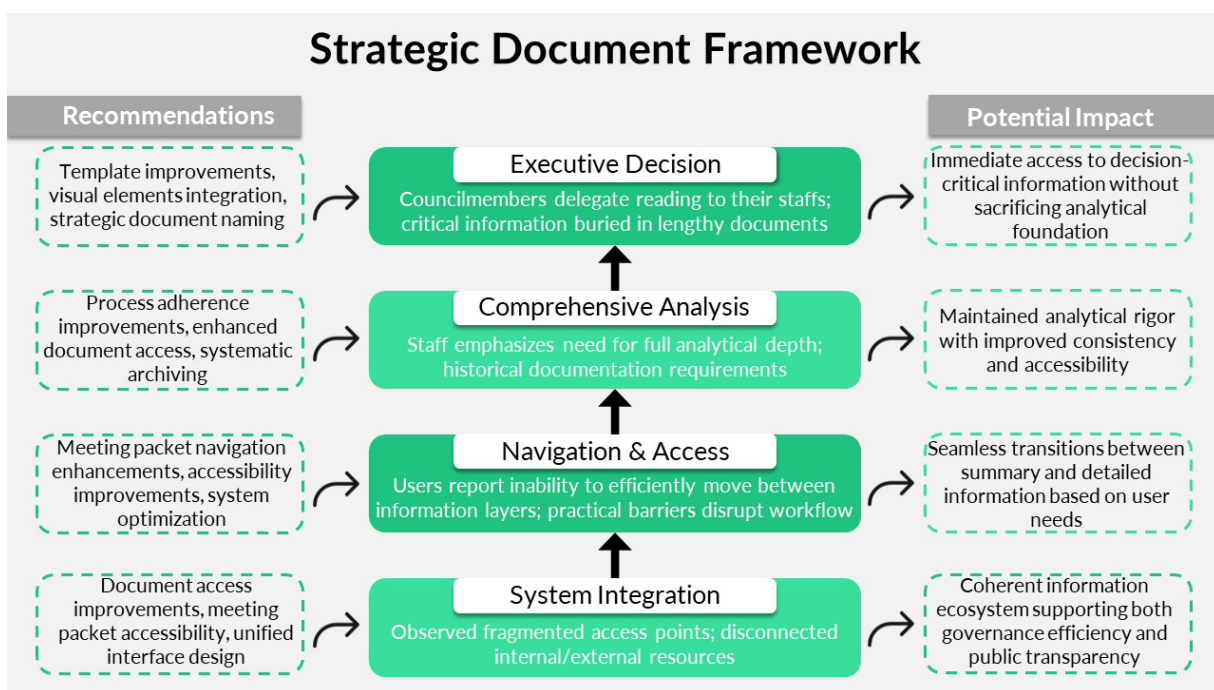


Figure 2: Strategic Document Framework

This framework transforms the current single-document approach into a strategic information system where each component reinforces the others. The following subsections examine how the requests for more visual elements and simplified formats aligns with practices from other jurisdictions as well as best practices research, creating opportunities that can be pursued individually or as part of a comprehensive approach to meeting King County's varying stakeholder needs.

### 7.1 Template Analysis

The Strategic Document Framework's success depends on template structures that clearly differentiate between information tiers. The following formatting improvements create the visual hierarchy essential for users to quickly identify executive summaries, locate key decision points, and navigate to

comprehensive analysis when needed. These template standards ensure that each information layer serves its intended purpose within the layered approach.

### 7.1.1 Current Challenges

Based on an analysis of King County staff reports, focus group and follow-on interviews, benchmarking analysis, and best practices research, several opportunities were identified for improving the formatting of existing templates. Specific examples include:

- Dense text blocks formatted in full justification which is known to be difficult to scan or skim
- Critical information buried within lengthy paragraphs
- Tables lacking visual hierarchy and consistent formatting
- Section headings without sufficient prominence
- Decision points that require extensive reading to locate

### 7.1.2 Recommendations

Area	Current Practice	Possible Changes	Benefits
Document structure	Information buried in paragraphs	Leverage elements of the “Format for Readability Guidelines” from NARA Writing Style Guide such as use of bullet points to highlight key information	Immediate focus on key issues requiring councilmember action
Text formatting	Full justification, minimal spacing	Left-aligned text with increased white space	Improved readability and reduced eye strain
Visual elements	Inconsistent table formatting	Leverage elements of the “Best Practices in Table Design” to maximize reader comprehension	Faster data comprehension
Content organization	Dense paragraphs	Bulleted lists and/or bold text used for key points	Easier to scan or skim information
Navigation	Strengthen visual hierarchy	Leverage best practice elements to consistently guide readers through document	Easier to locate specific information

Table 6: Template Analysis – Recommendations

### 7.1.3 Template Analysis Comparison

[The short video at this link](#) provides a visual template analysis of King County Council's departmental report as compared to other jurisdictions who reported satisfaction with their templates. The demo is designed to highlight how complex information can be made into more accessible, actionable formats.

By adopting these practices, King County Council can enhance the effectiveness of council communications, ultimately improving accessibility, transparency and comprehension.

