



# Committee Manager Feature Set

Overview

## Introduction

This document outlines the features available in our recent new feature set – Committee Manager

These features will provide much needed support to those managing the often manual processes to maintain and fill positions in Committees



## Applicants Dashboard

- Role based access control
- At a glance view of applicant status
- Access to existing member information and status
- Access to workflow steps to move applicant forward
- Automated email content generation for efficient communication
- Filters and sorting to locate the information you need the most

MEMBERS AND APPLICANTS

MEMBERS

APPLICANTS

Add Applicant +

Search by Name or Email

Also Show Expired Applicants

Group Actions

	Date	Name	Email	Committee	Position	Term Info	Status	Actions
<input type="checkbox"/>	10/14/2020	Antonia Soto	asoto@cityname.com	Board of Parks and Recreation	Seat 1	01/02/2022 - 12/31/2025	Training check	
<input type="checkbox"/>	10/14/2020	Christine Smith	csmith@cityname.com	Finance Committee	Seat 3	01/02/2022 - 01/01/2024	Received	
<input type="checkbox"/>	10/14/2020	Darrell Hall	dhall@cityname.com	Planning Commission	Multiple	Multiple	Received	
<input type="checkbox"/>	10/14/2020	David Suttle	dsuttle@myemail.com	Finance Committee	Seat 3	01/02/2022 - 01/01/2024	Received	
<input type="checkbox"/>	10/14/2020	Jane Doe	jdoe@googlemail.com	Board of Parks and Recreation	Seat 1	01/02/2022 - 12/31/2025	Received	
<input type="checkbox"/>	10/14/2020	John Smith	johnsmith@googlemail.com	Planning Commission	Seat 3	07/01/2019 - 12/31/2021	Training check	
<input type="checkbox"/>	10/14/2020	Mary Kelly	maryk@email.com	Planning Commission	Seat 5	01/01/2022 - 12/31/2025	Received	
<input type="checkbox"/>	10/14/2020	Nici Sullivan	nicola.higgins@primegov.com	Multiple	Multiple	Multiple	Received	
	10/14/2020			Board of Parks and Recreation	Seat 1	01/02/2022 - 12/31/2025	Received	
	10/14/2020			Finance Committee	Seat 3	01/02/2022 - 01/01/2024	Received	
<input type="checkbox"/>	10/14/2020	Paul Jones	pjones@google.com	Board of Parks and Recreation	Seat 1	01/02/2022 - 12/31/2025	Received	
<input type="checkbox"/>	10/14/2020	Paula Malavasi	paula.malavasi1@hotmail.com	Planning Commission	Seat 3	07/01/2019 - 12/31/2021	Received	

Showing 1 to 10 of 10 Entries



## Members Dashboard

- Role based access control
- At a glance view of current and historic members
- Access to relevant member information in the user profile dialog
- Automated email content generation for efficient communication
- Filters and sorting to locate the information you need the most

