

**AGENDA**  
**State Executive Council for Children's Services**  
**March 13, 2025**  
**9:30 AM**

1604 Santa Rosa Road  
Henrico, VA 23229  
Richmond/Henrico Rooms

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Note: This is an in-person meeting  
To accommodate interested members of the public, the meeting will be viewable at:

**Please join the meeting on your computer, tablet, or smartphone.**  
<https://meet.goto.com/707361437>

**You can also dial in using your phone.**

Access Code: 707-361-437  
United States: [+1 \(872\) 240-3412](tel:+18722403412)

- 9:30 Call to Order / Opening Remarks** – Honorable Leah Mills  
Deputy Secretary of Health and Human Resources
- Action Item:** Approval of Remote Participation per SEC Policy 2.1.3 and §2.2-3708.3, COV (if necessary)
- Action Item:** Approval of the Agenda and Certification of Quorum
- 9:40 Member Introductions (and Introduction of Newly Appointed Members)**
- 9:45 Public Comment** (Five-minute limit per speaker)
- 9:55 Excellence in CSA Recognition**
- 10:10 Action Item:** Approval of December 2024 Minutes
- 10:15 SEC Policy Review** – SEC Policy 4.5.3 – Administrative Funds
- Action Item:** Final approval of revised Policy 4.5.3
- 10:25 SEC Policy Review** – SEC Policy 4.4.2 – Medicaid Funded Services
- Action Item:** Final approval of revised Policy 4.4.2 (Repeal)
- 10:35 SEC Policy Review** – SEC Policy 2.1.3 – Individual Participation in State Executive Council Meetings by Electronic Means
- Action Item:** Approval of revised Policy 2.1.3 for the second (60-day) public comment period
- 10:45 SEC Policy Review** – SEC Policy 5.1 – ~~CSA Data Set~~ *Local Match Rates*
- Action Item:** Approval of revised Policy 5.1 (New number 4.5.6) for the initial (45-day) public comment period

**11:05 State and Local Advisory Team (SLAT) Report** – Mills Jones, SLAT Chair

**Action Item:** Approval of revised SLAT Bylaws

**11:20 Presentation:** DBHDS Adolescent Substance Use Disorder Needs Assessment and Strategic Plan  
Kari Savage, Director, DBHDS Office of Child and Family Services

**11:50 OCS Executive Director's Report** – Scott Reiner

**12:15 Member Remarks / Updates**

**Closing Remarks and Adjourn** – Honorable Leah Mills

**Remaining 2025 Meetings**

June 12  
September 11  
December 11

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**STATE EXECUTIVE COUNCIL (SEC)  
FOR CHILDREN'S SERVICES  
1604 Santa Rosa Road  
Richmond/Henrico Rooms  
Richmond, VA 23229**

**Thursday, December 12, 2024**

**SEC Members Present:**

Leah Mills, Deputy Secretary of Health and Human Resources for The Honorable Janet Kelly,  
Secretary of Health and Human Resources (*SEC Chair*)  
Carl Ayers for James Williams, Commissioner, Virginia Department of Social Services  
John Budesky, County Administrator, Hanover County  
The Honorable Kevin Carroll, Member, Chesterfield County Board of Supervisors  
The Honorable Carrie Coyner, Member, Virginia House of Delegates (*virtually*)  
Nicole Gore for Nelson Smith, Commissioner, Virginia Department of Behavioral Health and  
Developmental Services  
Natalie Handy, VP of Government Affairs & Advocacy, Health Connect America, Private  
Provider Representative  
Samantha Hollins, Ph.D. for Lisa Coons, Superintendent of Public Instruction, Virginia Department of  
Education  
The Honorable Jacob Holmes, Vice Mayor, City of Bristol  
Mills Jones, Chair, State and Local Advisory Team (SLAT)  
Sandra Karison for Karl Hade, Executive Secretary of the Supreme Court of Virginia  
The Honorable Chad Logan, Judge, 26<sup>th</sup> Judicial District, Juvenile and Domestic Relations  
District Court  
Jeff Lunardi for Cheryl Roberts, Director, Department of Medical Assistance Services  
Andrea McMahon for Amy Floriano, Director, Department of Juvenile Justice  
Anahita Renner, Parent Representative  
Melvin Roy, Founder and CEO of Foster-U, Service Recipient Representative  
Ron Spears, CEO, Elk Hill, Private Provider Representative

