

**2019 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, November 14, 2019**

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, Associate Professor of Public Law and Government, UNC School of Government
- 9:00 **Population Estimates, The Census, and You!
(Imperial Rooms 1&2&3)**
Michael E. Cline, State Demographer, Demographic and Economic Analysis Section, NC Office of State Budget and Management
Population estimates are an important building block for planning for local government services. In addition, at least \$200 in state funds per person are distributed to local communities annually based in whole or in part on annual population estimates. Clerks play a key role in supporting the annual population estimates program by submitting information about annexations, residential building permit activity, and reporting new or expanding nursing homes, children's homes, and other group quarters facilities. In addition, as we prepare for the 2020 Census, clerks can play a key role in promoting the census to ensure every North Carolinian is counted in 2020. In this session you will learn about demographic trends occurring in North Carolina, the importance of the 2020 Census for your local area, and how municipal populations are estimated annually. In addition, you will learn how to prepare and submit information to the North Carolina Demographic Survey system.
- 10:00 **Chapter 160D: A New Land Use Law for North Carolina
(Imperial Rooms 1&2&3)**
Adam Lovelady, Associate Professor of Public Law and Government, UNC School of Government
Enacted earlier this year by the General Assembly, Chapter 160D of the General Statutes consolidates the prior city- and county- enabling authority for development regulation and implements a range of consensus clarifications and reforms. The changes will require updates to all local government development regulations before Chapter 160D takes effect on January 1, 2021. This session will provide an overview of the changes and outline additional resources available from the School of Government.

- 11:00 **Break**
- 11:30 **Dealing with Challenges and Changes in Records Management & Records Retention
(Imperial Rooms 1&2&3)**
Courtney Bailey & Emily Sweitzer, Records Analysis Unit, NC Department of Natural and Cultural Resources
This session will focus on the various challenges and changes in the world of records management faced by records' custodians in the state of North Carolina, including new retention schedules, the storage and preservation of electronic records, and dealing with the intricacies of public records in the social media realm.
- 12:30 p.m. **Lunch (Imperial Rooms 4&5)**
- 1:15 **Dealing with Challenges and Changes in Records Management & Records Retention (cont'd)
(Imperial Rooms 1&2&3)**
- 2:45 **Break**
- 3:15 **"Ask Trey!"
(Imperial Rooms 1&2&3)**
Trey Allen, Associate Professor of Public Law and Government, UNC School of Government
As the School of Government's faculty advisor for city and county clerks, Trey Allen receives questions on many issues of importance to clerks. This session will give clerks an opportunity to ask Trey questions on a wide range of topics, including the open meetings law; the public records law; the adoption, amending, and repeal of ordinances; meeting minutes; and public hearings.
- 4:15 **Concurrent Business Meetings
(N.C. Association of Municipal Clerks: Imperial Rooms 1&2&3)
(N.C. Association of County Clerks: Imperial Rooms 6&7)**
- 5:15 **Academy II Adjourns for the Day**

Master Clerks Academy II (continued)
Friday, November 15, 2019

Agenda

- 7:45 a.m. **Registration & Continental Breakfast (located outside Imperial Rooms 1&2&3)**
Time Allowed for Hotel Check Out
- 9:00 **Utility Fee Guide 2019**
Kara Millonzi, Albert and Gladys Hall Coates Distinguished Term Professor of Public Law and Government, UNC School of Government
This session will examine the types of fees that local governments are authorized to charge related to their water and sewer operations. It will look at common issues and review recent changes in the law. Finally, it will afford clerks an opportunity to ask questions related to their utility rate-setting and fee collections.
- 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, November 14, & Friday, November 15, 2019

Instructor Biographies

Trey Allen joined the School of Government in 2013. He researches and writes about the general regulatory and enforcement powers of local governments, local government liability, and board procedures. He also teaches and advises extensively on those topics. Allen has authored books, book chapters, and articles on issues involving his subject areas, and he contributes to the School's blog *Coates' Canons: NC Local Government Law*. In 2019 he received the Margaret Taylor Writing Award for his book *Local Government Immunity to Lawsuits in North Carolina*. On the programming side, Allen plays a major role in planning and coordinating the School's many educational offerings for clerks to municipal and county governing boards. Annually these programs include the Clerks Certification Institute, the New Clerks Institute, a three-day academy for experienced clerks, educational sessions for conferences of the NC Association of Municipal Clerks and NC Association of County Clerks, and several regional academies conducted around the State in cooperation with the NCAMC and NCACC. Allen previously worked as an attorney at Tharrington Smith LLP in Raleigh, where he represented local school boards. Prior to that he 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. Allen 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*.

Dr. Michael (Mike) Cline is the State Demographer of North Carolina and annually produces the official population estimates for the state, counties and municipalities. In addition, he prepares twenty-year population projections for counties and the state; advises state agencies and the Governor's office regarding the implications of demographic change; and supports census related activities. Mike moved to North Carolina in April 2017 after a long career in Texas – including a stint working within the Office of the State Demographer of Texas and, most recently, as the Associated Director of the Hobby Center for the Study of Texas at Rice University. A native of the small west Texas town of Snyder, his professional work in demography began soon after the 1990 Census when he helped three rural counties redraw county commissioner court boundaries. Since then, he has provided demographic research in support of business, non-profit and government decision making. Dr. Cline has authored or co-authored several books, book chapters and articles, including: *Population Change in the United States: Socioeconomic Challenges and Opportunities in the Twenty-First Century* and *Changing Texas: Implications of Addressing or Ignoring the Texas Challenge*. Dr. Cline earned his Ph.D. in Demography from the University of Texas at San Antonio, his M.A. in Geography from Kansas State University and his B.A. in Geography from Texas Tech University.

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.

Kara Millonzi joined the School of Government in 2006. She attained the rank of full professor in July 2017, and was awarded the Albert and Gladys Hall Coates Distinguished Term Professorship in September 2017. She specializes in local government finance law, general county law, and incorporation. She administers the Coates' Canons Local Government Law Blog, and has authored well over 100 posts on issues related to local government law and finance. Millonzi also administers NC Finance Connect, an online community portal, centered around the topic of local government finance. She has authored numerous publications, including *A Guide to Billing and Collecting Public Enterprise Utility Fees for Water, Wastewater, and Solid Waste Services*, *Introduction to Local Government Finance* (3d. edition), and *The Governance and Funding Structure of North Carolina Public Schools*. She teaches several core finance courses and directs the NC County Attorneys Conference and Fundamentals Workshop and Local Government Finance Officers Conference each year. Before joining the School, Millonzi practiced law with Testa, Hurwitz & Thibault, LLP in Boston and clerked for the Honorable Louis F. Oberdorfer, United States District Court for the District of Columbia. She is a member of the North Carolina State Bar and the Bar of the Commonwealth of Massachusetts. Millonzi earned a BA in economics, *summa cum laude*, Phi Beta Kappa, from the University at Buffalo and an MA in economics from the University of Maryland at College Park. She earned a JD, with highest honors, Order of the Coif, from the University of North Carolina at Chapel Hill, where she served as editor in chief of the *North Carolina Law Review*.

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.

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 2019 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 3.0 CMC points (6.0 hours).**
- 2. Persons successfully completing Master Clerks Academy I will receive 3.5 CMC/MMC points (7.0 hours).**
- 3. Persons successfully completing Master Clerks Academy II will receive 4.0 CMC/MMC points (8.0 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.**