

# Mastering Public Records Request Management and More:

## 45 Tips for Clerks





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## Introduction

Expert public records request managers are the backbone of a transparent, compliant, and efficient local government. Your work helps facilitate the flow of information between residents and their representatives, securing and sustaining the public's trust.

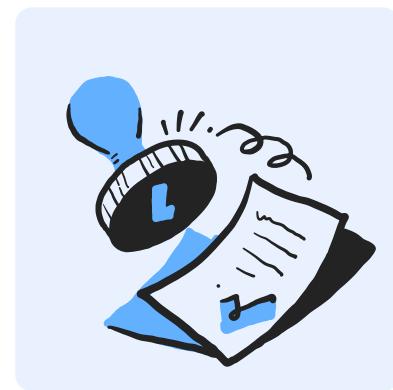
To support you in your role, we've created this helpful list of tips for success. Whether you're a novice public servant or a veteran looking to inspire your team, you'll find actionable best practices to take the stress out of fulfilling public records requests.





## Understanding The Law

The foundation of legal compliance is a thorough understanding of your state's regulations for handling and fulfilling records requests.



### Here are a few areas to focus on:

#### 1. Know Your State's Public Records Laws

The Freedom of Information Act (FOIA) provides the public with access to documents from federal government agencies, but your state has its own specific public records laws too. It may be called FOIA, a Right-to-Know law, or something else entirely.

#### 2. Understand Your State's Mandatory Time to Respond Requirements

Public records request laws impose timelines for a compliant response. California, for example, currently allows ten days to procure records and send a response. In some states, government employees can ask for extra time to process especially complex requests. Double-check that you know your mandated timelines to make sure you're meeting the public's needs and avoiding potentially costly non-compliance penalties.

#### 3. Develop Processes for Handling Confidential and Sensitive Information

In many instances, the law or internal policies require redaction of certain information from public-facing documents. Establish clear guidelines for identifying and properly handling sensitive content while complying with your state's laws and without sacrificing the public's trust.

#### 4. Adhere to Storage and Retention Laws

Your state's retention schedules dictate how long specific records must be kept at the ready. Take time to carefully review these requirements and align your recordkeeping practices to stay prepared for audits and legal reviews.

#### 5. Ensure Public Records Are Easily Accessible

Applications, permits, and reservation forms in digital formats should meet web accessibility standards to ensure compatibility with assistive technology such as screen readers and keyboard navigation. Digital forms should be designed with inclusive features such as proper tagging, optimized text, and navigable structure. Avoid using lengthy paragraphs, vague labels, and CAPTCHA systems, if possible.

#### 6. Archive Your Social Media Posts

Don't forget about your social media posts and any comments they attract. All 50 states consider social media content as public records, and social networking sites don't do a great job of preserving content on your behalf.



## Professional Development

No matter how many years of experience you have, these tips for continual learning can help you boost your expertise.



### 7. Find a Mentor or Offer Mentorship

If you're new to the clerk's office, identify a seasoned professional who can share lessons learned and offer critical guidance. If you've spent years in the profession, don't hesitate to offer your expertise and contribute to a positive workplace culture.

### 8. Earn Professional Certifications

Professional development is an ongoing process. Working toward certifications like the Essentials of Records and Information Management or the Certified Municipal Clerk and Master Municipal Clerk will bolster your expertise and could open exciting, new career opportunities.

### 9. Join National or State Associations

Professional associations provide access to rich resources like training materials just for local government leaders. Consider adding your name to the National Association of Government Archives & Records (NAGARA) or your state's equivalent.

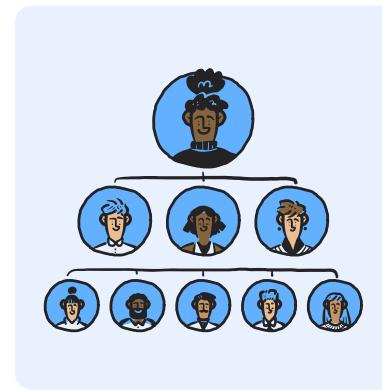
### 10. Build a Network of Public Records Professionals

Building a network of fellow government professionals can provide countless opportunities to exchange best practices and collaborate on tackling tough challenges.