**Other Staff Present:**

Stephanie Bacote, Program Audit Manager, OCS  
Mary Bell, Program Consultant, OCS  
Rachel Friedman, Program Auditor, OCS  
Marsha Mucha, Administrative Staff Assistant, OCS  
Scott Reiner, Executive Director, OCS  
Kristi Schabo, Senior Policy and Planning Specialist, OCS  
Carrie Thompson, Research Associate Senior, OCS  
Susan Whyte, Assistant Attorney General

**Members Absent:**

Susan Fischer Davis, MD for Karen Shelton, MD, Commissioner, Virginia Department of Health  
Kathryn Hayfield, Commissioner, Department for Aging and Rehabilitative Services  
The Honorable Dalia Palchik, Member, Fairfax County Board of Supervisors

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Nancy Robbins, Parent Representative  
The Honorable Schuyler VanValkenburg, Member, Senate of Virginia

### **Call to Order/Opening Remarks**

Leah Mills, Deputy Secretary of Health and Human Resources, called the meeting to order at 9:35 a.m. On a motion by Carl Ayers, seconded by Jeff Lunardi, the SEC approved Delegate Coyner's request pursuant to §2.2.-3708.3 and SEC Policy 2.1.3 to participate virtually from her office in Chester, VA, due to a transportation issue.

The new local government representatives Mr. Budesky, Supervisor Carroll, and Vice Mayor Holmes were welcomed. Ms. Handy and Mr. Spears were congratulated on their reappointments to the SEC as private provider representatives. Introductions were made.

Mrs. Mills remarked on the recent Reclaiming Childhood Youth Mental Health Summit and Governor Youngkin's Executive Order 43, which created the Reclaiming Childhood Task Force to sustain ongoing collaboration of efforts to improve youth mental health outcomes.

### **Public Comment**

There were no public comments.

### **Approval of Minutes**

On a motion by Natalie Handy, seconded by Ron Spears, the SEC approved the September 12, 2024 meeting minutes. (Mr. Budesky, Supervisor Carroll and Vice Mayor Holmes abstained.)

### **SEC Policy Review**

*Repeal of Policy 4.3 – “Carve-out” of Allocation for Development of New/Expanded Services (Adopted April 30, 2013)*

Ms. Schabo reported that, at the SEC's September 12, 2024 meeting, the SEC approved Policy 4.3 for a 60-day public comment period. This policy has never been used, and funds have never been appropriated for its intended purpose. No comments were received during the comment period.

After further discussion, the SEC repealed Policy 4.3 on a motion by Anahita Renner, seconded by Kevin Carroll.

*Policy 4.5.3 – Administrative Funds*

Ms. Schabo reported that the SEC approved Policy 4.5.3 for a 45-day public comment period on September 12, 2024. The proposed changes align the existing policy with a new administrative funding process utilized by OCS that is more streamlined and accessible to localities.

Ms. Schabo further reported that if the SEC approves today, the next steps would be to disseminate Policy 4.5.3 for a 60-day public comment period. After further discussion on a motion by Jacob Holmes, seconded by Carl Ayers, the SEC approved Policy 4.5.3 for a 60-day public comment period.

*Repeal of Policy 4.4.2 – Medicaid Funded Services*

Ms. Schabo reported that the SEC approved Policy 4.4.2 for a 45-day public comment period at its September 12, 2024 meeting. Policy 4.4.2 is a verbatim restatement of language that has been included in the Appropriation Act since 2009.

Ms. Schabo further reported that if the SEC approves today, the next steps would be to disseminate Policy 4.4.2 for a 60-day public comment period. After further discussion on a motion by Sam Hollins, seconded by Ron Spears, the SEC approved Policy 4.4.2 for a 60-day public comment period.

*Policy 2.1.3 – Individual Participation in State Executive Council Meetings by Electronic Means*

Ms. Schabo presented a Notice of Intent to Develop/Revise Policy for Policy 2.1.3 and a copy of the policy. Policy 2.1.3 provides guidance to the SEC regarding the parameters of electronic participation in SEC meetings or any committees established by the SEC.

The proposed changes bring the current policy into compliance with the guidelines set forth in §2.2-3708.2 and §2.2-3708.3, as amended, effective July 1, 2024.

During the discussion, several edits were suggested for consistency and clarity. Those edits were noted and will be made. On a motion by Carl Ayers, seconded by Andrea McMahon, the SEC approved Policy 2.1.3 for a 45-day public comment period.

