VACo Supervisors' Forum Presentations Thursday, April 29, 2021



Working with Your School Board 930am

The Honorable **Ruth Larson**James City County Supervisor

The Honorable **Jim Kelly, PE**Williamsburg-James City County School Board Chair

Partnerships: The County Board of Supervisors and the Local School Board

Ruth Larson, BOS, Berkeley District & Jim Kelly, Chair, WJCC School Board, Jamestown District

City of Williamsburg & James City County

A joint school system - WJCCPS

WJCC Demographics

- Approx. 75k county residents
- Approx. 12k city residents
- Approx. 11,700 prek-12 school students
- 9 elementary schools
- 4 middle schools
- ▶ 3 high schools
- All 16 schools fully accredited- 13 years in a row
- ► Typically add about 100 students per year

WJCC Demographics

- ▶ 36% economically disadvantaged
- ▶ 750 ELL (8%), growing population
- ▶ 1740 (15%) special education
- ► Approx. 300 homeless students
- ► The City provides 22% of school budget
- ► The County provides 52% of school budget
- Williamsburg 2020-2022 LCI .7459
- ▶ James City 2020-2022 LCI .5553

WJCC Demographics

- ▶ 911 teachers
- ► 1764 total school employees
- \$54,435 average teacher salary
- \$43,000 starting teacher salary with Bachelor
- > \$137,808,944 FY19 Budget
- ▶ \$12,483 FY19 Per Pupil Expenditure
- \$55,974,166 Five-Year CIP (FY19-23)

Partnerships Required

- City and County fund the school division with the County paying the higher share
- ► The School Division negotiates and works with two funding partners
- Agreement with the School Division, an agreement that is worked out between the funding bodies.

What Can Go Wrong

- Finger Pointing
- City and County
- The School Division and funding partners
- Personalities on boards and with staff
- Election/Appointment turnover
- Staff and Administration turnover City, County, Schools
- Redistricting decision made by BOS, impact on SB

Building Partnerships

- Agree to work together
- Agree to communicate openly and transparently
- Create and maintain a Liaison Committee
- CIP planning process no surprises
- Joint Operating and CIP planning meetings
- Share communication trigger point for capital projects
- Joint legislative advocacy

Active Engagement

- School Board Members meet with Supervisors Counterparts
- Regular visits to schools
- Regular attendance at school events
- Regular communication among staff, CFOs, Mayor, County Administrator, Superintendent

The Positives of Partnerships

- No finger pointing
- No negative newspaper stories
- We are in this together
- No surprises
- Respect and recognition of competing funding needs
- Delicate balance

Pitfalls to Partnerships

- Stay in your lane, City, County, Schools
- Autonomy

Impact of Partnerships

- Positives outweigh the pitfalls
- Schools are the heart of strong communities
- Schools are an economic driver









It's all about the kids and our communities

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Working Together is Just Better



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Role of Constitutional Officers 1030am

Alan D. Albert

Partner at O'Hagan Meyer
Legislative Counsel at Virginia Association of Local Elected
Constitutional Officers

Robyn de Socio

Executive Secretary
Virginia Compensation Board

CONSTITUTIONAL OFFICERS AND THE COMPENSATION BOARD



CONSTITUTIONAL OFFICERS

• Constitution of Virginia, 1901 revisions, sets out 5 locallyelected officers, commonly referred to as "Constitutional Officers":

• Sheriff:

- Law Enforcement
- Jail Operations
- Courtroom security
- Service of civil process

• Commonwealth's Attorney:

- Prosecuting violations of state law and local ordinances
- Providing legal advice to local governments and state agencies

• Circuit Court Clerks:

- Administration of civil and criminal cases in Circuit courts
- Maintenance of local land and property records
- Administration of wills and estates
- Maintenance of certain state and local business records and licenses

CONSTITUTIONAL OFFICERS

- Commissioners of the Revenue and Treasurers:
 - Taxes: local real estate and personal property taxes; state income taxes
 - Revenue: Local revenue collections, custody, accounting and disbursements;
- Related offices include appointed officers:
 - Regional Jails
 - Directors of Finance
 - Regional Drug Prosecutors;
- Commonwealth of Virginia considers these officers and their employees to all be "State-Supported Local Employees" NOT state employees.

COMPENSATION BOARD

• 3 Board Members

- Chairman, appointed Agency Head by the Governor
- Tax Commissioner, ex-officio member, appointed by the Governor
- Auditor of Public Accounts, ex-officio member, appointed by the General Assembly
- Policy-making board meeting once a month (4th Thursday); establishes policies for operations to supplement statutory responsibilities and budget language directives
- Staff, comprised of Executive Secretary (staff director) and presently 16 staff members, responsible for handling day-to-day operations and administering statutory duties and the policies of the Board

COMPENSATION BOARD

- Mission: to "fix and determine what constitutes a fair and reasonable budget for the participation of the Commonwealth toward the total cost of the office" for each constitutional officer.
- Replaced Fee Commission in 1934, responsible for setting fees for services of constitutional officers to fund office support. Between 1942 and 1992, fees became deposits to the Commonwealth General Fund, replaced with a state appropriation for funding support.
- Primary Duty: Oversee process by which counties and cities are reimbursed by the Commonwealth for the state's share of support for Constitutional Officers.
 - Fair and Reasonable (treat everyone the same, use objective criteria to allocate available funding)
 - State's share (Funding is limited by General Assembly; not intended to cover all expenses)

BUDGET PROCESS & REIMBURSEMENT PROCESS

- General Assembly appropriates \$735M (growing to \$746M) and 17,000 positions for the Compensation Board to establish annual operating budgets for 650+ Constitutional Officers, regional jails and finance directors.
- Local governments also obligated by law to provide a budget and appropriate funds for constitutional offices (officers cannot expend funds without a local appropriation, even if those funds are accrued through fees, or are reimbursable by the Compensation Board).
- Local budget must include AT A MINIMUM the positions, salaries, and total amounts approved by the Compensation Board.
- Salaries and expenses are paid by the locality, Constitutional Officer requests reimbursement, Compensation Board processes reimbursement back to the locality on a monthly basis, based upon the state's share of the amounts budgeted.

COMPENSATION BOARD BUDGET

- Positions and Specific Salaries
 - Presently represents almost 99% of funds allocated
 - Career development programs provide additional salary incentives
 - Salary increases for new sheriffs' deputies at one year
 - Elected officer salaries set by the legislature
 - Only Constitutional Officers have authority over hiring, firing or otherwise managing their employees
 - Compensation Board maintains guidelines for salary actions impacting Compensation Board funded salary levels
 - Significant funding increases/restorations for salaries/positions for FY22

COMPENSATION BOARD BUDGET

- Temporary/Hourly-Wage salaries (minimal funding allocated)
- Office Expenses (minimal funding allocated)
- Equipment (available through accrued savings in other areas e.g. position vacancy)
- Additional allowances upon request for expenses incurred for:
 - Physicals for new deputies
 - Guard duty for a jail inmate while getting treatment at a hospital
 - Attendance at annual association meetings or Compensation Board sponsored training
 - Legal defense where not covered by insurance
 - Acting as a substitute prosecutor in another locality

LOCALITY RESPONSIBILITIES

- Social Security Insurance (reimbursable)
- Retirement Program premiums (partially reimbursable)
- Group Life Insurance Program premiums (partially reimbursable)
- Retiree Health Care Credit premiums (partially paid by Locality)
- Liability Insurance and Fidelity/Surety Bond premiums (paid by Locality)
- Health Insurance (not reimbursable)
- Leave Benefits, including payoff of accrued balances upon separation of employment by agreement (not reimbursable)

LOCALITY RESPONSIBILITIES

- Many Localities also fund:
- Salary supplements at varying levels, often to align salaries with local pay plans
- Additional locally funded positions in constitutional offices
- Office expense and office equipment funding

BUDGET CYCLE

- September/October State agency budget requests due
- December Governor's budget proposals introduced to the legislature
- February 1 Constitutional Officers required to submit budget request to the Compensation Board
- Early March General Assembly adjourns, Compensation Board provides summary of budget actions and provides Budget Estimates within two weeks of adjournment
- April Compensation Board conducts public Budget Hearing prior to setting budgets
- Approved Budgets to Constitutional Officers and Governing Bodies on May 1 (must be AFTER Reconvened [Veto] Session, typically 6th Wednesday post-adjournment)

BUDGET APPEALS

- Constitutional Officers have the right to APPEAL budget decisions of the Compensation Board (within 45 days by June 15)
- Budget Appeals include an appeal against the Locality and the budget it has also set for the Constitutional Officer
- The purpose of the right to appeal is to prevent arbitrary or capricious actions on the part of the Compensation Board or the local government against a constitutional officer as an elected official.

COMPENSATION BOARD FUNCTIONS

- Quarterly Jail Inmate Per Diem Payments to Localities
 - \$59 million (\$56 million in FY22)
 - \$4 per day for Local Responsible Inmates
 - \$12 per day for State Responsible Inmates
- Revenue Refunds to Localities (Clerks' Fees)
- Jail Audit Function
- Jail Cost Report
- Fines & Fees Report
- Mental Illness in Jails Report
- Technology Trust Fund Administration
- IT Functions (two major systems plus web-based systems)
- Training Programs for Constitutional Officers

THANK YOU

• Questions?

• Contact:

Robyn de Socio, Executive Secretary
Compensation Board
804.225.3439
robyn.desocio@scb.virginia.gov

DINOSAURS?!



OR PARTNERS IN GOVERNANCE?



DINOSAURS? OR PARTNERS IN GOVERNANCE?

WORKING WITH CONSTITUTIONAL OFFICERS IN THE SHARED SANDBOX OF LOCAL GOVERNMENT

Alan D. Albert O'Hagan Meyer PLLC

VACo Supervisors' Forum • April 29, 2021



SHARING SOMETIMES IS HARD – BUT IT COULD BE WORSE!

- Constitution of 1870 gave us four of our present five officers, more or less in present form but there were dozens more independent elected officials!
- Elected at county level:
 - Sheriff
 - Commonwealth's Attorney
 - Clerk of Circuit Court (and County in most instances)
 - Treasurer
 - Superintendent of the Poor
- Three-year terms except Clerk, who got four

IN ADDITION TO COUNTY-WIDE OFFICERS

- Counties divided into "townships," which EACH elected:
 - A supervisor
 - Township clerk
 - Assessor
 - Collector
 - Commissioner of Roads
 - Overseer of the Poor
 - Justice of the Peace
 - Constable
- Each of the township "supervisors," when they met together, formed the "Board of Supervisors" for the county (thus your name!).

BUT WAIT! THERE ARE MORE!

- Each township was divided into one or more school districts
 - School Trustee who supervised schools could be elected or appointed
- Minimum size for school district = 100
 inhabitants (not school-age students total
 inhabitants)

AND EVEN MORE! (FOR ROADS, OF COURSE!)

- In addition to the township officers, each county was divided into multiple "road districts," separate and distinct from the townships
- Each road district had an elected Overseer of Roads
- And, just for good measure, the Constitution of 1870 made clear that the General Assembly could create whatever other local officers it saw fit

BY 1902, THIS LOVE FOR ELECTIONS HAD DIED DOWN A BIT

- Constitution of 1902 gave us our present five constitutional officers in counties, close to present form
 - Sheriff
 - Commonwealth's Attorney
 - Clerk of Circuit Court (and County in most instances)
 - Treasurer
 - Commissioner of the Revenue (elected or appointed)
- In addition, each county and city had an elected
 - Superintendent of the Poor
 - County Surveyor

YOUR JOBS ARE BEGINNING TO LOOK MORE FAMILIAR BY 1902

- The former "townships" are now known as "magisterial districts" (from Latin, magister = teacher, or (medieval usage) person in authority)
- No more magisterial districts can be created we are done with proliferating townships!
- Minimum size is 30 square miles
- Each magisterial district elects a supervisor
- When all of the supervisors of the county are assembled, they form the Board of Supervisors

YOUR JOBS ARE BEGINNING TO LOOK MORE FAMILIAR BY 1902

- Job description of the Supervisors:
 - "The supervisors of the districts shall constitute the board of supervisors of the county, which shall meet at stated periods and at other times as often as may be necessary, lay the county and district levies, pass upon all claims against the county, subject to such appeal as, may be provided by law, and perform such duties as may be required by law." (Section 111)
- And there are some things that even supervisors aren't responsible for!
 - "Counties shall not be made responsible for the acts of the sheriffs." (Section 114)

GREAT THINGS ABOUT CONSTITUTIONAL OFFICERS



GREAT THINGS ABOUT CONSTITUTIONAL OFFICERS

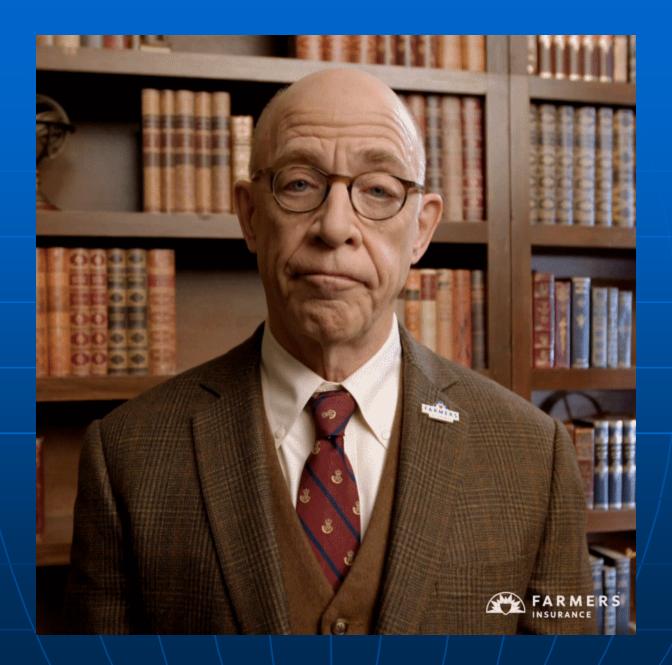
- They run for, and want to do, messy jobs you don't have to do:
 - Collect taxes (ugh!)
 - Assess property & business income
 - Have people shoot at them
 - Throw folks in jail
 - Decide who gets prosecuted
 - Ask juries to put folks in jail
 - Maintain court records, land records, marriage licenses, hundreds of other records – and keep judges happy!

GREAT THINGS ABOUT CONSTITUTIONAL OFFICERS, continued

- They represent the whole county so have a lot of folks voting for them
 - Extreme example: Fairfax County, 2019 sheriff's race:
 - **285,290** votes
 - Incumbent sheriff got 223,285 of those votes
 - To put this in perspective this is as much or more than typical winning congressional district vote
- For most of you, your constitutional officer will have been elected by somewhere between five and ten times as many voters as you have

GREAT THINGS ABOUT CONSTITUTIONAL OFFICERS, continued

- They often have been around a long time
 - Gene Harding (Charlottesville) became a Deputy City Sergeant (now called Deputy Sheriff) in 1946, City Sergeant (Sheriff) in 1948, Treasurer in 1956 – 46 years as elected constitutional officer
 - Obviously, something in the Charlottesville water the Commissioner of the Revenue Ora Maupin, served a mere 45 years in that office
- Longevity is good, not in and of itself, but for the experience it brings
- As the Farmer's Insurance Guy says, they know a thing or two, because they've seen a thing or two



WHY IS WORKING TOGETHER SO IMPORTANT?



WHY IS WORKING TOGETHER SO IMPORTANT?

- The responsibilities of these offices are core government functions – public safety, law enforcement, raising of the revenues, maintenance of the judicial system.
- The time ended, years ago, when state funding was sufficient to run these offices properly.
- The sad truth is that the Commonwealth has not even made the statutorily-required contributions for two decades
- The shortfall is now nearly \$50 million a year money you should be receiving, and you aren't

PARTNERSHIP BEGINS WITH UNDERSTANDING

- Reach out to your officers
 - Schedule a visit, take a tour
 - Ask what the greatest challenges are
 - Take your constituent concerns to the officer herself
 - Get to know the work of the statewide associations they are doing great work in training, standards, addressing real public policy issues.
- Get them on the Board agenda for reports and question time. It's amazing what talking can do.
- Don't undermine them. They are elected just like you. They have hard jobs, and they are fulltimers, just like your other agency heads. They need your support if we, jointly, are going to serve the citizens well.