MEMBERS AND APPLICANTS

MEMBERS

APPLICANTS

Add Member +

Search

Search by Name or Email

☒ Also Show Historic Members

Group Actions ▾

■	Name	Email	Committee	Position	Status	District	
<input type="checkbox"/>	<div><div>⊖</div><div>Aayushi Singhal ✓</div></div>	Aayushi.Singhal@Primegov.Com	Multiple	Multiple	Multiple		<div><div>✉</div><div>👁</div><div>⋮</div></div>
			Planning Commission	Seat 4	Upcoming		
			Salary Commission	Seat 2	Upcoming		
			Salary Commission	Seat 2	Term Completed		
<input type="checkbox"/>	<div><div></div><div>Alexandre Cardoso ✓</div></div>	Alexandre.Cardoso@Primegov.Com	Planning Commission	Seat 4	Upcoming		<div><div>✉</div><div>👁</div><div>⋮</div></div>
<input type="checkbox"/>	<div><div></div><div>Antonia Soto ✓</div></div>	Asoto@City.Com	Board Of Parks And Recreation	Seat 3	Term Completed		<div><div>✉</div><div>👁</div><div>⋮</div></div>
<input type="checkbox"/>	<div><div></div><div>Darrell Hall ✓</div></div>	Darrell.Hall@Cityclerk.Com	Board Of Parks And Recreation	Seat 2	Active		<div><div>✉</div><div>👁</div><div>⋮</div></div>
<input type="checkbox"/>	<div><div></div><div>David Suttle ✓</div></div>	David.Suttle@Cityclerk.Com	Planning Commission	Seat 3	Vacated		<div><div>✉</div><div>👁</div><div>⋮</div></div>
<input type="checkbox"/>	<div><div></div><div>Doris Matson ✓</div></div>	Dmatson@Mycity.Com	Board Of Parks And Recreation	Seat 1	Term Completed		<div><div>✉</div><div>👁</div><div>⋮</div></div>
<input type="checkbox"/>	<div><div></div><div>Jane Doe ✓</div></div>	Jane.Doe@Citylocation.Com	Board Of Parks And Recreation	Seat 1	Active		<div><div>✉</div><div>👁</div><div>⋮</div></div>
<input type="checkbox"/>	<div><div></div><div>Jesse Hernandez ✓</div></div>	Jhernandez@Mycity.Com	Salary Commission	Seat 2	Term Completed		<div><div>✉</div><div>👁</div><div>⋮</div></div>
<input type="checkbox"/>	<div><div></div><div>Joan Doore ✓</div></div>	Joandoore@Mycity.Com	Planning Commission	Seat 1	Term Completed		<div><div>✉</div><div>👁</div><div>⋮</div></div>
<input type="checkbox"/>	<div><div></div><div>John Henry ✓</div></div>	Jehnry@Mycity.Com	Planning Commission	Seat 1	Term Completed		<div><div>✉</div><div>👁</div><div>⋮</div></div>

Showing 1 to 10 of 20 Entries

PROFILE

APPLICATIONS

HISTORY

TRAINING

DOCUMENTS

Actions

**Details****First name**

Nici

**Middle Name**

N/A

**Last Name**

Sullivan

**Position**

Accounting Supervisor

**Department**

Communications

**District**

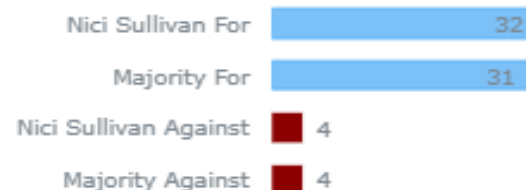
45

**Contact Details****Email**[nicola.higgins@primegov.com](mailto:nicola.higgins@primegov.com)**Phone**

123-456-789

**Mobile**

N/A

**Attendance****0 meeting missed of 65****Voting****Bio**

Nici was born and raised in this town and has been happily serving the members of district 4 for over 8 years.

CANCEL



## Manage Positions

- Timeline view of Committee membership
- View position history, and export
- Track training requirements per position and match with member completed training
- Track appointing entity, nominating entity and qualifications
- Advertise positions to the public, selecting your custom form
- Support for applications at the Committee level, specifying position and term details later in the approval workflow



COMMITTEE DETAILS

Planning Commission

- PROFILE
- POSITIONS
- MEETING TYPES

Position +	Terms
Seat 1 Chair	
Seat 2	
Seat 3	
Seat 4	
	202020212022202320242025

Position History

Seat 1 - Chair

ExcelPDF

Term Start	Term End	Person	Status
01/01/2016	12/31/2017	Joan Doore	Term Completed
01/01/2018	12/31/2019	John Henry	Term Completed
02/01/2020	12/31/2021	Nici Sullivan	Active

## Position Information - Planning Commission

Position Name:

Seat 5

Sub Title:

Member

Note

Note

Type:

☐ Board Member ☒ Council Member

Nominating Entity:

City Clerk

Appointing Entity:

Council

Initial Term Length:

4

Years

Max Term Length:

4

Years

Position Start:

01/01/2001

Position End:

01/01/2050

Required Training:

Health and Safety x

Health and Safety

Required Qualifications:

Bachelors Degree

## User Details - Nici Sullivan

x

PROFILE

APPLICATIONS



HISTORY

TRAINING

DOCUMENTS

Actions

Add Training +

Training Type	↕	Title	↕	Source	↕	Training Time	↕	Date Added	↕	Expiration	↕
Health and Safety Certificate Level 2		Health and Safety		Online		4 Hours		10/15/2020		10/15/2022	 