**State and Local Advisory Team (SLAT) Report**

Mills Jones, SLAT Chair, reported on the following items:

- SLAT last met on November 7, 2024.
- Currently, two SLAT workgroups focus on several areas of the SEC’s Strategic Plan. One workgroup is developing a model strategic plan template for localities to assist them with building their strategic plans. The second workgroup is creating a model CSA intake form.

Mr. Reiner noted that OCS is developing a model Family Survey form and best practice guidelines. SLAT will review the draft survey and guidelines, which will then be presented to the SEC for final review/approval.

- SLAT conducted a CSA Family Impact Survey. Mr. Jones shared findings from the survey with the SEC members.
- SLAT is also working on amending its bylaws in the elections and terms of office sections.
- Mr. Jones thanked CSA Coordinators Bryan Moeller and Rudy Zavala for their leadership of the CSA Coordinator Mentoring Program. He also thanked OCS on behalf of Cristy Corbin, the SLAT parent representative, for the parent scholarships to this year’s CSA Annual Conference.

**Presentation: New CANS Reports**

Carrie Thompson, OCS Research Associate Senior, presented the new CANS Detail Reports, which are now available on the CSA Data and Outcomes Dashboard. The new reports provide users with program-level assessment summaries and trends.

### **OCS Executive Director's Report**

Mr. Reiner reported on the following items:

- The CSA Annual Conference was held in October in Roanoke, and approximately 600 participants were in attendance. The 2025 CSA Annual Conference will be held October 15-16, 2025, at the Hotel Roanoke and Conference Center.
- CSA FY2024 Closing – Fiscal year 2024 was successfully closed with no pending matters to resolve.
- Reports to the General Assembly – Members received copies of the five reports recently submitted to the General Assembly and a summary of CSA activities.
- Eligibility as a Child in Need of Services (CHINS) – As discussed at the SEC's September 12, 2024 meeting, a statutory change will be introduced in the 2025 General Assembly Session to include CHINS as an eligible population for CSA. The proposed legislation will have no fiscal impact.

Mr. Reiner further explained that this change was also recommended by the Commission on Youth (COY) Study of the Use and Impact of Relief of Custody on Care and Support of Youth. Delegate Coyner and Senator Favola will carry the legislation.

- SEC Strategic Plan – One of the two-year metrics in the SEC's Strategic Plan is developing a process to acknowledge areas of local excellence and best practices. Mr. Reiner presented a brief document on the process for SEC members to review.

### **Member Remarks/Updates**

Members reported for their agencies and organizations on their projects, new programs, other ongoing activities and workforce issues. Members continue to work within their agencies and advocate through their associations for improvements to services and service delivery for Virginia's children, youth, and families.

Several members remarked on the CSA Conference and encouraged others to attend next year.

### **Closing Remarks and Adjournment**

There being no further business, the meeting adjourned at 12:45 p.m. on a motion by Sam Hollins, seconded by Natalie Handy, and approved by the SEC. The next meeting is scheduled for March 13, 2025.

**Public Comments and Responses – Proposed Revisions to State Executive Council for Children’s Services  
Policy 4.5.3 Administrative Funds**

#	Commenter	Public Comments	OCS Response
		No public comment was submitted regarding this policy.	

## POLICY 4.5.3

### ADMINISTRATIVE FUNDS (~~ADOPTED 1994~~)

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#### 4.5.3.1 Purpose

To provide guidance to local Children's Services Act (CSA) programs about accessing administrative funds, as detailed in the Appropriation Act, from the Office of Children's Services (OCS).

