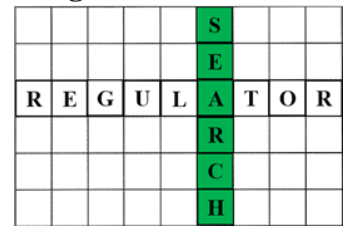




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National Survey on Local Government Cannabis Regulations and Administration

RegulatorSearch.com



Advisory Services and
Executive Search for
Local and State
Government
Cannabis Regulations

Fall 2024

It's Time We Heard from Municipal Cannabis Regulators

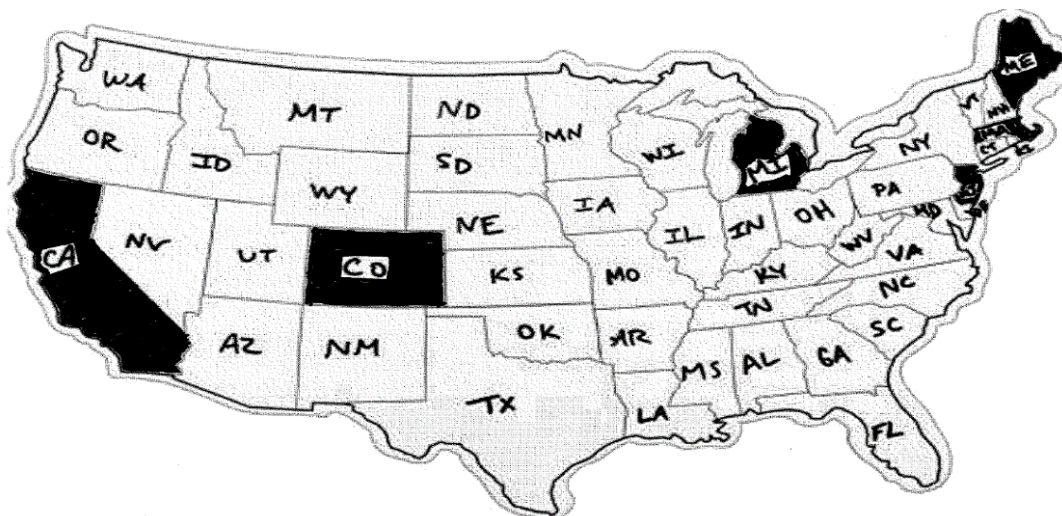
By Garland Doyle, M.P.A. and Jonathan Starks

This report represents the opinions and perspectives of municipal cannabis regulators who oversee cannabis regulations in either a borough, city, township or village in the states of California, Colorado, Maine, Massachusetts, Michigan and New Jersey. This is the second year that we have surveyed local government cannabis administrators. In 2022, we focused exclusively on the state of Michigan. The National Council on Municipal Cannabis (NCMC) in partnership with Regulatory Professional Advisory Services and Search Consultants (Regulator Search) expanded the survey to include five additional states. We plan to continue to expand the survey until it includes municipal regulators from each state that has legalized medical and/or adult-use cannabis.

The National Survey on Local Government Cannabis and Administration findings are based on survey responses from local government cannabis regulators during fall 2023 through winter 2024. Fifty-five (55) municipal regulators from six different states participated in the survey.

Key Findings

1. 78% of Municipal Cannabis Regulators have a college degree.
2. Most local government cannabis administrators have other responsibilities within their municipality.
3. Regulators value professional development.
4. Cannabis Regulators represent all kinds of geographic settings.
5. It is taking 1-4 months for most cannabis applications to be reviewed locally.
6. Many local regulators are satisfied with the guidance they receive from their state regulatory agency.



78% of Municipal Cannabis Regulators have a college degree

Municipal cannabis regulation is a relatively new profession. 37% of the survey respondents have been in their position for 2 years or less. One of the goals of the survey was to gain an understanding of who are municipal cannabis regulators. The majority of lead local regulators are male. 78% of the regulators who responded to the survey are college graduates. 32% of the regulators have a masters' degree.