STATEWIDE ASSOCIATIONS CAN BE A GREAT RESOURCE



QUESTIONS – OR FRUSTRATIONS

Alan D. Albert

<u>aalbert@ohaganmeyer.com</u>

(757) 348-8590

Effective Board/Manager/Administrator Relations 1130am

The Honorable **Brenda Ebron-Bonner**Dinwiddie County Chair

W. Kevin Massengill

Dinwiddie County Administrator

Effective Relationship Between the Board of Supervisors and Administrator





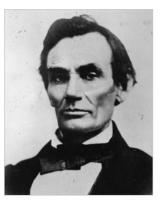
THE HONORABLE BRENDA EBRON-BONNER, CHAIR
W. KEVIN MASSENGILL, COUNTY ADMINISTRATOR

Rotating Chairmanship



Dinwiddie County Model: Rotating Chairmanship

- Five member Board of Supervisors
- Rotate Chair in Numerical Order of Districts
 - No "Politics" in Selection
 - Each Board Member Gets to Lead.
 - Helps with "Chair Burnout" (Reduces Stress)
 - Vice Chair has a Training Year
 - Much Harder to Criticize Chairman's Job
 - Solidarity





1860 1864

Building Strong Relationships



Understand Each Others Roles and Responsibilities!

Remember: The Goal is UNITY

If it is unclear where you're going – you will get there each time!

You cannot achieve legitimate unity without a mutual understanding in a common belief of where each of you are headed together. You must believe in the same shared goal.

Understand each others roles and responsibilities!

The board chair and administrator must be headed in the same direction. However, respect the fact that only one of you can hold the reins at a time...

Mutually Understood Roles and Responsibilities

New Chairman/Vice Chairman Orientation:

- Held Before Each Organizational Meeting
- Topics:
 - Bylaws Expectations
 - Structure of Regular and Special Meetings of the Board
 - Involvement with Agenda Construction
 - Preferences
 - Flow of the Meetings
 - Citizen Comment Period/Responses
 - Resolutions/Proclamations
 - Provide List of Standing Meetings for the Calendar Year
 - Regional Meetings
 - Civic/Organizational Meetings
 - Economic Development Prospect Visits

Orientation, Continued

Relationship with County Administrator:

- Roles and Responsibilities Establish Clear Goals and Objectives
- Administrative Housekeeping
 - Record Keeping/Leave Requests
 - Performance Evaluations
- Expectation of Communication
 - Expectations
 - Frequency
 - Local News Alerts
- Staff Interactions/Assignment of Work
 - Who's the Boss?
- Media Relationships

Orientation, Continued

Constitutional Officers Relationships

School Board Relationships

Legislative Affairs

Boards/Commissions/Authorities

Goals and Objectives for the upcoming year provided and discussed





The Importance and Value of Building Strong Relationships between the Chair and County Administrator...

C. A.V. E. People

Citizens

Against

Virtually

Everything



Strong Relationships Matter

Community Satisfaction!

- Unity is a key ingredient to good public relations
- "Its not about aptitude, Its how your viewed!"
 - Public perceptions matter
 - Division = Dysfunctional Government (CAVE People) thrive on division



- County Workforce needs shared Leadership:
- The level of influence that you have over someone else in your life.
 - Leverage your influence to make someone better
 - People are watching your actions and listening to what you say.

Overall Satisfaction!

- 2 is better than 1, because more gets done
- Good government is fun when everyone is staying in their lane!

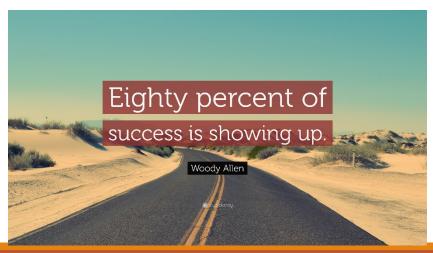


Our 6 Rules of Relationship... RULE 1 - Show up for each other!

Investment – True relationships are not a cheap investment. It requires:

- Your Time;
- Your Resources; and
- Your Complete Dedication;

There is a big difference between true friendship and acquaintances



Our 6 Rules of Relationship... RULE 2 – Develop Trust

How?

- Be Reliable
 - Depend on one another

Be Loyal

- Put the other persons needs and concerns before yourself
- Defend each others actions and criticisms

Keep Confidences

- Must be able to share information with one another
 - Knowledge is power Keep Secrets
- Don't be a gossip!
- REMEMBER: Trust takes months (sometimes years) to build and can be lost in one occurrence of gossip



Our 6 Rules of Relationship... RULE 3 - Listen with Empathy

- •How to Listen with empathy?
 - Very hard to do...
- Put yourself in their situations....
 - o walk a mile in the other persons shoes.
- Learn how to listen to one another not just hear.
 - Exactly what they are saying not what you think they are saying
- Learn to listen and respond to the emotion and tone
- Pickup body language
 - Lean to look at each other when talking
 - Don't be distracted



Our 6 Rules of Relationship... RULE 4 - Accept each others Flaws

Everyone has characteristics that bug you to death!

You each have strengths

Accentuate the good qualities

You each have weaknesses

Don't dwell on the flaws

Mistakes will be made

Slow to anger



Our 6 Rules of Relationship... RULE 5 - Celebrate Wins and Share in the Losses

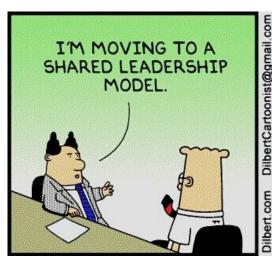
We are committed to the same goals

We focus on personal success of each other and that of the organization

- Not envious, jealous, or critical of who gets the credit
- Just as happy when other person's achieves as their own achievement
 - Board members, Staff, Community, other localities
 - Much happier when we celebrate the Wins!



Our 6 Rules of Relationship... RULE 5 - Celebrate Wins and Share in the Losses







We have been through a lot of losses together

- Don't blame or professionally attack one another
- Share the losses When you share in the losses you know you have support. We all need support in defeat

Our 6 Rules of Relationship... RULE 6 - Bring out the best in one another!

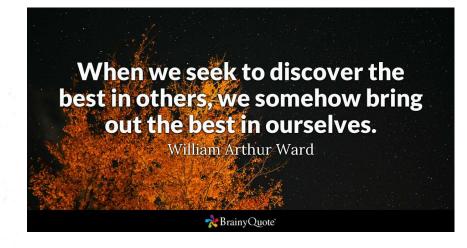
We are committed to each others success

Personally and professionally

Be role models to one another...

- We all need to be coached
- We all need people that will be completely honest even if it is not what we want to hear



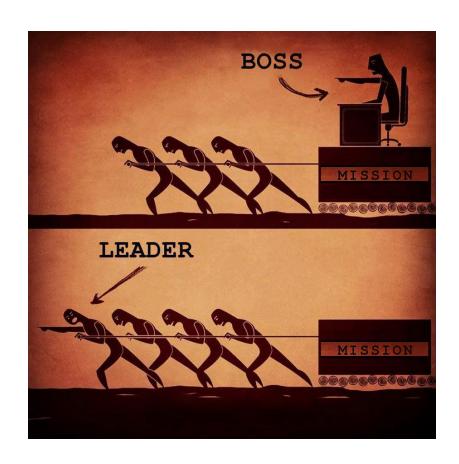


Building Strong Relationships

The speed of the leader...The speed of the team!

Embrace Shared Leadership

- Both the Chairman and the County Administrator have a Leadership responsibility to the Board of Supervisors, County Staff, and the Citizens of the Community.
- Deliver On your Commitments
- No one likes a Gun Slinger



Summary

- Consider a new Chairman/ Vice Chairman Orientation
 - Expectations of the Chairman
 - Expectation of the County Administrator
 - Establish Clear Objectives
- Building Strong Relationships
 - Rules
 - Show up!
 - Develop Trust
 - Listen with Empathy
 - Accept Each Others Flaws
 - Celebrate Wins and Share Losses
 - Bring Out the Best in Each Other
 - Stay in Your Lane
 - Embrace Shared Leadership





The Honorable Brenda Ebron-Bonner, Chair

W. Kevin Massengill, County Administrator

Thank You.

- W. Kevin Massengill, County Administrator
- 804 469 4500 extension 2105
- kmassengill@dinwiddieva.us
- www.dinwiddieva.us

FOIA Training for Local Government Officials 230pm

Alan Gernhardt

Executive Director
Virginia Freedom of Information Advisory Council

The Virginia Freedom of Information Act (FOIA) For Local Elected Officials

Virginia Freedom of Information Advisory Council http://foiacouncil.dls.virginia.gov/foiacouncil@dls.virginia.gov
(804) 698-1810

Training Contents

- Introduction
- FOIA requirements for local elected officials
- Public Records
- Public Meetings
- Remedies and Penalties
- Other resources for further questions

Introduction

- About the FOIA Council
- Purpose and policy of FOIA
- Structure of FOIA how to find what you need within the Code
 - General Provisions -- §§ <u>2.2-3700</u> through <u>2.2-3703.1</u>
 - Records Procedures and Exemptions -- §§ <u>2.2-3704</u> through <u>2.2-3706</u>
 - Training Requirements -- §§ <u>2.2-3704.2</u> and <u>2.2-3704.3</u>
 - Meetings Procedures and Exemptions -- §§ <u>2.2-3707</u> through <u>2.2-3712</u>
 - Remedies and Penalties -- §§ <u>2.2-3713</u> through <u>2.2-3715</u>

About the FOIA Council

§§ 30-178 through 30-181

- State legislative branch advisory council
- Legislative forum for studies and recommendations to the General Assembly
- Answer questions from government, citizens, and media
- Publishes advisory opinions and educational materials
- Provides FOIA training presentations
- Not an investigative or enforcement agency

Purpose & Policy of FOIA

§ 2.2-3700

- Ready access to public records
- Free entry to meetings of public bodies
- FOIA is to be liberally construed to promote awareness of governmental activities and operations
- Any exemption from public access to records or meetings shall be narrowly construed
- No record shall be withheld or meeting closed to the public unless specifically made exempt

FOIA Requirements for Local Elected Officials

Note: Constitutional officers are subject to FOIA for records purposes only. Other local elected officials are generally subject to both the records and meetings provisions of FOIA.

Requirements for Local Elected Officials

§ 2.2-3704.3

- Receive FOIA training from the FOIA Council or your local government attorney within two months of assuming office
- Training may be presented live or online
- Receive training again at least once every two (2) years since last training
- Clerk of the public body must keep records of training (name of the official, date of the training) for five years
- Note: There is no requirement to report training to the FOIA Council, only to keep your own records

Requirements for Local Elected Officials

(continued) – § <u>2.2-3702</u>

- All elected, reelected, appointed, and reappointed officials must:
- Be furnished by the public body's administrator or legal counsel with a copy of FOIA within two weeks following election, reelection, appointment, or reappointment; and
- Read and become familiar with the provisions of FOIA.
- A current copy of FOIA may be found on the <u>FOIA Council</u> website.

Other Laws May Also Apply

- Other laws may also affect access to public records and meetings, but which laws apply will vary depending on the type of record, type of meeting, and type of elected official.
- Because the FOIA Council's statutory authority is limited to providing advice and guidance regarding FOIA, there will be times when you need to consult others for advice.

Examples of Other Laws

- Court records are subject to laws in Titles <u>16.1</u> and <u>17.1</u> of the Code, as well as the Rules of the Supreme Court of Virginia
- Code §§ 15.2-1415 through 15.2-1421 set out specific laws for meetings of local governing bodies
- Various provisions in Title <u>15.2</u> address public hearings
- Code §§ 22.1-72 through 22.1-75 address school board meetings and procedures
- Code § <u>58.1-3</u> prohibits the release of certain tax information

Public Records

Recognizing and responding to FOIA requests

§§ <u>2.2-3704</u> through <u>2.2-3706</u>

Introduction to Records & FOIA

- All public records are presumed open unless specifically exempt
- Definition of "public record" (§ 2.2-3701)
 - all writings and recordings that consist of letters, words or numbers, or their equivalent . . . however stored, and regardless of physical form or characteristics
 - prepared or owned by, or in the possession of a public body or its officers, employees or agents
 - in the transaction of public business.
 - Note: draft versions are public records

Debunking FOIA myths

- FOIA addresses access to public records (§ <u>2.2-3704</u>)
- FOIA does not require you to answer questions, give interviews, or provide explanations
- Inspect or Copy
- Not free public bodies may charge to produce public records
- FOIA exemptions generally do not prohibit release
- Informal vs. formal requests no difference

Who has the right to make a request under Virginia FOIA?

- Citizens of the Commonwealth
- Representatives of newspapers & magazines with circulation in the Commonwealth
- Representatives of radio & television stations broadcasting in or into the Commonwealth

Requests from out-of-state

- Best practice is to respond to out-of-state requesters even if they do not have access rights under Virginia FOIA
 - Standardizes practices for internal consistency
 - Out-of-state requester can get a Virginia citizen to make the same request anyway
- Do not have to follow FOIA procedure strictly since out-of-state requesters cannot enforce Virginia FOIA

Requesting Public Records

(continued)

- How requests may be made:
 - Requester must identify records with reasonable specificity
 - Public body may require the requester's name & legal address
 - A request does not have to be in writing
 - A request does not have to say "FOIA"
 - The requester's purpose does not matter
- Requester has the choice to inspect or to receive copies

Responding to Records Requests

- Five working days to respond after request is received
 - The first day to respond is the day after the request is received
 - Weekends and legal holidays do not count as working days
- Failure to respond is deemed a denial of the request and a violation of FOIA
- Creation of new records not required
- Always allowed to make agreements with the requester on the production of records

Five Responses

- 1) Provide the requested records
- 2) Requested records are being entirely withheld
- 3) Requested records are being provided in part and withheld in part
- 4) Requested records could not be found or do not exist
- 5) Additional time needed to search for/produce records

Exemptions & Redaction

§ <u>2.2-3704.01</u>

- Most FOIA exemptions are not prohibitions exempt records may be withheld, but they may also be released in the discretion of the custodian
- Only exempt portions of records may be withheld (redacted)
- An entire record may be withheld only if the entire record is exempt

Charges for Records Requests

- May make reasonable charges not to exceed actual cost incurred in accessing, duplicating, supplying, or searching for requested records
 - Cannot charge more than the actual cost to the public body
 - Requester may request an estimate in advance
 - Public body may require an advance deposit if estimate is > \$200
 - If a bill goes unpaid 30 days or more, do not have to respond to new requests until the outstanding balance is paid

Exemptions of General Application

- Personnel records § <u>2.2-3705.1</u> (1)
- Attorney-client privilege- § <u>2.2-3705.1</u> (2)
- Legal memoranda and other work product § 2.2-3705.1 (3)
- Contract negotiations § <u>2.2-3705.1</u> (12)
- Procurement exemptions § <u>2.2-3705.6</u> (10) and (11)
- Account & routing numbers § <u>2.2-3705.1</u> (13)

Public Meetings

Procedures for open, closed, and electronic meetings §§ 2.2-3707 through 2.2-3712

Introduction to Meetings under FOIA

- Policy: All meetings must be open unless closed following an exemption – § 2.2-3700
- Definitions of "public body" and "meeting" § 2.2-3701
- Open Meetings §§ <u>2.2-3707</u> through <u>2.2-3710</u>
- Closed Meetings §§ <u>2.2-3711</u> and <u>2.2-3712</u>
- Electronic Meetings §§ <u>2.2-3708.2</u>

Definition of "Public Body"

§ 2.2-3701

- Any legislative body, authority, board, bureau, commission, district or agency of the Commonwealth or of any political subdivision of the Commonwealth, including cities, towns and counties, municipal councils, governing bodies of counties, school boards and planning commissions
- Any committee, subcommittee, or other entity however designated, of the public body created to perform delegated functions of the public body or to advise the public body

Definition of "public body"

(continued)

- Also includes:
 - Other organizations, corporations or agencies in the Commonwealth supported wholly or principally by public funds (may include tax-exempt organizations, for example)
 - Constitutional officers are included, but only for records purposes

Definition of "meeting"

§ 2.2-3701

- Includes meetings including work sessions, when sitting physically, or through electronic communication means as a body or entity, or as an informal assemblage of (i) as many as three members or (ii) a quorum, if less than three, of the constituent membership, wherever held, with or without minutes being taken, whether or not votes are cast, of any public body
- "quorum if less than three" means two members, if they are a quorum of the public body (Ex. A subcommittee with only two or three members total would have a quorum of two members)
- Must be discussing or transacting public business in real time

Definition of "meeting" - Exceptions

The following are not considered meetings subject to FOIA:

- Gatherings of employees (the meetings rules only apply to members of the public body, not staff)
- Gatherings where no part of the purpose is the discussion or transaction of any public business
- Public forums, candidate appearances, or debates, the purpose of which is to inform the electorate and not to discuss or transact public business

Open Meetings - Requirements

- Notice
- Open to the Public
- Minutes

Notice Requirements

§ 2.2-3707

- Contents: date, time, and location of the meeting
- For local public bodies, FOIA requires notice to be posted in three locations:
 - 1. Official public government website, if any;
 - 2. Prominent public location in which notices are regularly posted; and
 - 3. At the office of the clerk of the public body OR at the office of the chief administrator

Notice Requirements (continued)

- Regular meetings post three working days before the meeting
 - Note: Do not count the day of the meeting as one of the working days
- Special, emergency, or continued meetings two elements:
 - Notice must be "reasonable under the circumstance" (varies with circumstances)
 - Public notice must be posted at the same time the members are notified
- Direct notice to those who request it (usually by an email list)

What does it mean for a meeting to be open to the public?

