Clerk Duties – Town of Niagara

The following is a list of monthly and annual duties that clerks can use as a reference and to know what is expected of them in their position (this is not a comprehensive list). Not all duties apply to all clerks; it will depend on their office situation, municipality and structure.

# Daily- Weekly

* + Check email (Especially during an election.)
  + Handle the mail.
  + Receive phone calls and respond as needed

# Monthly

* + Prepare and distribute meeting agendas and packets; email agenda; post agenda on website and bulletin board
  + Prepare invoice listing to be paid and give to treasurer to cut checks
  + Prepare deposit and give to treasurer
  + Attend monthly board meetings (and any specially called meetings)
  + Prepare minutes, post minutes online, email minutes, file minutes for record retention
  + Make sure the board signs the minutes once approved
  + Mail checks paying invoices and keep track of check numbers
  + Maintain Minute Books for all Boards, Committees and Commissions.
  + Maintain website – updating notices.
  + Keep a check and balance of totals from bank and treasurer
  + Keep the battery charged on election machine
  + Purchase supplies as needed for office, hall, elections, fees for website and gmail.

# Yearly, Quarterly, or Varied

Election Tasks - (Spring Elections are every year and Fall Elections are in even years. Primaries are in February and August if needed)

* New Clerks have to take the training and become certified in WisVote.
* Update WisVote as necessary - new registrations, felon & death lists, transfers (in & out), reg alerts, DMV checks, address maintenance
* Prepare election plans in WisVote including polling places and candidates for local election with certifying the winner if a local candidate.
* Update files in the office on registrations, photo ID, and absentee (indefinitely confined and requested for year)
* Prepare and post all notices and mailings – publish as needed
* Prepare and process nomination papers packets for local contests (November for prep and December for signing with January processing).
* Coordinate pick-up of ballots from County (also adjust order of ballots as needed)
* Absentee voting. (prepare mailings as soon as possible and field new requests within 48 hours)
* Absentee votes – keep track of ballots coming in and maintain a security of ballots. Identify any ballots that may be rejected. Prepare El-125 to present with ballots to Chief Inspector on election day.
* Be available 2 weeks prior to election for in-person voting and Friday before election.
* Prepare Election Inspector schedule and mail or email for every election (every two years new election board voted on in December -odd year - with oaths of office).
* Prepare Poll Books and Ineligible Voters List and adjugated incompetent.
* Be present (in person or by phone) and assist with Election Day (6:00am set up machine)
* Complete Election Day forms and transport materials to County (by 3pm next day).
* Distribute School District paperwork if necessary.
* Complete after election tasks including: scanning votes in person, scanning absentee votes, entering EDR’s, entering Inspector Statement numbers, reconciling election, closing election, confirming any returned EDR postcards, and sending off notices to anyone who is indefinitely confined and did not return a ballot in April or November.
* Administer Oaths of Office (for local election)
* Chief Inspector and Election Inspector training - maintain record of hours.
* Clerk training - certify hours to Wisconsin Election Commission through WisVote (6 hours every 2 years)
* Equipment Testing - provide proper notice. Coordinate cartridge pick-up with county and do the Pre-lat and Public tests
* Municipal Board of Canvas for local election results provide proper notice.
* Prepare the polling place setup with required notices
* Coordinate for the yearly election machine maintenance.

Licensing and Permits

* Prepare and distribute annual alcohol licensing packets (license year July 1 to June 30).
* Prepare and post related notices and publications for a June decision from board
* Process and prepare annual licenses - i.e. Liquor/Cigarette/Operator (with Town seal)
* Process and prepare licenses as necessary during the year.
* Keep books and report to county the dog licensing.

Budget

* Prepare Annual Budget or provide financial, clerical and or technical support for preparation of the Annual Budget (Levy Limit Worksheet, GTA, etc).
* Prepare/Notice Summary Budget with public hearing notice.
* Prepare any adopting resolutions as needed.
* Make sure all expenditures stay in the budget or the board must amend the budget.

Taxes

* File any chargebacks or rescinded taxes as needed.
* Manage and prepare Special Assessments in Ascent
* Type in Ascent any information to be printed on tax bill – including referendum
* Complete the Reports to County for preparation of tax bills.
* File Levy information with DOR
* Receive Levy amounts from Taxing jurisdictions and get to County once Lottery and school credit is known, enter into Ascent.
* Approve the numbers from the county before they mail the bills
* File a PILT request with the DNR and distribute payments to taxing jurisdictions when it arrives.
* File Statement of Taxes (SOT) with the DOR (County files the SOA)
* Complete and file the certificate of taxes (Get cert and SOT to County Treasurer and Town Treasurer)
* Assist in the preparation of Settlement Paperwork in January and February.
* Disburse settlements to other taxing jurisdictions in January and February by due date

Board of Review - MAY

* Review and make any necessary corrections to the Assessment Roll.
* Coordinate with the Assessors to schedule Open Book and Board of Review.
* Prepare Open Book and Board of Review notices and post/publish.
* Coordinate scheduling of Objectors for Board of Review
  + Serve as Clerk for Board of Review- prep scripts.
  + Prepare Minutes and file. Keep audio of BOR on file
  + Annual training certification process (at least 1 member trained and certified to DOR).
  + Send Final Reports to the county.