## 7.2 Visual Elements

Visual elements are critical to the Strategic Document Framework's layered approach, transforming dense data into more digestible executive summaries while preserving analytical depth. Strategic integration of charts, graphs, and visual highlights enables the document framework to serve both time-constrained decision-makers who need immediate comprehension and stakeholders requiring detailed analysis. Frequently cited educational and training literature\* reveals:

- 65% of the population consider themselves visual learners
- 10-20% of information presented through text or speech is retained after three days, while 65% of information presented through visuals is retained after three days
- Adding colors makes visuals 39% more memorable

### 7.2.1 Current Challenges

Based on an analysis of King County staff reports, focus group and follow-on interviews, benchmarking analysis, and best practices research, several opportunities have been identified for improving the formatting and presentation of data for improved decision making. Specific examples include:

- Dense financial information with difficult-to-scan numerical data
- Critical decision points buried within extensive datasets
- Limited visual differentiation between primary and supporting information
- Financial comparisons presented without visual aids or graphical elements

### 7.2.2 Recommendations

Area	Current Practice	Possible Changes	Benefits
Document structure	Detailed information with inconsistent use of visual summaries	Leverage best practice recommendations to update standardized templates and usage guidance	Immediate focus on key issues requiring council attention and/or action

Visual formatting	Dense numerical presentation with minimal visual cues	Consistent use of standardized presentations with clear hierarchy and strategic emphasis	Faster data comprehension
Visual elements	Limited use of charts and graphs	Integration of visuals for key comparisons	Enhanced understanding of relationships and trends; increased retention of data and information
Content organization	Comprehensive data presented all at once	Focused summaries followed by supporting details	Better meets the needs of various stakeholders depending on whether they need a short summary or full analytical depth
Technology approach	Table formats embedded within the Word document (pre-PDF conversion) often use Word table functionality that has known limitations in formatting	Embed Excel tables and/or take snapshots of Excel tables to provide increased visibility, automated calculation capability, and subsequent chart creation	Greater formatting control, reduction of calculation errors, and more visualization capabilities

*Table 7: Visual Elements – Recommendations*

### 7.2.3 Visual Elements Comparison

[This link](#) provides a visual demonstration comparing King County's current reporting approach with the City of Seattle's more visually accessible methods. The recording highlights how the same financial information can be presented in ways that dramatically improve comprehension and decision making.

One known challenge that will need to be addressed is the incremental time required to prepare information so that it can be easily comprehended. Implementation of recommendations should balance a combination of basic standards, more advanced visual training, and visual prioritizations to ensure that visuals clearly enhance decision making processes. An iterative approach that captures stakeholder feedback is a common best practice with visual design. By implementing the practices demonstrated in the recording, King County could maintain its comprehensive approach while making data insights more accessible. The transition to using Excel-based tables (embedded or image-based) would further enable rapid generation of charts, automatic calculation of percentage changes, and seamless transition from detailed reports to presentations.

For demonstrative purposes, mockups have been included in Appendix C to accelerate internal discussion around the benefits and costs of making formatting changes to the existing templates.

### 7.3 Document Naming

The Strategic Document Framework requires naming conventions that immediately signal which information layer users are accessing. While files leverage an internal standard for document naming, there is an opportunity to also present a “consumer” friendly naming standard so that stakeholders can more readily navigate in Legistar between document types. Clear naming supports the layered approach by helping users identify and choose their appropriate level of detail based on the document title alone.

#### 7.3.1 Current Challenges

Based on an analysis of King County's document naming systems, stakeholder feedback, and benchmarking with other jurisdictions, several opportunities have been identified for improving how documents are named and organized for the benefit of constituents. Specific examples include:

- Internal naming standards are not intuitive to users less familiar with existing internal naming conventions (e.g., "2023-1236\_ATT2A\_ContractDated\_01172023")
- Attachments lack descriptive titles
- Abbreviated file naming (SR, ATT1, AMD1, AMDS1) require specialized knowledge
- Supporting materials are not logically ordered by relevance or type
- Document relationships are not readily apparent based on file names

#### 7.3.2 Recommendations

Area	Current Practice	Possible Changes	Benefits
File naming conventions	Attachment titles with technical codes and abbreviations	Descriptive plain language titles	Immediate recognition of document content without opening files, reduced document search time
Document sequencing	Attachment order in Legistar is based on order of files attached	Leverage Legistar functionality to logically group documents for ease of system access and decision making workflow	Improved meeting preparation and document context, reduce document search time

Table 8: Document Naming – Recommendations

#### 7.3.3 Document Naming Comparison

[This link](#) provides a visual comparison between current King County naming conventions and the more intuitive approaches used by Snohomish County and the City of Seattle. The examples demonstrate how descriptive naming transforms technical identifiers into accessible references.

By implementing these types of convention improvements, it is expected that document search time will be reduced and meeting preparation efficiency will increase. Constituents may also be more apt to find, open, and read documents that are intuitively named and sequenced.

## 7.4 Process Adherence

The Strategic Document Framework can only succeed through consistent procedural implementation across all functional roles and with all meeting materials. Process adherence ensures that the layered approach—executive summaries, visual highlights, and comprehensive analysis—is systematically applied rather than inconsistently implemented. Training and workflow improvements sustain the document framework’s effectiveness by ensuring all meeting materials follow the established framework for serving varying stakeholder needs.