## Leadership and Culture

Effective government agencies thrive thanks to dedicated leadership and strong internal cultures.



### Here are some tips for fostering innovation and continuous growth:

#### 11. Offer Training on Evolving Best Practices

Public records laws aren't static documents—they're constantly changing. Keep your team in the know with training sessions that update them on recent changes and how they'll affect internal policies.

#### 12. Promote Collaboration Between Departments

Maintaining public trust is a team effort. Cross-department collaboration keeps the request fulfillment and response process efficient.

#### 13. Set Clear Expectations and Attainable Goals

Outlining goals and defining success can help even high-performing teams continually improve. Whether you aim to cut down on response times or increase the accuracy of fulfillment requests, clear and realistic goals help pave the way.

#### 14. Track Key Metrics

Your data tells a powerful story. Monitoring response times, request volumes, error rates, and other important data points can help identify bottlenecks and make strategic improvements to processes.

#### 15. Celebrate Sunshine Week Each Year

Sunshine Week offers an annual opportunity to highlight the importance of an open, transparent government. It's your opportunity to champion your team and educate the public on all the important work they do. You deserve a celebration!

#### 16. Recognize Big and Small Wins

Celebrating successes of all sizes boosts morale and motivates your team to continue serving the public to the best of their abilities.

#### 17. Document Lessons Learned

Each new challenge or setback is a learning opportunity. Successful initiatives can offer valuable takeaways too. Develop a process for capturing insights and your team will continually grow stronger.

#### 18. Foster a Culture of Continuous Improvement

Innovation thrives when the whole team feels empowered. Encourage teammates to offer their candid feedback to help create a culture where everyone is equipped to meet their potential and take your team to new heights.

#### 19. Develop Succession Plans for Key Roles

Staff changes are inevitable. Identify future leaders and prepare them to transition into new roles when the time comes.



## Processes and Procedures

Public records managers rely on structured workflows that ensure consistency, mitigate errors, and keep the agency in compliance with state laws.



**These tips focus on processes for successfully managing all types of records requests throughout the year:**

### 20. Audit and Evaluate Current Processes

Regular audits help to reveal bottlenecks, gaps, and inefficiencies in your response processes. Conduct a thorough assessment to give yourself a benchmark for making ongoing strategic improvements that support compliance and speed.

### 21. Standardize Procedures with a Checklist for Processing Records Requests

Templates and checklists to guide your processes will reduce the likelihood of human error and help get new staff members up to speed as quickly as possible.

### 22. Develop Templates for Common Request Types

Time-saving templates for common types of requests ensure consistency of service and keep you from devoting unnecessary resources.

### 23. Create an Emergency and Crisis Plan

Records requests don't cease during emergencies. You may see an uptick in requests during or in the aftermath of events like natural disasters or cybersecurity breaches. Develop contingency plans for staying efficient during tough times like these.

### 24. Introduce a Process for Large or Complex Requests

Some requests are more complex than others. Many require a high volume of documents or demand collaboration between departments. Implement project management strategies to avoid overloading your team when request complexity or backlogs are high.

### 25. Prepare for Election Season

Records requests inevitably spike during election seasons. Planning and allocating resources for high-demand periods like these ensures timely responses and maintains service quality.

### 26. Implement Processes for Clarifying Vague or Overly Broad Requests

Introducing formal processes for contacting requestors to clarify key details like the scope of requests will keep your team from wasting time guessing.

### 27. Create a Searchable Internal Archive of Previous Requests

A well-organized archive will save your team time as they fill out new requests. Looking back on the past will help to weed out duplicates and should offer valuable lessons on fulfillment best practices.

### 28. Regularly Review and Update Policies

Public records laws evolve and so should your policies for managing requests from residents. Schedule regular policy reviews to ensure you're still aligned with legal standards and prepared to deliver on your team's goals.



## Engaging with the Public

Earning your residents' trust takes hard work. Transparent communication, helpful resources, and responsive service all go a long way.