Ordinances and Resolutions

* + Draft Ordinances and Resolutions as necessary with the help of an attorney.
  + Publish and post as necessary any adopted Resolutions/Ordinances
  + Maintain Code of Ordinances and Resolution Books - FILES.
  + Yearly – update fee schedule
  + Coordinate updates to Comprehensive Plan (2029)
  + Any changes to the Zoning Ordinance requires a request for change from the board, a public hearing, a Planning Commission meeting to recommend changes, a final board approval, sending change to the County for their approval, receive official notice of approval, make changes to the Zoning Ordinance, get new copies to those interested, update the one on the website, and file the appropriate paperwork concerning the change.

Miscellaneous Notices

* + Prepare Notices and ½ mile Notification Letters for Petitions for Rezone.
  + Prepare Notices and ½ mile Notification Letters for Petitions for Variances.
  + Prepare Notices and ½ mile Notification Letters for Petitions for Cond Use Permits.
  + Publish as needed for type 1 or 2
  + Many meetings require notices and the clerk must be aware of the time to make these notices available to the public and if they require publication

Human Resources

* Update Employees Handbook
* Prepare and distribute employee materials for new hires as needed.
* Maintain and update personnel files as needed.
* Work with Treasurer and make sure all payroll, taxes, and benefits are paid as needed
* Update DOT listing of truck drivers
* Coordinate drug screening for road crew employees
* Communicate with employees as needed (keep up-to-date contact information)
* Make sure employee notices are properly posted

Hall Rental

* Keep track of hall facility usage (board, commission, 4H, Lake Shannon) and rentals
* Collect fees for rentals and keep track of payments and disbursements.
* Enter into online calendar and update website information regarding hall usage and rental policies
* Call to coordinate key pick-up
* Make sure key is returned and proper security deposit is returned

Miscellaneous Tasks

* + Custodian of the Municipal Seal.
  + Administer Oaths of Office
  + Maintain proper bonds and insurance policies for all assets
  + File and keep all active contracts: i.e. assessor, fire department (2024)
  + Maintain Records/Document Filing System.
    - Be aware of record retention laws!!!
    - Custodian of all minutes, financial report, road work, SOT, assessor records, maps, parcel data, insurance policies, etc. in perpetuity
    - Yearly, go through record retention items and safely file those needed and destroy those that may be destroyed.
    - Custodian of financials for 7 years
    - Custodian of Titles for vehicles and land (Right of Ways for roads and any parcels owned by the Town)
  + Set up rooms for meetings (i.e. Board, Council, Committee/Commission).
  + Serve as Notary Public.
  + Keep informed of laws or requirement changes through web based information resources, Institutes and Conferences. Inform the board of any irregularities in town business.
  + Respond to Open Records requests.
  + Town Annual meetings in April and October (must publish for October) Have poll listing to be signed by all attending
  + Reports to file or assist with filing
    - Biannual (even years) Tax Exempt properties Report by July 1.
    - Grant Administration (keeping track of monies received and spent on grants and making sure the instructions are followed– currently must upkeep ARPA
    - Help prepare LRIP application as needed
    - File Annual WISLR report to DOT – after road inspection (give board a listing of roads)
    - File Annual Liquor License.
    - File Annual Cigarette Report.
    - File Annual 2% Fire Dues Certification.
    - File Recycling Grant. – work with MFR
    - Prepare and file Bridge Aid Report in August with county
    - Special Assessment reports requested by title companies ($10 charge)
    - File SBD 10710 with Building and Safety
    - File Road certification with DOT and update WSLR with maintenance and construction data
    - Assist treasurer in filing the Municipal Financial Report, Video Report (franchise fee), and workman comp audit.
    - Renew SAM.gov registration yearly!!
  + Prepare and publish bid notices for road work, purchases, or sale.
  + Update county, state, and website with new board/employee contact information
  + Yearly update the Planning Commission and Board of Appeals members with board.
  + Manage cash supply in office
  + Coordinate with Zoning Administrator that the building permits are sent to the Assessor at the beginning of each year.
  + Update emergency address listing regularly and get to fire dept and rescue squad and City of Niagara copies
  + File and keep emergency response manual

(Updated 3-2022)

The following pages are from State Statutes as a reference to the Statutory Duties of Clerks for Towns. You can refer to these also.

