

**2020 Master Clerks Online Academy
For Municipal and County Clerks
UNC School of Government**

Agenda

Thursday, November 19, 2020

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| 8:45 a.m. | Welcome and Course Overview
Trey Allen , Associate Professor of Public Law and Government, UNC School of Government |
| 9:00 | Lessons Learned from COVID-19: How to Survive and Thrive in Uncertain Times
Peg Carlson , Professor of the Practice in Public Leadership and Organizational Development and Director, Center for Public Leadership and Governance, UNC School of Government
<i>Adapting to the COVID-19 environment has placed tremendous strains on clerks, many of whom have struggled to satisfy both professional and personal obligations while abiding by state and local emergency restrictions. This session will provide clerks with an opportunity to 1) share what they have learned about their work and themselves during the COVID-19 emergency, and 2) explore how these lessons can better prepare them and their organizations to face future challenges.</i> |
| 11:00 | Break |
| 11:15 | Legal Considerations for Local Government Purchasing and Contracting in 2020
Connor H. Crews , Assistant Professor of Public Law and Government, UNC School of Government
<i>This session will examine purchasing and contracting issues relevant to clerks during the COVID-19 emergency. Topics may include the treatment of electronic signatures and records under North Carolina law, the use of digital advertising and forms in the bidding and surplus property disposal processes, and certain legislative amendments that affect voting for some local government boards.</i> |
| 12:15 p.m. | Break |
| 1:00 | Local Government Authority to Regulate Public Protests
Frayda S. Bluestein , David M. Lawrence Distinguished Professor of Public Law and Government, UNC School of Government
<i>Over the past several months municipalities and counties around the State have had to cope with public protests of race-related matters and COVID-19 emergency measures. This session will examine the extent to which local governments may lawfully regulate public protests by, among other things, requiring permits and controlling protest locations and times.</i> |
| 2:00 | Break |

- 2:15 **Notarization During the COVID-19 Emergency: Recent Changes to the Law**
Charles A. Szypszak, Albert Coates Distinguished Professor of Public Law and Government, UNC School of Government
Earlier this year the General Assembly made a number of significant changes to notary public laws in response to the COVID-19 emergency. This session will bring clerks – many of whom are notaries – up to speed on those changes.
- 3:15 Break
- 3:30 **Concurrent Business Meetings**
(N.C. Association of Municipal Clerks)
(N.C. Association of County Clerks)
- 4:30 **Adjournment for the Day**

Friday, November 20, 2020

- 8:45 a.m. **Announcements**
- 9:00 **Remote Meetings: Legal Rules and Practical Aspects**
Trey Allen
COVID-19 has made remote meetings a routine occurrence for local government boards, some of which hadn't previously met by electronic means. This development has led to uncertainty about the measures boards should take to comply with the open meetings law and to hold public comment periods and public hearings during remote meetings. Legislation adopted by the General Assembly earlier this year provides substantial guidance, but its application is limited in important respects. This session will explain the law pertinent to remote meetings and consider some of the practical challenges involved in conducting such meetings.
- 10:30 **Break**
- 10:45 **Orienting New Elected Board Members: Best Practices**
Pamela O. Casey, City Clerk for Rocky Mount and Chair, Program & Education Committee, NC Association of Municipal Clerks
Trisha Hogan, Clerk to the Transylvania County Board of Commissioners and Vice President, NC Association of County Clerks
Lindsay K. Ray, Clerk to the Chatham County Board of Commissioners and Treasurer, NC Association of County Clerks
Melody Shuler, Town Clerk for Town of Waxhaw and President, NC Association of Municipal Clerks
Municipal and county clerks can – and are often expected to – do a great deal to prepare newly elected governing board members for their important responsibilities. Following a brief review of organizational meeting legal requirements, a panel of veteran clerks will draw on their experiences to recommend best practices for orienting new governing board members.
- 12:15 p.m. **Academy Adjourns**

Master Municipal Clerks Academy
Thursday, November 19, & Friday, November 20, 2020

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*.

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.