Figure 1 Gender of Municipal Regulators

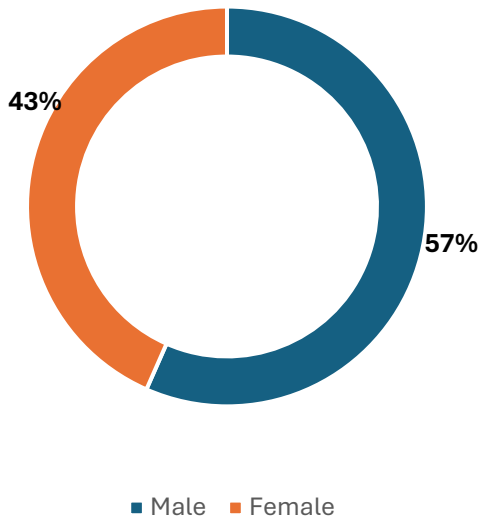


Figure 1.2 Municipal Regulators Highest Education Obtained

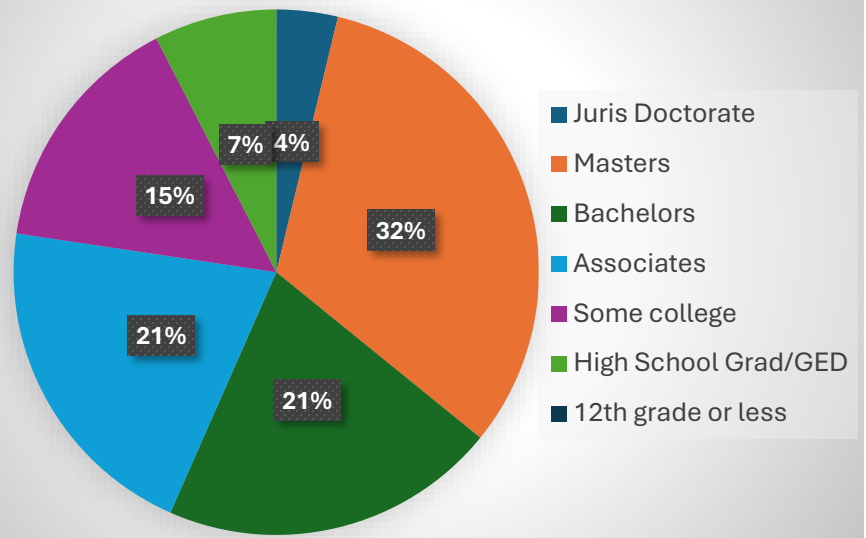
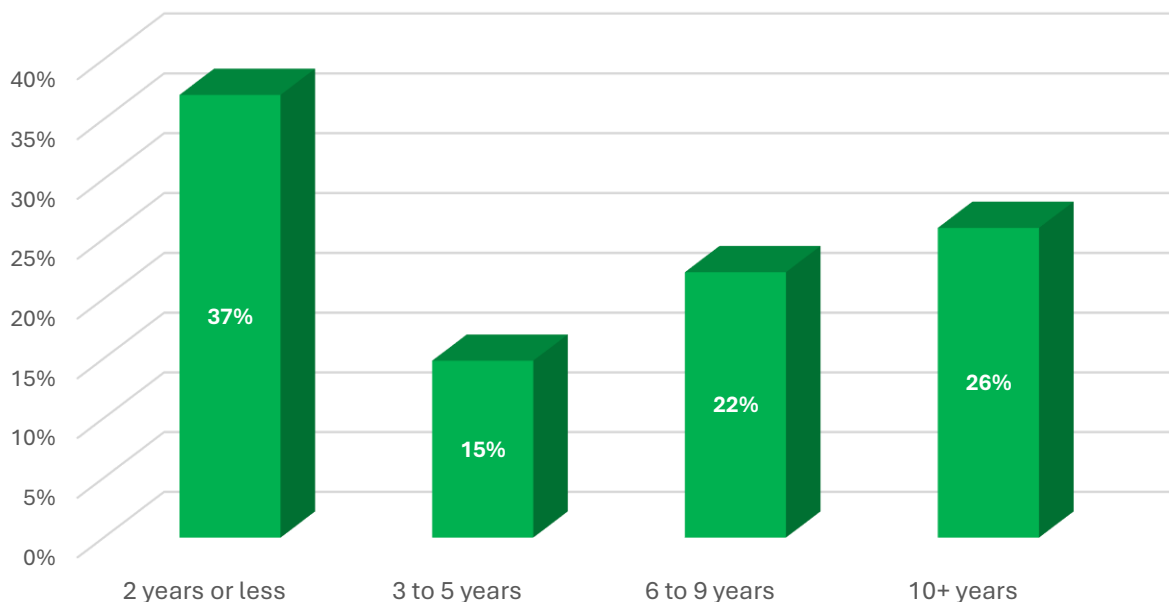


Figure 1.3 Number of years serving as a Municipal Cannabis Regulator



Most Local Government Cannabis Administrators have other responsibilities in their municipality

Most cannabis regulators who responded to the survey are more than just the cannabis regulator in their municipality. 31% of them serve as the manager/administrator for the entire town. 13% serve as the clerk for the municipality. Only 5% of the regulators surveyed stated that cannabis regulations were their only area of responsibility. In the majority of municipalities located in the six states that were surveyed, cannabis regulations are delegated to the lead regulator and one other staff member. Municipal cannabis regulators salaries vary. 39% make \$80,000 or more. 39% make \$50,000 to \$79,000. 22% make under \$50,000.

Figure 2 Salary Range of Municipal Cannabis Regulators

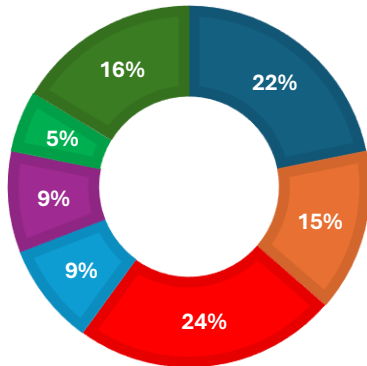
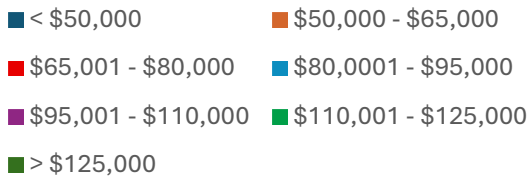


Figure 2.2 Number of Other Staff Members with Cannabis Regulations Responsibilities