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CANCEL



## Committee and User Custom Fields

- Add your own custom fields for Committees and for users
- Includes rich text options, supporting hyperlinks
- Manage which fields display within the user profile dialog and out to the public

## COMMITTEE DETAILS

### Planning Commission



PROFILE

POSITIONS

MEETING TYPES

PREFERENCES

COMMITTEE DOCUMENTS



#### PROFILE

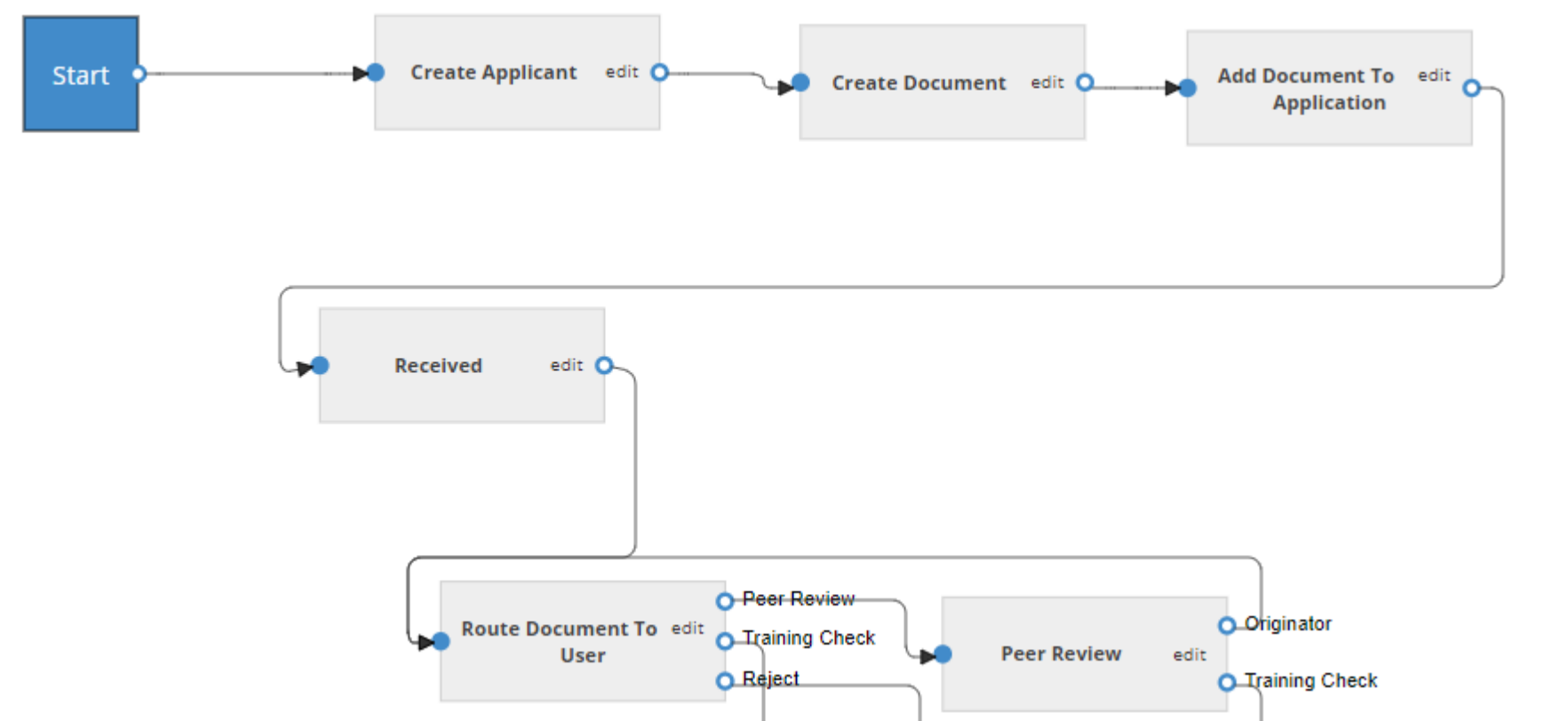
Name:	Planning Commission		
Type:	Standing Committee		
Description:	The Planning Commission was created under <a href="#">Chapter 2.50.100</a> of the <a href="#">Sunnyside Municipal Code</a> . Five appointees must reside in the Urban Growth Area or within the City limits and two appointees may reside within the Sunnyside School District Area.		
Active From:	1/1/2016	to	12/31/2045
Location:	City Hall		
Max Terms:	4		
Liaison:	Jamey Ayling		
Eligibility:			
Meeting Schedule:	Meets on the second Wednesday this is a test of the every month at 4pm.		