- Open meeting or public meeting means a meeting at which the public may be present - § 2.2-3701
- Must allow public to record, photograph, film, or otherwise reproduce
- FOIA does not address logistics such as room capacity
- Public bodies are encouraged to use additional means to increase public awareness (Ex. Live streaming online, broadcasting using television or radio, posting recordings of meetings, etc.)

Meeting Minutes

- Only required to be taken at open meetings
- Must include:
 - Date, time, location of the meeting
 - Members of the public body present and absent
 - A summary of matters discussed, deliberated, or decided
 - A record of any votes taken
 - Any motions to enter into a closed meeting and certification after a closed meeting

Agendas

- At least one copy of the proposed agenda and all agenda packets and, unless exempt, all materials furnished to members of a public body for a meeting shall be made available for public inspection at the same time such documents are furnished to the members of the public body.
- FOIA does not have requirements regarding specific agenda items, agenda contents or agenda changes
- FOIA does not address parliamentary procedure

Closed Meeting Procedures

Motion, Discussion, Certification

§§ <u>2.2-3711</u> and <u>2.2-3712</u>

Motion to Enter into a Closed Meeting

§ 2.2-3712 (A)

- Public body must take an affirmative recorded vote in an open meeting approving a motion that:
 - 1. Identifies the subject matter for the closed meeting;
 - Must be more than quoting or paraphrasing the exemption
 - 2. States the purpose of the closed meeting; and
 - Quoting or paraphrasing the exemption does state the purpose
 - 3. Makes specific reference to the applicable exemption from the open meeting requirements

Closed Meeting Discussions

§ 2.2-3712

- Restricted to those matters specifically exempted from the provisions of FOIA and identified in the motion (do not stray off topic)
- Minutes are not required, and if taken, are exempt from FOIA
- Who may attend?
 - Nonmembers if they are necessary or will aid consideration of the topic
 - Other members of public bodies may attend, but not participate in, closed meetings of committees, subcommittees, and other sub-entities of the parent body

Certification of a Closed Meeting

§ 2.2-3712 (D)

- At the conclusion of a closed meeting, public body must certify that the only things heard, discussed, or considered in the closed meeting were:
 - 1. Public business matters lawfully exempted from the open meeting requirements, and
 - 2. Such public business matters as were identified in the motion by which the closed meeting was convened
- Extra penalty for improper certification

Voting – §§ 2.2-3710 & 2.2-3711 (B)

- All votes taken to authorize the transaction of any public business must be taken and recorded in an open meeting
- No written or secret ballots
- May take straw polls or reach consensus in closed meetings
- Decisions made in closed meetings are not effective until a vote is taken at an open meeting (§ 2.2-3711 (B))

Commonly Used Exemptions

(Note: All meeting exemptions in FOIA are set out in § 2.2-3711.)

- Discussion of personnel § 2.2-3711 (A) (1)
- Discussion concerning scholastic records/students § 2.2-3711 (A) (2)
- Consideration of acquisition or disposition of real property § 2.2-3711 (A) (3)
- Discussion of prospective business or industry § 2.2-3711 (A) (5)
- Actual or probable litigation § 2.2-3711 (A) (7)
- Specific legal matters § 2.2-3711 (A) (8)
- Public safety issues § 2.2-3711 (A) (19)
- Discussion of award of public contract § 2.2-3711 (A) (29)

Electronic Meetings

§ 2.2-3708.2

- As of 2020, six distinct processes (five in FOIA, one in the state budget)
 four of these may be used by any public body, including local bodies
- A member of a local body may participate electronically due to
 - Personal matter that prevents attendance
 - Medical condition or disability that prevents attendance
- Both of these require a quorum, a participation policy, that the remote member's voice can be heard at the main location
- Personal matters may only be used twice per calendar year per member

Electronic Meetings

(continued)

- Two different electronic meetings procedures when the Governor has declared a state of emergency:
- Purpose limited to responding to the emergency § 2.2-3708.2 (A) (3) (version in FOIA)
- Broader purposes allowed, but has additional requirements Budget Item <u>4-0.01</u> (g) (version in the state budget)
- Both may be used by any public body
- No requirement for a quorum or to have a policy in place

Electronic Meetings

(continued)

- Members may monitor (listen/watch) even if they cannot participate
- Public & staff participation is always allowed restrictions only apply to members

Please see our <u>Electronic Meetings Guide</u> for a more detailed discussion

A note about FOIA & Social Media

- Because the definition of "public records" includes all types of records that are in the transaction of public business, various forms of social media may be public records
- Because any assemblage of three or more members (or a quorum of two) of a public body discussing or transacting public business simultaneously is a meeting subject to FOIA, social media may also be used to conduct meetings
- Please see our guide on <u>FOIA & Social Media</u> for a more detailed discussion

Remedies and Penalties

What happens if something goes wrong?

Enforcement is through the courts

§ 2.2-3713

- Petition for mandamus or injunction with affidavit showing good cause
- Mandamus: when the court orders a public official or employee to do something
- Injunction: When the court orders a public official or employee not to do something
- Petitioner may choose to file in general district court or circuit court
- Venue against a local body is in the county or city where the body is
- A single violation is sufficient to invoke the remedies

Petition for mandamus or injunction

(continued)

- Expedited hearing within seven days
- Petitioner must notify public body before filing
- If the petitioner wins, shall be awarded court costs, attorney fees, and any expert witness fees (paid by the public body)
- Public body bears burden to prove an exemption applies

Willful & Knowing Violations

§ 2.2-3714 (A)

- Willful & knowing violation of records and meetings requirements
 - \$500 to \$2000 civil penalty for first violation
 - \$2000 to \$5000 civil penalties for second and subsequent violations
 - Paid by the individual to the Literary Fund (not paid by the public body)
- May introduce advisory opinions of the FOIA Council as evidence that it was not willful & knowing - § 2.2-3715

Improper alteration or destruction of public records - § 2.2-3714 (B)

- Records altered or destroyed before record retention period expires
 - With intent to avoid FOIA
 - Civil penalty up to \$100 per record
 - In addition to any other penalties
 - Paid by the individual to the Literary Fund (not paid by the public body)
- Note: Record retention periods are set by the Library of Virginia under the Virginia Public Records Act

Improper certification of closed meetings - § 2.2-3714 (C)

- Improper certification of closed meeting
 - Civil penalty up to \$1000
 - Paid by public body to the Literary Fund
 - Mitigating factors: Opinions of the Attorney General, court cases, published Advisory Opinions from the FOIA Council

Additional Resources

- FOIA Council Contact us with any FOIA questions
 - Telephone (toll free) 866-448-4100
 - Telephone (Richmond) 804-698-1810
 - Email: foiacouncil@dls.virginia.gov
- <u>Library of Virginia</u> Records Management Section (for records retention questions under the Public Records Act)

Additional Resources

(continued)

- For members of municipal councils, county boards of supervisors, and school boards:
- Virginia Municipal League
- Virginia Association of Counties
- Virginia School Boards Association

Additional Resources

(continued)

For constitutional officers:

- State Compensation Board
- Virginia Sheriffs' Association
- Commonwealth's Attorneys' Services Council
- Treasurers' Association of Virginia
- Commissioners of the Revenue Association of Virginia
- Office of the Executive Secretary of the Supreme Court of Virginia

COIA Training for Local Government Officials 345pm

Rebekah Stefanski

Attorney

Virginia Conflict of Interest and Ethics Advisory Council



2021 VACO County Supervisors' Forum April 29, 2021

I. Council Membership

Council membership as of April 2021:

Speaker of the House Appointees
The Honorable Del. M. Keith Hodges
The Honorable Del. Vivian E. Watts

Senate Committee on Rules Appointees The Honorable Sen. Jennifer L. McClellan The Honorable Sen. Thomas K. Norment, Jr. The Honorable Wilford Taylor, Jr. (Chair)

Gubernatorial Appointees John C. Blair Bernard L. Henderson, Jr. Sharon E. Pandak

II. Council Duties

The Council shall perform the following duties (pursuant to § 30-356 unless otherwise noted):

- 1. <u>Furnish formal and informal guidance to all persons required to comply with</u> the Acts
- 2. Conduct training seminars and educational programs and publish educational materials for all persons required to comply with the Acts
- 3. Approve orientation courses conducted by state agencies and review, upon request, educational materials and training courses conducted for state and local government officers and employees
- 4. Prescribe the forms required by §§ 2.2-426, 2.2-3117, 2.2-3118, and 30-111
- 5. Provide disclosure forms to appropriate clerks at least 30 days prior to the filing deadline (§ 2.2-3115)
- 6. Provide software or electronic method for state filers to submit the required disclosure forms. The Council prescribes the method of execution and certification of electronically filed forms.
- 7. Review all disclosure forms required to be filed with the Council. The Council may review disclosure forms for completeness, including comparing lobbyist reports with other reports filed by the Council. If a disclosure form has been found to be incomplete, the Council shall notify the filer and direct the filer in writing to file a completed form within a prescribed period of time.
- 8. Redact personal information from any form prior to making the form available to the public
- 9. Establish and maintain a searchable database of disclosure forms filed with the Council
- 10. Notify the Secretary of the Commonwealth and the Attorney General concerning late or failure-to-file penalties (§§ 2.2-431 and 2.2-3124)

- 11. Accept and review any statement received from a filer disputing the receipt by such filer of a gift that has been disclosed on the form filed by a lobbyist.
- 12. <u>Receive and review requests for approval of travel submitted by individuals</u> required to file a Statement of Economic Interests (§ 30-356.1)
- 13. Submit complaints against incumbent legislators to the appropriate ethics panel (§ 30-114)
- 14. Review actions taken in the General Assembly with respect to the discipline of its members for the purpose of offering nonbinding advice
- 15. Request assistance, services, and information from any agency in order to effectively carry out its responsibilities
- 16. Report on or before December 1 of each year on its activities, including recommendations for changes in the laws, to the General Assembly and the Governor. The chair is required to submit the report pursuant to the DLAS procedures for legislative documents.

III. Prohibited Conduct and Personal Interests

- A. Prohibited Conduct (§ 2.2-3103)
 - 1. Solicit or accept money or other thing of value for services performed within the scope of your official duties except for compensation paid by your agency
 - 2. Offer or accept any money or other thing of value for obtaining employment, appointment, or promotion of any person with any governmental or advisory agency
 - 3. Offer or accept any money or other thing of value for the use of your public position to obtain a contract for any person or business with any governmental or advisory agency
 - 4. Use confidential information that you have acquired by reason of your public position and that is not available to the public for your or another party's economic benefit
 - 5. Accept any money, loan, gift, favor, service, or business or professional opportunity that reasonably tends to influence you in the performance of your official duties; this does not include political contributions actually used for a political campaign or constituent services and reported as required by campaign finance laws
 - 6. Accept any business or professional opportunity when you know that there is a reasonable likelihood that the opportunity is being given to influence you in the performance of your official duties
 - 7. Accept any honoraria for any appearance, speech, or article in which you provide expertise or opinions related to the performance of your official duties (this only applies to the Governor, Lt. Governor, Attorney General, Governor's Secretaries, and heads of departments of state government)
 - 8. Accept a gift from a person who has interests that may be substantially affected by the performance of your duties under circumstances where the timing and nature of the gift would cause a reasonable person to question your impartiality in the matter affecting the donor
 - 9. Accept gifts from sources on a basis so frequent as to raise an appearance of the use of your public office for private gain

- 10. Use your public position to retaliate or threaten to retaliate against any person for expressing views on matters of public concern or for exercising any right that is otherwise protected by law, provided, however, that this does not restrict the authority of any public employer to govern conduct of its employees, and to take disciplinary action, in accordance with applicable law, and provided further that this does not limit the authority of a constitutional officer to discipline or discharge an employee with or without cause
- B. "Personal interest" is a financial benefit or liability accruing to an officer or employee or to a member of his immediate family. (§ 2.2-3101)

Such interest shall exist by reason of:

- 1. Ownership in a business if the ownership interest exceeds three percent of the total equity of the business;
- 2. Annual income that exceeds, or may reasonably be anticipated to exceed, \$5,000 from ownership in real or personal property or a business;
- 3. Salary, other compensation, fringe benefits, or benefits from the use of property, or any combination thereof, paid or provided by a business or governmental agency that exceeds, or may reasonably be anticipated to exceed, \$5,000 annually;
- 4. Ownership of real or personal property if the interest exceeds \$5,000 in value and excluding ownership in a business, income, or salary, other compensation, fringe benefits or benefits from the use of property;
- 5. Personal liability incurred or assumed on behalf of a business if the liability exceeds three percent of the asset value of the business; or
- 6. An option for ownership of a business or real or personal property if the ownership interest will consist of subdivision (1) or (4) above.
- C. Personal Interest in a Contract (§ § 2.2-3107, 2.2-3108, 2.2-3109)
 You may not have a personal interest in a contract with your agency other than your own contract of employment. Members of county boards of supervisors, city councils, and town councils are also prohibited from having a personal interest in a contract with any governmental agency that is a component part of the local government and which is subject to the ultimate control of the governing body and with any other governmental agency if such person's governing body appoints a majority of the members.

There are many exceptions to this prohibition. It is recommended that you contact the Council regarding the application of an exception.

D. Personal Interest in a Transaction (§ 2.2-3112)

You must publicly disqualify yourself if the transaction applies <u>solely</u> to the entity in which you have a personal interest, or if you have a personal interest in a transaction and do not qualify for participation.

"Transaction" means any matter considered by any governmental or advisory agency, whether in a committee, subcommittee, or other entity of that agency or before the agency itself, on which official action is taken or contemplated.

It is recommended that you contact the Council if you have a question about a possible personal interest in a transaction.

IV. Gifts

When discussing gifts, always ask three separate questions:

- 1. Is it a gift?
- 2. Does it count toward the gift cap?
- 3. Do I have to report it on my Statement of Economic Interests?

A. Definition of a gift (§ 2.2-3101)

A gift is any gratuity, favor, discount, entertainment, hospitality, loan, forbearance, or other item having monetary value. It includes services as well as gifts of transportation, local travel, lodgings and meals, whether provided in-kind, by purchase of a ticket, payment in advance or reimbursement after the expense has been incurred.