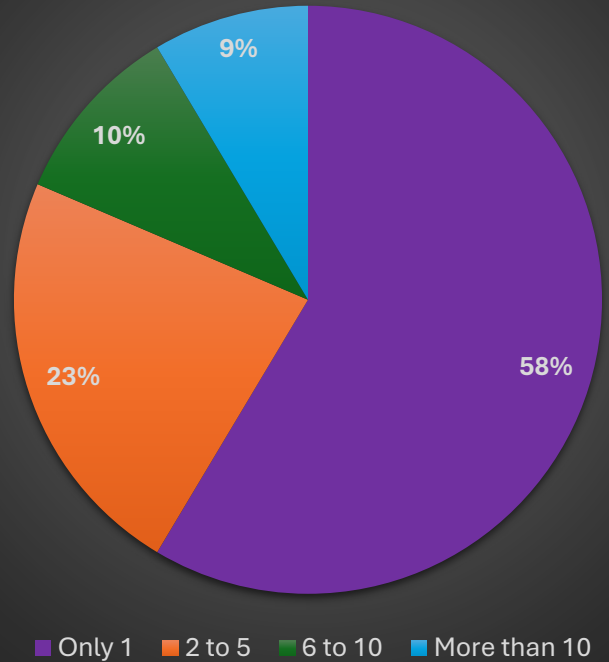
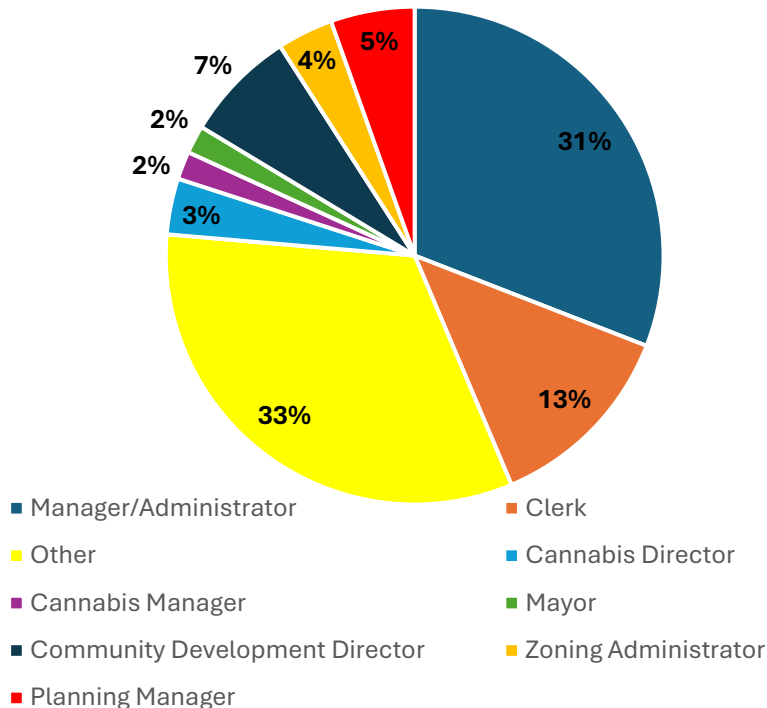


Figure 2.3 Cannabis Regulators Position Titles



Municipal Regulators value professional development

For cannabis regulators to increase their knowledge and skills about the emerging field of municipal regulations, regulators must seek opportunities to attend professional development sessions such as trainings, workshops and conferences. Nearly 50% of regulators preferred method of training is an online training course with an instructor. The least preferred method of training is an in-person one-on-one training offered at their municipality. As it relates to training topics, the top three choices for regulators are:

1. Cannabis Business and Compliance
2. Tips on Reviewing Cannabis Facility Operations
3. Best Practices for Reviewing Cannabis Licensing Applications

Figure 3 Regulators Preference for receiving training and additional education

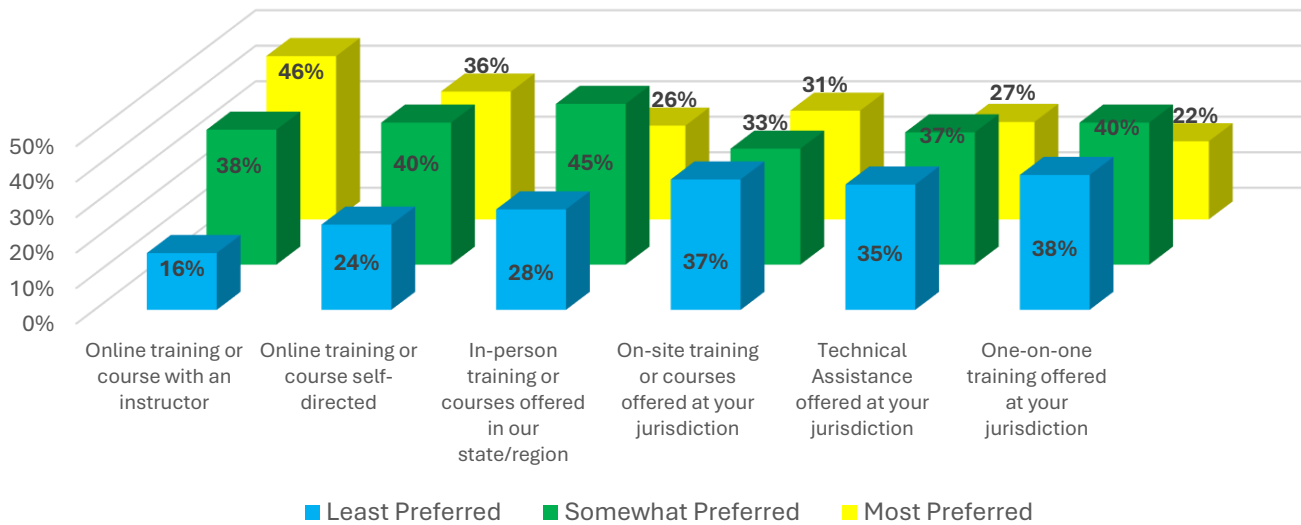
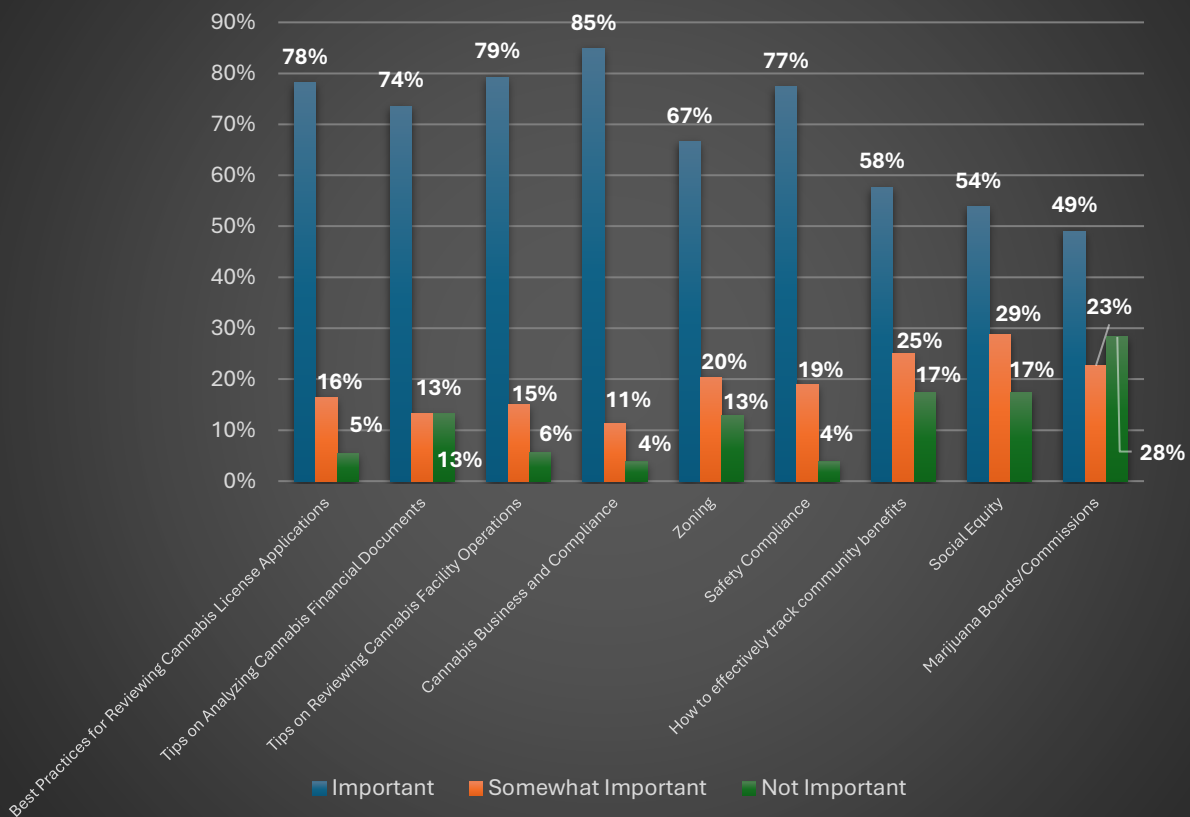