### 7.4.1 Current Challenges

Based on an analysis of King County's procedural implementation, focus groups, follow-on interviews, and benchmarking analysis, we have identified several opportunities for improving process adherence and consistency across King County Council operations. Specific examples include:

- Lack of consistently followed document naming conventions between the policy team, council assistants, and clerks
- Granicus functionality being underutilized based on deviations from King County’s system design
- Email-based workarounds creating system fragmentation and diminishing information integrity
- Limited support mechanisms for continuous process improvement as it relates to process adherence

### 7.4.2 Recommendations

Note the last two recommendations listed are specific examples of improvements that [Section 6.4 Business Process Management and Continuous Improvement](#) attempt to address.

Area	Current Practice	Possible Changes	Benefits
System optimization	Email workarounds and inconsistent tracking of documents that are a work-in-progress	Standardized use of Granicus capabilities and optimized legislative system	Consolidated information management with improved version control and traceability

Communication flow	Emails to councilmembers and personal staff do not consistently provide direct hyperlinks to referenced files	Leverage direct hyperlinks to agenda items in email communications and specific agenda item references	Enhanced context and reduced search time for relevant materials
Improvement culture	Reactive approach with undefined channels for updates	Proactive coaching with structured notification system for changes and updates  Revisit onboarding and training refresh programs if/when procedural gaps are identified	Supportive environment fostering excellence and ongoing professional growth  Consistent understanding and improved procedural literacy across departments

*Table 9: Process Adherence – Recommendations*

### 7.4.3 Process Adherence Comparison

Note: Visual demonstrations are not included for this section due to the internal process nature of this analysis. Reference jurisdictions provide effective models:

- The State of Washington Legislature implements regular training programs for both new hires and established staff, with formal training for process changes as part of their structured change management approach.
- The County of San Bernardino maintains process consistency through centralized oversight, including the removal of non-compliant items from agendas unless executive approval is granted. This accountability model effectively reshapes behavioral patterns toward desired process outcomes.

Implementation of organizational pulse-checks can be an effective way to identify and address any perceived training and/or process issues particularly across multi-group dependencies. For example, personal staff indicated challenges in accessing documents yet their path to getting a permanent resolution was not clear to them. By formalizing an approach to capture frustrations, King County Council will be able to establish a more proactive approach to evolving processes where needed in the spirit of overall efficiency.

## 7.5 Document Access

The Strategic Document Framework's layered approach requires technical infrastructure that supports seamless movement between information layers. Document access improvements ensure users can efficiently transition from executive summaries to comprehensive analysis without technical barriers



disrupting their workflow. These system enhancements enable the information architecture to function as intended, allowing stakeholders to navigate between layers based on their needs and time availability.

### 7.5.1 Current Challenges

Based on analysis of King County's Legistar implementation, stakeholder feedback, and comparison with other Legistar-based jurisdictions, several opportunities have been identified for improving how council documents and attachments are accessed and viewed. The primary challenge involves attachments in the Legistar system that currently prompt unnecessary downloads rather than displaying content directly in the browser. This creates a disjointed user experience with cluttered download folders, window management issues, and additional steps to access information. Councilmembers and staff must manually manage downloaded files, creating inefficiency in the review process.

### 7.5.2 Recommendations

Area	Current Practice	Possible Change	Benefit
Document viewing	Attachments prompt download to local storage requiring manual opening	IT-implemented inline viewing configuration for PDFs and documents	Streamlined access with reduced clutter and fewer steps to view content
System configuration	Technical settings force downloads instead of viewing	IT adjustment of content delivery settings in Legistar	More intuitive document access aligned with modern web standards
Navigation experience	Multiple windows and downloads disrupt workflow	Single-browser viewing with back-button navigation	Maintain context and reduce cognitive load when reviewing materials

Table 10: Document Access – Recommendations

### 7.5.3 Document Access Comparison

[This link](#) takes you to a King County Council provides a visual demonstration comparing King County's current Legistar attachment behavior with the more streamlined approaches used by the City of Seattle and San Bernardino County Legistar implementations. The recording highlights how the same platform can be configured to display documents inline rather than forcing downloads, significantly improving the user experience.

By implementing these recommended practices, King County Council can significantly enhance document access and streamline the review process for both staff and the public. Technical adjustments by the IT department to how documents are served within Legistar will reduce friction in accessing



information while maintaining security and functionality. These changes align with modern web usability expectations and will improve overall efficiency in council operations and public transparency.

## 7.6 Meeting Packet Navigation

Advanced navigation capabilities are fundamental to the Meeting Strategic Document Framework's success, enabling users to move fluidly between executive summaries, visual highlights, and detailed analysis while maintaining context. Enhanced PDF navigation and browser configuration ensure that the layered information approach functions seamlessly, allowing stakeholders to access their appropriate level of detail without technical obstacles undermining the document framework's effectiveness.

