



The Hub of the Wheel: Clerks Keep Government Running Smoothly

Carolyn Lloyd

Who are the clerks, and what are their needs? That was my first thought when asked several years ago to present a workshop on interpersonal communication to the Institute of Government's clerks' school. Answering those questions has led me from the shores of Nags Head to the mountains of Boone. What I discovered was a group of people totally dedicated to serving the governmental entity and citizens for whom they work.

The position of clerk is one of the oldest in government, dating back to prebiblical times. During the Middle Ages, the term *clerk* (a cleric or clergyman) became synonymous with *scholar* because clerks were among the few people in their community who could read and write. The clerk tied the past to the present by keeping the records of what happened.

Since then the position has gone through a major evolution, which has accelerated greatly in the last ten to fifteen years mainly because of the formation of professional organizations that have promoted education to meet the specific needs of clerks. These organizations also have provided networking opportunities to facilitate the exchange of ideas and techniques and have strengthened clerks' influence in matters that directly affect their position. The North Carolina Association of Municipal Clerks

and the North Carolina Association of County Clerks to the Boards of County Commissioners have become two of the most active organizations of public officials in the state. As a result of this influence, the role of clerk has become more complex, requiring that the present-day clerk be a professional administrator.

In order to understand this complex position better, I talked with a number of clerks, both individually and in groups, and gathered information through a questionnaire sent to more than 500 clerks in North Carolina. I found that no one job description can be written to fit the position. The diversity of responsibilities and the uniqueness of each position are due, at least in part, to the wide variation in size of the communities—from less than 500 to just under 500,000 citizens. Cities and counties also vary in their organization, and the clerk's duties reflect these differences. All clerks work for their governing boards, but some clerks also are accountable to a city or county manager. In some areas of the state the clerk's position is a part-time or even a volunteer position. In many small counties and towns it may be combined with one or more other positions, such as finance officer, manager or assistant to the manager, register of deeds, or tax collector. In larger cities and counties, in contrast, the clerk's position is basically an administrative one, supervising a staff that takes and prepares the minutes of council and board meetings, prepares the agenda, and keeps the historical records of the government.

The author is a private consultant with CADRE Associates, Inc. in Chapel Hill and specializes in interpersonal and presentational communication. Photographs by Carolyn Lloyd.

For a more in-depth look at the differences and similarities, I asked four clerks to share their knowledge and perceptions of their particular positions: Cathleen Small of Watauga County, Norma Bodsford of Guilford County, Nonnie Maness of Biscoe, and Jean Bailey of Rocky Mount. Three of these clerks are natives of the county or city they represent. Their educational backgrounds include high school, business school, and community college plus the experiential learning that results from working in a particular position for many years. Each has served between six and eleven years.

I selected clerks who would represent both cities and counties as well as communities that vary in



Jean Bailey locates information for a citizen in a minutes book for a previous year.

size: Watauga County with a population of 35,000; Guilford County with 315,000; Biscoe with 1,516; and Rocky Mount with 50,000. Three of the four communities have a city or county manager form of government. In Rocky Mount and in Watauga and Guilford counties, the council or board is the chief administrative and policy-making body, and the manager is responsible for day-to-day administration. Biscoe is governed solely by a mayor and board of commissioners. The clerks in the two city governments are accountable only to the mayor and the council, but in the two counties, they answer to the county manager as well as the board of commissioners. The number of people employed in the service

of government varies from fourteen in Biscoe to 2,032 full-time employees in Guilford County.

All of the clerks I interviewed displayed a keen interest in and an extraordinary knowledge about their particular governments as well as their own positions. Though they had different backgrounds, education, and experiences, they shared a sense of responsibility for the smooth running of their governments, which extended beyond their assigned duties.

One important aspect of the position of clerk is the central role the clerk plays in the governmental communication network. Many clerks describe themselves as being the funnel through which much of the communication is sent from department heads, citizens, employees, and others to the manager and council or board. Do you feel you are the "hub of the wheel" in your government? Who do you communicate with, and how often do you communicate with them?

Bodsford: Your description of a clerk as the hub of the wheel is much the way I think of my position here. The clerk is the hub and serves as one of the major sources of information on board actions. I communicate daily with the commissioners, the county manager, and the county attorney. I interact frequently with the planning director, other department heads, other government employees, and the press. The clerk also serves as a link between citizens and government. One of my primary functions is to provide information.

