



OCCMA Board of Directors Meeting and Retreat

November 16, 2023 10:00 am – 4:00 pm | November 17, 2023 8:30 am – 12:00 pm

Independence Event Center | River A & B

555 South Main Street, Independence, OR 97351

AGENDA

REGULAR AGENDA – 10:00 AM (Susie Marston)

A. Welcome	-
B. Consent Calendar*	-
1. Minutes of the October 11, 2023 OCCMA Board Meeting	02
2. Current Financial Report	06
3. Summary of All Transactions by Vendor	09
4. Summary of All Contracts Executed on Behalf of OCCMA	11
C. Appoint Additional Director to the OCCMA Board*	12
D. Membership Drive*	18
E. 2024 OCCMA Board Calendar	29
F. Approve Registration Fee for NW Regional Managers Conference*	31
G. Senior Advisor Reports (<i>Senior Advisors</i>)	-

RETREAT AGENDA (Martha Bennett)

A. Recognition of Outgoing Director Rachael Fuller	-
B. 2024 Work Plan	32
C. Committees	41
1. Review of 2024 Committees	
2. 2024 Committee Appointments	
D. 2024 OCCMA Proposed Budget	52
E. Other Business	-
F. Adjournment	-

NEW BOARD MEMBER ORIENTATION – Thursday, November 16 at 4:00 PM

New and returning board members are invited to participate

BOARD DINNER – Thursday, November 16 at 5:30 PM

Territory Restaurant at The Independence Hotel

*Agenda items denoted with an asterisk indicate a motion is recommended. The sample motion will appear in the agenda item's associated materials.



OCCMA Board of Directors Meeting

October 11, 2023 | 2:15 pm

Zoom

MINUTES

Board Members:

Scott Derickson, President – Present
Dan Huff, President-Elect – Present
Susie Marston, Past President – Excused
Angela Speier, Secretary, LOC – Present
John Walsh, Director – Present
Andy Varner, Director – Present

Rachael Fuller, Director – Present (virtually)
Adam Brown, Director – Present
Aaron Palmquist, Director – Present
Zoe Mombert, Director – Present
Mark Shepard, Director – Present
Jerry Gillham, Director – Present

Others: Rob Drake, Senior Advisor; Sheila Ritz, Senior Advisor (virtually); Dave Waffle, Senior Advisor (virtually), and Abigail Elder, Hood River City Manager (virtually)

A. Welcome

2:15 pm

President Scott Derickson called the meeting to order at 2:27 pm and welcomed members. He provided an update on the ICMA Conference that occurred last week and noted Washington will be collaborating with Oregon on the educational programming for the NW Regional Managers Conference in Seaside.

B. Consent Calendar

2:30 pm

It was moved by Director Palmquist and seconded by Director Brown to approve the consent calendar. There was no discussion and the motion passed unanimously (10-0). [10-Yes (Derickson, Huff, Fuller, Palmquist, Walsh, Varner, Brown, Shepard, Gillham, and Mombert); 0-No; 0-Abstain; 1-Absent (Marston)].

C. Adopt Update to the Policy Annex

2:30 pm

Director Palmquist provided an overview of the changes in the Policy Annex. Director Shepard said the DEI Committee will be looking at ways to increase diversity in the senior advisor program.

It was moved by Director Palmquist and seconded by Director Varner to adopt the proposed changes to the policy annex as presented in attachment 1. There was no discussion and the motion passed unanimously (10-0). [10-Yes (Derickson, Huff, Fuller, Palmquist, Walsh, Varner, Brown, Shepard, Gillham, and Mombert); 0-No; 0-Abstain; 1-Absent (Marston)].

D. Senior Advisor Vacancy

2:34 pm

President Derickson reported that Richard Meyers is interested in filling the position vacated by Ric Ingham and Dale Shafer is interested in filling the position vacated by Dan Bartlett. President Derickson

would like staff to research the eligibility of senior managers to serve as advisors. He would also like to recognize Dan Bartlett for his long service as a senior advisor.

It was moved by Director Palmquist and seconded by Director Gillham to nominate Richard Meyers to serve as a senior advisor for Region 5 (Linn, Lane, and Benton counties) and Dale Shafer to serve as a senior advisor for Region 1 (Clatsop, Columbia, Lincoln, and Tillamook counties) and direct staff to forward their statement of interests and resumes to ICMA for approval. There was no discussion and the motion passed unanimously (10-0). [10-Yes (Derickson, Huff, Fuller, Palmquist, Walsh, Varner, Brown, Shepard, Gillham, and Mombert); 0-No; 0-Abstain; 1-Absent (Marston)].

E. LOC Board of Directors Update

2:39 pm

Director Walsh provided an update on the LOC Board of Directors meeting that happened earlier this morning. Patty Mulvihill, LOC Executive Director provided an update on the LOC building. Director Walsh said the Oregon Municipal Policy needs to be updated which will be a three-year process. Director Mulvihill encouraged city staff to sign up to serve on a policy committee next year. The LOC Board discussed potential changes to the floodplain coming out of FEMA. The LOC is working with the NLC to get changes at the federal level. Discussion ensued on the Governor's Housing Policy and Director Mulvihill explained how the LOC is engaged in the process. She stressed the need for data to use in 2025 to show that cities are not the issue when it comes to building more housing. Director Mulvihill said Roseburg Councilor Ellen Porter has been appointed to serve on the LCDC Board which is the first time in years there has been a city representative on LCDC. Beery, Elsner, and Hammond will be hosting summer interns to collaborate with the LOC to analyze the last five years of LUBA decisions and how those have impacted housing production. They will also be looking at how much it costs cities when cases go to LUBA.

F. Overview of 2023 Summer Conference

3:05 pm

President-Elect Huff said the Professional Development Committee met to review the feedback that was received from conference attendees. He said there was a desire for more networking time and more activity driven sessions that include tabletop exercises. The board offered the following feedback on the conference:

- Have the host city do a welcome to their community at the very beginning to highlight things to do while the conference is happening.
- Have a place to mingle and network when sessions are happening.
- The tours being integrated into the event were fantastic, the board liked not having to pay extra to attend the tours.
- Like moving the conference around the state.
- Focus on soliciting sponsors.
- Pick locations that are cost friendly.
- Need to figure out a way to integrate the sponsors into the conference better.
- Don't need a big national keynote speaker, local panels on a topic such as housing can be just as powerful.

Need to talk strategically about the organization and the desire to bring the organization to the next level progression in terms of training and mentoring opportunities. President Derickson would like to develop a funding strategy to help bolster the professional development aspect of the OCCMA.

G. Senior Advisor Evaluations

3:20 pm

President Derickson said there is a need to help bolster the senior advisor program. He noted this program was created and remains connected to ICMA, but OCCMA has created its own program as well. The board discussed the need for flexibility and to ensure that new managers get connected to their advisor and other managers who can help them in their new role.

H. Oregon Latinos in Local Government (OLLG) Update

3:20 pm

Director Fuller said there was nothing else to add to the report in the packet.

I. Committee Updates

1. Audit

The board had a discussion on internal controls at the LOC and the recent changes to the Financial Department at the LOC. The LOC is working to streamline its financial processes. The Audit Committee will be meeting in a couple of weeks.

2. Bylaws

Director Palmquist said the membership will be asked to approve a few changes to the bylaws at the Annual Membership Meeting tomorrow.

3. Communications

Director Varner provided an update on the upcoming newsletter.

4. DEI

Director Shepard said the committee has not met since the summer conference, but he noted a lot of conference attendees commented on how much they liked the presentation and tour provided by the Confederated Tribes of the Umatilla Indian Reservation. He said the committee would like to continue to offer DEI sessions at the summer conference. There are seven DEI related work plan items the committee has been working on accomplishing.

5. Ethics

Director Mombert said new committee members have been appointed, but the committee has not met this year.

6. ICMA Liaison

Director Brown said the ICMA Annual Conference was great, and he provided an update on ICMA programs.

7. Nominating

President Derickson said the membership will be voting on the slate of board candidates at the meeting tomorrow.

8. Professional Development

President-Elect Huff said the Professional Development Committee planned one additional event this year which was the Spring Workshop that was held in conjunction with the LOC Spring Conference.

He said next year the committee will also need to plan the NW Regional Management Conference in March.

9. Support for Managers

Director Brown said in July the board asked the committee to provide feedback on a proposal from SGR regarding their Manager in Transition (MIT) Program. The committee is recommending the board not enter into an agreement with SGR but to add a MIT page to the OCCMA website that provides resources for managers in transition. Staff developed the page, and the committee reviewed it during their September meeting. The board was agreeable to this approach.

10. Northwest Women's Leadership Academy

Director Fuller said there was nothing else to add to the report in the packet.

11. Veterans Committee

Director Palmquist said the committee will be working on creating a website to promote the new affiliate group.

12. Civic Education Committee

Director Mombert said the committee was able to secure a 509 student who is creating a playbook for managers to use when they present the toolkit.

13. Scholarship Committee

Director Brown said the new scholarship program that was created by the board at the July meeting needs funding for it to be successful.

J. Senior Advisor Update

3:51 pm

Sheila Ritz said Hood River County is interviewing candidates this week for their county administrator position.

Rob Drake said he is still getting his feet on the ground and has been reaching out to managers in his territory. The board discussed quorum issues arising statewide and Director Mulvihill said the LOC is working updating its model charter to address this issue.

K. Other

3:55 pm

Staff reminded the board about the annual retreat on November 16-17 in Independence.

L. Adjournment

3:58 pm

President Derickson adjourned the meeting at 3:58 pm.

APPROVED by the OCCMA Board of Directors on November 16, 2023.

Respectfully submitted by:

/s/Angela Speier, Project & Affiliates Manager



Oregon City/County Management Association

Budget vs. Actuals FY23

January - December 2023

	TOTAL		
	ACTUAL	BUDGET	REMAINING
Income			
3-4000 Conference Income			
3-4300 Fall Conference			
3-4303 Registration Fall Conference		7,500.00	7,500.00
Total 3-4300 Fall Conference		7,500.00	7,500.00
3-4350 Spring Conference			
3-4351 Spring Conference Registration	2,543.00	2,800.00	257.00
Total 3-4350 Spring Conference	2,543.00	2,800.00	257.00
3-4400 Summer Conference			
3-4404 Registration Summer Conference	32,350.00	35,000.00	2,650.00
3-4407 Sponsorships	42,500.00	30,000.00	-12,500.00
3-4420 Activity Fee	700.00	1,000.00	300.00
Total 3-4400 Summer Conference	75,550.00	66,000.00	-9,550.00
3-4600 NW Women's Academy			
3-4606 NW Women's Leader Summit	15,050.00	16,000.00	950.00
Total 3-4600 NW Women's Academy	15,050.00	16,000.00	950.00
Total 3-4000 Conference Income	93,143.00	92,300.00	-843.00
3-4700 General Operations			
3-4701 Dues	45,101.69	50,000.00	4,898.31
3-4702 Dues Surcharge Scholarship(s)	7,783.28	5,000.00	-2,783.28
3-4770 CIS Senior Advisor	2,500.00	2,500.00	0.00
3-4780 ICMA Senior Advisor	3,753.24	5,000.00	1,246.76
3-4785 Charlie Henry Scholarship		0.00	0.00
Total 3-4700 General Operations	59,138.21	62,500.00	3,361.79
3-9998 Uncategorized Income	-9,800.00	224,271.00	234,071.00
Beginning Cash	13,800.00		-13,800.00
Oregon Latinos in Local Government			
3-4608 OLLG Dues	1,000.00	16,000.00	15,000.00
Total Oregon Latinos in Local Government	1,000.00	16,000.00	15,000.00
Total Income	\$157,281.21	\$395,071.00	\$237,789.79
GROSS PROFIT	\$157,281.21	\$395,071.00	\$237,789.79
Expenses			
3-5100 Conferences			
3-5330 Fall Conference			
3-5334 Food & Beverage Fall		6,000.00	6,000.00
3-5335 Room Rental Fall		600.00	600.00
3-5339 Speakers Fall		2,500.00	2,500.00
Total 3-5330 Fall Conference		9,100.00	9,100.00
3-5360 Spring Workshop	0.00		0.00



