

Clerks' 2025 End of Year Checklist

1. Finalize 2025 Minutes and Agendas

Make sure all meeting records are signed, approved, and filed properly before the year closes. This ensures a clean transition into the new year.

2. Archive and Backup Records

Organize your 2025 files—both paper and digital—according to retention rules. Confirm that backups are secure and accessible in case of audits or requests.

3. Publish the 2026 Meeting Calendar

Work with [boards and committees](#) to finalize schedules. Post them publicly early so residents and officials know what to expect.

4. Refresh Templates and Forms

Update agendas, minutes, and notice templates to reflect any policy or legislative changes taking effect in January.

5. Review [Board and Committee Rosters](#)

Check for expiring terms, vacancies, or new appointments. Prepare [onboarding materials](#) for incoming members.

6. Update Contact Lists

Verify that phone numbers, emails, and mailing addresses for board members, staff, and community partners are current.

7. Post Required Annual Notices

Schedule or draft any annual postings—like meeting schedules, disclosure reminders, or open meetings law notices—so they're ready to go.

8. Test Technology and Meeting Tools

Check your AV setup, virtual meeting platforms, and other software. Fixing small tech issues now prevents headaches later.

9. Evaluate Office Workflows

Take time to reflect on 2025: [what worked well](#), what slowed you down, and what could be streamlined in 2026.

10. Plan for Professional Development

Look ahead to clerk conferences, trainings, or certifications in 2026 and add them to your calendar before things get busy again.