

**2018 Annual New Clerks Institute and Master Clerks Academies
For City and County Clerks
Sheraton Imperial Hotel and Convention Center, Research Triangle Park, North Carolina
UNC School of Government**

**Master Clerks Academy II
Thursday, January 18, 2018**

Agenda

- 7:45 a.m. **Registration & Deluxe Continental Breakfast (Breakfast is located outside Imperial Rooms I&2)**
- 8:45 **Welcome and Course Overview
(Imperial Rooms 1&2&3)**
Trey Allen, Assistant Professor of Public Law and Government, UNC School of Government
- 9:00 **Monuments on Public Property: Legal and Practical Issues
(Imperial Rooms 1&2&3)**
Adam Lovelady, Assistant Professor of Public Law and Government, UNC School of Government
Across the country communities are debating the appropriate place for Confederate monuments. In North Carolina, recent legislation limits the authority for local governments to remove “objects of remembrance.” This session will introduce the statutory limits on moving statues, highlight the unanswered questions of the law, and explore practical implications for local governments.
- 10:00 **Prayer at Local Government Meetings
(Imperial Rooms 1&2&3)**
Frayda S. Bluestein, David M. Lawrence Distinguished Professor of Public Law and Government, UNC School of Government
This session will review the evolving jurisprudence regarding prayer at local government meeting, including the recent Fourth Circuit Court of Appeals decision in the Rowan County North Carolina case. Discussion will include the prayer cases in the context of Establishment Clause and First Amendment Free Speech cases, and review current practices in North Carolina cities and counties.
- 10:45 **Break**
- 11:15 **State Firearms Laws and Limits on Local Authority over Firearms
(Imperial Rooms 1&2&3)**
Jeff Welty, Associate Professor of Public Law and Government and Director, North Carolina Judicial College, UNC School of Government
Concerns about gun violence have prompted some local governments in North Carolina to consider imposing restrictions on the carrying or use of firearms. It is important for a local government that is weighing such action to understand relevant features of the state’s firearms laws. This session will examine statutory

provisions that govern the carrying of firearms in public, as well as provisions that circumscribe the authority of local governments to adopt and enforce firearms-related restrictions.

- 12:15 p.m. **Lunch (Imperial Rooms 4&5)**
- 1:15 **Citizen Academies: Making Them Work for You and Your Citizens**
Pamela O. Casey, City Clerk, City of Rocky Mount
By educating people about the roles and challenges of local government, citizen academies have the potential to transform participants' attitudes about their cities and counties. The academies can also increase interest in serving on appointed boards and commissions. This session will examine what it takes to make a citizen academy a success.
- 2:15 **Break**
- 2:45-4:00 **Answers to Recurring Procedural Problems**
Trey Allen, Assistant Professor of Public Law and Government, UNC School of Government
This session will address procedural issues that tend to tie local governing boards – and sometimes their clerks – in knots. It will also highlight key features of the new Suggested Rules of Procedure for a City Council and Suggested Rules of Procedure for the Board of County Commissioners, including important ways in which the new editions differ from prior editions.
- 4:00 **Concurrent Business Meetings**
(N.C. Association of Municipal Clerks: Imperial Rooms 1&2&3)
(N.C. Association of County Clerks: Imperial Rooms 6&7)
- 5:00 **Academy II Adjourns for the Day**

Master Clerks Academy II (continued)

Friday, January 19, 2018

Agenda

- 7:45 a.m. **Registration & Continental Breakfast (located outside Imperial Rooms 1&2&3)**
Time Allowed for Hotel Check Out
- 9:00 **OPEB?? What Does It Mean and Why Should We Care?**
(Imperial Rooms 1&2&3)
Greg Allison, Teaching Professor, UNC School of Government
OPEB – or Other Post-Employment Benefits – is a term that has caught the attention of governmental managers and elected officials nationwide for well over a decade. What exactly does it mean? Why do we hear that governments should be very afraid? Why are elected officials in particular concerned about

the potential budgetary implications? For governmental entities that provide post-employment benefits such as health insurance, or at least access to it, the new accounting and reporting requirements do have some significant impacts. This session will focus on defining OPEB and how cities and counties across North Carolina are addressing these potential challenges.

10:00

Break

10:30

Social Media: Insta-Snap-a-What-a? Welcome to the World of Social Media!
Shannon Tufts, Associate Professor of Law and Government, UNC School of Government

Social media has been heralded as an exciting opportunity for local governments, but it also has potential challenges and risks. This session will cover an overview of commonly used social media platforms, along with the legal, human resources, and citizen engagement opportunities and challenges related with this new medium.