#### 4.5.3.2 Authority

- A. Section [2.2-2648.D.3](#) of the Code of Virginia requires the State Executive Council to "provide for the establishment of interagency programmatic and fiscal policies developed by the Office of Children's Services, which support the purposes of the Children's Services Act (§ [2.2-5200](#) et seq.), through the promulgation of regulations by the participating state boards or by administrative action, as appropriate."
- B. Section [2.2-2648.D.9](#) of the Code of Virginia requires the State Executive Council to "provide administrative support and fiscal incentives for the establishment and operation of local comprehensive service systems."
- C. [Item 268, Paragraph C.2 of the Appropriation Act](#) states "All localities are required to appropriate a local match for the base year funding consisting of the actual aggregate local match rate based on actual total 1997 program expenditures for the Children's Services Act. This local match rate shall also apply to all reimbursements from the state pool of funds in this Item and carryforward expenditures submitted prior to September 30 each year for the preceding fiscal year, including administrative reimbursements under paragraph C.4. in this Item."
- D. [Item 268, Paragraph C.4 of the Appropriation Act](#) states "...Out of this appropriation, an amount equal to two percent of the fiscal year 1997 pool fund allocations, not to exceed \$2,560,000 the first year and \$2,560,000 the second year from the general fund, shall be allocated among all localities for administrative costs. Every locality shall be required to appropriate a local match based on the local match contribution in paragraph C.2. of this Item. Inclusive of the state allocation and local matching funds, every locality shall receive the larger of \$12,500 or an amount equal to two percent of the total pool allocation."<sup>1</sup>

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<sup>1</sup> With the allocation of an additional \$500,000 per year for administrative funds in the FY2017-2018 Appropriation Act, the minimum amount for localities increased to \$13,405 (state share) the maximum to \$53,623.



### 4.5.3.3 Definitions

*“Administrative budget plan” means the annual request for administrative funds submitted through the CSA local government reporting system (LEDRS)*

*“Administrative funds” mean funds appropriated by the General Assembly to support a locality’s non-direct services cost of implementing the Children’s Services Act (CSA). The Appropriation Act specifies the administrative funds available from the state general fund, defines the minimum and maximum amounts received by localities, and requires local matching funds.*

*“Fiscal Agent” means the individual designated by the locality as responsible for the final approval and submission of CSA financial documents to the Office of Children’s Services.*

*“Local Expenditure and Data Reimbursement System (LEDRS)” means the electronic system for integrated, required reporting for state CSA reimbursement and data collection by local governments.*

### 4.5.3.4 Administrative Funds

To receive administrative funds, each locality ~~is required to~~ *must* appropriate a local match based on the match rate used in the pool formula. *Each locality shall receive a minimum of \$13,405 in state allocation. every locality shall receive the larger of \$12,500 or an amount equal to two percent of the fiscal year 1994 pool allocations. No locality shall receive more than \$50,000 inclusive of the state allocation and local match.*<sup>2</sup>

### 4.5.3.5 Administrative Budget Plan Funding Process

~~Each year, the Community Policy and Management Team must submit to the State Fiscal Agent budget plans for using administrative funds (state and local combined).~~

~~Upon receipt of the Administrative Funds Budget Plan,~~ *After August 1<sup>st</sup> of each fiscal year, the State Fiscal Agent will process a single payment to the fiscal agent of the Community Policy and Management Team for the state’s share of the administrative allocation. The local government should use the following process to submit the administrative plan to the state fiscal agent by no later than June 15th of the fiscal year to ensure payment.*

1. *On or about August 1, the Office of Children’s Services will send the local CSA Fiscal Agent an electronic communication stating that their annual Administrative Funds are now available for the fiscal year.*

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2. *Upon receipt of this email, the fiscal agent will:*
  - a. *Log into the Local Government Reporting portal on the CSA website ([www.csa.virginia.gov](http://www.csa.virginia.gov)).*
  - b. *Click on the “Fiscal Agent Module” button.*
  - c. *Click the “Approve & Submit” button under the OCS admin plan section.*
  - d. *Review the information and click the “Acknowledgment” check box. The Acknowledgement indicates that the Fiscal Agent certifies that these funds will be utilized for allowable personnel, non-personnel, and equipment costs for the operation of the local CSA program and that the locality will provide matching funds,*
  - e. *Click the “Approve & Submit” button.*
3. *Once these steps are complete, the administrative funds will be processed for payment via electronic fund transfer by the CSA Fiscal Agent, the Virginia Department of Education.*
4. *Payments for the current fiscal year will be initiated in October.*

~~If, during the course of the year, the Community Policy and Management Team elects to use its administrative funds in a manner other than proposed in the Budget Plan, it may do so without amending the plan, provided the funds are expended for administrative and coordinating expenses or direct services to eligible youth and families. The decision on specific use of administrative funds rests with the Community Policy and Management Team.~~

~~The local fiscal agent must account for CSA administrative expenditures such that they are clearly identifiable as CSA administrative expenditures.~~

#### **4.5.3.6 Policy Review**

*This policy will be subject to periodic review by the State Executive Council for Children’s Services.*