Figure 3.2 The importance of various trainings for municipal regulators



Cannabis Regulators represent all kinds of geographic settings

The survey data showed 56% of regulators that participated in the survey are from cities. The majority of the respondents being 60% categorize their municipality as rural as opposed to urban.

Figure 4 Type of Jurisdiction for Municipalities

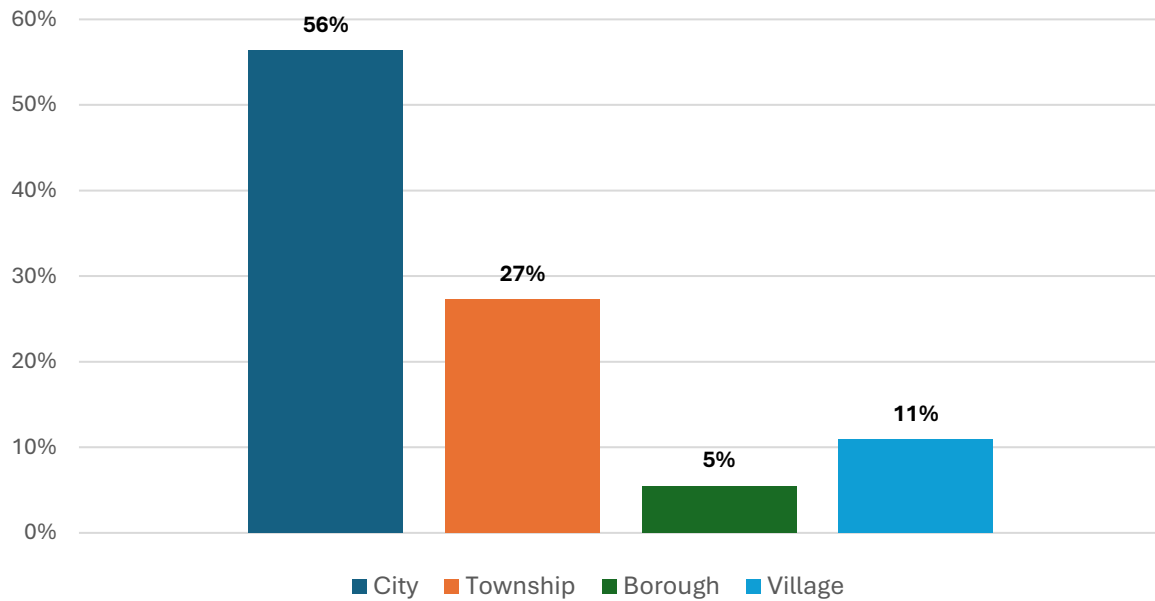
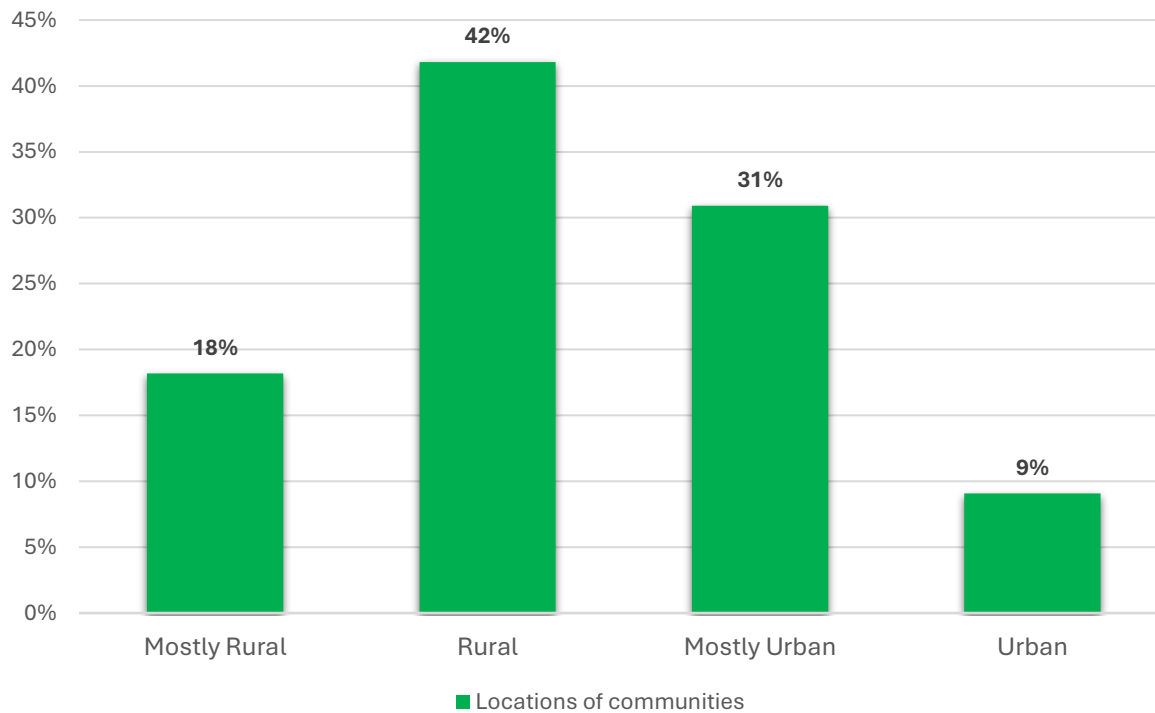