### 7.6.1 Current Challenges

Based on an analysis of King County's meeting packet navigation and stakeholder feedback, we have identified opportunities for improving how users navigate PDF meeting packets. The primary challenge involves hyperlinks within meeting packet PDFs that enhance navigation to specific document sections but significantly decrease usability when users cannot easily return to their original location. Common browsers like Microsoft Edge and Chrome do not support "back" navigation within PDFs, forcing users to manually scroll or remember page numbers to return to their previous position. This creates a disjointed reading experience, particularly when reviewing complex agenda materials with frequent cross-references.

### 7.6.2 Recommendations

Area	Current Practice	Possible Change	Benefit
PDF viewing tools	Default use of browser-based viewers with navigation limitations	Standardized use of full-featured PDF readers (Adobe, Foxit)	Enhanced navigation with functional back-button and improved meeting packet usability
User training	Limited awareness of PDF navigation options	Comprehensive education on viewer selection and navigation shortcuts	Efficient review of meeting materials with minimal disruption to reading flow
Document structure	Hyperlinked content with inconsistent understanding of navigation capabilities	Enhanced navigation instructions and training on table of content feature functionality	Increased usage of hyperlink / Table of Contents functionality

Browser configuration	Default browser PDF handling	Configured settings to open PDFs in dedicated readers	Consistent navigation experience across all council documents
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*Table 11: Meeting Packet Navigation – Recommendations*

### 7.6.3 Meeting Packet Navigation Comparison

Note: Visual demonstrations are not included for this section, but practical alternatives exist:

- Mozilla Firefox includes internal back-navigation in its PDF viewer, demonstrating that browser-based viewers can incorporate this functionality
- Adobe Acrobat Reader and Foxit Reader provide seamless navigation with Alt+← keyboard shortcuts to return to original locations after following hyperlinks

By implementing these recommended practices in partnership with King County Information Technology, King County Council can significantly enhance the usability of meeting packets and improve the efficiency of document review. The emphasis on proper tool selection and user training creates an environment where hyperlinks enhance rather than hinder navigation. Strategic improvements balanced with feasibility/impact of changes will be critical to ensure that any changes don't have an adverse impact to workflow or IT browser security considerations.

## 7.7 Meeting Packet Accessibility

Comprehensive accessibility ensures that the Strategic Document Framework serves all stakeholders through integrated calendar access, systematic archiving, and aligned internal-external resources. These accessibility improvements enable the layered approach to function across all platforms and user groups, ensuring that executive summaries, visual highlights, and comprehensive analysis are equally available to councilmembers, the policy team, and the public through streamlined access points.

### 7.7.1 Current Challenges

Based on an analysis of King County's meeting packet access systems, stakeholder feedback, and benchmarking with other jurisdictions, we have identified several opportunities for improving how council meeting materials are accessed and archived. Specific examples include:

- No visibility to meeting packets on the Meeting Calendar page
- Location of Meeting Packets on the [County Council Meeting page](#) is difficult to find and disconnected from document visibility / availability process
- Offline internal distribution of meeting packets drives users away from usage of Granicus Legistar as the system used throughout the process.

### 7.7.2 Recommendations

Area	Current Practice	Possible Change	Benefit
Granicus calendar integration	Meeting calendar lacks direct packet access requiring multiple page navigation	Integration of Meeting Packet within Granicus	Streamlined access reducing preparation time for councilmembers and constituents
Document workflow	Disconnected access between meetings and supporting materials	Unified interface linking scheduled meetings to agendas, staff reports, and exhibits	Consistent document relationships with improved meeting preparation efficiency
System utilization	Underutilized Granicus's updated Legistar capabilities	Discussions with Granicus may identify opportunities for document flow optimization Full activation of InSite configuration for packet management	Leverage (potentially upgrade) existing infrastructure investment with any enhancements they have made to functionality
Public transparency	Difficult for public to readily to access meeting packets (current and historical)	Aligned internal and external resources to ensure single source of truth	Improved public trust and transparency with consistent information access

Table 12: Meeting Packet Accessibility – Recommendations

### 7.7.3 Meeting Packet Accessibility Comparison

Reference jurisdictions demonstrate effective models for meeting packet access:

[This link](#) provides a visual demonstration comparing King County's current lack of integration of Meeting Packets with the more streamlined approaches used by Pierce County and the City of Seattle. The recording highlights how the same platform can be configured to display Meeting Packets within the existing solution rather than requiring separate web page locations or off-line workarounds internally.

By implementing these proven practices, King County Council can leverage its existing Granicus Legistar infrastructure while significantly enhancing meeting packet accessibility. The recommended transition to calendar-integrated posting, systematic archiving, and aligned internal-external resources will improve governance efficiency and public transparency. Technical configuration through Granicus support, combined with standardized packet posting policies, will transform the current fragmented approach into a comprehensive document management system that serves both council operations and constituent needs.

## 7.8 Meeting Materials and King County Television, YouTube, Cable Channels, and Website

While the King County website and King County television (KCTV), as well as the other ways to access meetings such as YouTube, Vimeo, Legistar, Facebook, and cable channels were not in-scope for this analysis, it was noted during observation work that there are opportunities to enhance the meeting materials experience related to these mediums.