Oregon City/County Management Association

Budget vs. Actuals FY23

January - December 2023

	TOTAL		
	ACTUAL	BUDGET	REMAINING
3-5361 Food & Beverage -Spring		2,000.00	2,000.00
3-5362 Room Rental - Spring		600.00	600.00
3-5364 Speaker(s) - Spring	1,112.78	1,000.00	-112.78
Total 3-5360 Spring Workshop	1,112.78	3,600.00	2,487.22
3-5440 Summer Conference			
3-5441 Activities Summer	1,195.37	3,000.00	1,804.63
3-5442 Administration Summer		500.00	500.00
3-5443 Audio/Trade Show Summer	4,500.00	3,500.00	-1,000.00
3-5444 Food & Beverage Summer	19,756.43	35,000.00	15,243.57
3-5445 Lodging Summer	1,106.20	2,000.00	893.80
3-5446 Postage/Printing Summer	360.00	500.00	140.00
3-5447 Travel Summer		500.00	500.00
3-5448 LOC Summer Wells/Jordan Sch	2,137.32		-2,137.32
3-5449 Summer Wells/Jordan Scholarship		2,500.00	2,500.00
3-5450 Speaker Summer	8,379.47	7,500.00	-879.47
Total 3-5440 Summer Conference	37,434.79	55,000.00	17,565.21
3-5550 NW Regional			
3-5557 NW Travel		4,000.00	4,000.00
Total 3-5550 NW Regional		4,000.00	4,000.00
3-5600 NW Women Academy			
3-5601 LOC Admin Svcs NWWLA	2,729.50	2,575.00	-154.50
3-5602 Other Administration	1,235.10	9,600.00	8,364.90
3-5604 Speaker Fees	2,000.00		-2,000.00
3-5605 NW Women Food & Beverage	488.70	6,000.00	5,511.30
3-5606 Miscellaneous		1,000.00	1,000.00
Total 3-5600 NW Women Academy	6,453.30	19,175.00	12,721.70
Total 3-5100 Conferences	45,000.87	90,875.00	45,874.13
3-5700 Oregon Latino's in Local Government			
3-5701 LGHN Dues		13,300.00	13,300.00
3-5702 Meetings & Events	529.00	2,650.00	2,121.00
3-5703 LOC Admin Services	3,172.88	3,126.00	-46.88
3-5704 Travel		2,000.00	2,000.00
Total 3-5700 Oregon Latino's in Local Government	3,701.88	21,076.00	17,374.12
3-6000 Operations Expense			
3 6056 Listerv		750.00	750.00
3-6001 LOC Services	26,136.20	26,523.00	386.80
3-6016 Board Functions	811.56	6,000.00	5,188.44
3-6018 ICMA Membership- Executive		2,000.00	2,000.00
3-6020 Coaching Program		1,000.00	1,000.00
3-6021 Conference Calls		100.00	100.00



Oregon City/County Management Association

Budget vs. Actuals FY23

January - December 2023

	TOTAL		
	ACTUAL	BUDGET	REMAINING
3-6027 Marketing/Supplies		3,000.00	3,000.00
3-6030 Membership	183.78		-183.78
3-6033 Miscellaneous		1,500.00	1,500.00
3-6034 Miscellaneous Credit Card Exp	0.00	3,000.00	3,000.00
3-6035 Insurance	750.00	750.00	0.00
3-6036 National/Committee Travel	0.00	8,000.00	8,000.00
3-6039 Newsletter		2,500.00	2,500.00
3-6042 Postage	0.00	400.00	400.00
3-6045 Printing, Fax		300.00	300.00
3-6051 Scholarships Charlie Henry	2,341.78	2,500.00	158.22
3-6054 Senior Advisor	8,813.38	14,000.00	5,186.62
3-6057 Web Support	1,188.00	1,500.00	312.00
3-6058 Audit		8,000.00	8,000.00
3-6059 Sponsorship of Other Organizations		2,000.00	2,000.00
3-6060 Managers In Transition	1,500.00	2,500.00	1,000.00
Total 3-6000 Operations Expense	41,724.70	86,323.00	44,598.30
Melio Credit card fee	87.00		-87.00
Total Expenses	\$90,514.45	\$198,274.00	\$107,759.55
NET OPERATING INCOME	\$66,766.76	\$196,797.00	\$130,030.24
NET INCOME	\$66,766.76	\$196,797.00	\$130,030.24



Oregon City/County Management Association

Transaction List by Vendor

September - October, 2023

DATE	TRANSACTION TYPE	NUM	POSTING	MEMO/DESCRIPTION	ACCOUNT	AMOUNT
Canopy						
10/02/2023	Bill Payment (Check)		Yes	MIT Services	3-1001 Checking	-150.00
10/13/2023	Bill Payment (Check)		Yes		3-1001 Checking	-150.00
CIS Trust						
09/08/2023	Bill Payment (Check)		Yes	General Liability Insurance	3-1001 Checking	-250.00
Dave Kanner						
10/10/2023	Bill Payment (Check)		Yes	Senior Advisor Reimbursement	3-1001 Checking	-47.96
Dave Waffle						
10/10/2023	Bill Payment (Check)		Yes	Senior Advisor Reimbursement	3-1001 Checking	-317.17
David Clyne						
10/10/2023	Bill Payment (Check)		Yes	Senior Advisor & Ethics Investigation Reimbursement	3-1001 Checking	-45.00
10/10/2023	Bill Payment (Check)		Yes		3-1001 Checking	-406.54
Elite Taxis Inc.						
09/14/2023	Bill Payment (Check)		Yes	Summer Conference Tour Buses	3-1001 Checking	-492.59
Forest Grove						
10/10/2023	Bill Payment (Check)		Yes	Golf Tournament Reimbursement	3-1001 Checking	-70.00
Gary Milliman						
10/30/2023	Bill Payment (Check)		Yes	Senior Advisor Reimbursement	3-1001 Checking	-1,902.88
Just Right Awards and Engraving Inc.						
10/10/2023	Bill Payment (Check)		Yes	Outgoing board awards	3-1001 Checking	-419.08
LOC						
10/02/2023	Bill Payment (Check)		Yes	LOC Conference-Senior Advisor	3-1001 Checking	-520.00
10/02/2023	Bill Payment (Check)		Yes	LOC Contract	3-1001 Checking	-16,313.10
10/02/2023	Bill Payment (Check)		Yes	Credit card expenses - Summer Conference	3-1001 Checking	-8,575.50
10/25/2023	Bill Payment (Check)		Yes	Legal services	3-1001 Checking	-137.50
Melio						
09/30/2023	Bill Payment (Check)	143334	Yes	Check Fees	3-1001 Checking	-6.00
10/01/2023	Bill Payment (Check)	143339	Yes		3-1001 Checking	-1.50
10/09/2023	Bill Payment (Check)	143333	Yes		3-1001 Checking	-1.50
10/31/2023	Bill Payment (Check)	143328	Yes		3-1001 Checking	-16.50



Oregon City/County Management Association

Transaction List by Vendor

September - October, 2023

DATE	TRANSACTION TYPE	NUM	POSTING	MEMO/DESCRIPTION	ACCOUNT	AMOUNT
10/31/2023	Bill Payment (Check)	143340	Yes		3-1001 Checking	-1.50
10/31/2023	Bill Payment (Check)	143341	Yes		3-1001 Checking	-1.50
10/31/2023	Bill Payment (Check)	143342	Yes		3-1001 Checking	-1.50
10/31/2023	Bill Payment (Check)	143343	Yes		3-1001 Checking	-1.50
10/31/2023	Bill Payment (Check)	143344	Yes		3-1001 Checking	-1.50
Oregon State University Cascades						
09/14/2023	Bill Payment (Check)		Yes	NWWLA Retreat Venue Rental	3-1001 Checking	-330.00
Pendleton Convention Center						
10/02/2023	Bill Payment (Check)		Yes	OCCMA Summer Conference Food and Beverage, AV, Rental	3-1001 Checking	-23,987.74
Penhollow Promotions LLC						
10/19/2023	Bill Payment (Check)		Yes	NWWLA T-Shirts	3-1001 Checking	-452.55
Rob Drake						
10/30/2023	Bill Payment (Check)		Yes	Senior Advisor Reimbursement	3-1001 Checking	-396.78
Sheila Ritz						
10/25/2023	Bill Payment (Check)		Yes	Senior Advisor Reimbursement	3-1001 Checking	-218.01
Taylor Phoumivong						
10/25/2023	Bill Payment (Check)		Yes	OLLG Speaker Honorarium	3-1001 Checking	-150.00



OCCMA

**Oregon City/County
Management Association**

A State Affiliate of **ICMA**

To: OCCMA Board of Directors
From: Angela Speier, Project & Affiliates Manager
Date: November 9, 2023
Subject: Summary of Contracts Executed on Behalf of OCCMA

There have not been any contracts executed on behalf of OCCMA since the last board meeting.



OCCMA

**Oregon City/County
Management Association**

A State Affiliate of **ICMA**

To: OCCMA Board of Directors
From: Angela Speier, Project & Affiliates Manager
Date: November 9, 2023
Subject: Appoint additional director to the OCCMA Board

On October 12, 2023 the OCCMA membership approved several changes to the OCCMA Bylaws, including adding an additional director to the OCCMA Board. When the Nominating Committee met in August to interview the candidates for the board, they were aware this potential change could occur. The committee unanimously recommended the board appoint Sabrina Cotta, Acting Ashland City Manager, to fill the newly created position. This change allows for three directors to be appointed every year, so City Manager Cotta will serve a two-year term expiring on December 31, 2025.

Staff reached out to Ms. Cotta to ensure she is still interested in serving on the board. She indicated that she is and that her city council is supportive of her representing Ashland in a statewide capacity.

Attachment:

1. Sabrina Cotta's board application and resume

Suggested Motion

I move to appoint Sabrina Cotta to fill the newly created director position on the OCCMA Board of Directors for a term expiring on December 31, 2025.



OCCMA
Oregon City/County
Management Association
A State Affiliate of **ICMA**

APPLICATION FORM
2024 OCCMA Board of Directors
DUE: July 30, 2023

Name: Sabrina Cotta **Title:** Deputy City Manager

Organization: City of Ashland Oregon

Please Indicate Position Sought (Director or President-Elect): Director

Please answer the following questions:

Are you an OCCMA active member? ☒ Yes ☐ No ☐ Not Sure

Why are you interested in serving as a member of the OCCMA Board of Directors?

I feel very passionate about having diverse representation serve in leadership roles. I believe this organization provides an important support network in both professional development as well as creating a space for local government leaders to come together and share ideas and get excited about serving their communities. I fear we are seeing less interest from people in serving in local government and I want to part of the effort to engage with and support individuals interested in serving in local government and promote this career path, especially for those who traditionally have been underrepresented in leadership roles. I also appreciate that this organization provided me with an opportunity to meet fellow Oregonian government nerds at professional conferences which gave me a network of people to turn to as needed. I would like to give back in recognition of the value OCCMA has provided me.

The Nominating Committee will be considering the following factors: local government position, race, gender, tenure, size of the community you serve or have served, and the geographic area in which you serve and have served. Please describe how you will contribute to the diversity of the OCCMA Board of Directors.

As a female, as a veteran, as someone who is newer to the role of Deputy City Manager and has relocated here from Colorado fairly recently, I believe I will bring a unique perspective to this Board. I am a deputy city manager working in the exciting space supporting both City Council, the City Manager and Department Directors. I have government experience at multiple levels with different forms of government which provides a unique perspective on serving in local government. I also work for a city that is a few miles from the California border, looking to bring a voice from a more rural, smaller (22k population of Ashland), southern area in Oregon.

Board members are expected to chair one or more OCCMA committees. Please identify which committee(s) you would be interested in chairing and how you could contribute to this role based on your knowledge, skills, and experience.

I would be honored to chair the Scholarship Committee, having been a member of the committee this year as well as a scholarship recipient I believe I could successfully help guide the discussion about maintaining and growing scholarship opportunities for members. I would also be interested in chairing the DEI Ad Hoc Committee and/or the NWWLA Steering Committee & Leadership Team. I believe my work in human resources and the DEI space would be valuable for the DEI Committee. I am a supporter of what NWWLA is doing and have heard great things from the staff member I nominated last year who participated. I would love to help ensure the continued success of this program.

In what ways have you been involved as an active member of OCCMA?

I am currently on the Scholarship Committee, DEI Committee and Veterans Committee. I have attended the OCCMA conference in 2022 as a scholarship recipient as well as the LOC conference in 2022. I will be a speaker on a panel at the LOC conference in October of this year. I am been a member of OCCMA since I began my tenure here at the City of Ashland. I have also referred staff members to participate in the NWWLA and regularly encourage my City Council to participate in both trainings and conference provided by LOC/OCCMA.

Email your completed form and current resume by **5:00 pm on July 30, 2023** to:

Angela Speier ♦ Project & Affiliate Manager ♦ aspeier@orcities.org ♦ Phone: (503) 540-6599

Sabrina Cotta
(520)305-5198 ■ sacotta@gmail.com

PROFILE:

I am a customer service-oriented leader with a background in financial analysis and working with elected officials on policy decisions and implementation. I have over ten years of experience in local government including municipalities, counties and special districts. I enjoy leading organization wide initiatives and working closely with elected officials, the public and employees in the areas of strategic planning, process improvement and fiscal sustainability.