Bailey: Basically my office is an information office. I am in the center of things because as clerk I am usually more accessible than the mayor, council members, and other city officials. I have immediate access to information because I am on the front line in the city council meetings. I communicate daily with the mayor, the city manager, and various department heads, depending on what is going on. My office has quite a bit of contact with the newspapers, and we get anywhere from fifteen to twenty calls a day from the general public.

Although clerks' duties vary across the state, the clerks' organizations have stressed the need for all clerks to perceive their role as a professional. What

does this mean to you? Do you see yourself as a professional, and what steps have you personally taken to develop professionally?

Small: Being a professional means to contribute to the smooth running of the county, to know your board, and to be able to deal with the public in a businesslike but caring manner. I take seminars on different subjects to become more knowledgeable about the workings of the laws and the general information needed on issues facing the board.

Bailey: I see professionals in any field as being people who are aware and knowledgeable of what their responsibilities are and confident in what they are doing. They keep up-to-date on all the changes and modern techniques that affect their position. In order to develop professionally, I joined both the North Carolina Association of Municipal Clerks and the International Institute of Municipal Clerks, and I have earned both my Certified Municipal Clerk and Academy for Advanced Education certificates.

What role do the clerks' organizations and other clerks play in the development of professionalism?

Bailey: Both of these elements have been very important to me in my development as a city clerk. I have found that the most valuable resource I have is a fellow clerk. Each clerk possesses a wealth of information and is always willing to share. To build on this, the North Carolina Association of Municipal Clerks is formalizing this networking process through a mentoring program called WSOS (We Share Our Services). Each new clerk who wishes to participate will be assigned an experienced clerk who will serve as mentor and be on call for that clerk until he or she becomes comfortable with the job. I have sought and received this kind of help on an informal basis over the years, and this has contributed greatly to my development as a professional. The clerks' organizations facilitate this networking and provide many opportunities for professional development through education that is tailored to meet clerks' specific needs. The Certified Municipal Clerk and Academy for Advanced Education certificates are granted to clerks meeting specified educational and experiential requirements.

Each clerk's job description evolves out of the needs and wants of a particular governmental entity, and no standardized job description has been developed for this position throughout the state. Would you describe in detail what it is that clerks do? Could you describe an average day—what routine tasks are you expected to perform, and what tasks of an unexpected nature might come up?

Maness: I don't have an average day. That's one thing that makes the job interesting—every day is different. I think I spend about 25 percent of my time on clerk duties. I have three titles and many other responsibilities. Besides the position of town



Deputy Clerk Janice Wooten observes Nonnie Maness as she advises Billing Clerk Pamela Hurley (seated) on a water-billing question.

clerk, I hold the positions of tax collector and finance officer. I am a registered commissioner for the Montgomery County Board of Elections, a notary public, and unofficially the personnel officer. As the town clerk, I record the minutes for all the board meetings, prepare the agendas for those meetings with the mayor, mail out packets of all material related to the agenda to the commissioners, handle the maintenance of the records, attend meetings as clerk or as representative for the mayor, and confer with the town attorney.

Bodsford: It is hard to explain an average day. For a clerk, many days start before 8:00 A.M. and go well after 5:00 P.M. You do whatever is necessary.

The major task of clerk is to take full and accurate minutes of each board meeting, and with the taking of minutes come many other related jobs. My office prepares an agenda before board meetings, takes and indexes the minutes, corresponds with department heads and people who need information about a board action, and keeps boards' and commissions' records. I am also responsible for supervising the work of the deputy clerk. Many days the unexpected is the norm when you work with the commissioners or a manager. You never know what that day may bring. After an election when new commissioners come on the board, I assist with their orientation by providing them information on county



Norma Bodsford (right) reviews the agenda for the upcoming meeting with Commissioner Dot Kearns.

government. The clerk must be aware of the political nuances and take care in how he or she handles certain issues.

One of your mandated duties is your work related to the council or board meetings. To give the reader some idea of just what it is that the clerk is required to do in relation to these meetings, I would like you to give an account of the various specific tasks you perform in preparation for these meetings.

Maness: We have one regular meeting a month. I start preparing the agenda on the Tuesday before the board meeting on the following Monday. I finalize

the agenda with the mayor on Wednesday afternoon and mail copies of it to the commissioners on Thursday. On Monday the deputy clerk and I set up the room, which is used for many other functions, by arranging the chairs, placing name plates, and providing information and materials that might be needed during the meeting. On Monday night I arrive early to turn on the lights and heat and make sure everything is in its place.