Figure 4.2 Urban v Rural Municipalities



How municipalities are dealing with the legalization of marijuana

It is taking 1-4 months for most cannabis applications to be reviewed locally.

Nearly 90% of the local governments that participated in the survey allow both recreational and medical marijuana in their municipalities. The days of customers needing a medical card are almost obsolete today. Over 90% of the local regulators that responded to the survey have their own application review process that is separate from their state regulatory process. This means cannabis businesses in most cases must obtain both a state license and receive approval from the municipality where they want to locate their cannabis operation. Figures 5.3 displays the different types of cannabis businesses allowed in municipalities across the six states. The top three types of licenses available in municipalities are: Grower/Cultivation at 78%. Retail at 76% and Safety Compliance/Testing at 60%. As application review processes become more complex that cannabis regulators oversee, it is taking most regulators 1-4 months to review applications locally as shown in figure 5.4 on page 7. With cannabis businesses launching in communities, there needs to be some incentive to giving back to the communities they are making a profit in. More than 75% of municipalities do not have a community benefits component in their ordinance or social equity programs. Data pertaining to community benefits and social equity are shown on page 7 as figures 5.5, 5.6 and 5.7.

Figure 5 Types of Marijuana Allowed in Municipalities

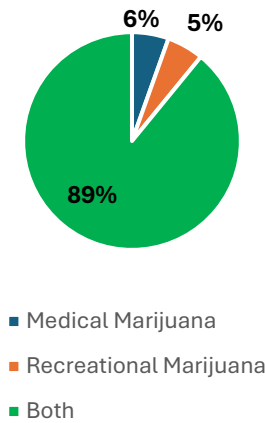


Figure 5.2 Municipalities with their own application review process separate from the state process