PROFESSIONAL EXPERIENCE

Deputy City Manager

City of Ashland, Oregon | March 2022- Present | Supervisor: Joseph L. Lessard

Interim Human Resources Director | March 2022- April 2023

Interim Finance Director | June 2022- April 2023

- Member of Executive Leadership team
- Oversees activities of departments, division, and special projects
- Policy direction and research
- Serves as Acting City Manager when assigned
- Lead negotiator for Union contracts
- Facilitates process improvements and streamlining operations
- Facilitates effective public outreach and engagement

Director of Administrative and Internal Services

Pueblo West Metropolitan District, Colorado | October 2019- Present | Supervisor: Nina Vetter

- Under the direction of the District Manager, directs the overall operation of five divisions, and responsible for other organization-wide initiatives.
- Provides oversight for the District clerk, information technology, procurement, fleet and facilities.
- Responsible for leading organization-wide strategic planning, process improvements and sustainability initiatives.
- Project lead on drafting current District strategic plan and developed performance measures collaboratively with all departments and elected officials.
- Successfully transitioned employees to remote work in three days due to COVID-19. Successfully transitioned all procurement and Board of Director functions to online platforms within two weeks to accommodate COVID-19 restrictions.
- Currently project lead on implementing OpenGov software to streamline the development process in conjunction with County, City and Regional Building partners.
- Oversees the District's capital improvement planning and budget process.
- Works collaboratively with a 5-person elected board on policy decisions and implementation.

Interim Strategic Plan & Performance Administrator/ Analyst II Office of Innovation and Sustainability

Colorado Springs, Colorado | January 2018 to October 2019 | Supervisor: Ryan Trujillo

- Facilitated the implementation of the City-wide Strategic Plan through planning and engaging with community members, City leadership and City departments
- Conducted the management and review of current department performance measures
- Facilitated ResultsCOS, a program to identify areas of success and opportunity with departments and facilitate collaboration and discussion around these areas to develop creative and innovative solutions to move the City forward
- Project manager on sustainability initiatives to include: LED lighting and other energy savings system conversions in City facilities, turf to native grass conversion on City property, planning and executing Sustain-a-fest celebration events, formulation and submission of grant application to DOLA for an EV readiness plan
- Project lead on Pikes Peak 2030 regional sustainability plan update
- Planned, coordinated, and taught the Ascent Academy- the City's process improvement training course
- Assisted in the preparation and administration of all budgetary funds within the Office of Innovation and Sustainability (Facilities, Fleet, Office Services, Utilities, Fuel, Innovation) to include submitting budget

recommendations, identifying and justifying unfunded needs for consideration, monitoring expenditures, and preparing and analyzing regular reports to monitor spending

- Chair of the City-wide Facilities Committee to include the coordination of meetings, the production and analysis of an on-going 5 year project timeline to address the City's most pressing facility needs, and annual budget recommendations to City leadership
- Administrator of the City-wide shared Facilities Capital Improvement, Non- Capital Improvement and Emergency needs budgets
- Project manager on SmartCOS projects to include: the build-out of a micro-grid, a smart streetlight strategy and pilot program, and smart building technology to reduce energy costs and increase security within City facilities

City Council Legislative Analyst

Colorado Springs, Colorado | May 2017 to January 2018 | Supervisor: Eileen Lynch Gonzalez

- Provided professional research on legislative and policy matters for all nine Councilmembers, fellow Council staff, and in conjunction with executive staff
- Investigated and recommended resolutions for constituent concerns and responded to constituent inquiries for individual Council members and Council as a whole
- Reviewed proposed legislation and provided additional research and information to Councilmembers.
- Documented Council direction on assigned projects and reported as needed on progress.
 - Staff liaison to the Food Policy Advisory Board and the Commission
 - Examples of past projects include: Participating with and researching for the Affordable Housing Group to determine possible future policies to increase the preservation of current affordable housing and the construction of new affordable housing within city limits, researching and proposing policy and code change around barricade requirements for neighborhood block parties, the number of allowable beehives per residential lot, inspection needs for setback allowances for new construction of single family residences, standardization of City Council Board and Commission requirements, and the standardizing of internal policy reports and tracking to Councilmembers
- Acted as the Interim Communications Specialist for the City Council
 - Produced and distributed media releases, organized and presented information at several town halls
 - Maintained social media accounts and monitored Council media coverage
 - Completed Colorado Open Records Act requests and legal holds on behalf of Councilmembers

Manager/Run Coach

The Colorado Running Company, Colorado Springs, Colorado

September 2016 to February 2017 | Supervisor: John O'Neill

Up and Running, El Paso, Texas

September 2014 to April 2016 | Supervisor: Chris Rowley

Big Dog Running Company, Columbus Georgia

September 2013 to June 2014 | Supervisor: Vikena Yutz

Budget Analyst Lake County Finance and Administrative Services

Lake County, Illinois | August 2012 to December 2013 | Supervisor: Gary Gordon

- Assisted in the development, review, and implementation of the County budget
- Performed day-to-day control and management involving the formulation, execution, analysis and monitoring of the budget and funding requirements directly for the following departments: County Administrator's Office, County Board, Planning, Building and Development, Solid Waste Agency of Lake County, Stormwater Management Commission, Human Resources, Risk Management, Finance and Administrative Services, and Information Technology.
- Provided assistance, advice and guidance on budgeting and conducted reviews and special studies of budget related issues
- Conducted costing analysis to determine recommendations for equipment replacement versus outsourcing
- Assisted with revision of the Planning, Building and Development fee schedule
- Assisted with procurement contracts for various services
- Developed a process for electronic document retention
- Performed cost analysis on support services spending resulting in decision for print services to remain in-house

- Edited budget documents for accuracy and compliance with legal and regulatory requirements
- Special projects and research as needed

Intern Pima County Department of Community Development and Neighborhood Conservation

Pima County, Arizona | May 2012 to August 2012 | Supervisor: Daniel Tyluki

- Reviewed and updated policies and procedures for the Community and Rural Development Program's Home Repair and Weatherization Program to ensure compliance with legal and regulatory requirements
- Wrote contracts for the Outside Agency Program allocating funds from the Pima County General Fund to non-profit agencies in Pima County
- Provided advice, guidance and assistance through data gathering and documentation prep with the State of Arizona yearly audit

Instructor/ Research Assistant School of Government and Public Policy

University of Arizona, College of Social and Behavioral Science | August 2009 to May 2012 | Supervisor: Edella Schlager

- Developed and taught online distance courses and in-classroom courses on Public Policy and Public Administration
 - Teacher: POL 480 Formation of Public Policy / PA 206 Introduction to Policy and Public Administration/ SGPP 304 The Politics of Policy Making
- Advised and evaluated undergraduate students on their performance and progress in class
- Supervised classes ranging from 5 to 40 students to ensure proper classroom conduct and a professional environment
- Teaching assistant for large lecture classes including international relations, American government and public policy
- Research assistant for network analysis of cooperative interactions of regional entities and incorporation of international guidelines into domestic legislation around climate change.
- Advanced knowledge of research techniques, methods and procedures
 - Quantitative: advanced knowledge of statistical procedures as well as economic evaluation of non-market goods and standards for regional economic impact studies
 - Qualitative/ Mixed: advanced knowledge of social network analysis procedures, survey design, focus group, and interview procedures

Consultant Grogan Cornell Consulting

City of Tucson, Arizona | May 2011 to February 2012

- Assisted in the development of a survey instrument to better understand economic and workplace opportunities for women in the Tucson area at the request of a non-profit looking to better coordinate their services with other organizations in the area
 - Crafted questions to understand what positions women held, their salary range, training opportunities available and what organizations provide economic and training assistance to aid women looking for new or better employment
- Created official correspondence to communicate with survey respondents the mission of the survey, the format of the survey and how the data would be used from the survey ensuring confidentiality of participants
- Using SurveyMonkey, distributed surveys to all relevant private and public entities
- Conducted analysis of data using statistical and social networking techniques to understand which organizations provided the most service and if they worked with other organizations to do this and what services were lacking in the area. A report was provided to the hiring organization with information of how to better address needs in the area for better training and how to coordinate activities to serve more people

Management Fellow

City of Tucson, Arizona | July 2008 to August 2009 | Supervisor: Nicole Ewing-Gavin

- Completed special projects as assigned by City Manager
 - Extensive assignments in the Internal Audit and Water departments
- Wrote official correspondence for the City Manager
- Represented the City Manager's Office at various department and council meetings as needed
- Conducted budgetary review of city software to eliminate unused software contracts from the budget, saving the City of Tucson approximately \$15,000 annually

- Acted as a liaison for the city-wide collaborative audit project focused on performance auditing. Direct liaison for the fire and police departments, planning department, water department and parks and recreation department. Presented information to city staff, council and council aides about the project
- Acted as a liaison for the Joint City/County Water Study Oversight Committee attending public meetings, delivering presentations to community members, recording official meeting minutes, preparing official reports and documents, and conducting interviews with members of the press

Administrative Assistant College of Business and Public Policy

University of Alaska, Anchorage | May 2007 to May 2008 | Supervisor: Greg Protasel

- Administered department budget review to ensure that all expenses made were acceptable and that the department did not go over budget
- Advised students on their progress in the graduate program and assisted in developing a course plan to ensure all graduation standards of the program were met
- Organized recruitment events for prospective students to include a welcome banquet
- Collaborated with professors for academic course planning to ensure required courses were offered in a timely fashion for graduation and that the number of elective courses met the need of the student population
- Conducted enrollment number analysis to demonstrate growth of the program over time and the increased need for more course offerings as the number of students in the program increased
- Reviewed graduate student applications to ensure they met entrance criteria and advised the department head on who should be considered for admittance to the program
- Organized the logistics of speaking engagements and department functions for the Public Administration Department
- Enhanced the program's Educational Effectiveness Assessment Plan by updating with current enrollment numbers and financial summaries to demonstrate that the program was growing substantially each year and that the department budgeted allocation should reflect the increasing need for resources

MILITARY EXPERIENCE

Persian Farsi Linguist | United States Army | October 02 – August 04

EDUCATION

University of Arizona, Tucson, Arizona | *Master of Political Science*, December 2011

School of Government and Public Policy | Qualifying Fields: Public Policy & International Relations

University of Alaska, Anchorage, Alaska | *Master of Public Administration*, May 2008

College of Business and Public Policy | Qualifying Fields: Public Management & Public Policy

Colorado State University, Fort Collins, Colorado | *Bachelor of Arts*, May 2006

Major: Political Science | Minor: Anthropology

BOARDS/PROFESSIONAL ORGANIZATIONS

- Colorado City/ County Manager Association
- International City Managers Association
- National Institute for Government Procurement

SOFTWARE

- Microsoft Office | Peoplesoft | Cartegraph | Blackbaud | Google Suite | Accela | OpenGov | Zoom



OCCMA

**Oregon City/County
Management Association**

A State Affiliate of **ICMA**

To: OCCMA Board of Directors
From: Angela Speier, Project & Affiliates Manager
Date: November 9, 2023
Subject: 2024 Membership Drive

As of November 7, 2023, OCCMA has received 291 applications for membership. The specific breakdown between membership classifications is included on the right.

Active membership increased by four individuals from 2022, however affiliate membership has dropped by six individuals. Of the active members 31 are assistant city managers, assistant to the city manager, or deputy/assistant county administrators. Retired membership has decreased by five individuals. The remaining categories have remained consistent.

Staff is seeking board feedback on the membership drive materials attached to this staff report.

Active	202
Affiliate	15
Cooperating	8
Honorary	2
Lifetime	39
Retired	11
ICMA Complimentary	4
Student	8
Managers in Transition	2
TOTAL	291

Below is a timeline for the drive.

December

- Finalize all membership drive materials including the 2024 OCCMA dues form, thank you for joining letter, and thank you for renewing letter from the OCCMA President.
- Update the OCCMA website with the new membership forms.
- Announce the membership information on the listserv and send emails to the chief administrative officer of each city with instructions on how to sign-up.
- Members will have the option to renew through the paper form or electronically. Advertise the membership drive in the LOC Bulletin.

January

- Monthly reminder emails will be sent to those who have not yet renewed or paid their membership.
- Staff will continue to advertise the membership drive in the LOC Bulletin.

February

- All previous year's memberships expire on February 1, 2024 and all members who have not paid will be removed from the OCCMA listserv.
- Monthly reminder emails will be sent to those who have not yet renewed or paid.
- Staff to confirm all board and committee members have renewed.

March

- Monthly reminder emails will be sent to those who have not yet renewed or paid.

- Final invoices will be issued to those who applied but have yet to pay.

Attachments:

1. Updated membership letter
2. Demographic questions proposed by the DEI Committee
3. 2024 dues form
4. 2024 due pro-rated form for new members
5. Updated thank you for joining letter
6. Updated thank you for renewing letter

Suggested Motion

I move to approve the 2024 membership drive materials.



OCCMA

**Oregon City/County
Management Association**

A State Affiliate of **ICMA**

To: City/County Managers, Administrators, Assistants, Records, and COG Directors
From: Dan Huff, 2024 OCCMA President
Date: December 6, 2023
Subject: 2024 OCCMA Membership

Dear Colleagues:

The Oregon City/County Management Association (OCCMA) is an organization of managers, administrators, recorders, and assistants from throughout the State of Oregon. Our mission is to support and energize our members, and the profession in order to foster responsible, local government with the objective of improving the sustainability and livability of Oregon communities. The OCCMA allows members to provide one another with support and professional guidance.