12:00 p.m.

Academy II Adjourns

Master Municipal Clerks Academy II
Thursday, January 18, & Friday, January 19, 2018
Instructor Biographies

Trey Allen joined the School of Government as Assistant Professor of Public Law and Government in 2013. He researches and writes about the general regulatory powers of local governments, local government liability, and board procedures. His publications include books on board procedures and articles and book chapters on local government powers and liability defenses. Trey is also a contributor to *Coates' Canons*, the School's blog on local government law. In addition to his scholarly work, Trey plans, coordinates, and teaches in the School's programs for municipal and county clerks. He was previously an attorney at Tharrington Smith LLP in Raleigh, where he represented local school boards. Prior to that Trey served as a law clerk for Justice Paul M. Newby of the North Carolina Supreme Court and as a judge advocate in the United States Marine Corps. Trey earned a bachelor's degree from the University of North Carolina at Pembroke and a law degree from the University of North Carolina at Chapel Hill, where he was a published staff member of the *North Carolina Law Review*.

Greg Allison is a teaching professor at the School of Government, where he lectures and provides technical support in the field of governmental accounting and financial reporting. He has been on the faculty since 1997 and is director of the School's Municipal and County Administration course. He was an assistant director with the Government Finance Officers Association of the United States and Canada in Chicago, Illinois; former finance director for the City of Morganton, North Carolina; and an auditor with the international accounting firm Deloitte and Touche. He is also co-author of the 8th and 9th Revised and 10th editions of *Governmental and Nonprofit Accounting*, published by Prentice Hall. Allison was awarded the Outstanding Conference Speaker Award for both 2000 and 2001, the Outstanding Chapter Speaker Award in 2005, the Outstanding Discussion Leader Award in 2006, 2007, 2008, 2013, and 2015, the 5.0 Discussion Leader Award in 2014, and the 2014 R. Donald Farmer Award by the NC Association of Certified Public Accountants. He was awarded the Association's Outstanding Member in Government Award for 2000–2001. He was also recognized as the Albert and Gladys Hall Term Lecturer for Teaching Excellence for 2002–2004, and the Term Faculty Achievement Award for 2010–2012.

Frayda Bluestein joined the School of Government (then the Institute of Government) in 1991. From 2006 to 2017 she served as the School's associate dean for faculty development. Prior to joining the School, she worked in private law practice, focusing primarily on municipal and land use law, and for one year in the Legislative Drafting Division of the North Carolina General Assembly. Her publications include books and articles about local government structure and authority, public contracting, conflicts of interest and transparency laws. She is a frequent contributor to the School's *Coates' Canons: NC Local Government Law* blog, writing on topics including North Carolina local government authority, annexation, public records, open meetings, conflicts of interest, and First Amendment issues affecting local government. She was awarded the School of Government's two-year professorship for outstanding junior faculty achievement in 1998, the two-year professorship for teaching excellence in 2004, and the David M. Lawrence Distinguished Professorship in 2014. In 2016, Bluestein was honored with the

Grainger Barrett Award for Excellence from the Government and Public Sector Section of the North Carolina Bar Association and the Ernest H. Ball Award for Excellence in Municipal Law from the North Carolina Association of Municipal Attorneys. Bluestein earned a BA from the University of California at Berkeley and a JD from the University of California at Davis.

Pamela O. Casey is a native of Eastern North Carolina and resides in Rocky Mount. She began working in the City of Rocky Mount City Clerk's Office in 2007 as Administrative Secretary, was promoted to Assistant City Clerk in 2009 and appointed City Clerk in 2013. Prior to working for local government Pam served as a legal assistant for over twenty (20) years. She maintains her certification as a North Carolina State Bar Certified Paralegal. She has earned her certification as a municipal clerk through both the International Institute of Municipal Clerks (IIMC) and the North Carolina Association of Municipal Clerks (NCAMC). Pam currently serves as the NCAMC District 5 Director. She is a graduate of the UNC/SOG Municipal Administration class and serves on the Nash County American Red Cross Blood Services Committee.