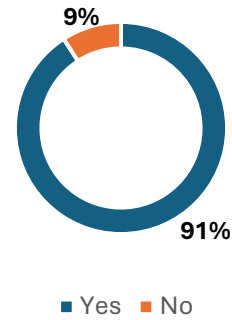


Figure 5.3 Types of Marijuana Licenses offered in Municipalities

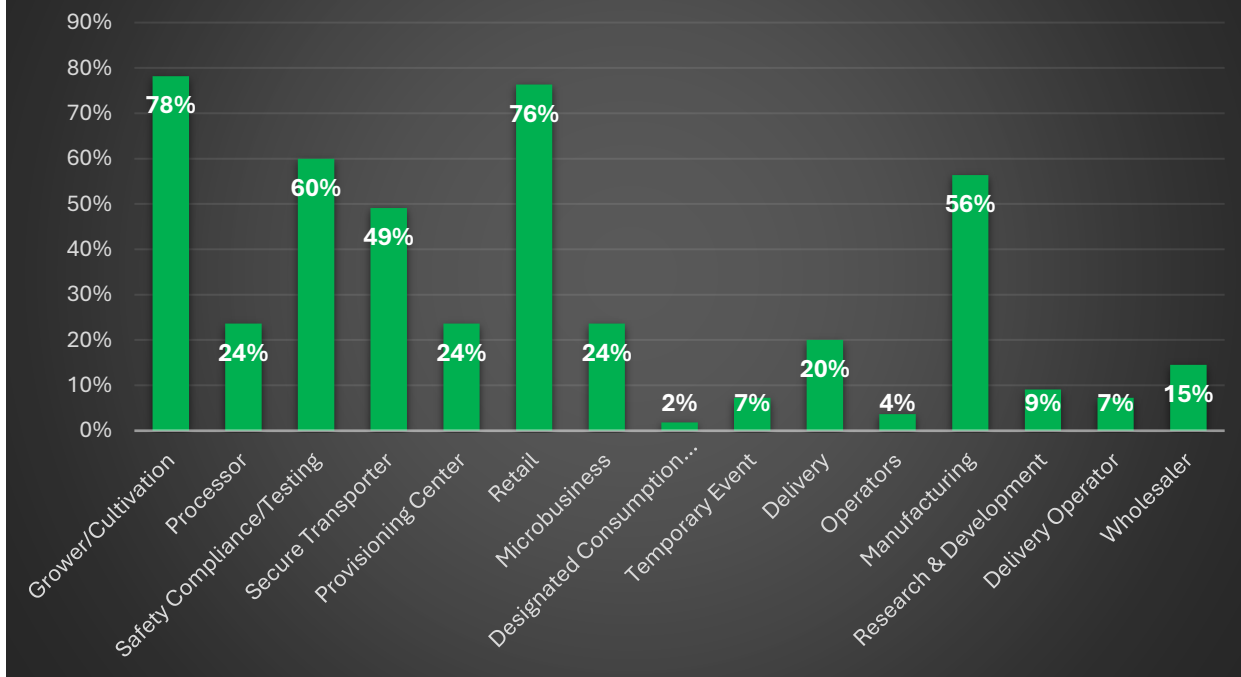


Figure 5.4 Municipality Application Review Timeframe

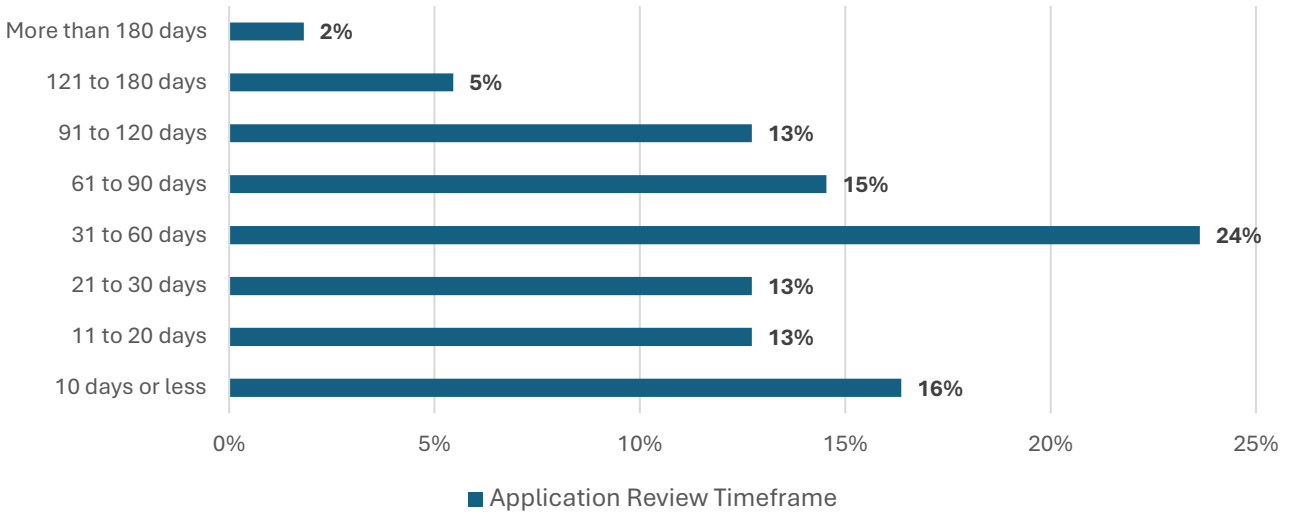


Figure 5.5

Does your municipality require cannabis applicants to have community benefits/charitable plans?

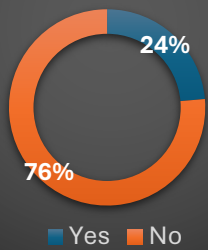


Figure 5.6

Does your municipality offer Social Equity Programs?