As incoming President of the OCCMA, I invite you to either renew your membership or become a member of the association for the 2024 calendar year. OCCMA exists to support professional local government management by increasing the knowledge and ability of administrators and managers, promoting the exchange of information between the members, and sustaining the functions, principles, and goals of the International City/County Management Association (ICMA).

Membership in the OCCMA provides the following benefits to help meet these obligations:

- Access to the OCCMA listserv (for active, affiliate, and student members)
- Access to the members only portion of the website at www.occma.org
- Support from the OCCMA Senior Advisor Program
- Access to the OCCMA's [Civic Education Toolkit](#)
- Access to quarterly E-Newsletters
- Allows members to participate on an OCCMA committee and in our affiliate organizations such as the NW Women's Leadership Academy (NWWLA) and the Oregon Latinos in Local Government (OLLG)
- Networking opportunities
- Professional development opportunities:
 - OLLG Winter Session, February 23, Lake Oswego City Hall
 - NW Regional Manager's Conference, March 26-29, Seaside Convention Center
 - Spring Manager's Workshop, April 25, Running Y Ranch, Klamath Falls
 - OCCMA Summer Conference, June 24-27, Best Western Plus Hood River Inn
 - OLLG Summer Session, September 20, TBD
 - Fall Manager's Workshop, October 17, The Riverhouse on the Deschutes, Bend
 - Access to the ICMA Coaching Program and other ICMA training opportunities
 - Scholarships are available for members to participate in professional development opportunities

Be sure to review the categories of membership and the ICMA Code of Ethics, which has been adopted by OCCMA before signing the membership form. The OCCMA Board of Directors has approved a 15% surcharge to the dues formula and authorized the revenue gained from the surcharge to be used for scholarships. To learn more about the OCCMA Professional Development Program please visit <https://occma.org/Scholarships>. In addition, to

encourage new members to join the organization, the board has authorized new members and members returning after three years or longer to get their first year of dues half-off. You may also renew your membership online by visiting www.occma.org and clicking the Join Us tab. If you have any questions about membership, please contact Angela Speier at aspeier@orcities.org or by phone at 503-540-6599. Also consider joining the ICMA to become part of the international network for local government management professionals.

I look forward to working with you to continue bringing excellent, professional development and support services to the local government managers in the State of Oregon in 2024!

Sincerely,

A handwritten signature in black ink, appearing to read 'Dan Huff', with a stylized, cursive script.

Dan Huff, Molalla City Manager
2024 OCCMA President

We ask these questions to better understand the support needs of the OCCMA membership.

1. In what decade were you born?
 - a. Before 1940
 - b. 1940 – 1949
 - c. 1950 – 1959
 - d. 1960 – 1969
 - e. 1970 – 1979
 - f. 1980 – 1989
 - g. 1990 – 1999
 - h. 2000 – 2009
 - i. Prefer not to answer
2. Which race or ethnicity best describes you?
 - a. Black or African American
 - b. Asian or Pacific Islander
 - c. White or Caucasian
 - d. Hispanic or Latino/a
 - e. Native American/American Indian/Alaska Native
 - f. Multiple ethnicities/Prefer to self-identify: (text box)
 - g. Prefer not to answer
3. To which gender identity do you most identify?
 - a. Woman
 - b. Man
 - c. Non-binary
 - d. Prefer to self-identify: (text box)
 - e. Prefer not to answer



OCCMA
Oregon City/County
Management Association
A State Affiliate of ICMA

2024 Membership Application

Please print legibly

NAME ▲

JOB/TITLE ▲

CITY/AGENCY ▲

EMAIL ADDRESS ▲

MAILING ADDRESS (INCLUDE CITY AND ZIP) ▲

STREET ADDRESS (INCLUDE CITY AND ZIP) ▲

DIRECTORY

Which contact number(s) would you like published in the 2024 OCCMA directory? (If not specified, office phone only).

Office:

Cell:

REGISTER HERE FOR 2024 LISTSERV

LISTSERV & MEMBERS-ONLY WEBSITE NOT AVAILABLE TO COOPERATING MEMBERS

☐

I WISH TO BE ON
THE OCCMA LISTSERV

☐

I DO NOT WISH TO BE ON
THE OCCMA LISTSERV

- ▶ MY LISTSERV EMAIL ADDRESS IS: _____
- ▶ Renewal forms must be received prior to February 1, 2024 or you will lose your listserv membership
- ▶ Use of the OCCMA listserv is governed by [rules and a code of conduct](#), please honor these rules when using the listserv. All listserv messages should be treated as a public record and could be subject to disclosure.

MEMBERSHIP CLASSIFICATION & RENEWAL FEES

Which membership classification is right for you? (descriptions on reverse side)

- ☐ ACTIVE MEMBER
(see calculation, right)
- ☐ HONORARY MEMBER
(complimentary)
- ☐ RETIRED MEMBER
(complimentary)
- ☐ LIFETIME MEMBER
(complimentary)
- ☐ AFFILIATE MEMBER
\$100 flat fee
- ☐ COOPERATING MEMBER
\$100 flat fee
- ☐ STUDENT MEMBER
\$30 flat fee
- ☐ MANAGER IN TRANSITION
(complimentary for up to three years in transition)

ACTIVE MEMBERSHIP APPLICANTS

Formula: .00191705 times total annual salary in excess of \$5,000 plus base dues.

Line 1. Annual Salary	\$	
Line 2. Add deferred comp.	\$	
Line 3. Total salary, Line 1+2	\$	
Line 4. Less \$5,000	\$	(5,000.00)
Line 5. Effective salary, line 3-4	\$	
Line 6. Line 5 x 0.00191705	\$	
Line 7. Add base dues	\$	44.50
Line 8. Total, line 6 + 7	TOTAL TO BE PAID	\$

CODE OF ETHICS ACKNOWLEDGEMENT

I have read and agree to abide by the International City/County Management Association's Code of Ethics as a condition for Active Membership in the Oregon City/County Management Association. I understand that as an Active Member I am subject to and will cooperate with peer review for any allegations of unethical behavior.

ACTIVE MEMBER SIGNATURE

DATE

Return completed form and payment to: OCCMA, 1201 Court St. NE #200, Salem, OR 97301, or fax (503) 399-4863, or email jaones@orcities.org. Credit card payments accepted, please call (503) 588-6550.

MEMBERSHIP CLASSIFICATIONS

ACTIVE

Any person who is an appointed manager or administrator, or an assistant city or county manager or administrator, or an assistant to a manager or administrator of a general purpose local government or council of governments in the State of Oregon, or a council appointed city recorder provided the city does not have a city manager or city administrator, or a corporate member of the International City/County Management Association who serves in Oregon, or while in transition from such a position and actively pursuing other eligible employment in Oregon, shall be eligible for active membership in the Association.

Active members shall comply with the ICMA Code of Ethics and the Declaration of Ideals.

Any active member of this Association, who has resigned or been removed from a position in local government, may retain active membership status for a period of three years, or for a longer period if authorized by a majority vote of the Board. Annual membership dues will be waived for up to three years while the member remains in transition and actively pursuing other eligible employment in Oregon. If it is shown to the satisfaction of the Board that the member's resignation or removal was for a cause that violates the ethical standards of the International City/County Management Association, the membership in the Association may be terminated immediately by the Board. The Board may consider requests for refunding dues. The decision of the Board shall be final.

AFFILIATE

Any person who fills a position in a general-purpose local government or council of governments and has obtained a statement co-signed with their current chief executive officer indicating a continued interest in pursuing a career in city/county management or an appointed administrative official reporting to a mayor/city council. Affiliate members shall hold no office or vote.

COOPERATING

Individuals who work for an employer who does business with and has close ties to one or more units of local government. Cooperating members shall hold no office or vote or have access to the OCCMA listserv or members-only website.

STUDENT

Any person registered as a student in a college or university public administration program or is currently working in a career in public management.

RETIRED

Any person who was previously an active member and has qualified for benefits under a local government retirement plan shall be eligible for retired membership by providing written notice to the Secretary-Treasurer and payment of the membership fee, if any, for the current year. Retired members shall hold no office or vote.

An individual who was not previously a member of OCCMA but who now resides in Oregon and has had a career in local government management that would have made them eligible as an active member in OCCMA may become a retired member upon approval of the majority of the Board.

HONORARY

Honorary members shall be chosen based on their contributions to the Association and/or to the field of city or county management in Oregon. Honorary membership shall be conferred by a Board vote at any regular meeting. Honorary members shall pay no dues, hold no office, or vote. Honorary membership is bestowed for an indefinite period.

LIFETIME

Lifetime membership shall represent the highest honor afforded to retired members. Lifetime members shall be chosen because of distinguished service in the field of city or county management during his or her management career and lasting and meaningful contributions to the OCCMA and the profession of local government management. Lifetime members shall pay no dues, hold no office, or vote.

To be eligible for lifetime membership in the Association, the person must have been an active member of the Association for a minimum of five years and is currently retired from the profession or no longer employed in the profession. Following a written letter of nomination signed by at least three active members of OCCMA, the Board will consider conferring lifetime membership to the nominee at any regular business meeting. A lifetime member shall be elected only upon recommendation of the Board. In making this recommendation, the Board shall consider contributions to the profession at a level greater than the organizations served by the nominee; contributions at a national level; contributions to the profession as a whole, including teaching or publication; and any other relevant service. Once a recommendation has been approved by the Board, lifetime membership shall be conferred upon an individual after a majority vote of the membership present at a general membership meeting. Lifetime members shall comply with the ICMA Code of Ethics and the Declaration of Ideals.

Revised 12/06/2022



OCCMA
Oregon City/County
Management Association
A State Affiliate of ICMA

2024 Membership Application

New or Returning Members

Pro-Rated Dues

Please print legibly

NAME ▲

JOB/TITLE ▲

CITY/AGENCY ▲

EMAIL ADDRESS ▲

MAILING ADDRESS (INCLUDE CITY AND ZIP) ▲

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Line 7. Add base dues	\$	44.50
Line 8. Total, line 6 + 7	\$	
TOTAL Pro-Rated Fee to be Paid (one-half of line 8)	\$	

CODE OF ETHICS ACKNOWLEDGEMENT

I have read and agree to abide by the International City/County Management Association's Code of Ethics as a condition for Active Membership in the Oregon City/County Management Association. I understand that as an Active Member I am subject to and will cooperate with peer review for any allegations of unethical behavior.

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To be eligible for lifetime membership in the Association, the person must have been an active member of the Association for a minimum of five years and is currently retired from the profession or no longer employed in the profession. Following a written letter of nomination signed by at least three active members of OCCMA, the Board will consider conferring lifetime membership to the nominee at any regular business meeting. A lifetime member shall be elected only upon recommendation of the Board. In making this recommendation, the Board shall consider contributions to the profession at a level greater than the organizations served by the nominee; contributions at a national level; contributions to the profession as a whole, including teaching or publication; and any other relevant service. Once a recommendation has been approved by the Board, lifetime membership shall be conferred upon an individual after a majority vote of the membership present at a general membership meeting. Lifetime members shall comply with the ICMA Code of Ethics and the Declaration of Ideals.

Revised 12/06/2022



OCCMA

Oregon City/County Management Association

A State Affiliate of ICMA

Dear :

Thank you for joining the OCCMA for 2024. We have an exciting year ahead, as OCCMA is sponsoring four major activities to bring managers together to focus on professional topics and training.

- **Northwest Regional Managers Conference, March 26-29** at the Seaside Convention Center
- **OCCMA Spring Workshop, April 25** at the Running Y Ranch in Klamath Falls
- **OCCMA Summer Conference, June 24-27** at the Best Western Plus Hood River Inn. This conference is an opportunity for developing professional and personal skills as well as relationships with colleagues.
- **Fall Workshop, October 17** at the Riverhouse on the Deschutes in Bend. OCCMA holds its annual business meeting and half-day training session during the League of Oregon Cities Annual Conference in October.

In addition to these activities, OCCMA sometimes sponsors or co-sponsors more specialized seminars, coaching opportunities, and training programs at a variety of locations in Oregon and the Northwest. We publicize the availability of these programs on our website – www.occma.org – and through our e-quarterly newsletter sent to all members. Members also have access to a newly developed [Civic Education Toolkit](#). City Managers and local government professionals can use this toolkit as a resource to present to community groups, students, individuals, and elected officials. Our website also includes an online membership directory that is continuously updated. To access the 'members only' area of our website, your user id is: _____ and your password is: **Occma12-2024**.

You are now signed up for the OCCMA listserv. During the year, managers can stay connected with and ask questions of fellow managers on the OCCMA listserv. Many members have found this service of value when they need to do a quick survey of what other cities are doing with a particular issue. To post an email on the listserv, please send your email to occma-listserv@gaggle.email.

OCCMA has eight retired city managers who serve as Oregon's Senior Advisors. These individuals are assigned to different regions throughout the state, please visit occma.org/senior-advisor-program to see who your senior advisor is. Senior Advisors will visit managers throughout the year, keep you abreast of ICMA services and programs, and serve as a "sounding board" for new and seasoned managers alike. Senior Advisors will reach out to you throughout the year.