**60.33  Duties of town clerk.**The town clerk shall:

**(1)**Clerk of town meeting. Serve as clerk of the town meeting under s. [60.15](https://docs.legis.wisconsin.gov/document/statutes/60.15).

**(2)**Clerk of town board.

**(a)** Serve as clerk of the town board, attend meetings of the board and keep a full record of its proceedings.

**(b)** File all accounts approved by the town board or allowed at town meetings and enter a statement of the

accounts in the town's record books.

**(c)** File with the town board claims approved by the clerk, as required under s. [60.44 (2) (c)](https://docs.legis.wisconsin.gov/document/statutes/60.44(2)(c)).

**(3)**Finance book. Maintain a finance book, which shall contain a complete record of the finances of the town, showing the receipts, with the date, amount and source of each receipt; the disbursements, with the date, amount and object of each disbursement; and any other information relating to town finances prescribed by the town board.

**(4)**Elections and appointments.

**(a)** Perform the duties required by chs. [5](https://docs.legis.wisconsin.gov/document/statutes/ch.%205) to [12](https://docs.legis.wisconsin.gov/document/statutes/ch.%2012) relating to elections.

**(b)** Transmit to the county clerk, within 10 days after election or appointment and qualification of any town

supervisor, treasurer, assessor or clerk, a written notice stating the name and post-office address of the elected or appointed officer. The clerk shall promptly notify the county clerk of any subsequent changes in such offices.

**(c)** Transmit to the clerk of circuit court, immediately after the election or appointment of any constable or

municipal judge in the town, a written notice stating the name of the constable or municipal judge and the term for which elected or appointed. If the judge or constable was elected or appointed to fill a vacancy in the office, the clerk shall include in the notice the name of the incumbent who vacated the office.

**(5)**Sale of real property. Execute the conveyance of real property of the town.

**(6)**Notices.

**(a)** Publish or post ordinances and resolutions as required under s. [60.80](https://docs.legis.wisconsin.gov/document/statutes/60.80).

**(b)** Give notice of annual and special town meetings as required under ss. [60.11 (5)](https://docs.legis.wisconsin.gov/document/statutes/60.11(5)) and [60.12 (3)](https://docs.legis.wisconsin.gov/document/statutes/60.12(3)).

**(7)**Records.

**(a)** Comply with subch. [II of ch. 19](https://docs.legis.wisconsin.gov/document/statutes/subch.%20II%20of%20ch.%2019) concerning any record of which the clerk is legal custodian.

**(b)** Demand and obtain the official books and papers of any municipal judge if the office becomes vacant

and the judge's successor is not elected or appointed and qualified, or if any municipal judge dies. The

town clerk shall dispose of the books and papers as required by law.

**(8)**Licenses. Issue any license or permit granted by the town board when presented with a receipt from the town treasurer indicating that any required fee has been paid.

**(8m)**Street trade permits. Stamp or endorse street trade permits at the request of an employer under s. [103.25 (3m) (b)](https://docs.legis.wisconsin.gov/document/statutes/103.25(3m)(b)).

**(8p)**Traveling sales crew worker permits. Stamp or endorse traveling sales crew worker permits at the request of an employer under s. [103.34 (11) (c)](https://docs.legis.wisconsin.gov/document/statutes/103.34(11)(c)).

**(9)**Schools.

**(a)** Perform the clerk's duties under chs. [115](https://docs.legis.wisconsin.gov/document/statutes/ch.%20115) to [121](https://docs.legis.wisconsin.gov/document/statutes/ch.%20121), relating to public instruction.

**(b)** Within 10 days after the clerk's election or appointment, report his or her name and post-office address

to the administrator of each cooperative educational service agency which contains any portion of the

town. The clerk shall report to the administrator the name and post-office address of each school

district clerk within 10 days after the name and address is filed in the clerk's office.

**(c)** Make and keep in the clerk's office a map of the town, showing the exact boundaries of school districts

within the town.

**(d)** Apportion, as provided by law, tax revenues collected by the town for schools.

**(10)**Highways and bridges. Perform the duties specified in chs. [82](https://docs.legis.wisconsin.gov/document/statutes/ch.%2082) to [92](https://docs.legis.wisconsin.gov/document/statutes/ch.%2092), relating to highways, bridges and drains.

**(10m)**Notice of property tax revenue. Notify the treasurer of the county in which the town is located, by February 20, of the proportion of property tax revenue and of the credits under s. [79.10](https://docs.legis.wisconsin.gov/document/statutes/79.10) that is to be disbursed by the taxation district treasurer to each taxing jurisdiction located in the town.

**(11)**In general. Perform all other duties required by law, ordinance or lawful direction of the town meeting or town