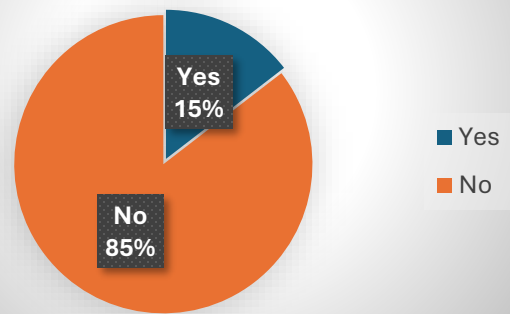
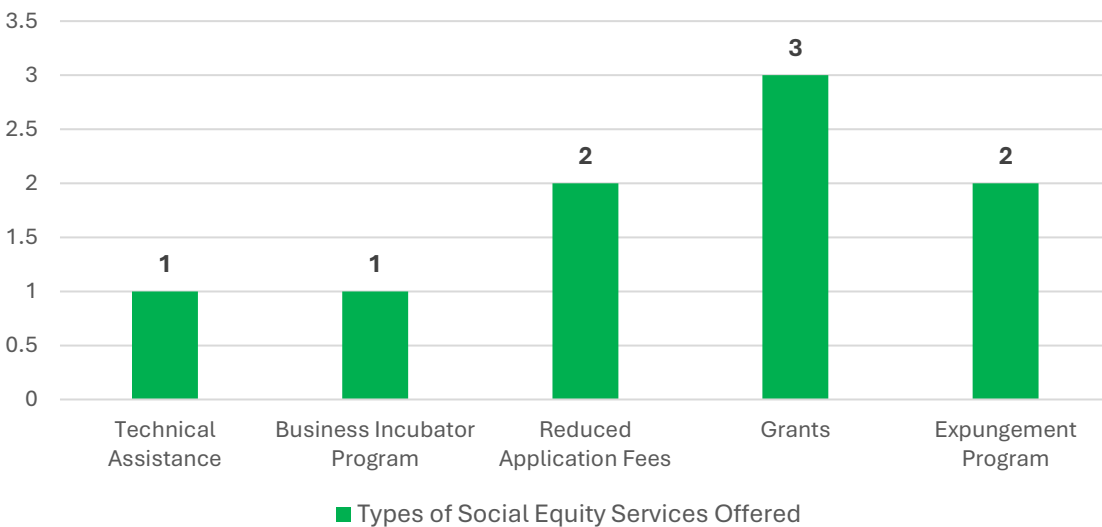
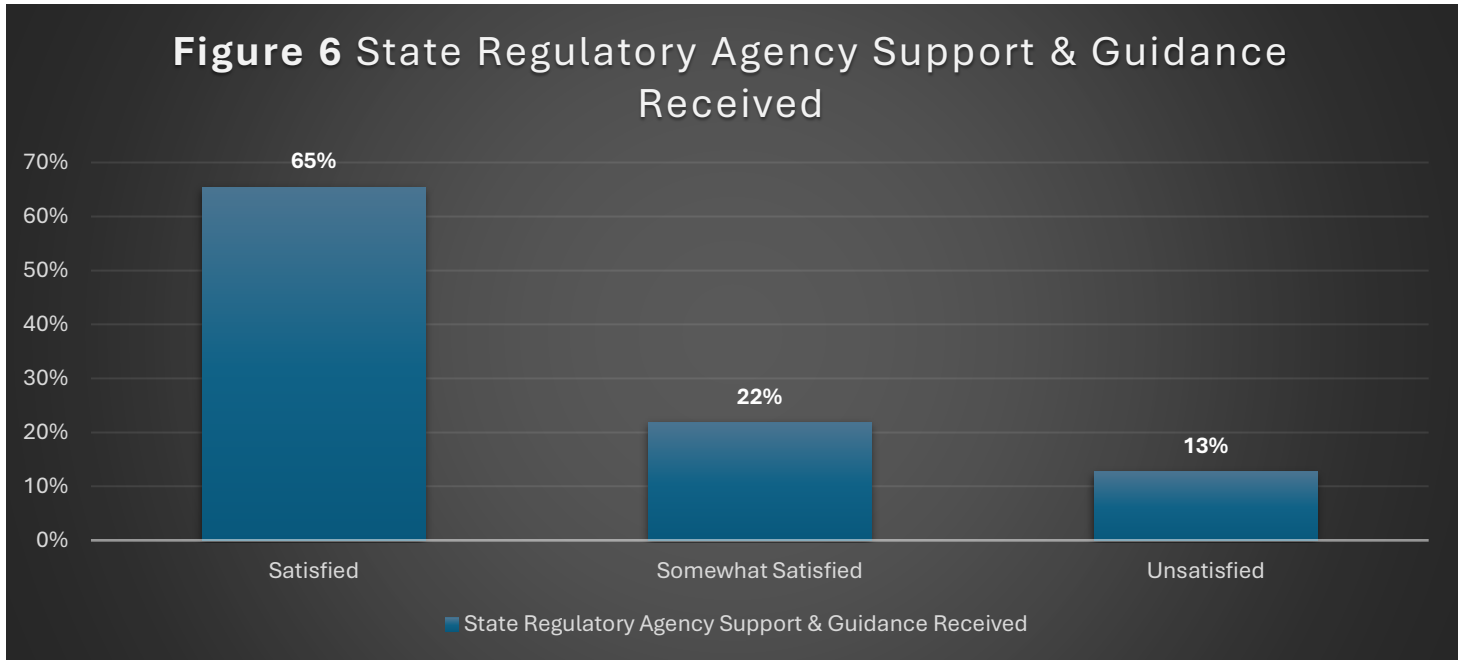


Figure 5.7 Types of Social Equity Services Offered by Municipalities



Many local regulators are satisfied with the guidance they receive from their state regulatory agency

As cannabis regulators continue to navigate the cannabis process from accepting applications to conducting the review process to providing applicants and residents with the information needed to stay up to date on any cannabis news and regulations, the responsibility can not solely rely on them. Regulation starts at the state level. It is imperative that municipal cannabis regulators have an open line of communication with its state regulatory agency. The following data displays municipal regulators overall satisfaction with their state regulatory agency.



Although the majority of regulators expressed that they were satisfied with the support and guidance they receive from their state regulatory agency, some regulators felt improvements could be made in the areas of technical support and communication.

Municipal Regulator from California

“I feel a bit like we are on our own. We have had to expend a lot of funds on lawyers and consultants to navigate this process.”

Municipal Regulator from Colorado

“The agency works hard to partner and collaborate with our local partners. They are a great team and spread thin with staff. The industry is changing rapidly and holds many meetings for all stakeholders to share their thoughts.”

Municipal Regulator from Maine

“It feels like every time you have a question about anything related to the subject, when you contact the office of cannabis policy, you get a different answer depending on who you speak with.”

Municipal Regulator from Massachusetts

“A lot of the guidance have been timid. Decisions are not clear. Processes are indicated but the steps are to be determined and at the local level we feel obligated to move forward without clear direction.”

Municipal Regulator from Michigan

“With most regulatory agencies in state government, poorly staffed or understaffed the Michigan agency is doing the best it can to support the laws of the state. It often takes a long time for most of the inquiries to be concluded.”

