



**MARION COUNTY BOARD OF COMMISSIONERS
WORK SESSION**

**Clerk's Office Management and Compliance Audit Report
Minutes**

Thursday, March 26, 2026, 2:30 p.m. – 3:30 p.m.
Commissioners' Boardroom
Courthouse Square, 555 Court St. NE, Suite 5231
Salem, Oregon 97301

ATTENDANCE:

Commissioner's: Colm Willis, and Kevin Cameron.

Board's Office: Chris Eppley, Toni Whitler, and Matt Lawyer.

Legal Counsel: Andrew Mittendorf.

Clerk's Office: Bill Burgess, Rebekah Stern Doll, and Holly Steele Haselton.

Bakertilly Consultant: Tammy Lohr-Schweitzer.

Commissioner Colm Willis called the meeting to order at 2:37 p.m.

1. Welcome & Introductions

-Commissioner Colm Willis

2. Clerk's Office Management & Compliance Audit

-Chris Eppley & Bill Burgess

- Audit Overview:
 - Conducted by Baker Tilly, led by consultant Tammy Laura Schweitzer.
 - Organizational effectiveness, operations, and law compliance and best practices.
 - Methods:
 - Document review.
 - Staff interviews.
 - All-staff survey.
 - On-site visits.
 - Process walk-throughs.
 - Peer benchmarking against Deschutes, Lane, and Washington counties.
- Clerk's Office Role and Resources:
 - Elections.
 - Voter registration management maintenance of official public records.
 - Licensing and recording services.
 - Property document recording.
 - Marriage licenses.
 - Records repository for county.
 - Annual budget is \$4.3 million.
 - 17 permanent Full Time Equivalents (FTEs).
 - Approximately 170 temporary workers during elections.
- Key Strengths Identified:
 - Testing and observation around signature verification.

- Election deadlines.
- Ballot creation and counting.
- Internal controls in recording showed no instances of non-compliance.
- Strong customer service orientation.
- Progress in technology adoption:
 - Movement toward digital records and workflow automation.
- Staff resiliency and adaptability amid organizational change and turnover.
- Workforce & Strategic Direction Issues:
 - No current up-to-date strategic plan:
 - Prior plan expired several years ago.
 - Lack of plan makes it harder to set clear priorities and measure performance.
 - Staff report feeling priorities shift frequently:
 - Even though customer service remains central.
 - Significant staff turnover:
 - Average turnover of about 25% over last three fiscal years.
 - Turnover peaked at nearly 50% in FY 2024–2025.
 - Temporary staff stay a few weeks due to wanting stable employment.
 - Performance management practices are inconsistent.
 - Limited regular feedback and inconsistent communication of expectations.
 - Limited formal training and succession planning:
 - Loss of previous long-tenured staff since COVID.
 - Fewer staff now hold advanced certifications.
 - Training is constrained by cost, travel, and time.
- Process, Policy, and Compliance Gaps:
 - Many policies and procedures are outdated or inconsistently applied.
 - Existing documentation is extensive but needs updating and editing.
 - No formal Business Continuity Plan (BCP):
 - No structured roadmap for maintaining operations during disruptions:
 - Staff shortages, system outages, emergencies.
 - Records retention practices not always clearly documented.
 - Office layout leaves staff vulnerable in processing areas and front counters.
 - Current setup isn't enough protection if things become disruptive or violent.
- Survey Results and Workplace Climate:
 - Employee survey from September 24–30, 2025 showed mixed responses:
 - About half disagree/strongly disagree that issues are addressed promptly and fairly.
 - Clear performance expectations and regular feedback concerns.
 - Context for survey:
 - Done shortly after period of very high turnover in 2024–2025.
 - At least one employee described as “disruptor,”:
 - Contributed to turmoil before being removed.
 - Consultant used qualitative survey responses and interviews for findings:
 - Detailed comments were not shared back to preserve confidentiality.
- Current Internal Efforts and Improvements:
 - Implementation of weekly team meetings:
 - Elections team meets every Tuesday.
 - Licensing and recording staff meet every Thursday.
 - For communication, alignment on week priorities, and team cohesion.
 - Increased training and professional development:
 - Participation in Property Records Industry Association (PRIA) webinars.
 - Expanded use of Oregon Association of County Clerks training.
 - Regional zone meetings with other counties to discuss similar issues.
 - Conference calls with other county clerks and Secretary of State:

