2025 Checklist for Clerks: How to Drive Impactful Efficiencies in Your Community

Introduction

Clerks are always under pressure to improve productivity, increase transparency, and streamline processes, so developing a comprehensive strategy is critical.

By leveraging the right tools, you can reduce siloed workflows, automate repetitive tasks, and transform how you serve tech-savvy residents — and your agency. From implementing integrated, searchable databases to offering self-service options for residents, you can free up valuable time for essential responsibilities while meeting the growing demand for accessible, efficient services.

If you're looking to uplevel your workflows and improve the civic experience for your community, this checklist can help.

Increase Self-Service and Save Time with Clerk Productivity Tech

Empower residents to self-service their needs, while also reducing siloed processes and increasing productivity across your agency. [Digital, searchable, integrated solutions](#) can help you meet the expectations of digitally-minded residents, and give you more time to focus on other essential tasks. In addition, you can save time by using [consent agendas](#) (if they're allowable in your community).

Automate the Agenda and Meeting Management Process

Agenda and meeting management software can automate and expedite the agenda and meeting minute creation process and can reduce your preparation time from days to minutes.

More Agenda and Meeting Tips

1. Use agenda management software to standardize templates.

2. Automate agenda distribution to council members and the public with private and public packets.

3. Enable electronic voting and live tracking during meetings.

4. Use hybrid meeting tools to support in-person and remote attendees.

5. Implement automated transcription tools for meeting videos.

6. Assign action items during meetings and use audit trails.

7. Publish minutes and decisions promptly on the website.

8. Maintain a searchable archive of past agendas and minutes.

9. Set up notification systems for upcoming meetings and deadlines.

10. Train staff on digital meeting tools and best practices.

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Calculate Potential Savings

Adopting a digital agenda and meeting management solution will save you money on paper, ink, toner, and general printing costs. Find out how much you're spending on printing — and determine how much time you can save by going digital — with this calculator.

Automate the Open Records Request Process

Manually managing FOIA requests is time-consuming and risky. Learn how you can automate this process and cut back turnaround time by more than 50%.

More Public Records Requests Tips

1. Implement a dedicated software solution for managing requests.

2. Automate acknowledgment and response workflows.

3. Set up a portal for citizens to submit and track requests online.

4. Use templates for common responses.

5. Maintain an up-to-date database of frequently requested documents.

6. Assign roles and responsibilities for handling requests.

7. Enable audit trails to track request progress and compliance.

8. Integrate invoicing features for request fees.

9. Monitor response times to ensure compliance with laws.

10. Provide staff training on handling sensitive or complex requests.

Achieve Compliance with Social Media Archiving Laws

Social media is a critical tool for public officials to connect and engage with their communities — but it also requires an intricate understanding of public records laws and First Amendment rights. Silencing a resident unfairly could result in significant fines and reputational harm. Learn about six examples of content moderation where missteps impacted public institutions, along with actionable steps to help you avoid these pitfalls.

More Social Media Archiving Tips

1. Choose software that captures social media posts and interactions in real time.

2. Ensure compatibility with all platforms used by your agency.

3. Enable searchable archives for efficient retrieval.

4. Set up automated alerts for flagged or deleted content.

5. Train staff on social media policies and legal requirements.

6. Use analytics to track engagement and identify trends.

7. Create a content review workflow for social media posts.

8. Maintain compliance with state and federal social media records laws.

Be Prepared for Emergencies or Unexpected Events

Developing a disaster preparedness plan can be challenging, especially given evolving legal and regulatory compliance. The right technology can support clerks throughout every step of this important journey.

Set Realistic Deadlines

When setting agenda submission deadlines for board members and other stakeholders, be realistic. Remember that presenters often aim to share the most current and accurate information, which may continue to evolve until the last moment. To manage both in-progress items and those unlikely to change, set the deadline a few days ahead to receive agenda items and supporting documents.

Make your Ordinances Accessible and Searchable Online

Save time and improve transparency in your community by publishing your code online. Plus, by employing cutting-edge integrations with your agenda and meeting management and website processes, you can cut down on administrative work, too.