The Board and I thank you for joining OCCMA, and hope that you will become an active member and participate fully in the organization. If you are in the Molalla area, please stop by my office for a visit. If you have any membership questions, please feel free to contact Angela Speier at aspeier@orcities.org or 503-540-6599.

Sincerely,

Dan Huff, Molalla City Manager
2024 OCCMA President



OCCMA

Oregon City/County Management Association

A State Affiliate of ICMA

Dear First Name:

Thank you for renewing your OCCMA membership for 2024. We have an exciting year ahead, as OCCMA is sponsoring four major activities to bring managers together to focus on professional topics and training.

- **Northwest Regional Managers Conference, March 26-29** at the Seaside Convention Center
- **OCCMA Spring Workshop, April 25** at the Running Y Ranch in Klamath Falls
- **OCCMA Summer Conference, June 24-27** at the Best Western Plus Hood River Inn. This conference is an opportunity for developing professional and personal skills as well as relationships with colleagues.
- **Fall Workshop, October 17** at the Riverhouse on the Deschutes in Bend. OCCMA holds its annual business meeting and half-day training session during the League of Oregon Cities Annual Conference in October.

In addition to these activities, OCCMA sometimes sponsors or co-sponsors more specialized seminars, coaching opportunities, and training programs at a variety of locations in Oregon and the Northwest. We publicize the availability of these programs on our website – www.occma.org – and through our e-quarterly newsletter sent to all members. Members also have access to a newly developed [Civic Education Toolkit](#). City Managers and local government professionals can use this toolkit as a resource to present to community groups, students, individuals, and elected officials. Our website also includes an online membership directory that is continuously updated. To access the 'members only' area of our website, your user id is: _____ and your password is: **Occma12-2024**.

You are now signed up for the OCCMA listserv. During the year, managers can stay connected with and ask questions of fellow managers on the OCCMA listserv. Many members have found this service of value when they need to do a quick survey of what other cities are doing with a particular issue. To post an email on the listserv, please send your email to occma-listserv@gaggle.email.

OCCMA has eight retired city managers who serve as Oregon's Senior Advisors. These individuals are assigned to different regions throughout the state, please visit occma.org/senior-advisor-program to see who your senior advisor is. Senior Advisors will visit managers throughout the year, keep you abreast of ICMA services and programs, and serve as a "sounding board" for new and seasoned managers alike. Senior Advisors will reach out to you throughout the year.

The Board and I thank you for renewing your OCCMA membership, and hope that you will become an active member and participate fully in the organization. If you are in the Molalla area, please stop by my office for a visit. If you have any membership questions, please feel free to contact Angela Speier at aspeier@orcities.org or 503-540-6599.

Sincerely,

Dan Huff, Molalla City Manager
2024 OCCMA President



OCCMA

**Oregon City/County
Management Association**

A State Affiliate of **ICMA**

To: OCCMA Board of Directors
From: Angela Speier, Project & Affiliates Manager
Date: November 9, 2023
Subject: 2024 OCCMA Board Meetings and Conference Calendar

Below is a list of dates for OCCMA conferences and board meetings in 2024.

January 26

OCCMA Board of Directors Meeting
Location: Virtual at 10:30 am

March 26-29

NW Regional Managers Conference
Location: Seaside Convention Center

March 29

OCCMA Board of Directors Meeting
Location: Seaside Convention Center at 10:00 am

April 25

OCCMA Spring Workshop
Location: Running Y Ranch, Klamath Falls

April 25-26

LOC Spring Conference
Location: Running Y Ranch, Klamath Falls

June 24-27

OCCMA Summer Conference
Location: Best Western Plus Hood River Inn

June 24

OCCMA Board of Directors Meeting
Location: Best Western Plus Hood River Inn at TBD

August 30

OCCMA Board of Directors Meeting to determine Board of Directors Nominations
Location: Virtual at 10:30 am

October 16

OCCMA Board of Directors Meeting
Location: The Riverhouse on the Deschutes, Bend at 2:15 pm

October 17

OCCMA Fall Workshop and Annual Membership Meeting
Location: The Riverhouse on the Deschutes, Bend

October 17-19

LOC Annual Conference

Location: The Riverhouse on the Deschutes, Bend

November 21-22

OCCMA Board of Directors Retreat

Location: Independence Event Center at 10:00 am



OCCMA

**Oregon City/County
Management Association**

A State Affiliate of **ICMA**

To: OCCMA Board of Directors
From: Angela Speier, Project & Affiliates Manager
Date: November 9, 2023
Subject: Approve Registration Fee for the 2024 NW Regional Managers Conference

Staff has analyzed the venue rental, food and beverage, and transportation costs for the 2024 NW Regional Managers Conference and is recommending the following registration fees:

Member Registration (OCCMA, WMCA, AMMA): \$500

Non-member Registration: \$600

Guest Registration: \$325

Guest Dinner Registration (only): \$60

The cost includes every activity associated with the conference including tours, receptions, and the two dinners (one onsite and one offsite). This would not cover the cost of staff travel and speaker fees. The thought is that sponsorships could help cover those costs. The board could choose to charge additional fees for tours and dinners if you would like to lower the registration fee for attendees or not hold the onsite dinner. In 2019, the last time the OCCMA hosted the NW Regional Managers Conference in Hood River the member registration fee was \$425.



OCCMA

**Oregon City/County
Management Association**

A State Affiliate of **ICMA**

To: OCCMA Board of Directors
From: Martha Bennett, OCCMA President-Elect
Date: November 9, 2024
Subject: Discussion/Think Questions for OCCMA Board Retreat

1. What are the top three to five things that are having an impact on the profession of local government management right now?
2. What are the top three to five things that OCCMA faces as a professional organization right now? These could be opportunities, threats or challenges (Positive or negative).
3. What are the three most valuable things that OCCMA provides to its members? In other words, when you explain why your City pays your dues, what do you tell people you value in your membership?
4. Are things (up to three) you don't view as valuable?
5. What are the things OCCMA does really well already that we should do MORE of?
6. What should we START doing to increase value to members?
7. What can we STOP doing to free up capacity/focus to either increase a current activity or to add a new activity?

8. Bonus question: Our website contains the following introduction to OCCMA:

We are non-partisan government professionals committed to:

- *the highest standards of public integrity and ethics*
- *ensuring diversity, equity and inclusion in our deliberative and organizational systems,*
- *incorporating the newest and best local government practices through continued education and*
- *promoting the Council/Manager form of municipal government.*

In these pursuits, OCCMA offers access to local government peers, mentorship, information, and learning opportunities so that elected officials and communities thrive, and the value of local government is reinforced.

In what ways does this statement adequately capture our mission and values? Does it need to be updated?

Attachments:

1. 2023 Work Plan with status updates
2. DEI Committee Work Plan



2023 WORK PLAN

OUR MISSION

Our mission is to support and energize our members and the profession in order to foster responsible, responsive local government with the objective of improving the sustainability and livability of Oregon communities.

OUR STRATEGIC GOALS

Our Strategic Plan has four goals which reflect our Mission:

- A. Cultivate diversity inclusion and a sense of belonging within OCCMA's membership and governance structure.
- B. Provide professional development opportunities to our members.
- C. Support our members in the profession.
- D. Promote and expand membership.
- E. Promote civic education and effective local government.

OCCMA carries out its Mission through programs and special activities conducted by the Board and a number of standing committees.

CORE BELIEFS

1. PUBLIC SERVICE: including the stewardship of democratic principles and the efficient and transparent use of public resources;
2. ETHICS: as the core of professionalism in local government leadership and management as outlined in the ICMA Code of Ethics;
3. COUNCIL/MANAGER FORM OF GOVERNMENT AND PROFESSIONAL MANAGEMENT: as the preferred local government structure;
4. EQUITY AND INCLUSION: ensuring that local governments are inclusive and mirror the diversity in communities;
5. THE CONTINUOUS PURSUIT OF EXCELLENCE: including professional development, life-long learning, networking, capacity building, knowledge sharing, and engagement;
6. STEWARDSHIP: balancing resources including people, financial, social capital, and environmental so that communities are better than we found them;
7. LEADERSHIP: developing leadership capacity and attracting and developing future generations of leaders; and
8. CIVILITY: promote social interactions in which people demonstrate and maintain respect for one another even when they disagree.

WORK PLAN

OCCMA carries out its Mission through programs, support services, and special activities conducted by the Board and a number of standing and ad hoc committees, with administrative support from the League of Oregon Cities. On January 27, 2023 the Board of Directors adopted a work plan for 2023. The letters in parentheses reference the goals(s) related to that work item. The 2023 OCCMA Work Plan is as follows:

A. OCCMA Board

A.1 Promote the council/manager form of government by creating a League of Oregon Cities conference workshop or program on the council/manager form of government. (C).

Status: this was incorporated into the joint mayor and city manager fall workshop.

A.2 Conduct an inventory of existing regional manager meetings and explore establishing regional meetings in parts of the state that are currently not served by regional manager groups and look at possibly utilizing the small cities network to assist with this effort (C).

Status: this has not been started.

A.3 Develop and provide OCCMA branded items for use in promoting the benefits and membership in OCCMA. (D).

Status: this has not been started.

A.4 Develop a relationship with the Oregon Association of Chiefs of Police (OACP). (C).

Status: this has not been started to my knowledge.

A.5 Develop a relationship with the Coalition of School Administrators to help with the implementation of SB 513. SB 513 was approved during the 2021 legislative session requires a half-credit course on civics to get a diploma. (E).

Status: in-progress the Civic Education Committee has made a connection with OSBA.

A.6 Present the OCCMA Toolkit to the LOC Board of Directors. (E).

Status: this has not been scheduled.

B. Nominating Committee

B.1 Recruit a diverse slate of candidates for the Board and president-elect reflective of the OCCMA community. (A).

Status: election occurred all four incoming board members are women. The board will be appointing a fifth member, and it was recommended by the Nominating Committee Sabrina Cotta fill that position.

B.2 Develop a bylaws amendment to ensure the Nominating Committee considers the following factors when they are recruiting and considering appointments to the board:

- Race;
- Gender;
- Tenure;
- Size of communities served; and
- Geographic areas served throughout their career. (A).

Status: the OCCMA membership approved adding language recommended by the Nominating Committee into the bylaws.

C. Ethics Committee

C.1 Educate members about the ethics policy and review complaints in accordance with the policy. (C).

Status: ethics committee has not met, but a fact finding committee has been established.

D. Support for Managers Committee

D.1 Regularly promote senior advisor services and encourage members and non-members to avail themselves of these services. (C).

Status: continue to promote the program in the newsletter.

D.2 Welcome newly appointed managers to the Association with a welcome package. (C, D).

Status: staff has been sending the welcome packet to new city managers.

E. Bylaws Committee

E.1 Develop written guidelines for scheduling billing and collection of dues by OCCMA. (C).

E.2 Review the potential amendment from the Nominating Committee to amend the selection criteria to the board. (A).

E.3 Review the listserv policy as it relates to ethics and make recommended amendments. (C).

E.4 Amend the bylaws to include an additional director to the OCCMA Board of Directors. (A).

Status: all items completed.

F. Audit Committee

F.1 Review the policy annex to ensure policies are matching practices. (D).

Status: new language was included in the bylaws update.

G. Professional Development Committee

G.1 Utilize the PDC guidelines as a basis for conference planning in 2023, and review and revise the policy guidelines to reflect operational best practices for future conference planning. (B).

Status: has not been started.

G.2 Provide an opportunity at the conference to promote ethical local government management based on the ICMA Code of Ethics and Oregon Government Ethics. (B).

Status: session held at the 2023 Summer Conference.

G.3 Work with county managers to consider the development of a proposed county track of training opportunities at the conferences. (B).

Status: this was not completed in 2023.

G.4 Collaborate with the DEI Committee to develop sessions and focus on the utilization of diverse and inclusive professionals to present at our conferences and engage with OCCMA. (A,B).

Status: session and tour held at the 2023 Summer Conference.

G.5 Work with the ICMA Student Chapter at PSU to bolster student membership in OCCMA. (B).

Status: six students applied for scholarships to attend the conference.

G.6 Collaborate with OLLG and NWWLA to develop sessions for the OCCMA Summer Conference. (A,B).

Status: session was held at the 2023 Summer Conference.

G.7 Begin planning the 2024 NW Regional Managers Conference. (B).

Status: work has started.

G.8 Solicit ideas for workshop and conference session topics from the OCCMA membership. (B).

Status: Ideas were solicited in the summer evaluation.

G.9 Add professional reading recommendations to the website. (B,C).

Status: this has not been started.

H. Diversity, Equity, and Inclusion Committee (ad hoc)

H.1 Clarify and re-commit to including DEI topics at every conference and newsletter and work to spotlight the equity lens in every topic. (A, B).

H.2 Data collection – collect current demographic information about OCCMA membership and beyond. What are the demographics of Oregon city managers, assistants and potentially city recorders and where are they and their organizations in leading DEI. This could be a combined research and survey project that looks at basic demographics and asks a few simple questions about leadership in this work. An example could be from Santa Clara County and a project that was presented at ICMA as part of the Equity cohort's final presentation. There could also be an opportunity to collaborate or utilize ELGL diversity dashboard. (A).

