



New Clerk/Treasurer and Staff Training

Training specifically tailored for New Clerk/Treasurer's or other key office staff such as Deputy Clerks' or Utility Clerks'. The "New Clerk/Treasurer or Finance Director" training is an extensive two day class that will review all of the required elements of the position. This class will focus on the legal compliance issues that a new clerk/treasurer's will face on a daily basis. Starting with the "legal compliance" calendar that was created by our own, Toni Nelson we will use this as a base of discussing the following areas:

➤ Clerk's role

- Meetings and Minutes
 - Executive sessions
- Public Records Officer
 - Archiving
 - Public records request
- Records Management
 - Organizing for efficiency, accuracy and retrieval

➤ Clerk/Treasurer

- Payroll/Human Resources
- Land Use
- Legal
- Public Relations
- Utilities
 - Billing and Collections

➤ Treasurer's role

- Accounting
 - Fund Accounting and BARS
 - Accounts Payable
 - Accounts Receivable
- Reporting
 - Monthly and Quarterly reports to management
 - Annual Financial Report
- Budgeting
- Investments



Training for new personnel will help to ensure the success of their new position, and the accuracy of the information being provided to the public and to management. An investment in training is an investment in the future of your local government organization.

This class includes 5 hours of continued mentoring via our **Direct Access and Support Program**.

Email Toni or Craig at ps@visionms.net to get started today!

