

A full Local S&T workshop will be held at the Regional Training Seminar (RTS). The S&T track is four days long and concludes on Friday. Each Local Treasurer will have a one-on-one local evaluation session with one of the trainers on the last day of the session. If possible, S&Ts should plan for departure after 5 p.m.

S&Ts to do before arrival: Upload your current WinStabs data to TD Connect by Tuesday of the week prior to the workshop.

- Current WinStabs data
- Laptop computer
- last 6 months of meeting minutes and bills of allowance records for those meetings
- LCA procedure records – if they've been created
- Payroll schedules for each carrier you work with
- Last 6 months of bank statements with check images
- EFTPS payment history
- State/Municipal tax information and records

S&Ts to bring to the workshop:

S&T Agenda*

(The training schedule may change based on the needs of participants.)

- Monday: Registration/Evening Reception
- Tuesday, Training Day 1: Role of Local Officers in Business Operations, Local Meeting Basics, Reporting & Record Keeping
- Wednesday, Training Day 2: Disbursements, WinStabs, Excel, Fund Accounting & Budgeting
- Thursday, Training Day 3: Mock Meeting, Payroll Taxes, TD Connect, eBill, and Variances
- Friday, Training Day 4: Member Records, Managing Payroll, One-on-One Local Evaluation

*If travel plans prohibit you from staying for the full duration of the S&T track, please let us know so we can work to accommodate you.

Questions about Local S&T training can be directed to Local Support Department Supervisor Katy Andrijowych at kandrijowych@smart-union.org