### 7.8.1 Current Challenges

- Suboptimal Platform Visibility: Legistar provides the most comprehensive user experience, allowing simultaneous video viewing and document review, yet it is difficult to locate through standard information channels
- Incomplete Platform Documentation: The primary King County television website lacks comprehensive information about all available viewing options and optimal usage guidance
- User Experience Gaps: No clear guidance exists for constituents on how to effectively navigate and utilize available meeting platforms

### 7.8.2 Technical and Operational Issues

- Scheduling System Deficiency: Known system error prevents standing meetings from appearing on broadcast schedules until post-occurrence, limiting advance planning capabilities
- Accessibility Conflicts: Closed captioning placement interferes with headline visibility, creating accessibility barriers
- Production Quality: Camera focus on staff presenters rather than presentation materials reduces engagement and information clarity

### 7.8.3 Recommendations

Area	Current Practice	Possible Changes	Benefit
Enhance Legistar discoverability	No prominent placement of the medium for accessing and interacting with meeting materials	Implement prominent placement and clear navigation pathways for accessing and interacting with meeting materials when watching live or taped meetings while stating clearly that the only way to simultaneously see and scroll through meeting materials is via Legistar <a href="https://king.granicus.com">https://king.granicus.com</a>	Clarity on the best way to interact with meeting materials while watching meetings

Reduce number of clicks to get to KCTV and Broadcast Schedule	Kingcounty.gov front page does not have a direct link to KCTV	Add link to KCTV on front page of <a href="http://kingcounty.gov">kingcounty.gov</a> site	Increased visibility and better access to KCTV and King County Committee and Council Meetings
Ease of finding information about King County Council	Extensive scrolls need to happen to find information about King County Council	Move information about the King County Council higher up on the <a href="http://kingcounty.gov">kingcounty.gov</a> front page	Increased visibility and better access to KCTV and King County Committee and Council Meetings
KCTV camera views	Camera often focuses on the policy team member reading from the staff report	Implement dynamic camera work focusing on presentation materials and visual aids  Find ways to inform constituents that watching meetings via Granicus will allow them the added capability to watch, listen, and/or read closed captioning while also allowing them the ability to scroll through the staff report as they choose	Enhanced ability to interact with reports while simultaneously watching the meeting
KCTV accessibility conflicts	Closed captioning words are overtop of headline words such that viewer cannot read the headline	Move either the closed captioning or the header information so they are not obstructing each other	Improved readability

Table 13: King County Television (KCTV), Websites, and other Channels – Recommendations

## » 8. Sample Implementation Approach

Successful implementation requires coordinated deployment of both the Strategic Document Framework and corresponding stakeholder alignment and change management initiatives. The technical document improvements must be accompanied by stakeholder alignment activities, capability building, and process enhancements to ensure sustainable adoption and stakeholder buy-in. The below phases are representative of a sample implementation plan. The specifics of phase scope need to be based on stakeholder priorities, skilled resource availability, IT dependencies, cost, and ease of implementation. We acknowledge that some of the recommended improvements in the report may be difficult to implement and will require careful consideration across all affected staff.

### 8.1 Sample Implementation Phases

#### 8.1.1 Phase 1: Foundation Building (Months 1-3)

**Objective:** Establish organizational alignment and prepare for technical changes

**Critical Activities:**

- Facilitate joint sessions between staff and councilmembers to establish shared understanding of meeting materials' primary audience(s), purpose(s), and usage(s)
- Align all stakeholders on Current State Documentation, finalize any outstanding mapping of existing workflows, and identify all stakeholders impacted by proposed changes
- Evaluate staffing, technology, and budget requirements for subsequent phases
- Develop stakeholder communication strategy to manage expectations and build support for changes

**Success Metrics:**

- Documented agreement on meeting materials' audience and purpose
- Stakeholder buy-in assessment scores above 70%
- Completed impact analysis for all proposed changes
- Communication plan approval from leadership

#### 8.1.2 Phase 2: Quick Wins Implementation (Months 2-4)

**Objective:** Build momentum through high-impact, low-complexity improvements

**Technical Quick Wins:**

- **Document Access Enhancement:** Configure Legistar to display PDFs inline rather than forcing downloads
- **Navigation Improvements:** Implement standardized PDF viewing recommendations and provide user training
- **Naming Convention Standards:** Deploy consistent, descriptive file naming across all meeting materials

#### **Process Quick Wins:**

- **Pre-briefing Meeting Structure:** Establish standardized protocols for when and how pre-briefing meetings occur
- **Training Enhancements:** Integrate audience and purpose clarity into existing policy team and councilmember training programs

#### **Success Metrics:**

- 50% reduction in document access time
- 90% adoption of new naming conventions
- Pre-briefing meeting attendance above 75% for complex items
- User satisfaction scores improvement of 25%

### **8.1.3 Phase 3: Strategic Document Framework Rollout (Months 4-8)**

**Objective:** Implement layered information design while maintaining analytical rigor

#### **Template Development:**

- **Executive Summary Templates:** Create standardized formats that lead with decision points and key information
- **Visual Integration Standards:** Develop guidelines for incorporating charts, graphs, and visual elements
- **Comprehensive Analysis Framework:** Maintain detailed analytical rigor while improving structure and readability

#### **Success Metrics:**

- Councilmember readership rates increase by 40%
- Meeting preparation time reduction of 30%
- Staff report completion time remains stable or improves
- Template adoption rate above 85%

