

VMCTA Education & Certification Committee  
Meeting Held via Zoom  
January 4, 2022 • 2:30 pm

Committee Members Present: Heidi Racht, Jessica Alexander, Patti Lewis, Diana Vachon, LaDonna Dunn, Sara Haskins

Committee Members Absent: Donna Kelty, Clyde Jenne, Charlie Dejener

Minutes: Heidi Racht / Diana Vachon

Agenda, distilled:

1. Call to Order - Agenda Review/Modification
2. Appoint Vice Chair and Secretary
3. Approve the minutes of last meeting
4. 2020 Spring Clerk & Treasurer Training
  - a. Date/Time/Locations
  - b. Discuss topics and possible speakers
  - c. Schedule of the day
  - d. Email Announcement and Online Registration
5. Annual Meeting
  - a. Discuss 2019 – \_any suggestions
  - b. Review Required Topics for 2020
  - c. Discuss Potential Dates in September
  - d. Brainstorm Opening Speaker & Instructors
6. Certification Applications
  - a. Revisions?
7. Set Next Meeting Date(s) – February and March
8. Adjournment

**1. Call to Order**

The meeting began at 2:40 pm, chaired by Diana Vachon.

**2. Appoint Vice Chair and Secretary**

**By consensus:**

Patti Lewis, vice-chair

Heidi Racht, secretary

**3. Approve the minutes of August 3, 2021 and August 6, 2021**

Minor corrections were made to both sets of minutes.

**MOTION:** Patti Lewis moved to approve; Heidi Racht, second. Approved with Vachon, Dunn and Haskins abstaining.

**4. 2020 Spring Clerk & Treasurer Training**

Discussion around location of trainings. Given the continuing issues around COVID, the Committee decided to try to hold two trainings in towns with larger halls. The towns where we have had good locations with two large rooms include West Rutland, Fairlee, and Danville. This isn't to say that there aren't other locations that could work just as well, but it was

decided to start with West Rutland and Danville. With many new clerks throughout the state, someone is going to have to travel a distance and there was no interest on the part of the Committee to add a third location and date.

The last in-person spring training was on Thursday, which worked fine. Dates were chosen: April 27 and April 28 and May 4 and May 5.

**ACTION ITEM:** Dunn will contact Danville and see if the dates work there; Racht will contact West Rutland when she hears from Dunn.

The Committee decided to have the same schedule for both dates. With the spring training emphasis on the basics with some extras for experienced clerks and treasurers.

Topics include: VSARA, elections (clerk led discussion as SOS Elections will be doing trainings through the summer and the staff has its topics – tips from clerks would be a better use of training in the spring); legislative update – ask Carol Dawes to present; notary training by SOS Office (Haskins will follow up); licensing – training.

Dunn suggested having a what clerks should be looking at when they accept documents for recording presentation that could be done by a title searcher: mobile homes, UCCs, multiple discharges, surveys.

**ADDENDUM TO ACTION ITEM:** Ask clerks at potential training sites to recommend a title searcher.

Racht left the meeting at 3:17 and Vachon took over the minutes.

Heidi offered to send out postcards announcements and do the certificates post training.

LaDonna will email out the last handout with links to references for clerks and possible update for training

Sara

- reach out to S.O.S. and ask for a presenter on Notaries, clarifying responsibilities as clerk, electronic notaries, update on renewing in 2023.
- will work on a Google online sign up
- will reach to Bobbi possible co-present (with Patti/Sara?) cash handling, ethics, & tax collections

Diana

- reach out to Carol Dawes regarding presenting at the Spring Training regarding legislature, vitals, licensing
- send out the email announcements
- will ask Lucrecia about presenters for Duties & Responsibilities for Treasurers

Patti will reach out to Donna K., Tammy L, and Diane J. asking about co-teaching elections

Jessica will reach out Sue Cornwall to ask her to present on Reports & Audits AND “What Every Treasurer Should Know”

Then we briefly discussed the Annual Meeting. Tracy is looking into Fairlee again. Required topics came from Tracy’s email The pink courses are the ones we need to offer in 2022:

The mandatory courses for Clerk Certification:

Elections 2018, 2021

Recording and Records Management 2019

Municipal Law 2019, 2021

Vital Statistics 2018, 2021

The mandatory courses for Treasurer Certification:

Principles of Banking 2018, 2021

Cash Management 2019

Municipal Accounting 2018, 2021

Tax Collection 2019

Sara has been leading her county clerk’s group. She has had Sara from the State archivist office come and do an assessment on her vault. She was a wealth of information. Told her about archival folders. Sara thinks she would be a good presenter. Also Tanya Marshall for APRA, Legislation and E-recording presentation at the fall conference. Sara also had someone from Invest EAP come to her county group and speak to Supervisor Training and HR issues. She also recommends this presentation. EAP would love to come to the fall conference. We talked about hosting the woman Prithee (sp?) the Diversity and Inclusion presenter from 2019. She could remember everyone’s name. I look hers up. Other trainings/presentations:

Bias training

Bridging the generation gap

FBI – Anna Holden

NEMRC – for treasurers and bookkeepers

Parliamentary skills, government, and democracy

**Adjournment:**

The meeting adjourned, by common consent, at 4 pm.