Municipal Regulator from Michigan

“Providing greater technical support and become a repository of best practices and case studies.”

Municipal Regulator from New Jersey

“They are responsive when we reach out but offer no hands-on guidance during the initial process.”

Survey Background and Methodology

The 2023-24 National Survey on Local Government Cannabis Regulations and Administration was conducted by the National Council on Municipal Cannabis (NCMC) in partnership with Regulatory Professional Advisory Services and Search Consultants (Regulator Search). NCMC is a nonprofit organization that serves as a resource center for local government cannabis regulators and municipalities throughout the United States. Regulator Search is a firm that specializes in advisory services, consulting and executive search for municipalities and state level government cannabis regulations. Regulator Search was founded in 2023 by two municipal cannabis regulators to serve as a high-impact regulatory solutions provider for local and state cannabis regulatory agencies nationwide. Regulator Search are subject matter expert consultants.

The survey was designed to gather the opinions and perspectives on a variety of important issues facing municipal cannabis regulators in the states of California, Colorado, Maine, Massachusetts, Michigan and New Jersey. 55 municipal regulators responded from the six different states. 16 Michigan regulators responded. 11 from Maine. 10 from New Jersey. 7 from California. 6 from Massachusetts and 5 from Colorado.

This survey gave municipal cannabis regulators the opportunity to have their voices amplified and join in the conversation around local government cannabis administration in their respective states and the unique challenges and opportunities involved in this work. The survey responses presented here are those of local government cannabis regulators, while further analysis represents the views of the authors.

About the Authors

Garland S. Doyle

Doyle has nearly 30 years of municipal government regulations experience. As a local government cannabis regulations leader, Doyle is a sought-after speaker on municipal regulations, executive search, social equity, and community benefits. He serves as the Board President of the National Council on Municipal Cannabis (NCMC) and the City Clerk for Pontiac, Michigan.

As City Clerk, he is responsible for overseeing medical and adult-use cannabis regulations in Pontiac. Doyle has been leading cannabis regulations in the city since its inception in 2018.

In addition, he serves as the Board of Advisors Chair for Regulatory Professional Advisory Services and Search Consultants (Regulator Search), a minority-owned, woman-owned and veteran-owned cannabis regulations governmental expert consulting firm.

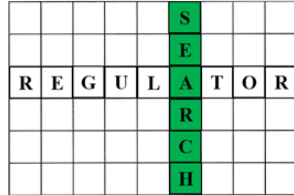
Doyle has given testimony before the National Academies of Sciences, Engineering, and Medicine Committee on the Public Health Consequences of Changes in the Cannabis Policy Landscape.

He holds a Master of Public Administration with a concentration in Nonprofit Administration and a Graduate Certificate in Local Government Management from Eastern Michigan University. His Bachelor of Arts degree is from Wayne State University. Doyle is a certified nonprofit professional (CNP).

Jonathan Starks

Starks serves as the Deputy City Clerk for the City of Pontiac, Michigan. In his role as Deputy City Clerk, he manages day-to-day operations of the Marijuana Regulations Division under the direction of the City Clerk. In addition, he serves on the National Council on Municipal Cannabis Board of Directors. Starks is a veteran. He served as an IT Specialist in the United States Army Reserve for eight years. Starks holds a Bachelor of Business Administration in Accounting from Cleary University.

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Regulator Search and NCMC form Strategic Partnership

Regulator Search has formed a strategic partnership with the National Council on Municipal Cannabis (NCMC) a national nonprofit organization that focuses on local government cannabis policy, regulations, leadership and research.

NCMC has two major initiatives. The Cannabis Center for Municipalities and the Municipal Cannabis Regulators Network (MCRN). The Cannabis Center offers consulting, technical assistance and resources to municipalities and local government cannabis regulators across the United States. MCRN is a professional network of municipal cannabis administrators who oversee medical and/or recreational marijuana regulations in boroughs, cities, townships and villages across the country.

MCRN promotes the development and advancement of municipal cannabis regulatory officials through leadership development, competency-based education, networking and best practices. MCRN works to provide its members with the tools and knowledge they need to effectively manage and develop municipal cannabis regulations in their communities.

What is the strategic partnership?

1. Regulator Search has agreed to offer municipalities that are members of NCMC Cannabis Center for Municipalities discounted executive search services.
2. Regulator Search will assist NCMC with designing leadership development programs for its Municipal Cannabis Regulators Network Members.

About Regulator Search

Regulatory Professional Advisory Services and Search Consultants, LLC

(Regulator Search) was founded in 2023 by two municipal cannabis regulators to serve as a high-impact regulatory solutions provider for local and state cannabis regulatory agencies nationwide. Regulator Search serves municipalities and state level cannabis regulatory agencies of all sizes.

Regulator Search Services

Cannabis Administration Services for Municipalities

- Initial Application Evaluation
- On Site Compliance Inspections
- Annual Permit Renewal Application Evaluation
- Technical Assistance and Subject Matter Expertise

Social Equity Program Services for Municipalities

- Social Equity Program Development
- Social Equity Application Design and Evaluation Processes
- Incubation Services
- Grant Programs Administration
- Technical Assistance

Executive Recruitment for both local and state level cannabis regulatory agencies

- Develop organizational brochure and position announcement
- Advertise position announcement
- Screen candidates (evaluate candidate qualifications, conduct initial reference checks, and analysis of social media)
- Recommend top Candidates to client for interviews
- Schedule and facilitate candidate interview process
- Develop interview questions for candidates
- Assist client with the evaluation of candidates
- Assist with negotiations and offer for selected candidate

For more information on services email: talent@regulatorsearch.com