#### 8.1.4 Phase 4: System Integration and Optimization (Months 6-10)

**Objective:** Create seamless information ecosystem supporting both governance and transparency

**Technology Enhancement:**

- **Granicus Calendar Integration:** Link meeting packets directly to calendar entries
- **Historical Archive System:** Implement searchable archive for past meeting materials
- **Mobile Optimization:** Ensure all materials display effectively on tablets and mobile devices

**Process Refinement:**

- **Quality Assurance:** Implement regular audits to ensure process adherence
- **Continuous Improvement:** Establish feedback mechanisms for ongoing refinement
- **Public Access Enhancement:** Align internal and external document access points

**Success Metrics:**

- 100% calendar integration for meeting packets
- Archive search functionality operational
- Mobile usability scores above 80%
- Process adherence rates above 90%

**Process Considerations:** Changes to meeting materials impact multiple workflows and stakeholders, requiring consideration of both technical and cultural factors, resource constraints, and end-to-end process implications.





## Appendix A: Definitions

**Additional Materials:** Any information that comes in after a meeting packet is posted but before the meeting takes place.

**Attachments:** Proposed Ordinance/Motion, Amendment(s) (if there are amendments), Transmittal Letter, Fiscal Note, and Alternate Amendment Deadline Schedule (if applicable)

**Document Channels:** Materials come from multiple channels (email, Legistar) and in various formats (PDFs, MS Word, links)

**Meeting Materials:** Highest level term that includes meeting packets and additional materials

**Meeting Packets:** Includes Agendas, Minutes, Staff Reports, Legislation, and standard supporting items attached to legislation.

**Staff Reports:** A report written by a policy team member necessary for documentation and understanding of council actions

**Strategic Document Framework:** Distinct information layers that serve different user needs and time constraints.

## Appendix B: Current State Process Flow

Available for Direct Access:

[Process Flow Interactive - valid through July 2025](#)

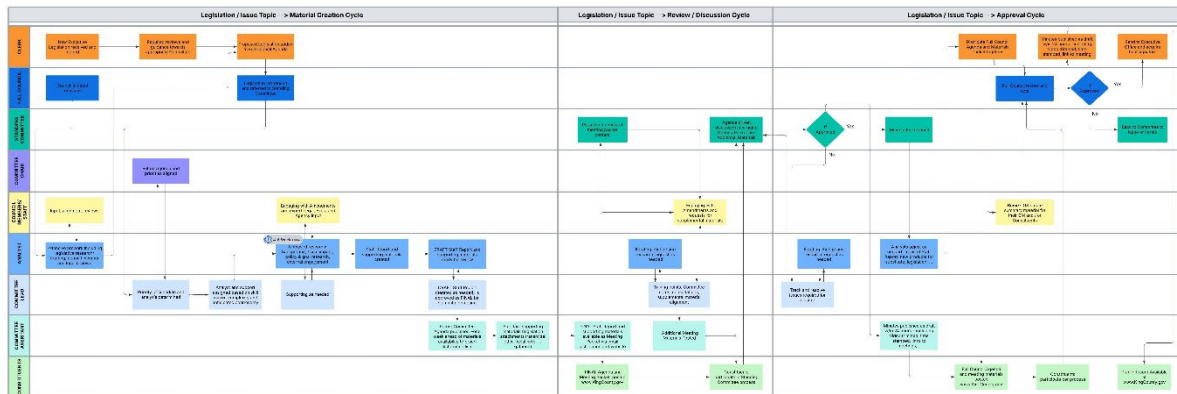


Figure 3: Process Flow Interactive - valid through July 2025

PowerPoint Visuals:



KC%20Legislative%20Con

## Appendix C: Mockup Templates for Staff Reports

### Current State Example:



Current State Staff  
Report\_Priority Hire

### Mockup Templates

For demonstrative purposes, mockups of this report have been included to accelerate internal discussion around the benefits and costs of formatting changes to the existing templates as well as a graphical summary of the report.



Mockup: Reformatted  
SR\_Priority Hire



Mockup: Summary  
Slide\_Priority Hire

## Appendix D: Focus Group and 1:1 Interview Questions

1. What meeting materials (we define meeting materials as: Staff reports, agendas, and supporting materials) do you rely on most frequently?
2. How do you use the meeting materials?
3. Which materials are most helpful when engaging with constituents about council decisions? Which are least helpful and why?
4. Who do you view as the primary audiences/customers of the meeting materials?
5. How would you describe the purpose of the meeting materials?
6. In what ways does the current state (meeting materials products as well as processes) meet your needs?
7. Do you have suggestions for ways meeting materials products could better meet your needs?
8. Would you like to have a 1:1 discussion with Clarity to talk more about meeting materials?

### **Assuming the interviewee has suggestions for Question #7, ask questions 9-12:**

9. How do you see this suggestion improving the experience?
10. If we were to consider the suggestion:
  - a. What considerations need to be made?
  - b. What trade-offs might need to be made?
  - c. How should the changes be implemented?
  - d. Do you see risk of compromising accuracy or objectivity?
11. In the scheme of all of work that needs to be completed in 2025, where does improving Meeting Materials fall in your list of priorities?

