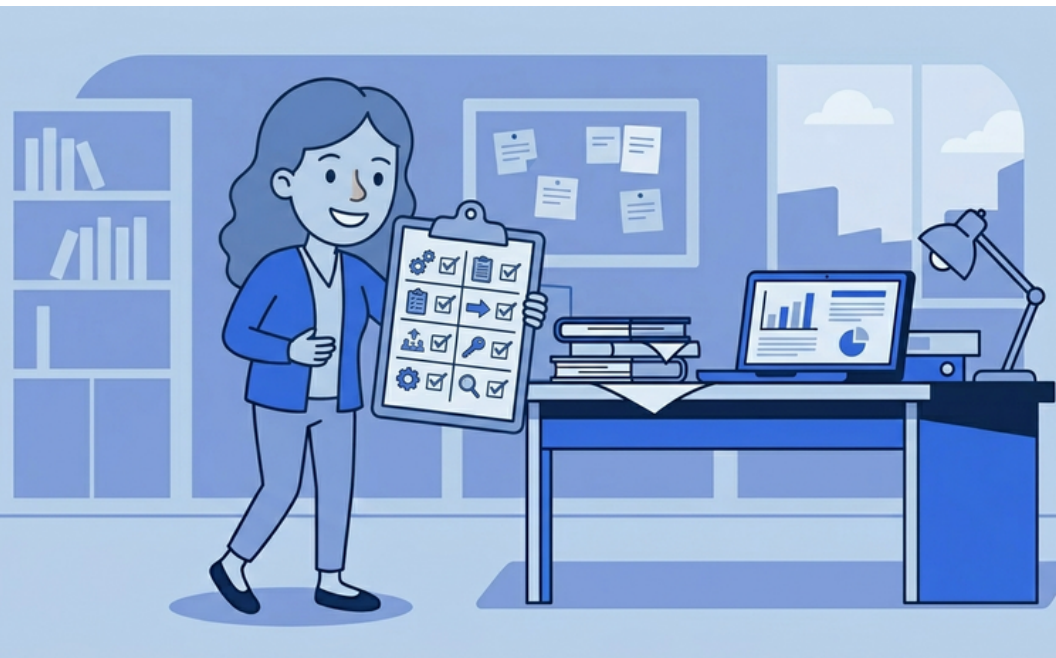




Build Your Own:

AI SOP Assistant for Municipal Clerks



Step 1: Create Your AI SOP Assistant Avatar

Before building your assistant, define how the AI should behave and what its role is.

(Think of this as creating a digital staff member for the clerk's office.)

Avatar Name

Example:

ClerkOps

Avatar Role:

Municipal Clerk SOP Development Assistant

Avatar Purpose

To help municipal clerks create, organize, and maintain clear, standardized procedures for clerk operations.

Responsibilities

Your AI SOP assistant should:

- Draft step-by-step SOPs
- Convert notes into procedures
- Improve clarity of existing SOPs
- Standardize document formats
- Assist with staff training documentation



Avatar Builder Prompt

Use this prompt when setting up your AI assistant.

“You are an assistant supporting a municipal clerk's office.

Your job is to help create, update, and organize Standard Operating Procedures (SOPs) used in local government.

Focus on procedures related to:

- meeting preparation
- agenda creation
- records management
- FOIL request processing
- election administration
- public notices
- document archiving
- municipal compliance processes

When writing SOPs, always provide:

1. Procedure title
2. Purpose
3. Responsible staff role
4. Step-by-step instructions
5. Required documents
6. Compliance considerations
7. Estimated time to complete

Write clearly so municipal staff can easily follow the procedure.”



Step 2: Identify Clerk Office SOPs to Build

Start by identifying the most common procedures in the clerk's office.

Most municipalities share similar workflows.

High-Value SOPs for Clerks

- Meeting agenda preparation
- Meeting minutes documentation
- Public notice publication
- FOIL request processing
- Records retention procedures
- Election preparation
- Resolution filing
- Document archiving

Example Prompt to Create an SOP

“Create a Standard Operating Procedure for preparing a municipal board meeting agenda.

Include:

- Purpose
- Responsible staff role
- Required documents
- Step-by-step process
- Compliance considerations”



Example Output (Simplified)

SOP Title: Board Meeting Agenda Preparation

Purpose:

Ensure agendas are prepared accurately and distributed on time.

Responsible Staff:

Municipal Clerk

Steps

1. Request agenda items from department heads.
2. Review submitted items for completeness.
3. Organize agenda items by category.
4. Prepare meeting packet materials.
5. Distribute agenda to board members.
6. Publish agenda to municipal website and public board.

Step 3: Store and Organize SOPs

Once SOPs are created, they should be stored in a *centralized knowledge system* so staff can easily access them.

A popular tool for organizing internal knowledge is *Guru*.

Guru allows municipalities to create *structured knowledge cards for procedures*.