A gift is <u>not</u>:

- 1. Any offer of a ticket, coupon, or other admission or pass unless the ticket, coupon, admission, or pass is used;
- 2. Honorary degrees;
- 3. Any athletic, merit, or need-based scholarship or any other financial aid awarded by a public or private school, institution of higher education, or other educational program pursuant to such school, institution, or program's financial aid standards and procedures applicable to the general public;
- 4. A campaign contribution properly received and reported pursuant to campaign finance disclosure laws;
- 5. Any gift related to the private profession or occupation or volunteer service of a legislator/state/local official or employee or of a member of his immediate family;
- 6. Food or beverages consumed while attending an event at which the filer is performing official duties related to his public service;
- 7. Food and beverages received at or registration or attendance fees waived for any event at which the filer is a featured speaker, presenter, or lecturer;
- 8. Unsolicited awards of appreciation or recognition in the form of a plaque, trophy, wall memento, or similar item that is given in recognition of public, civic, charitable, or professional service;
- 9. A devise or inheritance;

- 10. Travel disclosed pursuant to the campaign finance disclosure laws;
- 11. Travel paid for or provided by the government of the United States, any of its territories, or any state or any political subdivision of such state;
- 12. Travel provided to facilitate attendance by a legislator at a regular or special session of the General Assembly, a meeting of a legislative committee or commission, or a national conference where attendance is approved by the House Committee on Rules or its Chairman or the Senate Committee on Rules or its Chairman;
- 13. Travel related to an official meeting of, or any meal provided for attendance at such meeting by, the Commonwealth, its political subdivisions, or any board, commission, authority, or other entity, or any charitable organization established pursuant to § 501(c)(3) of the Internal Revenue Code affiliated with such entity, to which such person has been appointed or elected or is a member by virtue of his office or employment;
- 14. Gifts with a value of less than \$20; or
- 15. Attendance at a reception or similar function where food, such as hors d'oeuvres, and beverages that can be conveniently consumed by a person while standing or walking are offered; or
- 16. Gifts from relatives or personal friends. For the purpose of this definition, "relative" means the donee's spouse, child, uncle, aunt, niece, nephew, or first cousin; a person to whom the donee is engaged to be married; the donee's or his spouse's parent, grandparent, grandchild, brother, sister, step-parent, step-grandparent, step-grandchild, step-brother, or step-sister; or the donee's brother's or sister's spouse or the donee's son-in-law or daughter-in-law. For the purpose of this definition, "personal friend" does not include any person that the filer knows or has reason to know is a contractor or registered lobbyist or lobbyist's principal.

Items that are exempted from the definition of a gift are <u>not</u> subject to the \$108 gift cap and do not have to reported as a gift on your Statement of Economic Interests.

Please remember that travel that is not a gift may still be reportable on Schedule F of your disclosure form.

B. \$108 gift cap (§ 2.2-3103.1)

Individuals required to file a Statement of Economic Interests and members of their immediate family may not accept gifts with a total value in excess of \$108 per year from a lobbyist, lobbyist's principal, or a person, organization, or business who is or is seeking to become a party to a contract with your agency or an agency over which you have the authority to direct such agency's activities.

Immediate family means (i) a spouse and (ii) any other person who resides in the same household as the filer and who is a dependent of the filer.

- C. Exceptions to the \$108 gift cap (§ 2.2-3103.1)
 - Gifts given from lobbyists or contractors who are also your <u>personal friend</u>. In order to determine if an individual is your personal friend, you should consider the following:
 - a) The circumstances under which the gift was offered;
 - b) The history of the relationship between the person and the donor, including the nature and length of the friendship and any previous exchange of gifts between them;
 - c) To the extent known to the person, whether the donor personally paid for the gift or sought a tax deduction or business reimbursement for the gift; and
 - d) Whether the donor has given the same or similar gifts to other persons required to file the disclosure form.
 - 2. Food, beverages, entertainment, and the cost of admission or registration at a widely attended event. To determine if an event qualifies as a widely attended event, the event must:
 - 1. Have at least 25 persons invited or expected to attend, and
 - 2. Be open to individuals who:
 - a) are members of a public, civic, charitable, or professional organization,
 - b) are from a particular industry or profession, or
 - c) represent persons interested in a particular issue.
 - Travel approved by the Council via a <u>travel waiver</u>
 While such travel is exempted from the \$108 gift cap, it <u>must</u> be reported on Schedule F of your Statement of Economic Interests.

AN EXEMPTION FROM THE GIFT CAP IS NOT AN EXEMPTION FROM YOUR REQUIREMENT TO REPORT A GIFT ON YOUR STATEMENT OF ECONOMIC INTERESTS.

D. Reporting gifts

You must report any gift valued over \$50 or any combination of gifts with an aggregate value over \$50 received from <u>any</u> lobbyist, lobbyist's principal, or entity that is a party to or is seeking to become a party to a contract with your agency by you or a member of your immediate family.

V. Statement of Economic Interests

A. Who must file?

Individuals named in § § 2.2-3115 and 2.2-3116

B. With what entity do I file?

Individuals named in § 2.2-3115 file on paper with the clerk of the local governing body or school board.

Individuals named in § 2.2-3116 (constitutional officers) file electronically with the Council.

C. When do I file?

Statements of Economic Interests are filed annually, every February 1.

Deadlines are moved to the next business day if they fall on a weekend or state holiday.

- D. \$250 penalty for late filing
 - a. If you require a deadline extension, you may request one by submitting a deadline extension request form found on the Council's website.
 - b. The Council has five business days to respond to a request. If more information is requested, the Council has five business days after the information is received to respond to the request.
 - c. Deadline extensions are granted for:
 - The death of a relative of the filer, as relative is defined in the definition of "gift" in Article 3 or the Acts
 - 2. A state of emergency is declared by the Governor pursuant to Chapter 3.2 (§ 44-146.13 et seq.) of Title 44 or declared by the President of the United States or the governor of another state pursuant to law and confirmed by the Governor by an executive order, and such an emergency interferes with the timely filing of disclosure forms. The extension shall be granted only for those filers in areas affected by such emergency.
 - 3. The filer is a member of a uniformed service of the United States and is on active duty on the date of the filing deadline
 - 4. A failure of the electronic filing system and the failure of such system prevents the timely filing of disclosure forms
 - 5. Good cause shown

VI. Travel Waivers

- A. When do I need to request a travel waiver?
 - 1. Travel waivers are only required for travel valued over \$108 paid by a lobbyist, lobbyist's principal, or contractor.
 - 2. Travel waivers are <u>NOT</u> required for government paid travel or travel paid by any other entity who is not a lobbyist, lobbyist's principal, or contractor. Please remember that trips and travel that do not require a travel waiver may still be reportable on your Statement of Economic Interest.
 - 3. Requests can be made on the Council's website at: http://ethics.dls.virginia.gov/travel-waiver-request.asp
- B. How are travel waiver requests processed?

 The Council has five business days to respond. If the Council does not approve or deny the request within that time, the request shall be deemed approved by the Council. If more information is requested, the Council has five business days after the information is received to respond to the waiver request.

VII. Other Questions

1. How and under what circumstances is individual information released? ANSWER: All filings are available to the public via a Freedom of Information Act request.

All filings submitted electronically after July 1, 2016 are available to the public via the online searchable database on the Council website.

- 2. Are filers notified when their disclosure forms are requested and released? ANSWER: There is no requirement that the filer be notified that the information has been requested.
- 3. Is personal information released when a disclosure statement is requested? ANSWER: Section 2.2-3115 requires clerks of governing bodies and school boards to redact "any residential address, personal telephone number, or signature contained on" the form.

Section 30-356 requires the Council to "Redact from any document or form that is to be made available to the public any residential address, personal telephone number, or signature contained on that document or form..."

4. What training is required?

ANSWER: Section 2.2-3132 requires all local elected officials to take training at least once every two years. Elected officials that take office after July 1, 2019 have two months from the date they assume their office to complete their first training. The training must be completed once every two years from the date it was last completed. The clerk of the local governing body or school board is required to maintain attendance records for each elected official in their jurisdiction.

Contact Information:

Virginia Conflict of Interest and Ethics Advisory Council
Pocahontas Building
900 E Main Street
8th Floor
Richmond, VA 23219

Website: ethics.dls.virginia.gov Email: ethics@dls.virginia.gov

Stewart Petoe Executive Director spetoe@dls.virginia.gov 804.698.1845

Rebekah Stefanski Attorney rstefanski@dls.virginia.gov 804.698.1846

Elizabeth Sundberg Filing Coordinator esundberg@dls.virginia.gov 804.698.1848

Valerie Mizzell Assistant Filing Coordinator vmizzell@dls.virginia.gov 804.698.1847

VACo Supervisors' Forum Presentations Friday, April 30, 2021



Budget Workshop for Supervisors 830am

The Honorable **Jeffrey C. McKay**VACo President and Fairfax County Chairman

Meghan Coates | Director of Finance | Henrico County

Budget Workshop Breakout Sessions

Christian R. Goodwin | Louisa County Administrator

Theodore L. Voorhees | Orange County Administrator

BUDGETING BASICS, BEST FINANCE

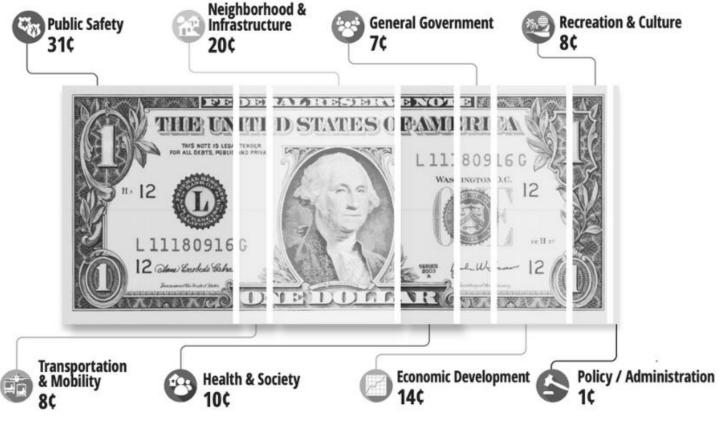
VACO SUPERVISORS FORUM
APRIL 2021



General Outline

- Basics of a Budget
- **1** Legal Requirements
- Types of Budgets
- General Processes
- Best Practices
- Transparency
- Discussion

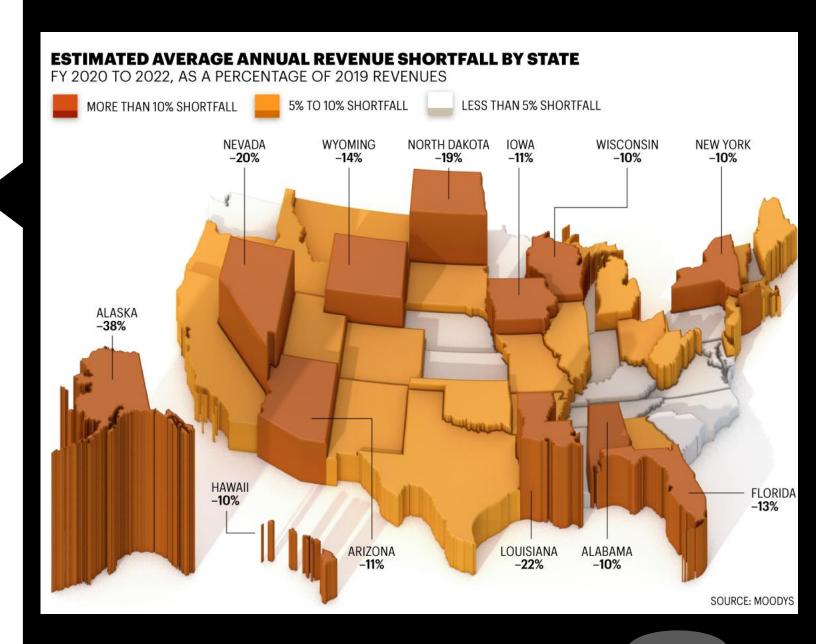
WHAT'S A BUDGET?



- PLANNING PROCESS THAT IS REQUIRED BY LAW
- MORE PRACTICIALLY, IT SETS TAX RATES AND ANTICIPATED REVENUES AND IS THE PLATFORM FOR MAKING DECISIONS REGARDING SERVICE PROVISION
- FISCAL YEAR BEGINS JULY 1
- LEGAL GUIDANCE IN VA CODE SECTION 45.2 COUNTIES, CITIES, AND TOWNS

What Purposes Does it Serve?

- Provides a framework for governing during the following 12 months
- Accountability
- Financial Control
- Public Engagement and Relations
- Photo, as an aside...



Virginia State Code Title §15.2 Cities, Counties, and Towns; Chapter 25. Budget, Audits and Reports

Legal Basis and Requirements

- Must include "estimated revenues and borrowings" and "contemplated expenditures" – it is a plan.
- Should include the current year's capital improvement projects, operations, and debt service.
- May include a "reasonable reserve for contingencies and capital improvements"
- Must provide local share for constitutional officers, social services, Children's Services Act (CSA) health department and schools
- The budget must be approved by July 1.
- May only spend after appropriations.

Constraints



Dillon Rule: Generally, the Board of Supervisors may exercise only those powers delegated and authorized to it by the General Assembly.



Each expenditure planned and revenue anticipated in budget must be supported by state authority.



Discretionary vs Non-Discretionary, impacts of state mandates.



Discretionary portion is where the Board can influence quality of life through the budget process.

TYPES OF BUDGETS

GENERAL FUND Education Other 35% 16% Capital & Debt 12% **Public Safety Human Services**

- OPERATING (REQUIRED BY LAW TO BE ADOPTED EACH YEAR)
- DIFFERENT TYPES OF OPERATIONAL BUDGETS AND THEIR USES: LINE-ITEM, PROGRAM, PERFORMANCE, AND INCREMENTAL OR ZERO-BASED
- CAPITAL (FIVE YEAR CAPITAL IMPROVEMENT PLAN, ONE YEAR CAPITAL BUDGET)

The Operating Budget

Each operational budget must show (§ 15.2-2504):

- The total amount appropriated, and the amount spent for the previous year (budget to actuals comparison);
- the amount appropriated and expected to be appropriated for the current year;
- The amount of increase or decrease in the proposed budget compared to the current year.

The Capital Budget

A capital budget is a plan for funding capital projects, and a timetable for the expected completion for each project.

CIP Project Type by Fund

	Year 1	Year 2	Year 3	Year 4	Year 5	Total 5-Year
	Budget	Budget	Budget	Budget	Budget	Budget
Airport CIP Fund	538,890	449,000	8,566,250	1,006,250	5,000,000	15,560,390
Facility Improvements	538,890	449,000	-	562,500	5,000,000	6,550,390
Land Acquisition	-	-	8,566,250	443,750	-	9,010,000
County Improvements Fund	26,915,513	34,400,167	27,290,735	21,806,628	30,981,011	141,394,054
Construction	1,415,000	6,500,000	-	-	-	7,915,000
Equipment	1,841,160	154,200	1,280,000	1,705,850	353,596	5,334,806
Facility Improvements	7,610,000	235,000	4,260,000	340,000	6,705,000	19,150,000
Reserve	700,000	700,000	700,000	700,000	700,000	3,500,000
Roads & Public Works	11,072,353	18,828,967	16,400,735	14,610,778	18,052,415	78,965,248
Technology	1,825,000	5,185,000	2,130,000	2,000,000	1,950,000	13,090,000
Vehicles	2,452,000	2,797,000	2,520,000	2,450,000	3,220,000	13,439,000
Public Utilities CIP Fund	18,330,649	26,402,778	23,555,211	22,745,661	20,121,508	111,155,807
Construction	-	960,000	-	-	-	960,000
Equipment	88,000	115,000	-	-	-	203,000
Facility Improvements	-	-	-	-	92,000	92,000
Land Acquisition	-	-	-	-	500,000	500,000
Technology	250,000	-	-	-	-	250,000
Utility Infrastructure	14,266,000	17,305,000	16,014,000	17,618,000	17,529,000	82,732,000
Utility Service Agreement	3,451,649	7,757,778	7,231,211	4,951,661	1,810,508	25,202,807
Vehicles	275,000	265,000	310,000	176,000	190,000	1,216,000
School Improvements Fund	7,000,000	49,525,000	3,000,000	13,250,000	10,700,000	83,475,000
Construction	4,000,000	36,000,000	-	-	4,100,000	44,100,000
Equipment	-	965,000	-	1,980,000	-	2,945,000
Facility Improvements	555,000	5,823,000	359,562	4,570,000	500,000	11,807,562
Land Acquisition	-	3,000,000	-	-	-	3,000,000
Technology	1,445,000	2,237,000	1,140,438	5,200,000	4,600,000	14,622,438
Vehicles	1,000,000	1,500,000	1,500,000	1,500,000	1,500,000	7,000,000
Grand Total	52,785,052	110,776,945	62,412,196	58,808,539	66,802,519	351,585,251

The Budget Process

- Details are largely driven locally, high-level points in code:
- April 1 department heads and constitutional officers submit budget requests; the Board, through its administrator, may set the format for submitting information.
- The Board can consider approval only after a public hearing.
- An advertisement of the budget must be made at least seven days prior to the hearing.