H.3 Listening session follow up – Based on what we learn from the survey, offer a couple of listening session drop ins to better understand and support our membership. (A).

H.4 Highlight and build on work of other state associations – Recognize that many local government staff are participating in associations that are doing excellent work on diversity, equity and inclusion. The committee would like to engage with a few of those to see where it can support and not re-create existing resources. A good example is the Oregon Recreation and Parks Association. (A).

H.5 Cultivate a welcoming and sense of belonging in profession and at our events – Consider looking at the COG's around the state and how they are the front door for OCCMA and new and emerging leaders. Continue more structured dinners and social activities at OCCMA events. (A).

H.6 Encourage recruitment of more diverse senior advisors. Go beyond call for applications to direct calls and asks. (A).

H.7 To explore and help facilitate land acknowledgement statements for conferences and board meeting if meaningful to the tribe. (A).

Status: DEI Committee Liaison will report on progress.

I. Communications Committee (ad hoc)

I.1 Produce a quarterly newsletter with articles on ethics, promotion of professional development opportunities, and diversity, equity and inclusion initiation opportunities for the profession, including a list of regional managers' meetings and contacts for those groups. Use the newsletter and other media to promote positive images of city events and other creative ways to bring communities together (B,C).

Status: 3 quarters published.

I.2 Review the content and design of the OCCMA website. (C).

Status: this has not been started.

I.3 Consider making the Communications Committee a formal standing committee. (B).

Status: completed.

I.4 Promote the Civic Education Toolkit and the ICMA Dues Structure. (E).

Status: awaiting toolkit playbook and article written on dues structure was included in the 1st quarter newsletter.

I.5 Define the purpose of the Communications Committee and whether it should be focusing on inward or outward communication. (E).

Status: this has not been started.

J. Northwest Women's Leadership Academy (ad hoc)

J.1 Continue to support and grow the relationship with NWWLA. (A, B, D).

Status: in progress.

J.2 Work with the Professional Development Committee to design a session at the summer conference. (B).

Status: session included in the conference.

K. Oregon Latinos in Local Government (OLLG)

K.1 Build the relationship with OLLG and evaluate other opportunities to engage with OCCMA. (A, B, D).

Status: in progress.

K.2 Work with the Professional Development Committee to design a session at the summer conference. (B).

Status: OLLG will be providing the membership with an update at the conference and will be hosting two in person events and 6 Café con Leche sessions in 2024.

L. Civic Education Committee (ad/hoc)

L.1 Update tools, resources, and information in the Civic Education Toolkit for OCCMA members when they are educating newly elected officials, the community (i.e. chamber of commerce and civic classes), and future local government employees about local government and what city managers do. (C,E).

Status: the committee is working with a PSU grad student to accomplish this by December.

L.2 Develop a presentation guide to promote the Civic Education Toolkit to OCCMA members. (C,E).

Status: the committee is working with a PSU grad student to accomplish this by December.

L.3 Develop a presentation template for OCCMA members to share the Civic Education Toolkit with local schools, civic groups, and future local government leaders. (C,E).

Status: the committee is working with a PSU grad student to accomplish this by December.

L.4 Develop and promote civics with local schools. (C,E).

Status: in progress.

L.5 Survey members to see how the committee can improve the Civic Education Toolkit. (C,E).

Status: completed, results have been shared with the committee.

M. Scholarship Committee

M.1 Create a defined scholarship program with eligible uses, percentage matches, and rules for selection. (A,B).

Status: completed, now we need to continue promoting the new program.

M.2 Explore the expansion of the scholarship program to allow funds to be used for ICMA training programs. (A,B).

Status: completed, now we need to continue promoting the new program.

M.3 Promote the scholarships for NWWLA and OLLG members to attend OCCMA conferences. (A,B).

Status: scholarships shared with all OCCMA membership.

N. Develop a Retired Senior Manager Corp.

N.1 To promote the ICMA Coaching and Credentialing Programs. (C).

Status: credentialing article was included in the 1st quarter newsletter. Will promote the coaching program in the 4th quarter and can do a session at the NW Regional Managers Conference.

O. Veteran's Committee (ad/hoc)

O.1 To evaluate the interest in creating a Veteran's in Local Government Affiliate Group. (C).

Status: board approved on April 25.

Draft DEI Committee 2024 Work Plan
November 7, 2023

1. Provide the Professional Development Committee with one or more options for DEI topics/sessions/presenters for each OCCMA conference in 2024.
2. Provide the OCCMA Communications Committee with one article for each newsletter that spotlights DEI issues.
3. Develop a process and begin tracking demographic data collected from OCCMA membership registration and renewal. (Demographic questions have been prepared for Board review)
4. Provide the Professional Development Committee with a minimum of three suggestions to cultivate a welcoming and sense of belonging for all participants at OCCMA Workshops and Conferences.



OCCMA

**Oregon City/County
Management Association**

A State Affiliate of **ICMA**

To: OCCMA Board of Directors
From: Angela Speier, LOC Project & Affiliates Manager
Date: November 9, 2023
Subject: 2024 OCCMA Committees

On October 9 staff began soliciting for OCCMA committee membership. Attached to this memo is a list of OCCMA members who have volunteered to serve on a committee in 2024. Article 10, Section 4 of the OCCMA Bylaws state the Audit Committee shall consist of the president-elect and two other directors appointed by the president. Article 7, Section 2 states that the Nominating Committee is to be made up of not less than three members, including the immediate past president.

Article 9 of the OCCMA Bylaws gives the president authority to make appointments to standing and ad/hoc committees. In addition, the president shall also assign board members as liaisons to the standing and ad/hoc committees to monitor committee activities and provide reports to the board and at the annual meeting. Each committee shall be chaired by an OCCMA member appointed by the president. President-Elect Huff has reviewed the committee volunteers and made recommended appointments to each committee. Staff would like the board to review these assignments and provide feedback to the incoming president. In addition, the board will also need to determine who will be replacing Director Rachael Fuller as the board liaison between the OCCMA Board and NWWLA, as well as the liaison on the OLLG Board of Directors.

Attachments:

1. 2023 Committee Rosters
2. 2024 Committee Requests and President-Elect Huff's Committee Recommendations



OCCMA

**Oregon City/County
Management Association**

A State Affiliate of **ICMA**

2023 OCCMA Committees

Standing Committees

Audit

Dan Huff, Chair	City Manager	Molalla
John Walsh	City Administrator	St. Helens
Zoe Mombert	Assistant to the City Manager	Wilsonville

Bylaws & Policy

Aaron Palmquist, Chair	City Manager	Irrigon
Spencer Nebel	City Manager	Newport
Robb Corbett	City Manager	Pendleton
Lonnie Rainville	City Administrator	Myrtle Creek
Justin Hogue	Deputy County Administrator/Business Services Director	Yamhill County
Jesse VanderZanden	City Manager	Forest Grove
Kenna West	City Manager	Independence

Ethics

Zoe Mombert, Chair	Assistant to the City Manager	Wilsonville
Spencer Nebel	City Manager	Newport
David Clyne	Senior Advisor	OCCMA
Keith Campbell	City Manager	Sherwood
David Milliron	City Administrator	North Bend
Gary Milliman	Senior Advisor	OCCMA
Martha Bennett	City Manager	Lake Oswego
Sabrina Cotta	Acting City Manager	Ashland
Greg Dirks	City Manager	Wood Village
Bryon Smith	City Manager	Hermiston
Kathryn Greiner	City Administrator	Condon

Nominating

Susie Marston, Chair	City Manager	Gervais
Justin Hogue	Deputy County Administrator/Business Services Director	Yamhill County
Sherilyn Lombos	City Manager	Tualatin
Rachael Fuller	Assistant County Administrator	Washington County

Spencer Nebel	City Manager	Newport
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Professional Development

Dan Huff, Chair	City Manager	Molalla
Masami Nishishiba	Department Chair	PSU
Eileen Stein	Manager in Transition	
Aaron Palmquist	City Manager	Irrigon
Stephanie Betteridge	Chief Innovation Officer/Assistant City Manager	Bend
Jesse VanderZanden	City Manager	Forest Grove
Nina Vetter	City Manager	Gresham
Phillip Cooper	Professor	PSU
Sherilyn Lombos	City Manager	Tualatin
Nick Lelack	County Administrator	Deschutes County
David Milliron	City Administrator	North Bend
Ann Ober	City Manager	Milwaukie
Jerry Gillham	City Manager	Sutherlin
Sara Singer Wilson	Principal/Owner	SSW Consulting
Ashley Sonoff	Associate	SSW Consulting
Robb Corbett	City Manager	Pendleton
Doug Wiggins	City Administrator/City Recorder	Union
Kevin Greenwood	Executive Director	Port of Hood River

Support for Managers

Adam Brown, Chair	City Manager	Keizer
Scott Dadson	Executive Director	MWVCOG
Sherilyn Lombos	City Manager	Tualatin
Nina Vetter	City Manager	Gresham
Richard Meyers	Senior Advisor	OCCMA
David Clyne	Senior Advisor	OCCMA
Dave Kanner	Senior Advisor	OCCMA
Gary Milliman	Senior Advisor	OCCMA
Sheila Ritz	Senior Advisor	OCCMA
Dave Waffle	Senior Advisor	OCCMA
Rob Drake	Senior Advisor	OCCMA
Dale Shafer	Senior Advisor	OCCMA
Pam Brangaccio	ICMA Senior Advisor Program Coordinator	ICMA
Patricia Martel	West Coast Regional Director	ICMA

Scholarship

Adam Brown, Chair	City Manager	Keizer
Lonnie Rainville	City Administrator	Myrtle Creek
Sabrina Cotta	Deputy City Manager	Ashland
Kelsey Lewis	Grants and Program Manager	Wilsonville (SMART)
Robin Fournier	City Manager	Scotts Mills
Roger Jordan	Senior Advisor Emeritus	OCCMA
Chris Workman	City Manager	Philomath

Ad Hoc Committees

Diversity, Equity, and Inclusion

Mark Shepard, Chair	City Manager	Corvallis
Sabrina Cotta	Deputy City Manager	Ashland
David Clyne	Senior Advisor	OCCMA
Martha Bennett	City Manager	Lake Oswego
Masami Nishishiba	Professor	PSU
Megan George	Deputy City Manager	Tualatin
Eileen Stein	Manager in Transition	
Kelsey Lewis	Grants and Program Manager	Wilsonville (SMART)
Stephanie Betteridge	Chief Innovation Officer/Assistant City Manager	Bend
Corey Falls	Deputy City Manager	Gresham
Robin Fournier	City Manager	Scotts Mills

Communications

Andy Varner, Chair	City Manager	North Plains
Jesse VanderZanden	City Manager	Forest Grove
Whitney Hale	Deputy County Administrator	Deschutes County
Gary Milliman	Senior Advisor	OCCMA
David Milliron	City Administrator	North Bend
Scott Dadson	Executive Director	MWVCOG
Jenny Haruyama	City Manager	Beaverton

Civic Education

Zoe Mombert, Chair	Assistant to the City Manager	Wilsonville
Scott Dadson	Executive Director	MWVCOG
Eileen Stein	Manager in Transition	
Erik Kropp	Deputy County Administrator	Deschutes County
Dan Huff	City Manager	Molalla
Jenny Haruyama	City Manager	Beaverton
Ric Ingham	Senior Advisor	OCCMA

Veterans

Aaron Palmquist, Chair	City Manager	Irrigon
Sabrina Cotta	Deputy City Manager	Ashland
Eric Underwood	City Manager	Donald
Jerry Gillham	City Manager	Sutherlin
Peter Troedsson	City Manager	Albany

NWWLA Steering Committee

Alissa Angelo	Interim City Manager	Stayton
Martha Bennett	City Manager	Lake Oswego
Nina Vetter	City Manager	Gresham
Sherilyn Lombos	City Manager	Tualatin

Andi Howell	Transit Director	Sandy
Liz Newton	Councilor	Tigard
Jessica Harper	Livability Manager	Gresham
Sarah Medary	City Manager	Eugene
Aquilla Hurd-Ravich	Community Development Director	Oregon City
Jenny Haruyama	City Manager	Beaverton
Simone Brooks	Assistant City Manager	Hillsboro
Stephanie Betteridge	Chief Innovation Officer	Bend
Rachael Fuller	Manager In Transition	

NWWLA Leadership Team

Megan George, Chair	Deputy City Manager	Tualatin
Megan Phelan, Past Chair	Assistant City Manager	Lake Oswego
Rachael Fuller	Assistant County Administrator	Washington County
Cate Schneider	Senior Management Analyst	Bend
Sambo Kirkman	Engineering Services Manager	Beaverton
Nicole Hendrix	Senior Management Analyst	Tigard
Emily Robertson	Policy and Administration Manager	MCDD
Sara Singer Wilson	Consultant	SSW Consulting

Oregon Latinos in Local Government (OLLG) Board of Directors

Maricela Guerrero, Chair	Economic Development Project Manager	Woodburn
Joe Samaniego, Vice Chair	City Manager	Tangent
Guilian del Rio	Equity Program Manager	Lake Oswego
Ambar Espinoza	Public Affairs Specialist	Metro
Danny Morato	Supplier Diversity Administrator	Hillsboro
Rachael Fuller	Board Liaison	OCCMA Board of Director



OCCMA

Oregon City/County
Management Association

A State Affiliate of ICMA

2024 OCCMA Committees

Standing Committees

Audit

The Audit Committee is recommending the OCCMA Board of Directors serve in this capacity.