Bodsford: On the average we have four board meetings a month. These are held on the first and third Mondays and the preceding Thursdays. The agenda preparation starts on Wednesday, a week before the Thursday meetings. We prepare agendas for both meetings so the commissioners can have a longer period of time to review them. The budget director receives all agenda items first because he must prepare the budget ordinances. He then brings all agenda items to me. Between Wednesday and Friday, draft agendas are prepared for review by the county manager and the chairman of the board. On Friday morning the deputy clerk and I finalize the agenda packets for delivery to the commissioners. We also mail agendas to the sunshine list (the press and people who have asked to receive copies of the agenda).

I understand that many clerks work at the "pleasure of the board." Just what does that mean, and what significance does that have for the position?

Bodsford: To serve "at the pleasure of" means that clerks are not afforded the same job protection and security as other full-time county employees. They are not protected by personnel procedures and can be removed by a majority vote of the board at any time. Clerks strive to do their job in a professional and competent manner and to remain non-political.

Bailey: As I understand this phrase, it means that a governing board can dismiss a clerk without cause, or, in other words, just because it no longer pleases them for you to be their clerk. I suppose that this came about because the clerk generally works for the governing board, which is elected, and this gives each board the option to change a clerk if they doubt the clerk's loyalty. While this could pose a problem as far as job security is con-

cerned, I do not believe it has been a real factor in North Carolina. Clerks are generally very adaptable to changing boards and make these transitions in a professional manner.

As I have talked with clerks over the last few years, they have discussed the ever-changing role they play in government. As your community's population increases and as technology increases the expectations of everyone, how do you see the role of clerk changing to meet the needs?

Bodsford: The work load has changed drastically. Our board now holds an average of four meetings a month; however, during the strategic planning times and budget cycles, it meets seven or eight times a month. As additional programs evolve, new committees are added, and as directions change in order to meet community needs, my duties change and expand.

Bailey: In the broad sense of the word, the responsibilities of clerks are basically what they have always been, even back to biblical times. What has changed and will change even more dramatically in the future is how we do our jobs. I think we will always be responsible for meeting the legal requirements of the council's actions, for preserving the legal and historical integrity of our governments through the creation and maintenance of the official legal records, and for managing that information. What form that will take in the future remains to be seen. I anticipate a time when we will be able to press a button and send information directly into the homes of our citizens or wherever else we need it to go. If the question is meant to ask if technology will replace the city clerk at some time in the future, no, I don't think so. The clerk gives an element of continuity to our local governments that can never be replaced by advances in technology.

Small: As the county grows, the position of clerk will become more complex. In 1977 Watauga County became a county manager type of government, and the position of clerk has been more defined since then. Before that time, someone in another position did the duties that clerks are required to do now. As the position becomes more complex, it will require someone with a higher degree of education and ability. I think one thing that is needed is to have a

course of study at the college level for people interested in becoming clerks.

What do you mean by "course of study?" Are you talking about something different from the in-service training and education clerks get through the Institute of Government's Clerk's School?


Small: While the Institute of Government does an excellent job of educating clerks, I think a curriculum in local government could be given at a community college, with a course to address the specific needs of both city and county clerks. There are courses for new county commissioners, county



Cathleen Small discusses a board action with County Attorney Stacy C. Eggers III.

administrators, county finance directors; why not one for clerks?

Bailey: The clerk's position has gradually, but steadily, been transformed from a high-level clerical job into a professional management position, and governing boards are becoming more aware of the importance of selecting competent (educated) and qualified individuals to fill the position of clerk. This is clear from the fact that boards are beginning to look outside their area for experienced clerks to fill vacancies, and clerks are now beginning to relocate from city to city to upgrade their salary and position. Although salaries for clerks have improved somewhat, I see, or at least hope to see, great leaps



At one time, minutes such as these from Biscoe were painstakingly written by hand. Today many cities and counties use computerized systems for processing and indexing minutes.

in this area for the future. This will happen as the profession ceases to be one where a person just happens into the job and becomes one that is part of a career ladder for individuals looking for a challenging and rewarding career. For this to happen, the clerks' profession must be one that is planned for. This will only come about when and if profiles of the profession and of clerks themselves begin to appear in public administration and public management literature, so that lingering, uninformed perceptions can begin to fall away. Then advanced students in public administration will see this position as a viable step in a public administration career. When this happens, a preparatory course for clerks will be added to our public administration and management science curriculum.

I have observed that clerks tend to be very dedicated and resourceful people. They seem always to be looking for ways to meet more effectively and efficiently the needs of their government and the people who run it. What are some of the needs you have seen, and how did you meet them?