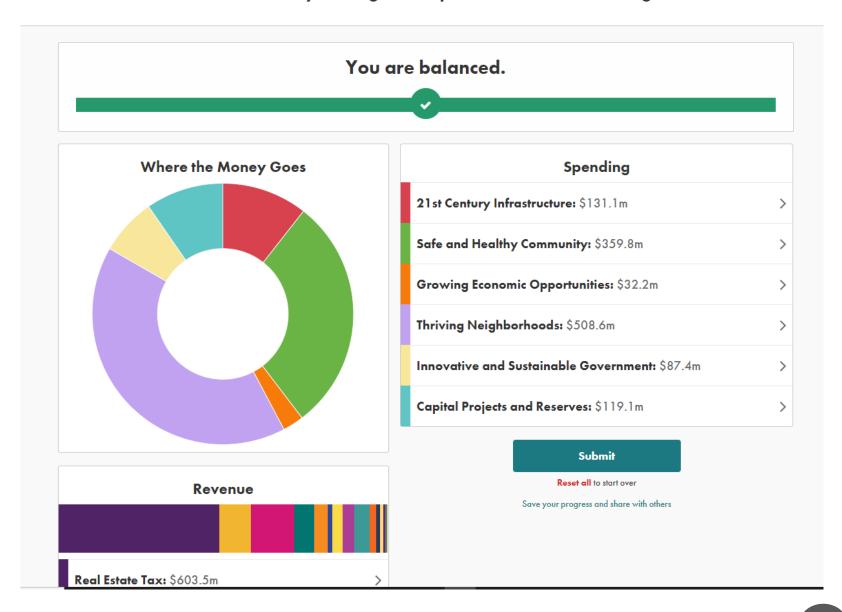
Spotlight on Schools:

- School Board and Superintendent responsible for submitting a budget to Board; No later than May 15, or within 30 days of the receipt of the estimates for state funding of education from the Department of Education, the Board of Supervisors must approve a school budget.
- Can only approve and appropriate by major category or in total.
- No discretion over line items in the school budget.

Balancing the Budget

- Monitoring economic conditions
- Demand for service, trends
- Public expectations
- Balancing different value sets

FY 2021-22 City Manager's Proposed General Fund Budget



BUDGET ADOPTION



- THE BUDGET MAY BE ADOPTED BY ORDINANCE OR RESOLUTION
- APPROPRIATION IS THE ACT OF THE BOARD TO RELEASE FUNDS SO THAT THEY CAN BE SPENT
- BOARD MAY APPROPRIATE ANNUALLY, SEMIANNUALLY, QUARTERLY OR MONTHLY
- APPROPRIATIONS MAY EXCEED THE ORIGINAL BUDGET, BUT EXPENDITURES MAY NOT EXCEED APPROPRIATIONS
- SUPPLEMENTAL APPROPRIATIONS AND BUDGET AMENDMENTS
- AMENDMENTS > 1% OF TOTAL EXPENDITURES REQUIRE NOTICE & PUBLIC HEARING TO AMEND BUDGET

Discussion: which would you fund?

A new animal shelter to replace the one that doesn't meet code or a new science wing on the high school?

Soccer fields or increases in funding to social services to assist needy citizens?

Funding to a nonprofit which runs a shelter for the homeless or more police officers on patrol?



BEST PRACTICES IN BUDGETING

Spotlight on Blueprint Chesterfield

- Framework to organize practices related to budgeting and strategic planning
- System for establishing and resourcing community priorities
- Creates a brand
- Ensures consistency in process and communication

FY21 BUDGET-IN-BRIEF



FY2022 Budget Five-Year Plan

Proposed FY2022 – 2026 General Government Five-Year Plan

County Revenue	FY2022	FY2023	FY2024	FY2025	FY2026
Prior Year Revenue & Other Funding Sources Total	\$721,844,000	\$806,834,200	\$827,476,100	\$845,084,700	\$867,891,900
Real Estate Taxes	35,683,900	15,651,300	16,238,200	16,847,200	13,550,500
Real and Personal Public Service Corporation Taxes	1,840,400	346,300	353,200	360,300	367,500
Personal Property Taxes	9,801,700	2,979,400	3,083,700	3,191,600	3,303,30
Machinery and Tools Taxes	(288,700)	-	-	-	-
Penalties and Interest	828,400	-	-	-	-
Special Assessments and Service Districts	129,700	-	-	-	-
Other Local Taxes	24,823,000	2,800,200	2,903,200	2,927,400	2,364,90
Permits and Fees	1,294,000	(41,000)	4,000	4,100	4,10
Fines and Forfeitures	(55,700)	-	-	-	-
Use of Money and Property	1,221,700	5,000	5,000	-	-
Charges for Services	154,700	207,300	59,400	60,400	61,60
State Revenue	1,868,800	32,100	272,100	(206,000)	34,00
Federal Revenue	453,300	-	-	-	-
Recovered Costs and Miscellaneous	1,688,200	117,800	124,700	132,100	140,10
Use of Reserves	5,546,800	(1,456,500)	(5,434,900)	(509,900)	(2,816,20
Total General Fund Revenue	\$806,834,200	\$827,476,100	\$845,084,700	\$867,891,900	\$884,901,70
Incremental Growth	84,990,200	20,641,900	17,608,600	22,807,200	17,009,80
Incremental Percentage Growth	11.77%	2.56%	2.13%	2.70%	1.96
Future Revenue Variance	-	2,027,700	3,782,300	2,215,400	2,536,20
Total Available Sources	\$806,834,200	\$829,503,800	\$848,867,000	\$870,107,300	\$887,437,90
County Expenditures	FY2022	FY2023	FY2024	FY2025	FY2026
Prior Year Baseline Expenditure Total	\$721,844,000	\$797,614,200	\$818,576,600	\$836,693,200	\$857,392,60
•					
Baseline Increases					
Public Safety Pay Plan Salary Increases (note: \$3.4 million of benefits are distributed below)	10,437,300	313,100	322,500	332,200	342,20
Salary/Merit Increases	3,859,300	2,846,300	3,975,000	4,062,900	4,167,80
Restoration of Personnel Funding	3,315,900	-	-	-	-
VRS Retirement	2,965,300	685,200	770,600	789,400	811,20
Group Life Healthcare Premiums	163,500	52,100	57,900	58,800	59,80
Centralized Personnel Items (includes retiree h/c, PT/OT restorations, LODA)	1,440,300	1,484,700	1,944,800	2,082,300	2,228,30
	3,692,400	1,229,700	684,500	698,000	713,50
Personnel Expenditure Baseline Subtotal	25,874,000	\$6,611,100	\$7,755,300	\$8,023,600	\$8,322,80
Debt Service	1,543,700	228,300	2,353,900	612,400	29,60
Pay-as-you-go Capital Funding	7,778,300	9,146,700	(16,700)	1,489,300	(2,092,30
Capital Expenditure Baseline Subtotal	\$9,322,000	\$9,375,000	\$2,337,200	\$2,101,700	(\$2,062,70
Recurring transfer	18,040,000	8,000,000	8,000,000	8,000,000	8,000,00
One-time funding for Schools	15,000,000	(5,000,000)	(3,000,000)	-	-
Education Expenditure Baseline Subtotal	\$33,040,000	\$3,000,000	\$5,000,000	\$8,000,000	\$8,000,00
Tax Relief for the Elderly and Disabled	2,948,200	1,219,500	1,341,400	1,475,600	1,623,10
Pass-through Expenditures (Convention Center, CVWMA)	2,314,700	100,000	102,000	103,300	104,90
Non-Departmental	23,200	89,700	95,900	102,600	109,80
Programmatic/Contractual/Policy Expenditure Baseline	\$5,286,100	\$1,409,200	\$1,539,300	\$1,681,500	\$1,837,80
Departmental Structure Restoration (Structural adjustments in FY22 items)	938,800	385,900	448,800	452,300	455,90
Program/Contract Contingencies	-	(500,000)	-	-	-
Risk Management	691,000	-	-	-	-
Transfer to Airport	(85,900)	68,000	32,500	2,400	(97,10
Transfer to Children's Services Fund	-	90,800	95,500	100,100	105,20
Transfer to Grants Fund	424,900	289,900	668,500	91,000	94,70
Transfer to Mental Health Fund	279,300	232,500	239,500	246,800	257,20
Other Baseline Adjustments	\$ 2,248,100	\$567,100	\$1,484,800	\$892,600	\$815,90
Projected Baseline Expenditure Total	\$797,614,200	\$818,576,600	836,693,200	\$857,392,600	\$874,306,40
Incremental Baseline Growth Incremental Baseline Percentage Growth	75,770,200 7.72%	20,962,400 2.63%	18,116,600 2.21%	20,699,400 2.47%	16,913,80 1.97
meremental baseline refeelinge growth	7.7276	2.03%	2.21%	2.4776	1.97
Projected Revenue to Accommodate Out Year Programmatic Enhancements	9,220,000	10,927,200	12,173,800	12,714,700	13,131,50
Prior Year Enhancements (Recurring)	-	9,220,000	10,927,200	12,173,800	12,714,70
Followers and Founded Founded	0.330.000		4.245.500	E 40 000	445.00

Using a Five-Year Plan

- Annual budget, longer range planning
- Shows changes in revenues, baseline expenditures, new programs
- Incremental investment in larger initiatives
- Starting point for annual process

What is a Program and Service Inventory?

Why don't you zero base your budget?

Visibility on spending/FTE at program level

Can be aligned in financial system

Measures, performance monitoring

Program and Service Inventor

		FY2	020 ADOPTED BUDGET			PYZ021 ADOPTED BU	OCET
PROGRAM NAME	PROGRAM DESCRIPTION	FY20 FTE	REVENUE	EXPENDITURES	FY21 FTE	REVENUE	EXPENDITURES
BUILDING INSPECTION							
	Building Inspection administers the building permit process from permit application to permit issuance to ensure compliance with the Uniform Statewide Building Code (USBC) and other related						
	laws and ordinances. Staff reviews applications for acceptance, reviews plans for code compliance,						
	processes fees, routes for review to other departments, issues approved permits and other related						
Permitting	documents.	20.0	\$4,719,300	\$1,520,500	18.8	\$4,931,100	\$1,515,600
	New construction and property maintenance inspections are required to ensure compliance with the						
	Uniform Statewide Building Code (USBC), the Virginia Property Maintenance Code (VPMC), related						
	laws and ordinances, and approved plans. This program picks up from permit issuance as inspectors						
Inspection	perform and coordinate required inspections through issuance of the certificate of occupancy and/or completion of the construction project.	34.0		2.594.600	29.0		2.251.500
Inspection	completion of the construction project.	34.0		2,594,400	29.0		2,251,500
	Administration includes the office of the building official, the building official's immediate support						
	staff, and general administrative support staff for the overall department. The Uniform Statewide Building Code and County code require appointment of a building official to act as executive in						
	charge of the local building department. This program includes executive level management and						
	support functions of the department, providing department leadership, budget management and						
	oversight, and general administrative support to the department. The building official is the department director, final authority, and interpreter of code for the locality; additionally, the building						
	official and immediate support staff is responsible for administration of the departmental budget and						
Administration	human resource management.	6.0		823,900	9.3		776,100
	Ensure structures are maintained in accordance with the Virginia Property Maintenance Code						
Property Maintenance	(VMPC) and County ordinances. Subtotal Building Inspection (General Fund)	60.0	\$4,719,300	\$4,938,800	3.0 60.0	\$4,931,100	222,300 \$4,765,500
	Net Cost	90.0	34011,000	\$219,500	00.0	20,000,000	-\$165,600
CIRCUIT COURT CLERK							
	Constitutional Officer responsible for more than 800 statutory responsibilities including civil and criminal case processing, land records processing and preservation, probate matters, marriage						
Circuit Court Clerk	criminal case processing, land records processing and preservation, probate matters, marriage licenses, concealed handgun permits, and a variety of other citizen services.	46.0	\$1,730,500	\$3,947,900	46.0	\$1,697,800	\$3,946,000
Circuit Court Clerk	Technology Trust Fund		350,000	350,000		303,000	303,000
	Subtotal Circuit Court Clerk (General Fund) Net Cost	46.0	\$1,730,500	\$3,947,900	46.0	\$1,697,800	\$3,946,000
	Subtotal Circuit Court Clerk (Grants)		\$350,000	\$2,217,400	-	\$303,000	\$303,000
	Net Cost						
CITIZEN INFORMATION AND RESOURCES							
Administration	Provides leadership, financial oversight, strategic planning, and coordination for Citizen Information and Resources.	2.0		\$227,500	2.0		\$225,000
	Serves as an in-house expert and resource on the older adults and adults with disabilities. Provides	2.0		9447,300	2.0		223,000
	educational and outreach programs and services as resource for information and assistance.						
	Partners with community organizations to leverage resources. Facilitates support groups, distributes						
Aging and Disability Services	information, and manages volunteers.	1.0		165,600	1.0		212,500
	Provides support for development and implementation of community engagement strategies and						
	countywide special events. Initiates and facilitates the involvement of the community, county						
	agencies and not-for-profit organizations in generating solutions to emerging issues and promoting						
Community Engagement Services	access to information and resources. Oversees areas of youth services, multicultural, and volunteerism, the engagement components of Citizen Information and Resources.	4.0		359,500	4.0		359,300
Commence of the Commence of th		-		*******	-		*******
	Provides alternative transportation services for County residents who are elderly, live in a low-						
Alternative Transportation Services	Income household or have a disability. Subtotal Citizen Information and Resources (General Fund)	1.0	310,000 \$310,000	2,130,400 \$2,883,000	1.0 8.0	310,000 \$310,000	2,086,200 \$2,883,000
	Net Cost		3210,000	\$2,573,000	0.0	3310,000	\$2,573,000
COMMISSIONER OF THE REVENUE							
	Maintain personal property records and administer billing. Generate tax revenue and ensure legal						
Commissioner of Revenue	compliance to tax code. Process tax returns for tax relief and tax exemption.	41.0	\$512,000	\$3,082,700	41.0	\$511,000	\$3,170,500
	Subtotal Commissioner of the Revenue (General Fund) Net Cost	41.0	\$512,000	\$3,082,700	41.0	\$511,000	\$3,170,500
COMMONWEALTH'S ATTORNEY	HEI COS			32,370,700			32,609,500
	Responsible for prosecuting all criminal offenses that occur within the jurisdiction of Chesterfield						
Local Receives	County on behalf of the Commonwealth and representing the people of Virginia in prosecuting the most serious crimes.	52.0	\$2,163,800	\$4,945,900	54.0	\$2,163,800	\$5,169,600
Legal Services	HUR SELANS WHITE.	32.0	32,103,800	34,945,900	34.0	34,101,800	30,109,000
	The Victim/Witness Assistance Program facilitates easy-access to services which assist victims and						
	witnesses of crime in understanding their rights and obligations throughout the criminal justice						
	process. We strive to reduce crime-related trauma and improve outcomes by partnering closely with government- and community-based agencies to address the individual circumstances of each victim						
	government- and community-based agencies to address the individual circumstances or each victim and their family. Program advocates provide a timely, systematic response to crime victim needs						
	through advocacy, education, linkage to resources and other supportive services. No other						
	department in Chesterfield County provides the comprehensive, statutorily mandated services to						
Victim and Witness Assistance	victims of violent crimes including homicides, robberies, felonious assaults, domestic violence and sexual violence occurring in this jurisdiction.	12.0	815,300	815.300	12.0	842.000	842.000
THE PARTY OF THE P	rease receive second in this parameter.		823,300	01,500		542,000	542,000
	Provide information and mandated services to victims of domestic violence occurring in Chesterfield						
	County. Respond to the emotional and physical needs of victims. Assist victims in understanding the						
Domestic Violence Prosecutor	criminal justice system and educate them on how their participation can best affect the outcome. Help victims of crime to stabilize their lives after victimization.	1.0	88,200	88.200	1.0	92,200	92,200
	Subtotal Commonwealth's Attorney (General Fund)	52.0	\$2,163,900	\$4,945,900	54.0	\$2,163,800	\$5,169,600
	Net Cost			\$2,782,100		*****	\$3,005,800
	Subtotal Commonwealth's Attorney (Grants) Net Cost	13.0	\$901,500	\$903,500	13.0	\$934,200	5934,200
	1401 0000						

Community Engagement in the Budget Process

- Making local government approachable
- Online surveys, accessible website
- Citizens' Budget Advisory Committee
- Year-round conversation
- Workshop style meetings, social media, speakers' bureau







2 years ago · 1.8K views

00 22



Untitled

2 years ago · 1K views

14









HOW CANTHE BUDGET PROCESS BE MORETRANSPARENT?