**Public Comments and Responses – Proposed Revisions to State Executive Council for Children’s Services  
Policy 4.4.2 “Medicaid funded Services”**

#	Commenter	Public Comments	OCS Response
		No public comment was submitted regarding this policy.	

#### **4.4.2 Medicaid Funded Services**

~~“Community Policy and Management Teams shall use Medicaid-funded services whenever they are available for the appropriate treatment of children and youth receiving services under the Children’s Services Act. Effective July 1, 2009, pool funds shall not be spent for any service that can be funded through Medicaid for Medicaid-eligible children and youth except when Medicaid-funded services are unavailable or inappropriate for meeting the needs of a child.”~~

~~Statutory Authority: 2011 Appropriation Act, Chapter 890, Item 274 E.~~

**Public Comments and Responses – Proposed Revisions to State Executive Council for Children’s Services  
Policy 2.1.3 “Individual Participation in State Executive Council Meetings by Electronic Means”**

#	Commenter	Public Comments	OCS Response
		No public comment was submitted regarding this policy.	

# POLICY 2.1

## STATE EXECUTIVE COUNCIL FOR CHILDREN'S SERVICES

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### 2.1.3 *Individual Participation in State Executive Council Meetings by Electronic Means*

#### 2.1.3.1 *Scope Purpose*

- ~~A. This policy shall apply to any individual member of the State Executive Council for Children's Services (SEC) without regard to the identity of the member requesting remote (electronic) participation or the matters that will be considered or voted on at the meeting.~~
- ~~B. This policy shall apply to any public meeting of the SEC or any committees established by the SEC.~~

*To set the parameters of electronic participation in meetings of the State Executive Council for Children's Services (SEC) or any committees established by the SEC.*

#### 2.1.3.2 *Authority*

~~§ 2.2-3708.2 of the Code of Virginia.~~

- A. Section [2.2-3708.2](#) of the Code of Virginia provides that "Any public body, or any joint meetings thereof, may meet by electronic communication means without a quorum of the public body physically assembled at one location when the Governor has declared a state of emergency in accordance with § [44-146.17](#) or the locality in which the public body is located has declared a local state of emergency pursuant to § [44-146.21](#), provided that (i) the catastrophic nature of the declared emergency makes it impracticable or unsafe to assemble a quorum in a single location and (ii) the purpose of the meeting is to provide for the continuity of operations of the public body or the discharge of its lawful purposes, duties, and responsibilities."
- B. Section [2.2-3708.3.B](#) of the Code of Virginia provides that "Individual members of a public body may use remote participation instead of attending a public meeting in person if, in advance of the public meeting, the public body has adopted a policy as described in subsection D..."

### 2.1.3.3 *Applicability Definitions*

~~An individual member may participate in a meeting of the SEC or a public meeting of any committee established by the SEC through electronic communication from a remote location for the following reasons:~~

- ~~A. A temporary or permanent disability or other medical condition prevents the member from attending the meeting in person or;~~
- ~~B. A personal matter prevents the member from attending the meeting in person.~~

~~“All virtual public meeting” means a public meeting conducted by the State Executive Council using electronic communication means during which all members of the SEC who participate do so remotely rather than being assembled in one physical location and to which public access is provided through electronic communication means as defined by [§2.2-3701](#) of the Code of Virginia.~~

~~“Caregiver” means any adult who provides care for a person with a disability as defined in [§51.5-40.1](#) of the Code of Virginia. A caregiver shall either be related by blood, marriage, or adoption to or the legally appointed guardian of the person with a disability for whom they are caring.~~

~~“Meeting” means a meeting as defined by [§2.2-3701](#) of the Code of Virginia.~~

~~“Member” means any member of the State Executive Council or any committees established by the SEC.~~

~~“Notify” or “notifies” for the purpose of this policy means written notice, including, but not limited to, email or letter, but does not include text messages or messages exchanged on social media.~~

~~“Remote participation” means participation by any individual member of the SEC by electronic communication means in a public meeting where a quorum of the SEC is physically assembled, as defined by [§2.2-3701](#) of the Code of Virginia.~~

### 2.1.3.4 ~~Procedures~~

- ~~A. Notification: The member requesting to participate through electronic communication from a remote location must notify the SEC chair or committee chair on or before the day of the meeting.~~
- ~~B. Quorum: In order for any member to be approved to participate in a meeting of the SEC or a public meeting of any committees established by the SEC through electronic communication, a quorum of the SEC or a simple majority of the committee must be physically assembled at the primary or central meeting location identified in the public notice required for the meeting.~~