Peg Carlson is director of the School of Government's Center for Public Leadership and Governance, a new initiative designed to integrate, coordinate, and expand the School's leadership, governance, and management programs and scholarship. Carlson rejoined the School of Government in September 2015, after serving on the faculty from 1992–2000. Prior to her return to the School, she was an executive consultant with Roger Schwarz & Associates and worked with a wide variety of public, private, and

nonprofit organizations as a facilitator, trainer, coach, and consultant to help them build effective leadership teams. She has published articles on developing effective groups, assessing the chief executive's performance, and multi-rater feedback and is co-author of *The Skilled Facilitator Fieldbook: Tips, Tools, and Tested Methods for Consultants, Facilitators, Managers, Trainers, and Coaches* (Jossey-Bass, 2005). Carlson received a BA in psychology from the University of Minnesota and an AM and PhD in organizational psychology from the University of Michigan.

Pamela O. Casey is City Clerk for Rocky Mount and Chair of the Program & Education Committee of the North Carolina Association of Municipal Clerks. She has been designated a Master Municipal Clerk by the International Institute of Municipal Clerks and a North Carolina Certified Municipal Clerk by the NCAMC.

Connor Crews joined the School of Government in February 2020 and his work focuses on local government contracting, procurement, and ethics. Immediately prior to joining the School, he worked as an associate at McGuireWoods LLP in Raleigh, where he served as bond counsel, borrower's counsel, and underwriter's counsel in a wide range of tax-exempt and tax-advantaged financings for public entities and nonprofit organizations. Crews received his J.D. from the University of Virginia School of Law, where he served as an Articles Editor for the *Journal of Law & Politics*. He earned a BA with highest distinction from the University of North Carolina at Chapel Hill. He is a member of the North Carolina State Bar and the District of Columbia Bar.

Trisha Hogan is Clerk to the Transylvania Board of County Commissioners and Vice President of the North Carolina Association of County Clerks. She has been designated a Certified Municipal Clerk by the International Institute of Municipal Clerks and a North Carolina Certified County Clerk by the NCACC.

Lindsay K. Ray is Clerk to the Chatham County Board of Commissioners and Treasurer of the North Carolina Association of County Clerks. She has been designated a North Carolina Certified County Clerk by the NCACC.

Melody Shuler is Town Clerk for the Town of Waxhaw and President of the North Carolina Association of Municipal Clerks. She has been designated a Master Municipal Clerk by the International Institute of Municipal Clerks and a North Carolina Certified Municipal Clerk by the NCAMC.

Charles Szypszak joined the School of Government in 2005. Prior to that, he was a director of a general practice firm in New Hampshire, where he provided counsel and advocacy for real estate and business matters. He provides counsel to state, national, and international institutions, organizations, and public officials on real property registration and conveyance laws. In the School's master of public administration program, he teaches the introduction to law course and an elective on military leadership and public service, and he teaches an introduction to legal thinking course in the University's undergraduate curriculum. He also teaches internationally, including in Poland and Lithuania, twice on a Fulbright award. He has been awarded the University's J. Carlyle Sitterson Freshman Teaching Award and the School's Albert and Gladys Hall Coates Teaching Excellence Award. He was an adjunct professor

of law at Franklin Pierce Law Center, a law clerk for Circuit Judge Hugh Bownes on the US Court of Appeals for the First Circuit and a captain in the US Marine Corps. Szypszak earned a BA from the University of Southern California, an MA from San Diego State University, and a JD from the University of Virginia School of Law.

Credit for Successful Completion of Master Clerks Academy

The International Institute of Municipal Clerks (IIMC) has designated the School of Government of The University of North Carolina at Chapel Hill as the official education provider for municipal and county clerks in North Carolina. By participating in the School's clerk-focused programs, clerks can earn credit towards the IIMC's designations of Certified Municipal Clerk (CMC) or Master Municipal Clerk (MMC). The School also works cooperatively with the North Carolina Association of Municipal Clerks (NCAMC) and North Carolina Association of County Clerks (NCACC) to offer programs through which clerks who have obtained certification through the NCAMC or NCACC can earn continuing education credit.

Clerks who have joined the IIMC and who successfully complete the 2020 Master Clerks Academy will receive four (4.0) CMC/MMC points. Clerks who have obtained certifications from the NCAMC or NCACC and who successfully complete the 2020 Master Clerks Academy will receive eight (8.0) hours of continuing education credit. **To receive points/credit, 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.**