



UNC
SCHOOL OF GOVERNMENT

North Carolina Judicial College

Orientation for New Clerks of Superior Court

February 7-10, 2023

UNC School of Government, Chapel Hill, NC

Tuesday, February 7

Elected Clerks in Attendance:

Hon. Yancey Washington, Hon. Todd Tilley, Hon. Caroline Quinn, Hon. Jim Mixson, Hon. Lisa Blalock, and Hon. Ray Matusko

- 9:30 a.m. **Check In Begins**
- 10:00 a.m. **Welcome and Introduction**
Hon. Yancey Washington, Clerk of Superior Court, Granville County
Jamie Lassiter, NC Conference of Clerks of Superior Court, Executive Director
Meredith Smith, UNC School of Government, Associate Professor of Public Law and Government
- 10:30 a.m. **An Overview of the NC Court System** [45 mins]
Jim Drennan, UNC School of Government, Adjunct and Former Albert Coates Professor of Public Law and Government
- 11:15 a.m. **Ethics and the Clerk** [45 mins]
Jim Drennan
- 12:00 p.m. *Box lunches in small groups with elected clerks in break out rooms (2500 hallway)*
- 1:00 p.m. **Criminal Matters** [45 mins]
Jim Drennan
Hon. Todd Tilley, Clerk of Superior Court, Perquimans County
- 1:45 p.m. **Civil Matters** [45 mins]
Nicole Brinkley, NC Administrative Office of the Courts, Assistant Legal Counsel
- 2:30 p.m. *Break*
- 2:45 p.m. **Creating an Effective Clerk's Office** [165 mins]
Willow Jacobson, UNC School of Government, Robert W. Bradshaw Jr. Distinguished Professor of Public Administration and Government
- 5:00 p.m. *Adjourn*
- 5:30 p.m. **Group Dinner: NoDa Brewing Company Tapas**
1118 Environ Way, Chapel Hill

Wednesday, February 8

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| 9:00 a.m. | What is in an E file? Lisa Smith, NC Administrative Office of the Courts, Procedural Help Desk Specialist | [30 mins] |
| 9:30 a.m. | Probate of a Will Meredith Smith Hon. Dana Hackney, Clerk of Superior Court, Chatham County | [75 mins] |
| 10:45 am | <i>Break</i> | |
| 10:55 a.m. | An Introduction to Intestate Succession Meredith Smith | [65 mins] |
| 12:00 p.m. | <i>Lunch</i> | |
| 12:45 p.m. | Opening the Estate, Qualification of the PR, and Bond Matt Kraus, NC Administrative Office of the Courts, Assistant Legal Counsel Lisa Smith | [75 mins] |
| 2:00 p.m. | <i>Break</i> | |
| 2:15 p.m. | Introduction to Inventories and Accounts Matt Kraus Hon. John Deaton, Clerk of Superior Court, Montgomery County | [75 mins] |
| 3:30 p.m. | <i>Break</i> | |
| 3:45 p.m. | Small Estate Administration Lisa Smith | [90 mins] |
| 5:15 p.m. | <i>Adjourn</i> | |

Thursday, February 9

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| 9:00 a.m. | What is a Special Proceeding? Nicole Brinkley | [45 mins] |
| 9:45 a.m. | <i>Break</i> | |
| 10:00 a.m. | Adoption and Legitimation Sara DePasquale, UNC School of Government, Albert and Gladys Hall Coates Distinguished Term Associate Professor of Public Law and Government | [120 mins] |
| 12:00 p.m. | <i>Lunch</i> | |
| 1:00 p.m. | Power of Sale Foreclosure Nicole Brinkley Hon. Tonya Leggett, Clerk of Superior Court, Martin County | [90 mins] |
| 2:30 p.m. | <i>Break</i> | |
| 2:45 p.m. | Judicial Decision-Making, Discretion, and Entering an Order Jim Drennan | [120 mins] |
| 4:45 p.m. | <i>Adjourn</i> | |

Friday, February 10

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| 9:00 a.m. | Estate Proceedings, Power of Attorney Proceedings, and Trust Proceedings Meredith Smith Hon. Yancey Washington | [75 mins] |
| 10:15 a.m. | <i>Break</i> | |
| 10:30 a.m. | Legal Advice vs. Legal Information Cheryl Howell, UNC School of Government, Albert Coates Professor of Public Law and Government | [45 mins] |
| 11:15 a.m. | Public Records and the Clerk Devon Barnhardt, NC Administrative Office of the Courts, Assistant Legal Counsel | [45 mins] |
| 12:00 p.m. | <i>Lunch</i> | |
| 12:45 p.m. | Incompetency and Guardianship Proceedings Meredith Smith Hon. Michelle Ball, Clerk of Superior Court, Johnston County | [120 mins] |
| 2:45 p.m. | Preparing to Step Back into the Office + Recap of Available Resources Meredith Smith | [15 mins] |
| 3:00 p.m. | Adjourn | |

CLE: **23.75** hours of general CLE credit (tentative)

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North Carolina Administrative Office of the Courts
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