- Coordinate on elections and compliance.
 - Cross training to ensure staff can back up others despite limited positions.
- Security and Safety Concerns:
 - Concern about citizen threats and others targeting election offices and staff.
 - Interest in reconfiguring observer areas:
 - Area allowing ballot processing observation while staff are protected.
 - Glass top and solid bottom cubicle until permanent structure is done.
 - Front counter security:
 - Current public-facing counters provide limited protection.
 - Potential bullet-resistant material use and better physical separation.
 - Reference to other agencies' models as a benchmark.
- External Risk & Vulnerability Assessments:
 - Cybersecurity and Infrastructure Security Agency (CISA) did two evaluations.
 - Risk and Vulnerability Assessment by Oregon Department of Justice and Oregon Fusion Center on January 27, 2026:
 - No physical separation of office and lobby:
 - Leaves employees vulnerable.
 - Election staff area and alley room seen from parking garage rooftops:
 - Recommend keeping blinds down and ballistic film on windows.
- Key Recommendations from Consultant:
 - Develop a 3-to-5-year strategic plan:
 - Define mission, vision, priorities, and measurable goals.
 - Aligning clerk's office plan with county's broader strategic plan.
 - Clarify staff roles and how their work supports mission.
 - Strengthen workforce practices:
 - Implement retention strategies and clearer career paths.
 - Improve training and succession planning.
 - Standard performance evaluations with timely and regular feedback.
 - Systematically update policies and procedures:
 - Establish routine review and revision cycle.
 - Ensure consistency and clarity for new and existing staff.
 - Create and maintain a robust Business Continuity Plan:
 - Use scenario-based planning to prepare for operational disruptions.
 - Integrate lessons from state exercises into local office procedures.
 - Enhance physical security:
 - Bulletproof/ballistic glass at counters and sensitive processing areas.
 - Ensure back-office spaces can be secured from public access.
- Board/Commission Expectations
 - Translate audit recommendations into a clear, prioritized action plan.
 - Address high turnover, training gaps, and inconsistent performance management.
 - Give clear understanding of strategic plans, roles, and performance measures.
 - Willingness to consider outside support to:
 - Facilitate development of strategic plan.
 - Assist with business continuity planning.
 - Potentially support workforce planning and implementation.

3. Other

-All

- Service Experience Observations from Commissioners:
 - Public-facing staff exhibit strong customer service and positive attitudes.
 - Newer staff often require help from supervisors to complete transactions:

- Indicates training and knowledge gaps.
 - Consistent with audit findings:
 - Regarding turnover, training, and policy implementation.
- Training and Certification Constraints:
 - Advanced elections training and certification:
 - Costly and largely out-of-state, limiting participation.
 - Not accessible to new staff due to constraints and recency of hiring.
- Survey Timing and Interpretation:
 - Employee survey was conducted just after a period of:
 - High turnover of nearly 50%.
 - Internal disruption attributed to at least one highly disruptive employee.
 - Believes survey conducted today might yield improved results:
 - Acknowledge importance of addressing earlier concerns.
- Next Steps / Implied Follow-Up:
 - Prioritize consultants' recommendations:
 - Strategic plan.
 - Workforce practices.
 - Policy updates.
 - BCP.
 - Security enhancements.
 - Links actions to measurable outcomes and timelines.
 - Review Oregon Fusion Center Risk and Vulnerability Assessment:
 - Forward to legal counsel, board, and relevant county leaders.
 - Use findings to guide facility redesign and security investments.
 - Consult with risk management, facilities, and potentially an architect to:
 - Redesign public and observation areas for safety and functionality.

Adjourned – time: 3:19 p.m.

Minutes by: Mary Vityukova

Reviewed by: Gary L. White