## Appendix E: Focus Group and Interview Participant Titles

Focus Group 1	6 Councilmembers
Focus Group 2	Policy Team
Focus Group 3	Policy Team
Focus Group 4	Clerks
Focus Group 5	Chiefs of Staff

2:1 Interview 1	Councilmember, Chief of Staff
1:1 Interview 2	Chief of Staff
1:1 Interview 3	Chief of Staff
1:1 Interview 4	Councilmember
1:1 Interview 5	Chief of Staff
1:1 Interview 6	Personal Staff member
1:1 Interview 7	Personal Staff member
1:1 Interview 8	Councilmember

## Appendix F: Benchmark Questions

### Respondent Information

1. Jurisdiction Name: \_\_\_\_\_
2. Your Role/Title: \_\_\_\_\_
3. Population of your jurisdiction: \_\_\_\_\_
4. Number of councilmembers in your jurisdiction: \_\_\_\_\_
5. Number of Policy team members supporting the council: \_\_\_\_\_

### Document Metrics and Structure

6. What is the average length of your staff reports?
  - ☐ 1-5 pages
  - ☐ 6-10 pages
  - ☐ 11-20 pages
  - ☐ 21-50 pages
  - ☐ 51-100 pages
  - ☐ 101+ pages
7. Which types of meeting materials do you regularly produce? (Select all that apply)
  - ☐ Staff reports
  - ☐ PowerPoint presentations
  - ☐ Executive summaries
  - ☐ Visual infographics
  - ☐ Memos
  - ☐ Briefing documents
  - ☐ Other: \_\_\_\_\_
8. What percentage of your meeting materials include visual elements (charts, graphs, etc.)?
  - ☐ 0-25%
  - ☐ 26-50%
  - ☐ 51-75%
  - ☐ 76-100%
9. How do you balance comprehensive documentation with accessibility? (Select all that apply)
  - ☐ Executive summaries of longer reports
  - ☐ Visual dashboards
  - ☐ Standardized report templates
  - ☐ Plain language requirements
  - ☐ Translation into other languages
  - ☐ Other: \_\_\_\_\_

## Timeline and Process

10. How many days before a meeting is your agenda typically finalized?
- ☐ ☐ Less than 24 hours
  - ☐ ☐ 1-2 days
  - ☐ ☐ 3-5 days
  - ☐ ☐ 6-9 days
  - ☐ ☐ 10-14 days
  - ☐ ☐ More than 14 days
11. How many days before a meeting are staff reports distributed to councilmembers?
- ☐ ☐ 1-3 days
  - ☐ ☐ 4-7 days
  - ☐ ☐ 8-14 days
  - ☐ ☐ 15+ days
12. What percentage of meetings have last-minute agenda changes (within 48 hours of meeting)?
- ☐ ☐ 0-25%
  - ☐ ☐ 26-50%
  - ☐ ☐ 51-75%
  - ☐ ☐ 76-100%
13. What percentage of meetings have last-minute agenda changes (within 24 hours of meeting)?
- ☐ ☐ 0-25%
  - ☐ ☐ 26-50%
  - ☐ ☐ 51-75%
  - ☐ ☐ 76-100%
14. How often do you conduct pre-meeting briefings with councilmembers?
- ☐ ☐ Never
  - ☐ ☐ Rarely (less than 25% of meetings)
  - ☐ ☐ Sometimes (25-50% of meetings)
  - ☐ ☐ Often (51-75% of meetings)
  - ☐ ☐ Always (more than 75% of meetings)
15. Who participates in pre-meeting briefings? (Select all that apply)
- ☐ ☐ All councilmembers
  - ☐ ☐ Committee chairs only
  - ☐ ☐ Policy team
  - ☐ ☐ Department heads
  - ☐ ☐ Council personal staff
  - ☐ ☐ Other: \_\_\_\_\_

## Staff Resources and Roles

15. How many staff hours on average are spent preparing materials for each council meeting?
- ☐ ☐ 1-10 hours
  - ☐ ☐ 11-20 hours
  - ☐ ☐ 21-40 hours
  - ☐ ☐ 41-60 hours
  - ☐ ☐ 61+ hours
16. Who primarily creates different components of meeting materials? (Please allocate percentages)
- ☐ Central/Policy Staff: \_\_\_\_%
  - ☐ Councilmembers' Personal Staff: \_\_\_\_%
  - ☐ Department Staff: \_\_\_\_%
  - ☐ Communications Staff: \_\_\_\_%
  - ☐ External Contractors: \_\_\_\_%
  - ☐ Other: \_\_\_\_% (please specify: \_\_\_\_\_) (Total should equal 100%)
17. Who primarily creates visual presentations for council meetings?
- ☐ ☐ Central/Policy Staff
  - ☐ ☐ Councilmembers' Personal Staff
  - ☐ ☐ Communications Staff
  - ☐ ☐ Department Staff
  - ☐ ☐ External Contractors
  - ☐ ☐ Other: \_\_\_\_\_
18. Please rate the clarity of roles between the policy team and personal staff in creating meeting materials:
- ☐ ☐ 1 - Very unclear
  - ☐ ☐ 2 - Somewhat unclear
  - ☐ ☐ 3 - Neutral
  - ☐ ☐ 4 - Somewhat clear
  - ☐ ☐ 5 - Very clear
19. What training is provided for creating meeting materials? (Only include training offered while staff are in their roles, do not include training they received before they took the role). Select all that apply)
- ☐ ☐ Formal document design training
  - ☐ ☐ Data visualization training
  - ☐ ☐ Plain language writing
  - ☐ ☐ Policy analysis
  - ☐ ☐ Presentation skills
  - ☐ ☐ No formal training
  - ☐ ☐ Other: \_\_\_\_\_



