Clerk Training – Stake Conference – Sept 13-14, 2014

1. Summary Items
    a. You are the standards keepers for records in your unit. So, when you're not there in a particular week, it's in your best interest to have your BP trained or other leaders trained on what your standards are. Or, make sure you fix things when you get back. Financial, Addressing, Budgeting, etc
    b. You can train or condition your leaders to know when you need info by showing them how helpful you can be in supplying information.
        i. e.g. each quarter give them their attendance rolls for the quarter without them having to ask you. (same time as collecting Quarterly Report info)
        ii. have some custom lists ready for those who have to consider calling someone in the ward. eg. Women suitable for a Primary calling, Elders who could serve in the quorum, etc
    c. It's good to have a wingman. Consider calling an assistant(s) to help deal with the 5 or 6 common duties in clerking. (Membership, Financial, Historical, Statistical, Administrative, sometimes technology)
    d. Handout (**Clerk Duties**) – shows the many things you need to think about each week, month, quarter and which type of clerk would be responsible for it.
2. Membership Records
    a. Handout (**Canada Post Addressing Guide**) – 3 pages show some **Stake standards** regarding phone numbers and addresses. Please format your records when you get them in to this format.
       Eg. Add 306- for phone numbers, use – dashes instead of (brackets)
       eg. Check city spellings, use SK instead of Saskatchewan
    b. It's not your job to find members and get their addresses but it is your duty to **Uncover** where addresses are incorrect and **inform** the Ward/Branch Council about the inconsistencies so they can work to correct the info. MLS contains a 9-step process to find lost members that you can **coordinate**. You can share this load with the Branch.
    c. You need to pay special attention to your Unit Member list when it comes to NC or No Contact people. The Church specifically asks that you don't put (NC) or things like that in their name but you can still track it with custom fields or as a separate list. One Ward puts them all in a Home Teaching route assigned to the Bishop. These people have complained or become irritable about Church contact, but until they go through the process of having their name removed, are still considered members. They are usually assigned to the Bishop/Branch President to have less frequent contact. (1/year)
    d. Handout (**UNIT Information**) – this handout should help you know the unit numbers and contact numbers of other Units in the stake where your members may be transferring to.
3. Financial Records
    a. Handout (**Missionary Accounts**) – have sent clerks this document before, standards on how to balance the missionary accounts at least once a year in December or before each audit.
    b. Handout (**Audit Checklist**) – quick 10-step process to be ready for your next audit
    c. Working on a Stake electronic reimbursement form. If you need to ask for something from the Stake, you'll likely be filling out a form like this. Eg. Scouting reimbursement
    d. Working on a Budgeting standard document
    e. Working on an Other account document – how to use or not use the OTHER account.
    f. Need to keep checking when you're not there that others have put in the tithing right or taken expenses out of the right budget accounts. It's much harder to look this up or change it after the current financial year. Make sure they are fixed before Dec 31 of the current year. MLS freezes these things on Jan 1 and moving or correcting things requires a lot more paperwork.
    g. Records need to be kept for 7 years according to CRA. You can dispose of records older than that.

4. Historical Records
    a. Minimum history is your latest Sustaining List from your Ward/Branch Conference and your Activities calendar
    b. There are lot of resources describing how you could go farther with your Unit History including testimonies, stories, etc
    c. Annual History is due each year by February.
5. Statistical Records
    a. Quarterly report – most problems are in getting your leaders to submit their numbers
        i. You can email reminders a week or two ahead
        ii. Corner them in the hall and get a general statement (about half attended, ¾)
        iii. Let them know you have their next quarter attendance rolls – submit their previous one
    b. Rescue Initiative – it's not going away
        i. Same problems in getting the info from your councils
        ii. Elder Spackman would like it monthly but we can barely get it quarterly
6. Administration
    a. Handout (**Clerk Duties**) – Reminders about what you can do each week
    b. Handout (**Clerk Schedule**) – When is the best time to do some of the big items. This monthly schedule gives highlights of when you may be starting or ending some of the activities mentioned in the Duties.
    c. Discipline – you're going to have to operate under your own initiative because you're a standards keeper when it comes to records.
        i. So, if you leave too many things open or undone for too long it will become OBVIOUS. Either at audit time or whenever someone asks "what about X" or "whatever happened with Y"
        ii. It's your job to CLOSE things. If a meeting is done and there are no action items you're minutes can say, "No business" or "No action items"
        iii. So, you will have a list of items that you get to keep around until you get some indication that they are CLOSED. You need to drag them out at each meeting or inform the Executive Secretary to put them on an agenda.
    d. Filing (not covered at meeting but via email)
        i. Handout (**Filing – Processing an Expense**) – here's one way to file financial expenses in your filing cabinet to make it easier for the auditor when they come to visit.
        ii. You need to have good records for deposits as well as at LEAST the 2 pages of each month's financial statement so you can record signatures.