Bylaws & Policy – Committee Volunteers

Aaron Palmquist	City Manager	Irrigon
Spencer Nebel	City Manager	Newport
Robb Corbett	City Manager	Pendleton
Brian Latta	City Manager	Dallas

Bylaws & Policy – President-Elect Recommendation

Aaron Palmquist, Chair	City Manager	Irrigon
Spencer Nebel	City Manager	Newport
Robb Corbett	City Manager	Pendleton
Brian Latta	City Manager	Dallas

Ethics – Committee Volunteers

Zoe Mombert	Assistant to the City Manager	Wilsonville
Spencer Nebel	City Manager	Newport
Keith Campbell	City Manager	Sherwood
David Milliron	City Administrator	North Bend
Sabrina Cotta	Acting City Manager	Ashland
Kenna West	City Manager	Independence
Branden Dross	City Administrator	Lafayette
Daphnee Legarza	City Manager	Lincoln City
Scott McClure	City Manager	Turner
Brian Latta	City Manager	Dallas

Ethics – President-Elect Recommendation

Zoe Mombert, Chair	Assistant to the City Manager	Wilsonville
Spencer Nebel	City Manager	Newport
Keith Campbell	City Manager	Sherwood
Martha Bennett	City Manager	Lake Oswego
Greg Dirks	City Manager	Wood Village

Bryon Smith	City Manager	Hermiston
Kathryn Greiner	City Administrator	Condon
Kenna West	City Manager	Independence
Scott McClure	Cit Manager	Turner

Nominating – Committee Volunteers

Kenna West	City Manager	Independence
Zoe Mombert	Assistant to the City Manager	Wilsonville
Spencer Nebel	City Manager	Newport
John Walsh	City Administrator	St. Helens
Eileen Stein	Interim City Administrator	Canby

Nominating – President-Elect Recommendation

Scott Derickson, Chair	City Administrator	Woodburn
Spencer Nebel	City Manager	Newport
Kenna West	City Manager	Independence
John Walsh	City Administrator	St. Helens
Sherilyn Lombos	City Manager	Tualatin

Professional Development – Committee Volunteers

Phillip Cooper	Douglas and Candace Morgan Professor of Local Government	PSU
Brandon Dross	City Administrator	Lafayette
John Walsh	City Administrator	St. Helens
Pau Khan Thang	Student	PSU
Ashley Sonoff	Associate	SSW Consulting
Frankline Muthomi	Assistant Professor	PSU
Eileen Stein	Interim City Administrator	Canby
Daphnee Legarza	City Manager	Lincoln City
Jordon Bennett	City Administrator	Cascade Locks
Anthony Pagano	City Administrator	Gold Beach
Kelly Hart	Community Development Director	Lebanon
Aaron Palmquist	City Manager	Irrigon
David Milliron	City Administrator	North Bend
Stephanie Betteridge	Assistant City Manager	Bend

NW Regional Managers Conference Subcommittee – President-Elect Recommendation

Martha Bennett, Chair	City Manager	Lake Oswego
Nina Vetter	City Manager	Gresham
Robb Corbett	City Manager	Pendleton
Ashley Sonoff	Associate	SSW Consulting
Daphnee Legarza	City Manager	Lincoln City
Spencer Kyle	City Manager	Seaside
Anthony Pagano	City Administrator	Gold Beach
Rich Huebner	Assistant City Manager	Moses Lake, WA

Spring Workshop Subcommittee – President-Elect Recommendation

Martha Bennett, Chair	City Manager	Lake Oswego
Jerry Gillham	City Manager	Sutherlin
Kelly Madding	Assistant City Manager	Medford
Jonathan Teichert	City Manager	Klamath Falls
Shawn Waite	City Administrator	Hubbard

Summer Conference Subcommittee – President-Elect Recommendation

Martha Bennett, Chair	City Manager	Lake Oswego
Sherilyn Lombos	City Manager	Tualatin
Jordon Bennett	City Administrator	Gold Beach
Rachael Fuller	Manager In Transition	OCCMA
Phillip Cooper	Douglas and Candace Morgan Professor of Local Government	PSU
Abigail Elder	City Manager	Hood River
Ambar Espinoza	Public Affairs Specialist	Metro and OLLG Board
Pau Khan Thang	Student	PSU
Matthew Klebes	City Manager	The Dalles
Sara Singer Wilson	President	SSW Consulting

Fall Workshop Subcommittee – President-Elect Recommendation

Martha Bennett, Chair	City Manager	Lake Oswego
Stephanie Betteridge	Assistant City Manager	Bend
Eileen Stein	Interim City Administrator	Canby
John Walsh	City Administrator	St. Helens
Frankline Muthomi	Assistant Professor	PSU

Support for Managers – Committee Volunteers

Kenna West	City Manager	Independence
Branden Dross	City Administrator	Lafayette
Mark Morgan	Assistant City Manager	Hermiston
John Walsh	City Administrator	St. Helens
Daphnee Legarza	City Manager	Lincoln City
Scott McClure	City Manager	Turner
Jordon Bennett	City Administrator	Cascade Locks
Richard Meyers	Senior Advisor	OCCMA
David Clyne	Senior Advisor	OCCMA
Dave Kanner	Senior Advisor	OCCMA
Gary Milliman	Senior Advisor	OCCMA
Sheila Ritz	Senior Advisor	OCCMA
Dave Waffle	Senior Advisor	OCCMA
Rob Drake	Senior Advisor	OCCMA

Dale Shafer	Senior Advisor	OCCMA
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Support for Managers – President-Elect Recommendation

John Walsh, Chair	City Administrator	St. Helens
Kenna West	City Manager	Independence
Branden Dross	City Administrator	Lafayette
Scott McClure	City Manager	Turner
Jordon Bennett	City Administrator	Cascade Locks
Richard Meyers	Senior Advisor	OCCMA
David Clyne	Senior Advisor	OCCMA
Dave Kanner	Senior Advisor	OCCMA
Gary Milliman	Senior Advisor	OCCMA
Sheila Ritz	Senior Advisor	OCCMA
Dave Waffle	Senior Advisor	OCCMA
Rob Drake	Senior Advisor	OCCMA
Dale Shafer	Senior Advisor	OCCMA
Pam Brangaccio	ICMA Senior Advisor Program Coordinator	ICMA
Patricia Martel	West Coast Regional Director	ICMA

Scholarship – Committee Volunteers

Adam Brown	City Manager	Keizer
Renata Wakeley	Special Projects Director	Woodburn
Sabrina Cotta	Deputy City Manager	Ashland
John Walsh	City Administrator	St. Helens
Roger Jordan	Senior Advisor Emeritus	OCCMA

Scholarship – President-Elect Recommendation

Sabrina Cotta, Chair	Deputy City Manager	Ashland
Adam Brown	City Manager	Keizer
Renata Wakeley	Special Projects Director	Woodburn
John Walsh	City Administrator	St. Helens
Donna McCormack	City Recorder/Manager	Culver
Roger Jordan	Senior Advisor Emeritus	OCCMA

Communications – Committee Volunteers

Mark Morgan	Assistant City Manager	Hermiston
Kelsey Lewis	Grants and Programs Manager	Wilsonville
David Milliron	City Administrator	North Bend

Communications – President-Elect Recommendation

Andy Varner, Chair	City Manager	North Plains
Mark Morgan	Assistant City Manager	Hermiston
Kelsey Lewis	Grants and Programs Manager	Wilsonville
David Milliron	City Administrator	North Bend
Sarah Merten	City Administrator	St. Paul
Kelly Hart	Community Development Director	Lebanon

Ad Hoc Committees

Diversity, Equity, and Inclusion – Committee Volunteers

Sabrina Cotta	Deputy City Manager	Ashland
Stephanie Betteridge	Assistant City Manager	Bend
Alexandra Rains	City Manager	Scappoose
John Walsh	City Administrator	St. Helens
Eileen Stein	Interim City Manager	Canby
Pau Khan Thang	Student	PSU
Daphnee Legarza	City Manager	Lincoln City
Kelly Hart	Community Development Director	Lebanon
Shawn Waite	City Administrator	Hubbard

Diversity, Equity, and Inclusion– President-Elect Recommendation

Sabrina Cotta	Deputy City Manager	Ashland
Stephanie Betteridge	Assistant City Manager	Bend
Alexandra Rains	City Manager	Scappoose
John Walsh	City Administrator	St. Helens
Eileen Stein	Interim City Manager	Canby
Pau Khan Thang	Student	PSU
Daphnee Legarza	City Manager	Lincoln City
Kelly Hart	Community Development Director	Lebanon

Civic Education – Committee Volunteers

Zoe Mombert	Assistant to the City Manager	Wilsonville
Branden Dross	City Administrator	Lafayette
Sabrina Cotta	Deputy City Manager	Ashland
Pau Khan Thang	Student	PSU
Eileen Stein	Interim City Manager	Canby
Daphnee Legarza	City Manager	Lincoln City
Kelly Hart	Community Development Director	Lebanon

Civic Education– President-Elect Recommendation

Zoe Mombert, Chair	Assistant to the City Manager	Wilsonville
Branden Dross	City Administrator	Lafayette
Pau Khan Thang	Student	PSU
Eileen Stein	Interim City Manager	Canby
Daphnee Legarza	City Manager	Lincoln City
Mark Morgan	Assistant City Manager	Hermiston
Sarah Merten	City Administrator	St. Paul
Dan Huff	City Manager	Molalla

Veterans – Committee Volunteers

Aaron Palmquist	City Manager	Irrigon
Sabrina Cotta	Deputy City Manager	Ashland

Eric Underwood	City Manager	Donald
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Veterans– President-Elect Recommendation

Aaron Palmquist, Chair	City Manager	Irrigon
Sabrina Cotta	Deputy City Manager	Ashland
Eric Underwood	City Manager	Donald
Jerry Gillham	City Manager	Sutherlin
Peter Troedsson	City Manager	Albany

NWWLA Steering Committee

Alissa Angelo	Interim City Manager	Stayton
Martha Bennett	City Manager	Lake Oswego
Nina Vetter	City Manager	Gresham
Sherilyn Lombos	City Manager	Tualatin
Andi Howell	Transit Director	Sandy
Liz Newton	Councilor	Tigard
Jessica Harper	Livability Manager	Gresham
Sarah Medary	City Manager	Eugene
Aquilla Hurd-Ravich	Community Development Director	Oregon City
Jenny Haruyama	City Manager	Beaverton
Simone Brooks	Assistant City Manager	Hillsboro
Stephanie Betteridge	Chief Innovation Officer	Bend
Rachael Fuller	Manager In Transition	

NWWLA Leadership Team

Megan George, Chair	Deputy City Manager	Tualatin
Megan Phelan, Past Chair	Assistant City Manager	Lake Oswego
Rachael Fuller	Assistant County Administrator	Washington County
Cate Schneider	Senior Management Analyst	Bend
Sambo Kirkman	Engineering Services Manager	Beaverton
Nicole Hendrix	Senior Management Analyst	Tigard
Emily Robertson	Policy and Administration Manager	MCDD
Sara Singer Wilson	Consultant	SSW Consulting

Oregon Latinos in Local Government (OLLG) Board of Directors

Maricela Guerrero, Chair	Economic Development Project Manager	Woodburn
Joe Samaniego, Vice Chair	City Manager	Tangent
Guilian del Rio	Equity Program Manager	Lake Oswego
Ambar Espinoza	Public Affairs Specialist	Metro
Danny Morato	Supplier Diversity Administrator	Hillsboro
Rachael Fuller	Board Liaison	OCCMA Board of Director

ICMA Liaison – President-Elect Recommendation

Scott Derickson	City Administrator	Woodburn
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OCCMA

**Oregon City/County
Management Association**

A State Affiliate of **ICMA**

To: OCCMA Board of Directors
From: Angela Speier, LOC Project & Affiliates Manager
Date: November 9, 2024
Subject: 2024 OCCMA Proposed Budget

Enclosed is the proposed 2024 OCCMA Budget for the board's review and comments. The following adjustments have been made for 2024:

- Addition of revenue and expenses related to hosting the 2024 NW Regional Managers Conference.
- Staff is budgeting higher for food and beverage costs associated with conferences and workshops.
- The contract for services with the League of Oregon Cities (LOC) expires June 30, 2024. There will be an increase associated with the new contract which is reflected in the budget.
- Broke out the LOC Associate Membership dues from the insurance line item. The OCCMA must be associate members of the LOC to access CIS insurance.
- Broke out a line item to track OCCMA Senior Advisor expenses.

