

2019 Annual New Clerks Institute
Sheraton Imperial Hotel and Convention Center, Research Triangle Park, North Carolina
UNC School of Government

Wednesday, November 13, 2019

Agenda

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| 7:30 a.m. | Registration Opens |
| 7:45 | Sit-Down Breakfast for Everyone Honoring New Clerks
(Imperial Rooms 4&5)
Hosted by City and County Clerks Association Presidents, Officers, and Program Committees |
| 9:00 | Welcome and Course Overview
(Auditorium)
Trey Allen , Associate Professor of Public Law and Government, UNC School of Government
Amy Miller , President, NC Association of Municipal Clerks
Jason Robinson , President, NC Association of County Clerks |
| 9:15 | Laws That Affect the Clerk
(Auditorium)
Trey Allen
<i>This session will provide an overview of important laws with which all clerks must be familiar, including the open meetings law, the public records law, laws regarding the administration and filing of oaths of office, legal restrictions on multiple office holding, and various statutory public notice requirements.</i> |
| 10:30 | Break |
| 10:45 | Laws That Affect the Clerk (cont'd) |
| 12:15 p.m. | Lunch (Imperial Rooms 4&5) |
| 1:15 | The Ins & Outs of Minutes & Agendas
(Auditorium)
Trey Allen
<i>Taking minutes and preparing agendas are two of a clerk's most significant professional responsibilities. This session will cover best practices and common pitfalls involving those tasks.</i> |
| 2:30 | Break |
| 2:45 | How Governing Boards Do Their Work |

(Municipal Clerks: Auditorium)

(County Clerks: Bull Durham Room)

John M. Phelps II, General Counsel, N.C. League of Municipalities

Trey Allen

This session will familiarize clerks with some of the procedural rules local governing boards follow in doing their work.

4:15

**Orientation for New Clerks: An Introduction to the Clerks' Profession
(Auditorium)**

Amy Miller, President, NC Association of Municipal Clerks

Jason Robinson, President, NC Association of County Clerks

The leaders of our State's two clerks associations will share their insights regarding the role of the clerk and highlight important "dos" and "don'ts."

4:45

Institute Adjourns

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Instructor Biographies

Trey Allen is Associate Professor of Public Law and Government at the UNC School of Government, where he researches and writes about the general regulatory and enforcement powers of local governments, local government liability, and board procedures. Trey also teaches and advises extensively on those topics. Trey has authored books, book chapters, and articles on issues within his subject areas, and he contributes to the School's blog *Coates' Canons: NC Local Government Law*. In 2019 Trey received the Margaret Taylor Writing Award for his book *Local Government Immunity to Lawsuits in North Carolina*.

On the programming side, Trey 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, annual conferences for the NC Association of Municipal Clerks and NC Association of County Clerks, and several regional academies conducted around the State with the support of the NCAMC and NCACC.

Trey was previously 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. 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*.

Amy Miller is Clerk for the City of Mount Holly. She also currently serves as President of the NC Association of Municipal Clerks. Amy has been designated a NC Certified Municipal Clerk by the NC Association of Municipal Clerks and a Certified Municipal Clerk by the International Institute of Municipal Clerks.

Jason Robinson is Deputy Clerk to the Board of Commissioners for Scotland County. He also currently serves as President of the NC Association of County Clerks. Jason has been designated a NC Certified County Clerk by the NC Association of County Clerks.

John M. Phelps II has been on the staff of the League of Municipalities since 1995 and is now in the League's General Counsel. Prior to joining the League he was in private law practice in Lillington for 11 years where he served as local counsel for the County of Harnett public utility enterprises. He also spent 2 years as vice president for public finance with J. Lee Peeler and Company in Durham where he specialized in financing local government projects. John is a native of Harnett County and received his undergraduate degree from Campbell University and his law degree from Campbell University School of Law. As a key member of the League's legal inquiry service, John has worked closely with many clerks and other municipal officials throughout the state. He has presented educational sessions at NCAMC regional schools and annual conferences and has been the League's liaison to the Association since 2010.

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.**