WHY TRANSPARENCY?

- SHOWS THAT GOVERNMENT
 VALUES = CITIZEN VALUES
- DEMONSTRATES COMPETENCY
- CLARIFIES POLICIES AND DECISION-MAKING PROCESSES
- OFFERS OPPORTUNITY FOR PUBLIC INVOLVEMENT
- PROVIDES INFORMATION ON PERFORMANCE WITH ENOUGH CONTEXT FOR CITIZENS TO EVALUATE THE QUALITY OF SERVICE



HOW DOWE GET THERE?

TRADITIONAL MODES STILL PROVIDE VALUE

...BUT OFFER OPPORTUNITIES FOR ENHANCEMENT

- FREEDOM OF INFORMATION ACT
- BOARD MEETINGS
- COMMUNITY
 MEETINGS/TOWN HALLS
- PAPER COPIES IN LIBRARIES AND CLERK'S OFFICES



REQUIRED COMMUNICATIONS

...MADE LESS FORMAL

LOUDOUN COUNTY BOARD OF SUPERVISORS





COMPREHENSIVE ANNUAL FINANCIAL REPORT

POPULAR ANNUAL FINANCIAL REPORT

BUDGET DOCUMENT

BUDGET-IN-BRIEF

COMPREHENSIVE PLAN -

→ STRATEGIC PLAN

REQUIRED COMMUNICATIONS

...MADE MORE ENGAGING

refunding debt.

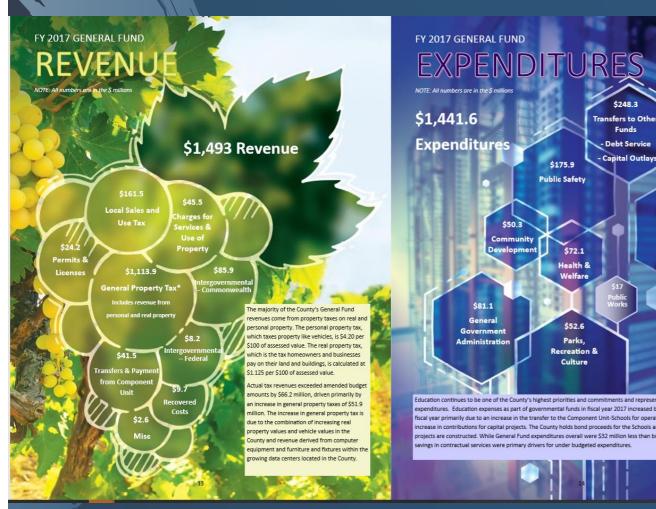
The increase in the component unit-schools' Current and Other Assets of \$24.6 million is due primarily to higher contributions from the County to the Component Unit - Schools. The increase in capital assets is due to investments in capital assets with the largest portion related to increases in the projects under constructions and the addition of new buildings, offset by depreciation. Please refer to Note VIII of the notes to the financial statements for detailed information. The decrease in Long-Term Liabilities is primarily due to decreases in the net pension liability and the net OPEB liability, as restated, offset by an increase in compensated absences. The increases in deferred outflows of resources and deferred inflows of resources are due to the deferral of amounts related to pensions and OPEB.

Statement of Activities

The following chart reflects the changes in Net Position (Exhibit II) in comparative format:

Table 2
Changes in Net Position
Comparison for the years ended June 30, 2018 and 2017 (thousands)

	Primary Government			Component Unit-Schools					
		In		ncrease /		Т		Ir	crease /
	FY18	FY17	(D	ecrease)	FY18		FY17	(D	ecrease)
REVENUES						Т			
Program Revenues:									
Charges for Services	\$ 82,404	\$ 77,7	72 \$	4,632	\$ 22,05	6 \$	21,572	\$	484
Operating Grants and Contributions	85,546	88,3	33	(2,787)	65,65	4	39,167		26,487
Capital Grants and Contributions	34,267	59,8	76	(25,609)	195,27	4	112,117		83,157
General Revenues:						Τ		ļ	
Property Taxes	1,227,488	1,138,3	69	89,119	-		-		-
Other Taxes	197,670	212,5	59	(14,889)	-		-		-
Grants and Contributions not Restricted to	58,386	57,8	65	521	310,02	2	317,040		(7,018)
Other	27,674	25,8	21	1,853	7,69	0	5,862	Г	1,828
Payment from Component Unit	21,253	28,4	17	(7,164)	-		-		-
Payment from Primary Government	-	-		-	737,00	1	692,138	Г	44,863
Total Revenues	\$ 1,734,688	\$ 1,689,0	12 \$	45,676	\$ 1,337,69	7 \$	1,187,896	\$	149,801
EXPENSES						Т			
General Government Administration	\$ 106,416	\$ 90,8	31 \$	15,585	\$ -	\$	-	\$	-
Judicial Administration	15,467	14,4	67	1,000	-		-		-
Public Safety	200,838	187,1	37	13,701	-	Т	-	Г	-
Public Works	54,001	53,7	23	278	-	\perp	-		-
Health and Welfare	96,851	94,7	19	2,132	-	Т	-		-
Parks, Recreation and Culture	63,442	58,4	07	5,035	-		-		-
Community Development	223,699	195,1	59	28,540	-		-		-
Education	947,494	833,5	14	113,980	1,170,96	4	1,110,535	Г	60,429
Interest and Other Debt Service Charges	40,898	38,3	12	2,586	-	Т	-		-
Total Expenses	\$ 1,749,106	\$ 1,566,2	69 \$	182,837	\$ 1,170,96	4 \$	1,110,535	\$	60,429
Change in Net Position	(14,418)	122,7	43	(137,161)	166,73	3	77,361		89,372
Net Position Beginning of Year	695,090	647,8	36	47,254	751,50	4	840,159		(88,655)
Cumulative Change in Accounting, Note XXII	-	(75,4	89)	75,489	-	Т	(166,016)	Г	166,016
Net Position Beginning of Year, Restated	695,090	572,3	47	122,743	751,50	4	674,143		77,361
Net Position End of Year	\$ 680,672	\$ 695,0	90 \$	(14,418)	\$ 918,23	7 \$	751,504	\$	166,733



\$729.9

\$14.3

REQUIRED COMMUNICATIONS

...MADE EASIER TO UNDERSTAND

FY2020 Budget

Revenue and Expenditure Summaries

Consolidated Revenue and Expenditure Summary FY2020 Adopted for All Funds

			Comprehensive		Healthcare	Fleet and	Risk
REVENUE SOURCES	General Fund	School Fund	Services	Grants	Fund	Radio Shop	Management
Real Estate Taxes	\$372,440,800	-	-	-	-	-	
Personal Property	76,261,200	-	-	-	-	-	-
Other Property	29,156,600	-	-	-	-	-	-
Utility & Other Local Taxes	125,269,900	-	-	-	-	-	-
Permits, Fees, etc.	8,689,600	11,226,100	-	-	-	-	-
Charges for Services	14,946,900	31,853,100	-	-	-	20,871,500	-
Miscellaneous and Recovered	6,152,700	100,000	632,800	-	-	-	9,928,500
State Funding	75,156,600	362,818,700	10,215,500	-	-	-	-
Federal Funding	9,743,400	340,000	-	-	-	-	-
Other Financing Sources	9,626,300	28,830,900		14,275,800	-	-	-
Use of Money and Property	3,945,800	-	-	-	-	-	-
Healthcare Contributions		-	-	-	126,318,700	-	-
REVENUE GENERATED WITHIN	\$731,389,800	\$435,168,800	\$10,848,300	\$14,275,800	\$126,318,700	\$20,871,500	\$9,928,500
Transfers from Other funds	\$2,347,100	\$302,028,900	\$6,874,400	\$1,452,200	-	-	-
Beginning Fund Balance		1,000,000	2,200,000		-	8,000,000	-
Healthcare Employer	-	-	-	-	(95,922,000)	-	-
AVAILABLE SOURCES	\$733,736,900	\$738,197,700	\$19,922,700	\$15,728,000	\$30,396,700	\$28,871,500	\$9,928,500
EXPENDITURES							
General Government	\$61,210,700	-	-	-	-	-	\$9,928,500
Administration of Justice	10,163,900	-	-	2,352,800	-	-	
Public Safety	185,800,600	-	-	8,677,300	-	-	-
Public Works	20,147,500	-	-	-	-	28,871,500	-
Health and Welfare	35,372,300	-	17,722,700	2,897,900	-	-	-
Parks, Recreation, Cultural	23,249,400	-	-	-	-	-	-
Community Development	22,398,200	-	-	1,800,000	-	-	-
Education	302,028,900	681,538,900	-	-	-	-	-
Utility Services	-	-	-	-	-	-	-
Debt Service	26,706,400	56,658,800	-	-	-	-	-
Miscellaneous	-	-		-	-	-	-
Reserves	178,500	-	-	-	-	-	-
Transfer to Other Funds	46,480,500	-	-	-	-	-	-
Healthcare Contributions		-	-	-	126,318,700	-	-
TOTAL EXPENDITURES	\$733,736,900	\$738,197,700	\$17,722,700	\$15,728,000	\$126,318,700	\$28,871,500	\$9,928,500
Contribution to Fund Balance	-	-	\$2,200,000	-	-	-	-
Healthcare Employer	-	-	. ,,	-	(95,922,000)	-	-
TOTAL BUDGET	\$733,736,900	\$738,197,700	\$19,922,700	\$15,728,000	\$30,396,700	\$28,871,500	\$9,928,500

FY2020 BUDGET-IN-BRIEF

020 BUDGET BY THE NU

Understanding how your tax dollar is invested

PUBLIC SAFETY INVESTMENT

Additional resources committed to recruitment and retention efforts, implementing new Police Retention Plan

More staffing in all public safety agencies

20 new firefighters to staff the Magnolia Green Fire Station

Mobile broadband for first responders

Implementing Police vehicle replacement plan

Increased starting pay for Sheriff's deputies

invested in

health and

INVESTMENT Support for senior services, +\$1.3M for

tax relief for the elderly Alternative transportation

\$0.07 invested

GENERAL GOVERNMENT INVESTMENT

- Continued support for general operational areas, investing in workload staffing
- Focused investment in technology upgrades

CHESTERFIELD COUNTY, VA

\$733.7 million

- Resources to accommodate
- Career Development Plans Three percent merit increase for eligible employees

PUBLIC WORKS & COMMUNITY DEVELOPMENT \$0.06 INVESTMENT

General Fund: Total Expenditures

Additional resources in Environmental Engineering to address drainage and water quality issues

Focused resources in Planning to provide consulting services

Operating resources for revitalization initiatives

\$0.03 invested in parks,

invested in

public works

development

PARKS, RECREATION, **CULTURAL INVESTMENT**

Two new parks maintenance positions to assist with care and maintenance of parkland

Library materials



EDUCATION INVESTMENT

Three percent raise for teachers

Staffing to accommodate an additional 520 students

Opening new Old Hundred Elementary School Funding long-term liabilities and an enhanced focus on major

maintenance

Resources to accommodate realignment of pupil transportation that occurred during FY2019

\$0.08 invested in

CAPITAL INVESTMENT

Funding for facility maintenance Additional staffing in Buildings and Grounds Transition \$10.5M in vehicle

registration fees to capital plan for transportation (over 5 year CIP)

\$0.01 invested in other miscellaneous

OTHER MISCELLANEOUS INVESTMENT

Centrally budgeted employee benefits

CHESTERFIELD COUNTY FY20 BUDGET AND FY20 BUDGET-IN-BRIEF

PEOPLE ARE LOOKING FOR DATA

...THAT'S EASY TO FIND AND USE

- REAL ESTATE RECORDS
- OFFICIAL DOCUMENTS
- LINE ITEM BUDGET AND ACTUAL DETAILS
- SOLICITATIONS AND CONTRACTS
- TAX RATE AND FEE SCHEDULES
- VENDOR PAYMENTS
- SALARY INFORMATION





A

SERVICES

GOVERNMENT

DEPARTMENTS

HISTORY

NEWS

CONTACT

Home / Public Data



Community

Data on Henrico's population, voting precincts, and government Ex. Census Information



Plans & Development

Data on housing, permits, building inspections, and construction activity Ex. Monthly Permit Report



Environment

Data on environmental quality and sustainability Ex. Water Quality Report



Public Safety

Data on crimes, fire, accidents, and inmates Ex. Annual Police Report



Financial Reports & Local Economy

Data on Henrico's finances, businesses, labor force, and economic indicators Ex. Henrico's Budget



Transportation

Data on roads, public transit, and airport activity Ex. Traffic Counts

INFORMATION IS EXPECTED ONLINE

...AND IS EASILY
ACCOMMODATED ON
MOST IN-HOUSE WEB
PLATFORMS



Datasets

Organization

Groups

bout

Suggest Dataset

Search (

Welcome to Virginia Beach Open Data!

The Virginia Beach Open Data portal is the central repository for data published by the City of Virginia Beach





 Business
 Virginia Beach Business Data

Business Licenses



Virginia Beach Demographics

INFORMATION IS EXPECTED ONLINE

...AND IS EASILY
ACCOMMODATED ON
MOST IN-HOUSE WEB
PLATFORMS

Welcome to the new Commonwealth Data Point! If you need to view financial data prior to 2017 — or any reports or demographic data please visit our legacy Data Point portal.

Welcome to Commonwealth Data Point

Financials

Lill Expenditures

View the state's expenses by secretariat, agency, and more

Revenue

See where the state is earning money per secretariat, agency, and

△ Budget

Compare the budget set forth by the state, including any adjustments and transfers

Salaries

Explore the salaries of state employees

Demographics

m Higher Education

View student body populations for four-year and two-year institutions

Public Schools

Explore enrollment across locality school districts

Prisons

See populations for correctional facilities across the state

Work Force

Observe employment rates for multiple sectors of the workforce

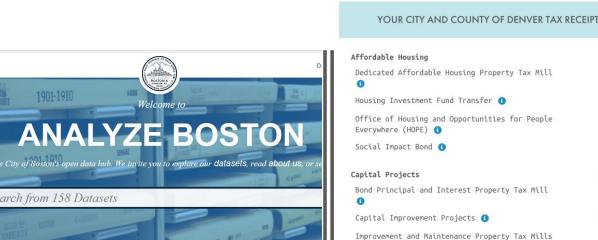
Finances at a Glance

Fiscal Year

2020 - 0

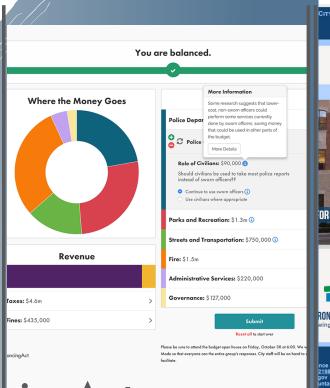
INFORMATION IS EXPECTED ONLINE

...AND IS EASILY **ACCOMMODATED ON MOST IN-HOUSE WEB PLATFORMS**



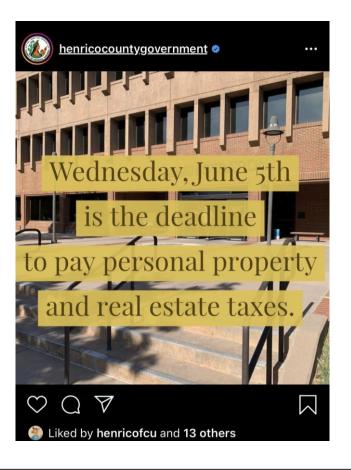
OPENGOV

\$1.89 Dedicated Affordable Housing Property Tax Mill \$0.00 Housing Investment Fund Transfer (1) \$0.81 Office of Housing and Opportunities for People \$0.18 \$0.90 \$13.50 Bond Principal and Interest Property Tax Mill \$0.00 \$13.50 Improvement and Maintenance Property Tax Mills \$0.00 \$8.23 Community Planning and Development Board of Adjustment for Zoning Appeals (1) \$0.10 Planning, Permitting, Inspections and \$8.13 Administration of Community Planning & Development Dept 1 Courts/Legal City Attorney (1) \$8.71 County Court & Municipal Public Defender (1) \$7.08 Economic Development BalancingAct Fconomic Development 6



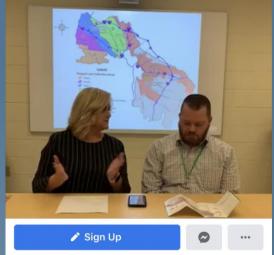


COMPETITIVE MARKET FOR OTHER SOLUTIONS









UTILIZE CAPTIVE AUDIENCES

SOCIAL MEDIA HAS DIVERSE APPLICATIONS FOR GOVERNMENT FINANCE



WHAT ARE THE OUTCOMES?