The total revenue proposed shows an increase of \$50,300 over the prior year's budgeted amount. However, due to rising costs the proposed budget includes using \$68,952 in unrestricted funds in 2024 to cover expenses.

The OCCMA proposed ending fund balances:

- NW Woman's Leadership Academy \$15,050
- Oregon Latino in Local Government \$1,800
- Roger Jordan Scholarship Fund \$8,553
- Charlie Henry Scholarship Fund \$158
- OCCMA General Operating Fund \$200,000

The OCCMA board will be asked to formally adopt the 2024 Annual Budget at the January 26, 2024 meeting.

Attachments:

1. 2024 Proposed Budget

OREGON CITY / COUNTY MANAGEMENT ASSOCIATION
2024 Budget - Proposed

		2020 ACTUAL	2021 ACTUAL	2022 BUDGET	2022 Year End	2023 BUDGET	2023 ACTUAL	2024 PROPOSED BUDGET	2024 Approved BUDGET
Conference Income									
<i>Fall Conference Registrations</i>									
3-4303	· Registration	1,475		7,500	7,500	7,500		6,000	
	Total Fall Conference	1,475	0	7,500	7,500	7,500	0	6,000	0
<i>Spring Conference Registrations</i>									
3-4351	· Registration	0		0	0	2,800	2,543	3,000	
	Total Spring Conference	0	0	0	0	2,800	2,543	3,000	0
<i>Summer Conference</i>									
3-4404	· Registration	4,875	31,915	40,000	33,560	35,000	32,350	35,000	
3-4407	· Sponsorships	8,400	21,400	25,000	27,700	30,000	42,500	30,000	
3-4411	· Roger Jordan Scholarship	0	1,500	0	5,100				
3-4420	· Activity Fee	0		0	0	1,000	700	1,000	
	Total Summer Conference	13,275	54,815	65,000	66,360	66,000	75,550	66,000	0
<i>NW Regional Conference</i>									
3-4501	· Registration	0	0	0	0	0		50,000	
3-4505	· Sponsorships	0	0	0	0	0		10,000	
	Total NW Regional Conference	0	0	0	0	0	0	60,000	0
Totals									
		13,275	54,815	72,500	73,860	76,300		135,000	0
<i>NW Women's Leadership Academy</i>									
3-4600									
3-4606	· Registration	0	6,850	13,900	13,900	16,000	15,050	14,600	
3-4607	· Sponsorship	0	650	0	0				
3-4610	· Scholarship	0	0	0	1,000	0		0	
	Total NW Women's Leadership Academy	0	7,500	13,900	14,900	16,000	15,050	14,600	0
<i>Oregon Latino's in Local Government</i>									
3-4608	· Dues	0	0	21,650	15,950	16,000	1,000	7,000	
3-4612	OLLG Event Registration							5,000	
3-4613	OLLG Event Sponsorships							1,000	
	Total Oregon Latino's in Local Govt	0	0	21,650	15,950	16,000	1,000	13,000	0
General Operations Income									
3-4701	· Dues	40,978	47,074	45,000	48,736	50,000	45,102	43,400	
3-4702	· Dues Surcharge Scholarships					5,000	7,783	7,600	
3-4703	· Dues Surcharge 2021	6,094	0	0	0	0		0	
3-4760	· Board Retreat Meetings	928	3,030	0	0	0		0	
3-4770	· CIS Senior Advisor	0	2,500	2,500	2,500	2,500	2,500	2,500	
3-4780	· ICMA Senior Advisor	629	2,409	7,000	3,794	5,000	3,753	5,000	
3-4785	· Charlie Henry Scholarship			5,000	1,954				
	Total General Operations Income	48,630	55,013	59,500	56,984	62,500	59,138	58,500	0
3-9998	Uncategorized Income						-9800	200,000	
	Beginning Cash						13,800		
	Total Income	61,905	117,328	167,550	161,694	170,800	157,281	221,100	0

OREGON CITY / COUNTY MANAGEMENT ASSOCIATION
2024 Budget - Proposed

		2020	2021	2022	2022	2023	2023	2024	2024
		ACTUAL	ACTUAL	BUDGET	Year End	BUDGET	ACTUAL	PROPOSED	Approved
								BUDGET	BUDGET
EXPENSE									
Conference Expense									
<i>Fall Workshop</i>									
3-5334	· Food & Beverage Fall	0	0	6,000	6,000	6,000		6,000	
3-5335	· Room Rental Fall	500	0	600	600	600		500	
3-5338	· Administration Fall	0	0	0	0	0		0	
3-5339	· Speakers Fall	0	0	5,000	500	2,500		2,500	
Total · Fall Conference		500	0	11,600	7,100	9,100	0	9,000	0
<i>Spring Workshop</i>									
3-5361	· Food & Beverage Spring	0	0	0	0	2,000		1,500	
3-5362	· Room Rental Spring	0	0	0	0	600		200	
3-5363	· Administration Spring	0	0	0	0	0		0	
3-5364	· Speakers Spring	0	0	0	0	1,000	1,113	1,500	
Total · Spring Conference		0	0	0	0	3,600	1,113	3,200	0
<i>Summer Conference</i>									
3-5441	· Activities Summer	0	0	3,000	480	3,000	1,195	5,000	
3-5442	· Administration Summer	8,272	0	500	0	500		500	
3-5443	· A/V & Trade Show Summer	0	0	500	3,285	3,500	4,500	6,000	
3-5444	· Food & Beverage Summer	0	19,317	35,000	26,058	35,000	19,756	50,000	
3-5445	· Lodging Summer	0	0	1,000	1,786	2,000	1,106	1,500	
3-5446	· Postage/Printing Summer	324	510	500	243	500	360	600	
3-5447	· Travel Summer	0	164	300	159	500		600	
3-5448	· Roger Jordan Scholarship	0	906	1,000	2,836	2,500	2,137	3,800	
3-5450	· Speaker Summer	0	850	7,500	2,978	7,500	8,379	10,000	
Total · Summer Conference		8,596	21,747	49,300	37,825	55,000	37,435	78,000	0
<i>NW Regional</i>									
3-5552	· NW Administration	0	0	0	0	0		5,000	
3-5553	· NW Venue Rental /AV							3,000	
3-5554	· NW Food & Beverage	0	0	0	0	0		58,000	
3-5556	· NW Postage/Printing	0	0	0	0	0		500	
3-5557	· NW Travel	0	0	0	799	4,000		2,000	
3-5559	· NW Speaker	0	0	0	0	0		10,000	
Mar-60	· Transportation							2,250	
Total · NW Regional		0	0	0	799	4,000	0	80,750	0
<i>NW Women's Leadership Academy</i>									
3-5601	· LOC Administration- OCCMA contribution	0	2,500	2,500	2,500	2,575	2,730	1,442	
3-5602	· Other Administration	0	8,892	10,566	10,566	9,600	4,881	5,550	
3-5603	· A/V & Room	0	0	0	0	0		1,000	
3-5604	· Speaker	0	0	0	0	1,000	2,000	1,000	
3-5605	· Food & Beverage	0	0	0	0	6,000	1,600	6,000	
3-5606	· Miscellaneous	0	0	0	0	0		1,000	
Total · NW Women's Leadership Academy		0	11,392	13,066	13,066	19,175	11,210	15,992	0
<i>Oregon Latino's in Local Government</i>									
3-5703	· LOC Administration- OCCMA contribution	0	0	0	3,125	3,126	3,173	1,610	
3-5701	· LGHN Dues	0	0	18,000	13,300	13,300			
3-5702	· Meetings & Events	0	0	2,500	495	2,650	529	5,000	
3-5704	· Travel	0	0	0	0	2,000		2,000	
Total Oregon Latino's in Local Government		0	0	20,500	16,920	21,076	3,702	8,610	0

OREGON CITY / COUNTY MANAGEMENT ASSOCIATION
2024 Budget - Proposed

		2020	2021	2022	2022	2023	2023	2024	2024
		ACTUAL	ACTUAL	BUDGET	Year End	BUDGET	ACTUAL	PROPOSED	Approved
								BUDGET	BUDGET
General Operations Expenses									
3-6056	· Listerv					750		500	
3-6001	· LOC Services	25,750	25,781	31,965	25,750	26,523	26,136	36,000	
3-6016	· Board Functions	0	3,232	6,000	3,500	6,000	812	6,000	
3-6019	· ICMA Executive Officers Membership	0	0	2,000	800	2,000		2,000	
3-6020	· ICMA Coaching Program	0	2,850	1,000	0	1,000		2,850	
3-6021	· Conference Calls	0	0	100	0	100	0	0	
3-6027	· Marketing/Supplies	0	572	1,000	496	3,000		6,000	
3-6030	· Membership						184	500	
3-6033	· Miscellaneous	250	1,082	1,500	566	1,500		500	
3-6034	· Miscellaneous - Credit Card Exp	825	2,893	3,000	3,000	3,000		4,000	
3-6035	· Insurance		0	0	0	750	750	500	
3-6036	· National/Committee Travel	0	2,500	8,000	2,682	8,000		8,000	
3-6039	· Newsletter	1,401	0	2,500	0	2,500		1,000	
3-6042	· Postage	152	0	400	400	400		400	
3-6045	· Printing, Fax	0	0	300	0	300		300	
3-6051	· Scholarships Charlie Henry	0	0	3,000	2,346	2,500	2,342	3,800	
3-6054	· Senior Advisor	2,451	4,974	14,000	8,700	14,000	8,813	12,000	
3-6055	· OCCMA Senior Advisor							2,000	
3-6057	· Web Support	0	972	1,500	1,787	1,500	1,188	2,000	
3-6058	· Audit	0	0	8,000	0	8,000	0	0	
3-6059	· Sponsorship of Other Organizations	0	0	2,000	250	2,000	0	2,000	
3-6060	· Managers In Transition	0	0	2,500	1,650	2,500	1,500	2,500	
3-3061	LOC Association Membership						0	650	
3-3062	· Committee Account	0	81,901	0	0	0	0	1,000	
Total General Operations Expenses		30,829	126,758	88,765	51,928	86,323	41,725	94,500	0
Melio Credit Card Fee							87		
Total Expenses		39,425	159,896	183,231	127,637	198,274	95,271	290,052	0
Net Income (Loss)		22,479	(42,568)	(15,681)	34,057	196,797	62,010	(68,952)	-
Fund Balance, beginning year		205,185	227,664	185,096		196,797	62,010	200,000	
Net Income (Loss)		22,479	(42,568)	(15,681)	34,057			(68,952)	0
Fund Balance, end of year		227,664	185,096	169,415	34,057	196,797	62,010	131,048	0

OREGON CITY / COUNTY MANAGEMENT ASSOCIATION
2024 Budget - Proposed

	2020 ACTUAL	2021 ACTUAL	2022 BUDGET	2022 Year End	2023 BUDGET	2023 ACTUAL	2024 PROPOSED BUDGET	2024 Approved BUDGET
Beginning Cash								
Beginning Cash - Operations	110,256	180,728	178,906	178,906	62,500	59,138	131,048	
Beginning Cash - NWWLA	0	0	6,190	6,190	19,175	28,850	12,850	
Beginning Cash - 2021 ICMA Conference	89,307	81,901	0	0	0		0	
Beginning Cash - OLLG	0	0	0	0	16,000	3,702	1,800	
Beginning Cash - RJ Scholarship	5,622	4,968	5,562	5,562		7,827	8,553	
Beginning Cash - Charlie Henry Scholarship	0	0	0	0	0	158		
Total Beginning Cash	205,185	267,597	190,658	190,658	97,675	99,675	154,251	0
Transfers								
· Operating to NWWLA	0	6,190	3,334	4,334	6,400	13,800	13,800	
· Operating to ICMA 2021	7,406	81,901	0	0	0	0	0	
· Operating to OLLG	0	0	1,150	2,155	(1,950)	0	0	
· Operating to RJ Scholarship	0	594	(1,000)	2,264	(2,500)	(8,553)	(8,553)	
· Operating to Charlie Henry Scholarship	0	0	0	0	(2,500)	-158	-158	
Total Transfers	7,406	88,685	3,484	8,753	(550)	5,089	5,089	0
Ending Cash								
· Ending Cash Balance - Operations /Unrestricted	180,728	178,906	158,741	15,730	198,274	200,000	200,000	
· Ending Cash Balance - NWWLA		6,190	9,524	8,345	17,225	15,050	15,050	
· Ending Cash Balance - ICMA 2021	81,901	0	0	0	0	0	0	
· Ending Cash Balance - OLLG		0	1,150	2,155	13,500	1,800	1,800	
· Ending Cash Balance - RJ Scholarship	4,968	5,562	0	7,827	-2,500	8,553	8,553	
· Ending Cash Balance - Charlie Henry	0	0	0	0	-2,500	158	158	
Total Ending Cash OCCMA	185,696	185,096	169,415	34,057	223,999	225,561	225,561	0