Recommended SOP Categories

- Clerk Office Operations
- Records Management
- Public Notices
- FOIL Requests
- Meeting Administration
- Election Administration

Example SOP Structure in Guru

Each SOP should include:

1. Title
2. Purpose
3. Responsible Staff
4. Steps
5. Required Documents
6. Compliance Notes



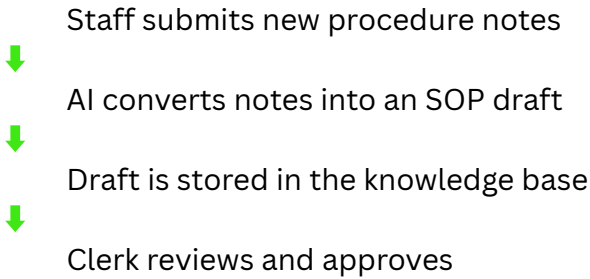
Example Prompt to Improve an SOP

“Review the following municipal SOP and improve clarity and structure. Ensure steps are clear and easy for new staff members to follow.”

Step 4: Automate SOP Creation and Updates

Procedures change as laws and policies evolve. Your AI assistant can help *update SOPs automatically*. Automation tools like “Make” can connect AI with your documentation system.

Example Automation Workflow



Example Prompt to Update an SOP

Update this municipal SOP based on the following policy change.

Highlight:

- **new steps**
- **removed steps**
- **compliance updates**

Example SOP AI Workflow

When a new process is introduced:

- Clerk enters notes into the AI assistant
- AI generates a formatted SOP
- SOP is saved in the knowledge base
- Staff are notified of the updated procedure

Total time required: 5–10 minutes

Benefits for Municipal Clerk Offices

Implementing an AI SOP assistant helps municipalities:

Standardize procedures

- Save hours writing documentation
- Train new staff quickly
- Preserve institutional knowledge

Most importantly, it ensures procedures remain consistent even as staff changes.

Example Clerk Office SOPs to Start With

- Meeting Agenda Preparation
- Meeting Minutes Documentation
- FOIL Request Processing
- Public Notice Publishing
- Resolution Filing
- Document Retention

Final Thought

Municipal clerks are the guardians of local government records and procedures.

An AI SOP Assistant simply acts as a documentation partner that helps maintain the accuracy, clarity, and accessibility of those procedures.

The result is a clerk's office that is:

More organized

More efficient

Better prepared for staff transitions

BEFORE YOU START

Before You Use AI: Build It the Right Way First

Artificial Intelligence can be an incredible tool for municipal clerk offices, but only when it is set up properly.

Think of AI like a new employee joining your office.

You would never hand a new employee important responsibilities without:

- Training them
- Explaining expectations
- Providing examples
- Teaching procedures
- Reviewing their work

AI works the exact same way.

Before using AI to help with municipal SOPs, public notices, meeting minutes, or compliance documentation, it is important to build and train your assistant first.

Why Setup Matters

Without proper setup, AI may:

- Provide incomplete information
- Format documents incorrectly
- Miss compliance considerations
- Produce inconsistent results
- Sound unprofessional or inaccurate

The better your setup, the better your results.

TRAINING YOUR GPT

How to Build a Strong AI Assistant

No matter what AI platform you use, every successful AI assistant starts with the same foundation.

Step 1: Define Its Role Clearly

Tell the AI exactly who it is.

Example:

"You are an assistant supporting a municipal clerk's office."

Step 2: Define Its Responsibilities

Explain what tasks it should help with.

Examples:

- Drafting SOPs
- Organizing procedures
- Writing public notices
- Assisting with records documentation

Step 3: Define Output Expectations

Tell the AI how responses should look.

Example:

"Always provide step-by-step instructions, use professional government language, and organize content clearly."

Step 4: Provide Context

Give the AI background on your office.

Examples:

- Municipality size
- Department structure
- Common clerk responsibilities
- Tone/format requirements

Weak Prompt:

"Write me an SOP."

Strong Prompt:

"Write a municipal clerk SOP for processing FOIL requests in a professional format including title, purpose, responsible party, and step-by-step instructions."

AI BEST PRACTICES & DON'TS

AI Professional Use Guidelines

DO:

Always review AI-generated work before using it
Fact-check legal/compliance-related information
Use AI as a first draft assistant—not final authority
Continue refining prompts for better results
Update your AI instructions as office needs evolve

DON'T:

Copy/paste AI output without review
Assume AI understands your municipality automatically
Enter confidential/sensitive information into public AI tools
Expect perfect answers without training/context
Rely on AI to replace professional judgment

Remember: AI Supports You. It Does Not Replace You

Municipal clerks remain responsible for:

- Accuracy
- Compliance
- Legal adherence
- Final approvals
- Public trust

AI is simply a tool to help you work faster and more efficiently.



518-483-0055