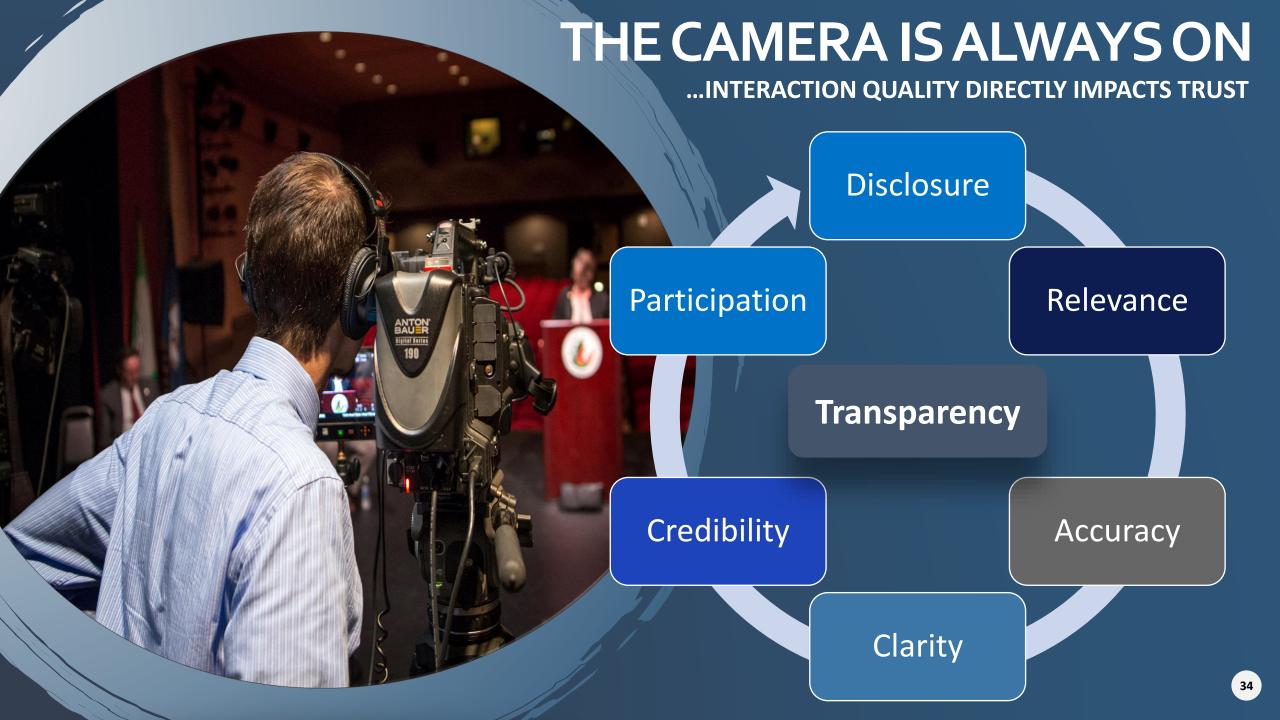
BUILDING BETTER COMMUNITIES

...TRANSPARENCY INCREASES INVOLVEMENT



- INCREASED WILLNESS TO PARTICIPATE IN GOVERNANCE
- ENHANCED COOPERATION AND WILLINGNESS TO INVEST IN COMMUNITY NEEDS
- COMPETITIVE ADVANTAGE





Wrap Up

Basics of a building a budget are largely driven by local decision makers.

However, there are nuanced code requirements. Involve your attorneys in process review.

There are lots of ways to craft and present your budget – all of them are right. Find what works for your community.

Best Practices – this space is continually evolving to make financial documents and decisions easier for the public to digest.

Transparency is crucial to gaining public trust – which is the foundation for civic engagement and a collaborative budget process.

BUDGETING BASICS, BEST FINANCE

VACO SUPERVISORS FORUM
APRIL 2021



Budget Workshop Breakout Sessions 830am

Christian R. Goodwin | Louisa County Administrator

County Budget Balancing Worksheet						
	F	Revenue	E	xpenses	Balance	
Initial Budget Shortfall					\$ (3,700,000)	Α
Revenue Generation Options						
\$0.01 on Real Estate Tax (valuations have been declining)	\$	400,000				
\$0.10 on Personal Property Tax Rate Generates		300,000				
Draw from Fund Balance - 1% of op budget is \$900K		900,000				
Total Additional Revenue Generated					\$ -	В
Adjusted Shortfall (A+B)					\$ (3,700,000)	С
Expense Reduction Options						
Cost savings of 1 day furlough for all staff			\$	50,000		
Eliminate transfer to utility fund (util fees increase 35%) *				680,000		
Reduce utility fund transfer from \$680K to \$300K (fees increase by 26%) **				380,000		
Close branch library (leaves main library)				100,000		
Closing Monday/Fridays at both libraries				60,000		
Eliminate Bookmobile (primarily serves children)				30,000		
Close County Parks one day/week (the one in your district is heavily used)				20,000		
Reduce civic contributions by percentage comparable to revenue loss***				25,000		
Reduce fire dept contributions by percentage comp to rev loss				150,000		
1% reduction in school transfer generates				175,000		
Eliminate new vehicle request				30,000		
Reduce county staff salaries by 1%				140,000		
Eliminate cable TV programs/services				50,000		
Elimate selected PT positions				95,000		
Freeze three formerly grant funded positions in Sheriff's Office				150,000		
Do not fund 10 County positions currently frozen				450,000		
Eliminate request for increase in Social Services Funding ****				50,000		
Delay select capital expenditures (means funding in a future year)			1	,000,000		
Eliminate Contingency Budget				200,000		
Eliminate additional positions (\$50K each)				50,000		
Total Savings					\$ -	D
Total Adjusted Shortfall (C+D)					\$ (3,700,000)	Ε

^{*} average bill increases from \$50 to \$67

^{**} average bill increases from \$50 to \$63

^{***} you sit on the Boards of 3 of the 6 funded civic organizations

^{****} caseloads have increased by 72% in the past 12 months

Budget Workshop Breakout Sessions 830am

Theodore L. Voorhees | Orange County Administrator

	Revenue	Expenditures	Balance	
Initial budget shortfall:			(\$3,700,000)	Α
Revenue generation options (increasing a revenue has positive impact):				
\$.01 on Real Estate Tax Rate generates	\$400,000			
\$.10 on Personal Property Tax Rate generates**	\$300,000			
Draw from the fund balance each 1% of operating budget is \$900,000	\$900,000			Į
Total additional revenue generated:				В
Adjusted shortfall (A + B):				С
Evapore reduction entities considered (aliminating a cost has positive impact).				Ļ
Expense reduction options considered (eliminating a cost has positive impact): Cost savings of imposing one furlough day for all County employees		\$46,000		+
				╁
Eliminate transfer to utilities fund; residential utility fees increase by 35%* Reduce utilities fund transfer from \$680,000 to \$300,000, fees increase by 26%^		\$680,000 \$380,000		╁
Closing the branch library (leaves one main library)		\$380,000		╁
				╄
Closing Mondays and Fridays at both libraries		\$60,000 \$30,000		┾
Eliminate Bookmobile (primarly serves children) Close County park one day a week		\$20,000		┾
				┾
Reduce civic contributions by percentage comparable to revenue loss Reduce contribution to volunteer fire departments by comparable percentage		\$25,000 \$150,000		╁
Every 1% reduction in school transfer generates		\$175,000		╁
Eliminate vehicle requested		\$30,000		╁
Reduce all employee salaries (county side) by 1%		\$140,000		╁
Eliminate cable TV programs and services		\$50,000		╁
Eliminate Cable 17 programs and services Eliminate PT positions in several offices		\$95,000		╁
Freeze three formerly grant funded positions in Sheriff's Office		\$150,000		╁
Do not fund ten county positions currenly frozen		\$450,000		╁
Reduce School local transfer by 40.2% of lost revenue		\$1,800,000		╁
Eliminate request for increase in Social Services funding~		\$50,000		╁
Eliminate request for increase in Social Services funding		\$1,000,000		╁
Eliminate capital expenditures not recommended for delay (e.g., roof repair)		\$100,000		╁
Eliminate Capital experiations for recommended for delay (e.g., roof repair)		\$200,000		╁
Eliminate additional County positions (average position costs \$50,000)		\$50,000		
				H
				t
Total savings:				D
				Ė
Total adjusted shortfall goal is zero! (C + D):				E
*Avg bill increases from \$50.27 to \$67.87				Ī
^Avg bill increases from \$50.27 to \$63.35				Γ
~Caseloads have increased 72% in the last 12 months)				Т
**The projected loss in property tax revenue is currently \$1,566,105 due to declining	values			T
Note that a decision to fund something (like employee raises) would have a negative in		cit worse.		T

Communicating with Your Constituents 1130am

The Honorable **Mary Biggs**Montgomery County Vice Chair

The Honorable **Christopher M. Winslow**Chesterfield County Vice Chair

COMMUNICATING WITH YOUR CONSTITUENTS

VACO SUPERVISORS' FORUM APRIL 2021

PRESENTERS



Christopher Winslow
Vice-Chair
Clover Hill Magisterial District
Chesterfield County
winslowc@chesterfield.gov





Mary Biggs
Vice-Chair
District F
Montgomery County
biggsmw@montgomerycountyva.gov



FOCUSING ON SIX AREAS





1

Stay Connected

- Pre-COVID: in-person community meetings, new business events, ribbon cuttings It was easy to see people out, have a quick conversation and hear about what's happening. More natural, organic relationship/constituent building, spontaneous
- During-COVID: virtual meetings, zoom calls, limited in-person and face-to-face meetings.... interactions are intentional, pre-planned, requiring more thoughtful consideration of who, what, when and where
- Moving forward: figuring out how to balance and take advantage of new ways to connect







7

Expand Your Reach

- Flipping the switch to a virtual world, promoted the use of social platforms and as a result, a rise in social media followers
- New comfort with technology use of email, phone and text messaging abilities
- Pandemic's silver lining: Broadening the engagement toolbox by melding what worked in the past for some audiences (inperson town halls) with new approaches that enable people to engage on their terms and timelines (electronic comments on the budget and many other matters)



Tell Your Story

- Understand who is your audience(s)
- Make the most of more people being connected online and through social media platforms by using those outlets to share updates and information
- Not only important for elected officials but also to make locality visible by departments and personnel sharing information
- Set realistic goals for what you want to achieve and when – know when to engage with followers
- Don't rely on the media to tell your story





Be committed. Be well.



#weareinthistogether

Be committed. Be well.









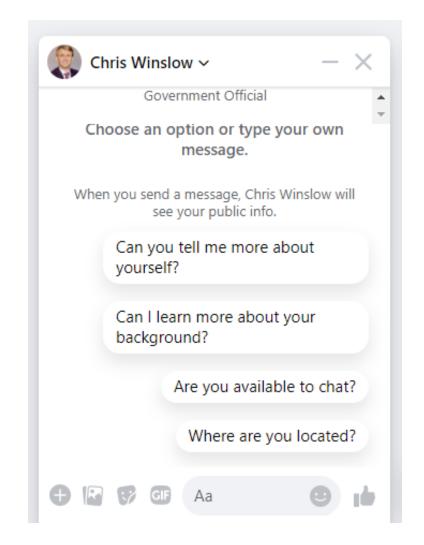




4

Be Accessible & Responsive

- Whether by phone, email, or text, make it easy and be responsive
- People want to know you received their message
- Keep it simple, "Thank you for your message. I appreciate you sharing these thoughts and will follow up soon."
- Involve staff to help you tackle your priorities and maintain community connections





Disclaimer/ Data Info

Establish & Maintain Trust

- Transparency and sharing information is paramount to establish and maintain trust
- Integrity and consistency matter
- Solicit feedback and be open with sharing results
- Acknowledge that all input received, whether verbally or digitally, is consumed and considered

Main Menu

Community Vaccination Goal

Chesterfield County Demographics

Chesterfield County Overview

Chesterfield Health District Overview

Locality Comparison

Locality Comparison Map

Plan RVA Localities

Doses Shipped

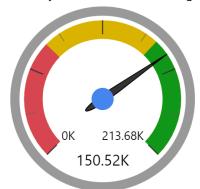
First Dose by Facility

Regions and Top 10

Top 10 Map

Strategic Partners

Community Vaccination Goal Progress



70.44%

Percent of Community Vaccination

Chesterfield County has established Vaccination Goal of about 213,000

Help move the needle by signing up

COVID-19 UPDATE April 26, 2021

Top Things To Know

- Vaccine appointment information for ages 16+:
 Anyone 65+ can walk in at any VDH clinic, no
- Click here to make an appointment, or
 Check the CDC's <u>Vaccine Finder</u>, or
 Call 540-838-8222 for local vaccines.
- Upcoming vaccine clinics:
 Tue./Wed., Apr. 27/28 Radford U's Dedmon Ctr.
- Thu., Apr. 29 Blacksburg Community Ctr. Fri., Apr. 30 - Christiansburg Recreation Ctr NOTE: The last scheduled mass vaccination clinicis May 18. Get your vaccine now!
- 2nd Doses:

 Walk-ins welcome at Dedmon Ctr., Apr. 27/28.
- Waix-ins welcome at Dedmon Ctr., Apr. 2/1/28.
 Appointments are preferred, but not required, for 2nd doses at other clinics. Click here or call 540-838-8222 to make your 2nd dose appointment.
 Visit the CDC's Vaccine Finder.
 If you have had COVID-19, you still need a vaccine.
- for longer-term immunity. Please wait 90 days for a vaccine after an active COVID case.
- Businesses: Sign up employees for COVID vaccir contact Ashley Briggs at 540-639-9313 or

COVID-19 Data

As reported to VDH, by date of lab report.

New River Valley PUBLIC HEALTH TASK FORCE

Fast Facts

- Task Force meetings are now Mon. & Wed. (not Fri.). This UPDATE will now be published Mon. & Wed. only. · Vaccines are available in our
- community for everyone ages 164
 Today, 29 COVID-19 patients are
- Today, 29 CovID-19 patients are hospitalized & 1 person is under investigation. Hospitals are at norma operations. Do not delay needed car Virginia COVID-19 call center: 877-VAX-IN-VA (877-829-4682).
- daily 8 a m -8 n m
- daily, 8 a.m.—8 p.m.

 Stop the spread of variants.

 Wear a mask. Watch your dista

 Wash your hands.

 COVID-19 testing:

 Montgomery Co. Health Dept.
 in Christiansburg,

 Mon., Wed. & Fri., 9-11 a.m.
- Appointments required. 540-267-8240. Giles Co. Health Dept. in Pearisburg, Mon.-Fri., 8:30-10:30 a.m.
- No appointment required.

 How many are fully vaccinat
- Nearly 32% of those age 16+, in the
- More than 2.4 million Virginian

May differ from other sources, due to reporting lags. Totals are cumulative since March 2020.