**Here are some tips for improving your relationship with residents and continually serving their needs.**

### 29. Share Examples of Commonly Requested Documents

Your residents may request budgets, meeting minutes, and other types of documents more often than others. Sharing examples on your website promotes transparency by potentially eliminating time-consuming duplicate requests. Even better, you can share self-service access to existing public requests.

### 30. Create a Public-Facing FAQ Document

First-time requestors may feel intimidated by the process. You can alleviate their concerns by answering common questions around subjects like timelines and costs in plain language.

### 31. Maintain Transparency by Making Your Records Policy Accessible

Prominently sharing your state's records request laws and your agency's internal policies demystifies government work and gives residents a valuable resource for learning their rights.

### 32. Offer Clear Instructions to Guide the Public

Clarity begets transparency and ultimately builds the public's trust. Your website should offer clear, step-by-step directions to guide requestors through the process and ensure they know what to expect.

### 33. Translate Key Materials to Serve Resident Population

Translate important documents to the commonly spoken languages in your community and ensure your residents can always understand and exercise their rights.

### 34. Educate Residents on their Rights and the Records Request Process

Explainer videos and workshops are a great way of raising awareness without asking readers to read lengthy documents or understand legal jargon.

### 35. Keep Requestors Informed of Progress

Residents may grow frustrated if they don't believe they have visibility into the request fulfillment process. Establish standard procedures for offering updates to acknowledge receipt and provide timeline estimates.

### 36. Publish Community Guidelines for Social Media Accounts

Your social media accounts are a valuable tool for engaging with residents and you may choose to adopt community guidelines to keep things civil. These set clear expectations for acceptable and unacceptable content and empower your team to take action when necessary.

### 37. Encourage Community Feedback

Gather feedback from your residents through their preferred channels and apply it to continuously improve transparency, efficiency, and quality of service.



## Technology and Innovation

Emerging solutions are transforming the way public records are fulfilled, stored, managed, and accessed. Strategically investing in new tools today can transform records management and prepare your team to enter a new era of public service.



### Here are some tips for innovation:

#### 38. Automate Your Processes for Tracking and Managing Records Requests

A good first step in embracing tech is introducing a solution to automate assignments, reminders, status updates, and other repetitive tasks associated with fulfilling records requests. You'll cut down on human error while saving countless hours.

#### 39. Implement a Cloud-Based, Centralized Software to Keep Records Secure and Organized

Cluttered filing cabinets are a thing of the past. A cloud-based platform enhances security, transparency, and accessibility while boosting the efficiency of all your workflows.

#### 40. Digitize All Records Upon Receipt

Going paperless cuts down on clutter and helps make for an efficient record retrieval and response process.

#### 41. Use Alerts and Automation to Flag Overdue Requests

Missing deadlines could mean serious penalties. Eliminate risk with automated alerts to notify staff of approaching or missed deadlines and ensure you stay compliant with state laws.

#### 42. Responsibly Explore AI-Powered Solutions

Artificial Intelligence (AI) has seemingly limitless potential, but it must be employed thoughtfully and strategically to support public buy-in and allay concerns from your team. For example, CivicPlus® NextRequest uses AI to scan documents. Pattern-matching algorithms identify documents that are likely to contain sensitive information and flag them for redaction.

#### 43. Deploy a Solution that Ensures Continuity During Staff Turnover

With the help of technology, document your workflows and preserve institutional knowledge to minimize the disruption of staff changes.

#### 44. Select a Public Records Request Management Solution that Integrates with Your Existing Tech Stack

Simplify implementation and adoption by selecting software that can integrate with your website and work alongside other solutions like your agenda, minutes, and meeting management, codification, and social media archiving tools.

#### 45. Choose a Software Vendor with Award-Winning Customer Support

Great customer support promotes long-term success. As you evaluate vendors, take note of their approaches to assisting agencies like yours through onboarding, troubleshooting, and ongoing management.



# Simplify and Streamline Public Record Management

CivicPlus offers solutions purpose-built for clerks and award-winning customer support.

Together, Social Media Archiving and NextRequest create a connected compliance ecosystem that makes managing and fulfilling public records requests—including those involving social media—faster, more accurate, and more defensible.

Get in touch to learn more about Social Media Archiving and NextRequest from CivicPlus.

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