More Codification Tips:

1. Transition all municipal codes to a digital, searchable format.

2. Implement a user-friendly interface for staff and citizens.

3. Set up automatic alerts for ordinance updates.

4. Integrate cross-referencing features for easy navigation.

5. Establish workflows for ordinance drafting and tracking.

6. Use collaboration tools for stakeholder feedback.

7. Automate publishing to ensure real-time availability of updates.

8. Offer training sessions for staff on using codification tools.

9. Maintain an archive of historical codes for reference.

10. Use analytics to identify commonly accessed sections for optimization.

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Enable Live Voting Technology

Discuss with your council the potential advantages of alternative voting solutions for your community. These tools can boost voter turnout, ease the workload on staff, reduce resources required for a successful election, and simplify the voting process for all residents.

Optimize Board Applications

Managing board applications and recruitment can be a disorderly, time-consuming process. Learn how you can digitally recruit, vet, and appoint civic board members and successfully facilitate ongoing board operations.

Provide Virtual Meeting Access

If you're not currently providing virtual meeting access to public meetings, consider the benefits of livestreaming and recording meetings. Offering a virtual option enables your administration to reach a broader audience, inviting diverse perspectives and greater community engagement in local discussions.

Master Virtual Meeting Best Practices

If you're offering video meeting participation, be sure to familiarize yourself with the top five best practices for livestreaming public meetings to enhance accessibility and engagement.

Modernize Your Municipal Website

Your website is the face of your agency and the primary tool for resident engagement. An efficient, user-friendly website can save time, reduce in-person inquiries, and improve public satisfaction.
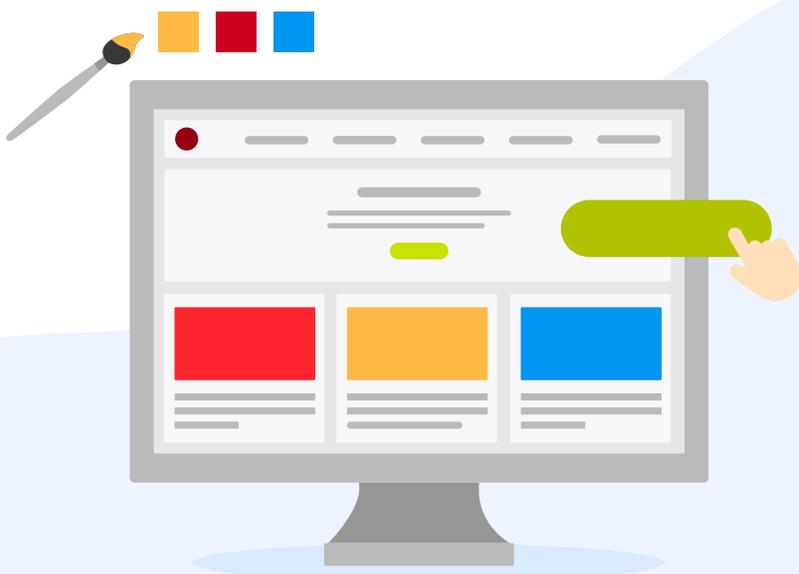
More Website Tips

1. **Ensure ADA compliance with accessible design and content.**

2. **Organize clear navigation with intuitive menus and categories.**

3. **Implement a robust search function for easy information retrieval.**

4. **Regularly audit content for accuracy and relevance.**

5. **Add self-service features like online forms and payment options.**

6. **Use analytics tools to track visitor behavior and optimize user experience.**

7. **Display meeting agendas, minutes, and public notices prominently.**

8. **Include a chatbot or FAQ section to handle common inquiries.**

9. **Maintain SSL encryption for secure browsing and data protection.**

10. **Create a content calendar for timely updates and announcements.**

Engage with Your Community

Attend chamber meetings and community events to connect with residents, colleagues, and vendors. Engaging in informal conversations outside formal meetings allows residents to share insights that can help improve their experience with your administration.

Join the Municipal Clerk Association

Become a member of your local or state Municipal Clerk Association to enhance your knowledge, share best practices, and connect with clerks nationwide.

Invest in Professional Development

Each year, allocate time and budget for attending key industry conferences. Both virtual and in-person events provide valuable learning opportunities, insights into trends, and networking with peers in the field.greater community engagement in local discussions.

Stay Connected to Your Mission

Remind yourself daily of your purpose as a clerk: to help your community run smoothly. Focusing on this mission can help keep everything in perspective and positively influence your outlook.

Prioritize Daily Self-Care

Schedule downtime every day. Taking regular breaks can help you feel more in control, stay purposeful, and prevent burnout.

Conclusion

Efficiency isn't just about saving time — it's about empowering clerks to focus on what truly matters: serving their communities. By optimizing websites, codification, agenda management, public records processes, and social media archiving, clerks can successfully navigate 2025 with confidence.

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