	New cases, today	New cases, 7-day avg.		Total hospitalizations	Total deaths	vaccines given
Floyd County	3	1	833	29	21	9,147
Giles County	- 1	4	1,239	50	20	10,748
Montgomery County	7	14	9,217	177	89	61,068
Pulaski County	1	5	2,571	120	61	21,052
Radford City	- 1	3	2,096	37	18	9,967
New River Health District	42	30	15,898	411	208	111,982
(feminia	1 240	1 200	662 224	27 862	10.640	E 044 804

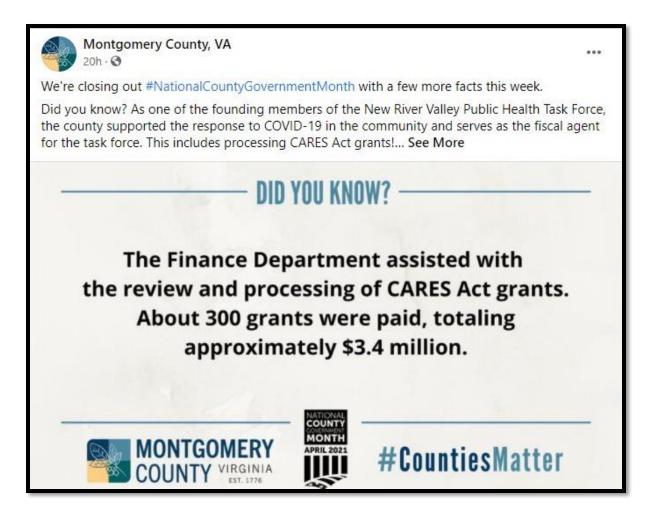
Be committed. Be well.





Keep it Simple

- Navigating a post-COVID world doesn't have to be difficult. Figure out what techniques have worked well for you and keep using them
- Know your audience and the best medium to reach them
- Spend time on your communications and invest monetarily (i.e. skilled staff, equipment, software, etc.)
- Messaging should be easy to understand less bureaucracy, more conversational
- Identify a central resource in your organization to assist with sharing information and to keep messaging consistent







- A lot can be accomplished with limited resources
- Social media isn't free, so evaluate the need and choose the best platform to meet them within a budget
- Parter with others neighboring localities or even private entities – who share your community goals and can offer expertise
- Consider cooperative contracts to purchase technology and tools
- Benchmark with others to learn what worked – and what didn't work
- Remember, keep it simple your audience(s) will appreciate it



CITIZENS COMMENTS

- Online Public Portal to collect citizen comments
- Meeting with constituents
- Groups
- In-person
- 700m
- Opportunities to interact with others in ways not previously possible, out-of-state representatives

Provide Comments Online for Virtual Board Meetings

Due to ongoing public health concerns related to COVID-19, Chesterfield County is encouraging citizens to provide comments online. Remaining consistent with the Board of Supervisors' rules and procedures, each citizen has the opportunity to provide a comment, not to exceed 400 words, which is comparable to speaking for 3 minutes, during the citizen comment period for unscheduled matters. Comments are subject to the same rules as during the spoken citizen comment period and will be limited to the first 15 entries submitted using the online form. Only 1 entry per citizen will be accepted during this comment period on unscheduled matters. The portal will close at 5 p.m. on the day prior to the scheduled Board meeting in order to prepare comments for the public and the Board to see in a timely manner; prior to the Board meeting.

View Citizen Comments for Jan. 27, 2021 Meeting (PDF)

Submit Comment

Name -	
First	Last
Email *	
District *	
Bermuda	
O Clover Hill	
O Dale	
○ Matoaca	
○ Midlothian	
C:4:	
Citizen comment on *	
Public hearing	
Zoning case	
Unscheduled matter	
A maximum of 15 citizens may leave comments for to procedures on <u>Citizen Comment Period on Unsched</u> day prior to the scheduled Board meeting in order to see in a timely manner, prior to the Board meeting.	Juled Matters. The portal will close at 5 p.m. on the
Comments *	
	1/2
All comments received will be distributed to the Board and meeting and will be made a part of the Board's official pub Board of Supervisors.	
If you have any questions about this form, please contact 1200 or by <u>email</u> .	the Clerk to the Board of Supervisors by calling <u>804-748-</u>

EFFECTIVELY
UTILIZING
COMMUNICATION
TOOLS & TECHNOLOGY





PUBLIC INFORMATION

Happening in Chesterfield e-newsletter | March 3, 2020 – March 1, 2021

- Subscribers added: 645 (9.8% increase)
- Average open rate: 37.9% | +21.8% vs. industry average

Montgomery County, Welcome Back! | Signage, Flyer

- Print: Newsletter, key contacts flyer and signage at Montgomery County Government Center
- Web: Created dedicated Operations Status page on website online services, phone, email
- Social Media: Growth on platforms in FY21
 - Facebook: 39% increase
 - Twitter: 7% increase



Chesterfield County, Virginia's Weekly e-Newsletter

Tuesday, April 20, 202









For immediate release: Oct. 21, 2020

Contact: Susan Pollard | 804-564-2722| PollardS@chesterfield.gov J. Elias O'Neal | 804-768-7516 | OnealJ@chesterfield.gov

Chesterfield Releases Recommendations for Voters to Prevent the Spread of COVID-19

All voters regardless of their health conditions are entitled to their right to cast a

ELD COUNTY eld County Rei News - Weather - Sports - Traffic Watch - COMMUNITY - EXPERTS - CONTESTS - A

ers are being en ray also are or Chesterfield County officials gear up for Election



Posted: Nov 2, 2020 / 05:57 PM EST / Updated: Nov 3, 2020 / 05:11 AM EST

CHESTERFIELD COUNTY, Va. (WRIC) - Over 100,000 registered Chesterfield County voters have already cast their ballots, according to General Registrar and Director of Elections Constance Hargrove

Local election officials say another 7,000 absentee ballots could still come in on Election Night. Those

I Chesterfield County poll workers ready for Election Day despite COVID-19 →

MEDIA RELATIONS

- Pitch Stories to Media Outlets
- News Releases and Video News Releases
- **News Conferences**
- Tell Your Story First If You Don't, Someone Flse Will
- Respond to Media Inquiries



Early voting in Chesterfield surpasses 140,000 GET NEWS UPDATES Registrar anticipates a record 80% turnout BY JIM MCCONNELL SENIOR WRITER 100,000 county residents voted in person during the early voting period that ended last Saturday. 2 Beyond the mines: How a 175-



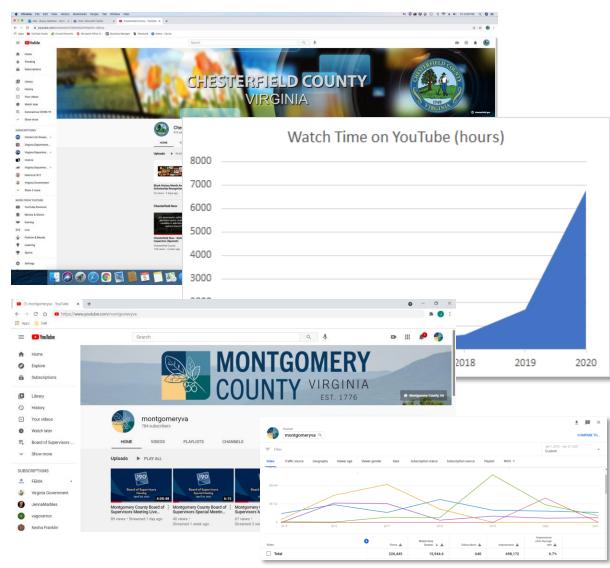
year-old church in Midlothian





VIDEO & TELEVISION PRODUCTION

- Chesterfield Community Television
- Video Production
- YouTube Channel Management
 - 803 videos added since 2014
 - **171,472** total views
- YouTube Channel Management Montgomery County
 - 668 videos added since 2015
 - **361,004** total views

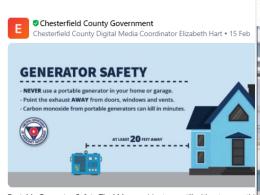






SOCIAL MEDIA

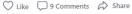
- Grow your audience
- Speak directly to constituents without the filter of a third-party (news media)
- Tell your own story in your own words



Portable Generator Safety Tips! Many residents are still without power thi morning. If you're using a portable generator, please keep in mind these in safety tips!

- -Never use a generator indoors, including garages, basements and sheds.
- -Keep generators at least 20 feet away from any structure.
- -Never place generators on or near combustible surfaces such as decks and
- -Always keep a generator dry. Do not use in wet or rainy conditions.
- -Always turn off generator and allow it to cool before refueling.
- -Always plug electrical appliances directly into the generator using the manufacturer-supplied cords or 3-pronged extension cords.
- -Always ensure a generator is wired and grounded appropriately.

Posted to Subscribers of Chesterfield County Government





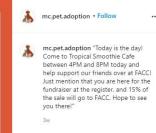




It's #NationalVolunteerWeek and we want to thank all the volunteers who have helped during the pandemic. From answering thousands of phone calls to providing

Montgomery County, VA April 19 at 11:42 AM - 3

Thank you, COVID-19 volunteers!



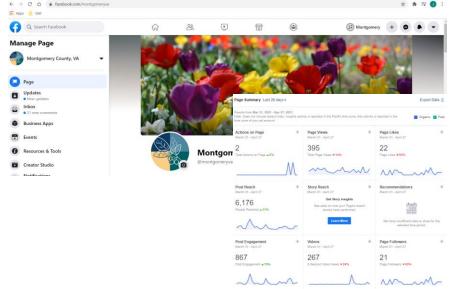




our website. https://montva.com/.../montgomery-county-awarded-virginia...

BECOME THE "GO TO" SOURCE OF **INFORMATION FOR RESIDENTS**

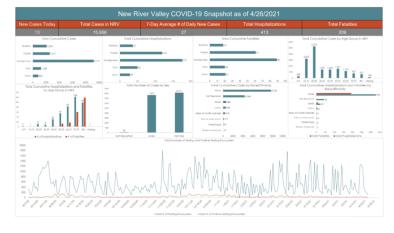








TASK FORCE



COVID-19 UPDATE

April 26, 2021

Top Things To Know

- 1. Vaccine appointment information for ages 16+: Anyone 65+ can walk in at any VDH clinic, no appointment needed.
- Click here to make an appointment, or
- Check the CDC's <u>Vaccine Finder</u>, or
 Call 540-838-8222 for local vaccines.
- Upcoming vaccine clinics;

 Tue./Wed., Apr. 27/28 Radford U's Dedmon Ctr.
- Thu., Apr. 29 Blacksburg Community Ctr.
- Fri., Apr. 30 Christiansburg Recreation Ctr.
- NOTE: The last scheduled mass vaccination clinic
- is May 18. Get your vaccine now!
- 2nd Doses:
- Walk-ins welcome at Dedmon Ctr., Apr. 27/28. Appointments are preferred, but not required, for 2nd doses at other clinics. Click here or call 540-
- 838-8222 to make your 2nd dose appointment. Visit the CDC's Vaccine Finder. 4. If you have had COVID-19, you still need a vaccine
- for longer-term immunity. Please wait 90 days for a vaccine after an active COVID case. Businesses: Sign up employees for COVID vaccine Contact Ashley Briggs at 540-639-9313 or

abriggs@nrvrc.org

As reported to VDH, by date of lab report.

New River Valley TASK FORCE

Fast Facts

- Task Force meetings are now Mon. & Wed. (not Fri.). This UPDATE will now
- be published Mon. & Wed. only.
- Vaccines are available in our community for everyone ages 16+!

 Today, 29 COVID-19 patients are hospitalized & 1 person is under
- investigation. Hospitals are at normal operations. Do not delay needed care!
- Virginia COVID-19 call center: 877-VAX-IN-VA (877-829-4682), daily, 8 a.m.-8 p.m.
- Stop the spread of variants
- Wear a mask. Watch your distance. Wash your hands.
- COVID-19 testing: Montgomery Co. Health Dept. in Christiansburg
- Mon., Wed. & Fri., 9-11 a.m. Appointments required. 540-267-8240. Giles Co, Health Dept, in Pearisburg. Mon.-Fri., 8:30-10:30 a.m. No appointment required.
- How many are <u>fully vaccinated?</u>
 49,800, or more than 27% of the total population, in the NRV.
- . Nearly 32% of those age 16+, in the

COVID-19 Data

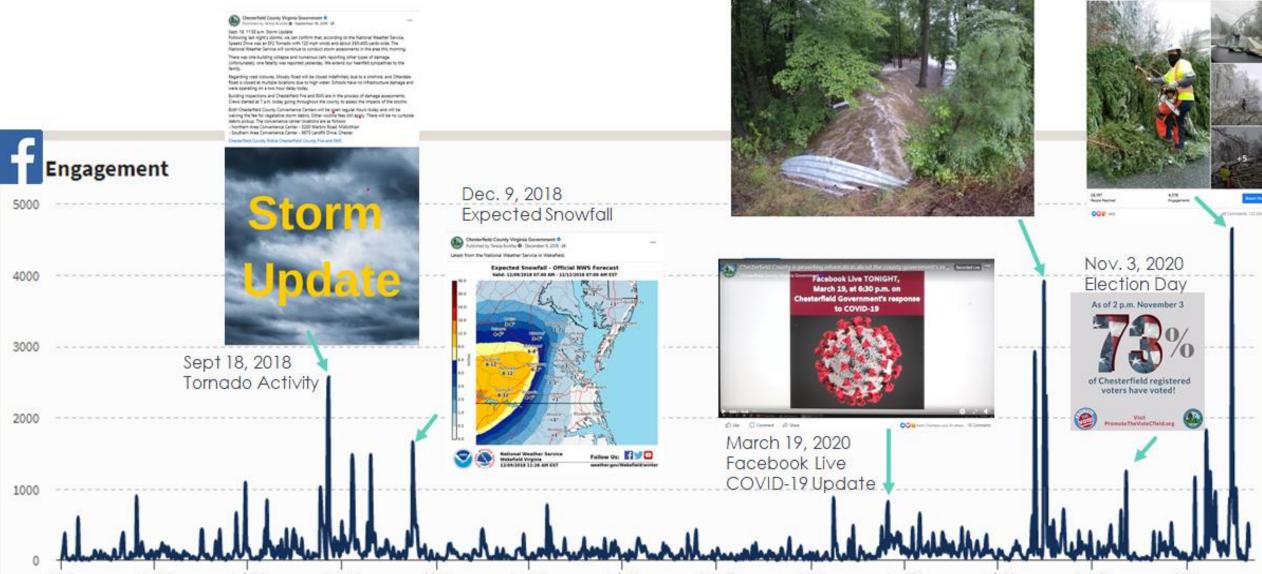
 More than 2.4 million Virginians. May differ from other sources, due to reporting lags. Totals are cumulative since March 2020.

	New cases, today	New cases, 7-day avg.	Total cases	Total hospitalizations	Total deaths	Total vaccines given
Floyd County	3	1	833	29	21	9,147
Giles County	1	4	1,239	50	20	10,748
Montgomery County	7	14	9,217	177	89	61,068
Pulaski County	1	5	2,571	120	61	21,052
Radford City	1	3	2,096	37	18	9,967
New River Health District	42	30	15,898	411	208	111,982
Virginia	1,340	1,300	652,321	27,852	10,640	5,911,691

www.NRVRoadToWellness.com | www.vdh.virginia.gov | #BeCommittedBeWell

Be committed. Be well,

BECOMETHE "GOTO" SOURCE OF INFORMATION FOR RESIDENTS



Chesterfield County Virginia Government .

ublished by J. Elies O'Ninal @ -August 16, 2020 @

Chesterfield County has declared emergency water restrictions for all its water custoriers. Customers are asked to conserve water for essential use only and immediately stop all imigation. While emergency restrictions are in place to help reduce demand on the water system, the water

> ption creats for their applicable and continued dedication to our recitants. These couhave peen surviving treatests to applicable clearing decread treat-prices replaces phosp in their. Dreat out these pictures of them working hard proper the county of





SUCCESS DURING PANDEMIC

- Making citizen and employee safety the priority
- Quickly transitioning to the virtual world, ensuring services continued even when buildings were closed
- Livestreaming public meetings
- Encouraging citizen engagement via online forms, voicemail, email and mail
- Conducting hybrid meetings incorporating limited in-person participation and virtually through Teams or Zoom
- Shining example: New River Valley Public Health Task Force



COMMUNICATING WITH YOUR CONSTITUENTS



STAY CONNECTED

Figure out how to balance and take advantage of new ways to connect



BE ACCESSIBLE AND RESPONSIVE

Use phone, email and text, and involve staff to help you tackle priorities and maintain community connections



EXPAND YOUR REACH

Meld what worked in the past with new approaches that enable people to connect on their terms



ESTABLISH AND MAINTAIN TRUST

Transparency and sharing information is paramount. Solicit feedback and share results



TELL YOUR STORY

Understand who your audience is and don't rely on the media to tell your story



KEEP IT SIMPLE

Know your audience and the best medium to reach them.