20. How do you maintain objectivity while making information accessible in your materials?

- ☐ ☐ Peer review process
- ☐ ☐ Structured templates
- ☐ ☐ Editorial guidelines
- ☐ ☐ Independent fact-checking
- ☐ ☐ Other: \_\_\_\_\_

### Technology and Access

21. What document management system do you use?

- ☐ ☐ Microsoft SharePoint
- ☐ ☐ Google Workspace
- ☐ ☐ Granicus/Legistar
- ☐ ☐ Custom-built system
- ☐ ☐ Other: \_\_\_\_\_

22. Rate the effectiveness of your document management system:

- ☐ ☐ 1 - Not effective at all
- ☐ ☐ 2 - Slightly effective
- ☐ ☐ 3 - Moderately effective
- ☐ ☐ 4 - Very effective
- ☐ ☐ 5 - Extremely effective

23. How do you name and organize documents for easy retrieval? (Select all that apply)

- ☐ ☐ Standardized naming conventions
- ☐ ☐ Document metadata tagging
- ☐ ☐ Folder hierarchies
- ☐ ☐ Searchable database
- ☐ ☐ Other: \_\_\_\_\_

24. What formats do you provide materials in? (Select all that apply)

- ☐ ☐ PDF
- ☐ ☐ Hyperlinked documents
- ☐ ☐ HTML/web-based
- ☐ ☐ Word/editable formats
- ☐ ☐ Machine-readable data
- ☐ ☐ Other: \_\_\_\_\_

25. What percentage of councilmembers primarily use digital vs. printed materials?

- ☐ Digital: \_\_\_\_\_%
- ☐ Printed: \_\_\_\_\_% (Should total 100%)

26. How would you rate the public's ability to access meeting materials on your website?

- ☐ ☐ 1 - Very difficult
- ☐ ☐ 2 - Somewhat difficult
- ☐ ☐ 3 - Neutral
- ☐ ☐ 4 - Somewhat easy
- ☐ ☐ 5 - Very easy
- ☐ ☐ I don't know.

27. How many clicks does it take for a member of the public to access the current meeting agenda from your homepage?

- ☐ ☐ 1 click
- ☐ ☐ 2 clicks
- ☐ ☐ 3 clicks
- ☐ ☐ 4+ clicks

28. What percentage of meeting materials are made available to the public?

- ☐ ☐ 0-25%
- ☐ ☐ 26-50%
- ☐ ☐ 51-75%
- ☐ ☐ 76-100%

### **Evaluation and Improvement**

29. How do you gather feedback on meeting materials? (Select all that apply)

- ☐ ☐ Formal surveys
- ☐ ☐ Informal feedback
- ☐ ☐ Focus groups
- ☐ ☐ Analytics tracking
- ☐ ☐ User testing
- ☐ ☐ We don't systematically gather feedback
- ☐ ☐ Other: \_\_\_\_\_

30. How would you rate Councilmember satisfaction with meeting materials?

- ☐ ☐ 1 - Very dissatisfied
- ☐ ☐ 2 - Somewhat dissatisfied
- ☐ ☐ 3 - Neutral
- ☐ ☐ 4 - Somewhat satisfied
- ☐ ☐ 5 - Very satisfied

31. How would you rate staff satisfaction with the meeting materials process?

- ☐ ☐ 1 - Very dissatisfied
- ☐ ☐ 2 - Somewhat dissatisfied
- ☐ ☐ 3 - Neutral
- ☐ ☐ 4 - Somewhat satisfied
- ☐ ☐ 5 - Very satisfied

32. How effective are your meeting materials in informing the public about council decisions?

- ☐ ☐ 1 - Not effective at all
- ☐ ☐ 2 - Slightly effective
- ☐ ☐ 3 - Moderately effective
- ☐ ☐ 4 - Very effective
- ☐ ☐ 5 - Extremely effective

33. What metrics do you use to evaluate the effectiveness of your meeting materials? (Select all that apply)

- ☐ ☐ Public engagement metrics
- ☐ ☐ Councilmember feedback
- ☐ ☐ Meeting efficiency
- ☐ ☐ Website analytics
- ☐ ☐ Media coverage
- ☐ ☐ We don't use metrics
- ☐ ☐ Other: \_\_\_\_\_

34. What recent changes have improved your meeting materials process?

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35. What has been your most successful innovation in meeting materials in the past 2-3 years?

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## Appendix G: Benchmark Findings



**Benchmark Comparison  
Table**

Note: Each benchmark jurisdiction structures and approaches their work differently, making it difficult to establish a like-for-like comparison.

## Appendix H: Best Practices Source List

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