Adam Lovelady's work at the School of Government is focused on land use law and local planning. As an Assistant Professor of Public Law and, he teaches, researches, and advises on topics of zoning, land subdivision, transportation, renewable energy, and historic preservation, and was named Albert and Gladys Hall Coates Distinguished Term Assistant Professor for 2015–2017. His publications include Land Subdivision Regulation in North Carolina (2015), regular blog posts on Coates' Canons: NC Local Government Law blog, and law journal articles on historic preservation and regional planning. His report Planning and Zoning for Solar in North Carolina (2014) earned the Margaret Taylor Writing Award in 2015. Lovelady's various research and activities have been supported by a grant from the Z. Smith Reynolds Foundation, a Junior Faculty Development Award from the UNC-Chapel Hill Committee of Faculty Research and Study Leaves, an innovation grant funded by the Local Government Federal Credit Union, and contributions from the NC League of Municipalities Risk Management Division. As part of the School's effort to provide effective instruction and positive impact, Lovelady has crafted and coordinated the Solutions Forum, a collaborative workshop that brings together local government officials from multiple jurisdictions and multiple departments to address a common challenge. Along with colleague David Owens, he has also created and authored a library of web-based training modules on zoning topics for local boards. Additionally, he serves as a Trainer for the National Alliance for Preservation Commissions, serving local preservation commissions around the US. Before joining the School of Government in 2012, Lovelady practiced law with McGuireWoods LLP in Richmond, Virginia, where he focused on land use regulation, environmental law, and sustainable development. He taught second grade in Atlanta as a part of Teach for America. He worked in historic preservation in Asheville and Shelby, NC. Lovelady earned a BA in history from Auburn University and a graduate planning degree and law degree from the University of Virginia.

Shannon Tufts designed and implemented the first local government Chief Information Officers Certification program in the nation and continues to run CIO certification programs for local and state government IT professionals. She created a National Certified Government Chief Information Officer program in 2007, in order to serve the growing needs of public sector IT professionals across the nation.

Tufts has taught numerous courses on public sector information systems across the United States, including IT investment strategies, embracing technology, project management, and stakeholder engagement in technology-enabled government. She serves on several federal, state, and local government committees to promote the effective use of technology in the public sector. Her publications in the area of e-government and public sector information technology include *Humanizing IT: Advice from the Experts* with G. David Garson, numerous book chapters, and articles in *Social Sciences Computer Review* and *Popular Government*. She was named Albert and Gladys Coates Distinguished Term Assistant Professor for 2012–2014. Tufts earned a BA from UNC-Chapel Hill, an MPA from UNC-Charlotte, and a PhD in public administration with a concentration in public sector information systems from North Carolina State University.

Jeff Welty joined the School of Government in 2008 and works in the area of criminal law and procedure. His research interests include search and seizure, digital evidence, criminal pleadings, capital punishment, and firearms law. He serves as the director of the North Carolina Judicial College, which provides training and education to the state's judicial officials. Welty founded and contributes regularly to the *North Carolina Criminal Law Blog*, an award-winning resource visited by approximately 100,000 users each month. He has written for, appeared on, or been quoted in the *New York Times*, the *Washington Post*, *Newsweek*, *National Public Radio*, *Bloomberg News*, *Lawyers' Weekly*, the *Raleigh News and Observer*, and many other media outlets. His books about capital punishment and digital evidence are widely-used legal references. Welty completed a federal judicial clerkship and worked in private practice before coming to the School. Welty earned a JD at Duke University School of Law, where he served as executive editor of the *Duke Law Journal* and graduated in 1999 with highest honors.

Credit for Successful Completion of Institute and Academies

The School of Government of The University of North Carolina at Chapel Hill is the International Institute of Municipal Clerks' recognized provider of city and county clerks' educational programming in North Carolina. The School's Clerks Institutes and Academies may be used for credit towards the IIMC's designations of Certified Municipal Clerk (CMC) and Master Municipal Clerk (MMC).

The School also works cooperatively with the North Carolina Association of County Clerks and the North Carolina Association of Municipal Clerks to provide programs that earn credit under their respective state certification programs.

The School awards points for successfully completing the 2018 New Clerks Institute, Master Clerks Academy I, and Master Clerks Academy II. **Points are awarded separately for the Institute and for each Academy. To receive credit for the Institute or for an Academy, the student must attend all sessions as shown by the School's electronic attendance monitoring system and must complete and submit an on-line evaluation form for that event.**

No partial credit can be awarded.

Amounts of Credit Awarded

1. Persons successfully completing the New Clerks Institute will receive 2.75 CMC points (5.5 hours).
2. Persons successfully completing Master Clerks Academy I will receive 3.0 CMC/MMC points (6.0 hours).
3. Persons successfully completing Master Clerks Academy II will receive 3.75 CMC/MMC points (7.5 hours)
4. The amount of credit awarded by the NC Association of Municipal Clerks and NC Association of County Clerks in their respective state certification programs is decided by each association in accordance with its own rules. Generally, the amount of credit allowed is based on the number of classroom hours attended.