## Custom Forms and Workflow

- Forms can be customized to your own look and feel
- Multiple forms can be generated to support different needs across positions
- Workflows and application status can be customized for your needs

# PRIME ✓ GOV





## Tracked Email Functionality

- Easily communicate with members and applicants
- Support for pre-set email content to support efficiency
- Recommend positions to others via email
- Include attachments as required
- Enter a 'Reply To' address to receive replies
- All emails sent are tracked by the system

## Send Email



### Send To

Enter email

### Cc | Bcc (Optional)

Cc

### Reply Address (Optional)

nicola.higgins@primegov.com

### Subject

Position Recommended: Board of Parks and Recreation - Seat 1

### Message



Paragraph



Times New R...



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Dear David Suttle,

You may be interested in applying for the following position:

Committee: Board of Parks and Recreation

Position: Seat 1

Term Dates: 02/01/2022 - 31/12/2025

You can apply to this position by the following link

<https://roadmap2.primegov.com/Forms/FormDefinition/44>

Attach Files

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Cancel

Send





## Overview Dashboards

- At-a-glance overview information across your Committees
- View Information On:
  - Active Committees – which Committees have all positions filled
  - Positions – which positions are expiring soon or already vacant
  - Applications – overview of application data
  - Training – which positions have members assigned without valid training records

## Active Committees

2 Active Committees

0 Complete

2 Incomplete

All Active Committees ▾

## Positions

18 Active

0 Expiring Soon

11 Expired/Vacant

## Applications


5 Active Applications


## Training






12 Positions with training requirements

8 Fully Trained

4 Requiring training completion

Export to PDF 

Export To CSV 

Committee	 Occupancy Status	 Activity Status	 Positions Required	
Board of Parks and Recreation	Incomplete	Active	8	
Planning Commission	Incomplete	Active	3	

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## Configurable and Exportable Report Options

- Configure document reports to match your content
- Export onscreen reports to CSV and PDF
  - Including option to export all user fields
- Filter to exclude Committees as needed
- Filter for specified date ranges
- Supporting
  - Expiring Seats
  - Expiring Training
  - Local Appointments List (Maddy Report)
  - Vacancy Report



## Report Type ⓘ

Expiring Seats ▼

## Committees

Selected Committees: 2 ▼

## Expiring In



Expiring in 90 days ▼

## Expiring Between



15/10/2020



and

13/01/2021



Generate →

Clear ✕

☐ Export All Fields In CSV

Export to PDF

Export To CSV

Clear Filters ✕

Committee: Board of Parks and Recreation ⚙

Committee ▼ ⚙	Position ▼ ⚙	Term Start ▼ ⚙	Term End ▼ ⚙	Current Term Member ▼ ⚙	Next Term Member ▼ ⚙
Board of Parks and Recreation	Seat 2	01/01/2016	12/31/2020	Darrell Hall	Nici Sullivan
Board of Parks and Recreation	Seat 7	01/01/2017	12/30/2020	John Rodriguez	Advertised

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## Report Type ⓘ

Expiring Training ▼

## Committees

Selected Committees: 2 ▼

Generate →

Clear ✕

☐ Export All Fields In CSV

Export to PDF

Export To CSV

Clear Filters ✕

Committee: Report Committee ⚙

Member Name ▼ ⚙	Training Types ▼ ⚙	Committee ▼ ⚙	Position ▼ ⚙	Term Start ▼ ⚙	Term End ▼ ⚙	Expiration Date ▼ ⚙
Alexandre Cardoso	Functional	Report Committee	Seat 02	01/01/2020	12/31/2020	
Alexandre Cardoso	Health and Safety	Report Committee	Seat 02	01/01/2020	12/31/2020	10/30/2020
Paula Malavasi	Functional	Report Committee	Seat 02	01/01/2022	01/31/2022	
Paula Malavasi	Health and Safety	Report Committee	Seat 02	01/01/2022	01/31/2022	

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Thank You