Bodsford: Two innovations that I have been responsible for are the talent bank list and the summary of board actions. We have approximately

twenty five boards and commissions. People who are interested in serving on a board or commission fill out and submit an application indicating their interest. We place their names, geographic location, race, district, and special interests on our talent bank list, which is kept on computer. When a vacancy occurs on a particular board or commission, we refer to this list. The summary of board actions is a summary of all the board actions taken during a board meeting. Typically it can take days or weeks for the official minutes of the meeting to be finalized for distribution. Through the summary, we get a brief synopsis of the board's actions out to department heads and others the day after the meeting, so that they can be informed on decisions that pertain to their jobs.

Bailey: I constantly look for ways to present a more comprehensive agenda package to city council members to make their job easier, and I have made changes several times to accomplish this goal. I changed the format of the minutes to make information retrieval easier. I developed a cover sheet for the agenda that the public receives when they attend a city council meeting, to inform them of procedures and how they might participate in the meeting. I also developed an "Action Agenda" that is sent to department heads (now electronically) the morning after a city council meeting, advising them of actions taken by the council on the various agenda items to eliminate the necessity of a call or memo.

One of the concerns that I have heard expressed by most clerks is that even though they play a central role in their governments, few people outside their office know who they are or what they do. I see this article as an opportunity for clerks to educate people about their position. Therefore, what message would you as a representative of all clerks like to send to the readers of Popular Government?

Maness: When people come to the Town Hall, usually it is because they must come—because government can sometimes be intrusive in people's lives. I would like citizens to know that the clerk's office is a place they can come to for assistance. They might not always like the answers, but at least this is a place to get an answer for a lot of things. I

Facts about North Carolina's Clerks

North Carolina's 100 counties and its approximately 486 municipalities are all required by law to have a clerk.¹ About 82.5 percent of city clerks are women, while about 17.5 percent are men.² As of late 1989, seventy-two county clerks to the boards of commissioners were women, while twenty-eight were men.

More than three fifths of municipal clerks on the Institute of Government's mailing roster hold one or more job titles in addition to that of clerk. The most common additional positions listed are tax collector (nearly 41 percent of clerks) and finance officer (nearly 38 percent of clerks). About 13 percent of municipal clerks are also purchasing agents, more than 8 percent are personnel directors, more than 7 percent are managers, and more than 1 percent are assistant managers. Occasionally, the clerk may also be a planning director, community development director, or governing board member. (The city clerks' mailing list does not report such additional job titles as administrative assistant.)

About two thirds of county clerks to boards of commissioners hold the primary title of clerk, clerk/administrative assistant, clerk/assistant to the manager, or a similar designation. In the other one third of the counties, a variety of situations exist. Sixteen clerks to the board are also county manag-

ers, three are assistant managers, three are county attorneys, and seven are finance officers. (Some of these persons also hold other positions besides clerk and the one listed.) Occasionally, county clerks are also registers of deeds or tax administrators. At least one clerk is also county information officer.

Many counties and municipalities have assistant or deputy clerks who assist the clerk in performing his or her duties. In some cases where the clerk holds an additional position or positions, the assistant clerk may be very heavily involved in the day-to-day responsibilities of minutes taking, notice giving, or record keeping.—*A. Fleming Bell, II*

Notes

1. N.C. Gen. Stat. §§ 153A-111 and 160A-171.

2. The data presented here were compiled primarily from the N.C. Association of County Commissioners' *1990 Directory of North Carolina County Officials* (Raleigh, N.C.: 1990) and from a roster of city clerks maintained by the Institute of Government and comprehensively updated in 1988. Some information about county clerks' job titles also was obtained from the roster of the 1990 Annual City and County Clerks' School, held January 24-26, 1990, at the Institute of Government, and from the Institute's roster of county clerks, which was comprehensively updated in 1989.

would also like the general public to take a greater interest in the way local government works. I love my job and helping people, and I look forward to meeting the challenges of the future.

Bailey: I would like everyone to recognize that clerks have a significant role to play in making our local government work as smoothly as possible. I would like the general public to know that there is a city clerk in their town who can provide a very significant and important link between them and the elected officials, and that this clerk would like nothing more than to be able to be of assistance to the citizens.

Small: I would like citizens to know that the clerk is responsible for all documents that are generated by the board of commissioners (that is, the minutes, ordinance books, resolution books, and any other documents entrusted to the clerk). As a clerk, I am dedicated to performing all of my duties in a professional and businesslike manner.

Bodsford: The clerk's job is not all cut and dried. As the hub of the wheel, the clerk must be responsive to the needs of elected and appointed government officials as well as citizens. The clerk can be a link for citizens with their government and can be a very valuable resource to both. ❖