- ~~C. *Technological requirement:* Arrangements shall be made for the voice of the remote participant to be heard by all persons at the primary or central meeting location.~~
- ~~D. *Documentation:* The reason the member is unable to attend the meeting and the remote location from which the member participates shall be recorded in the meeting minutes. The nature of the personal matter as provided in Section 2.1.3.3 shall also be included in the minutes.~~
- ~~E. *Limitation:* Members may only participate through electronic communication due to personal matters pursuant to subsection B. of 2.1.3.2. above for no more than two meetings of the SEC or the committee each calendar year.~~
- ~~F. *Approval Process:* Individual participation from a remote location shall be approved by the other members of the SEC or committee unless such participation would violate this policy or the provisions of the Virginia Freedom of Information Act (FOIA). If a member's participation from a remote location is challenged, then the other members of the SEC or committee shall vote whether to allow such participation. If the other members of the SEC or committee votes to disapprove of the member's participation because such participation would violate this policy, such disapproval will be recorded in the minutes with specificity.~~

## **2.1.3.4 Remote Participation of Members**

### **2.1.3.4.1 Mandatory requirements**

*Regardless of the reasons why the member is participating in a meeting from a remote location by electronic communication means the following conditions must be met for the member to participate remotely:*

- A. *A quorum of the SEC must be physically assembled at the primary or central meeting location. To determine whether a quorum is physically assembled, an individual member of the SEC who is a person with a disability as defined in [§ 51.5-40.1](#) and uses remote participation counts toward the quorum as if the individual was physically present. Further, an individual member of the SEC who is a caregiver for a person with a disability and uses remote participation counts toward the quorum as if the member was physically present.*
- B. *Arrangements have been made for the voice of the remotely participating member to be heard by all persons at the primary or central meeting location. If, at any point during the meeting, the voice of the remotely participating member is no longer able to be heard by all persons at the meeting location, the remotely participating member shall no longer be permitted to participate remotely and will be considered absent from the meeting (for the purposes of a quorum).*



- C. *This policy shall not prohibit or restrict any individual member of the SEC who is using remote participation from voting on matters before the SEC.*

**2.1.3.4.2 Process to request remote participation**

- A. *On or before the day of the meeting, and at any point before the meeting begins, the requesting member must notify the SEC Chair or the Office of Children’s Services (OCS) Executive Director that they are unable to physically attend a meeting due to (i) a temporary or permanent disability or other medical condition that prevents the member's physical attendance or the member is a caregiver who must provide care for a person with a disability at the time the public meeting is held, thereby preventing the member's physical attendance, (ii) a family member's medical condition that requires the member to provide care for such family member, thereby preventing the member's physical attendance, (iii) their principal residence location more than 60 miles from the meeting location, or (iv) a personal matter and identifies with specificity the nature of the personal matter.*
- B. *If the requesting member is unable to physically attend the meeting due to a personal matter, the requesting member must state the nature of the personal matter with specificity. There is no limit to the number of times that a member may participate remotely for the other authorized purposes listed in A (i)-(iii) above. Remote participation due to a personal matter (A (iv), above) is limited each calendar year to two meetings or 25 percent of the meetings held per calendar year rounded up to the next whole number, whichever is greater.*
- C. *The requesting member is not obligated to provide independent verification regarding the reason for their nonattendance, including the temporary or permanent disability, other medical condition, or the family member's medical condition that prevents their physical attendance at the meeting.*
- D. *The Chair (or OCS Executive Director if the requesting member is the Chair) shall promptly notify the requesting member whether their request is in conformance with this policy and, therefore, approved or disapproved.*

**2.1.2.4.3 Process to confirm approval or disapproval of participation from a remote location**

*When a quorum of the SEC has assembled for the meeting, the SEC shall vote to determine whether:*

- A. *The Chair's decision to approve or disapprove the requesting member's request to participate from a remote location was in conformance with this policy, and*
- B. *All persons at the primary or central meeting location can hear the voice of the remotely participating member.*

#### **2.1.2.4.4 Recording in the minutes**

- A. *If the member is allowed to participate remotely due to a temporary or permanent disability or other medical condition, a family member's medical condition that requires the member to provide care to the family member, or because their principal residence is located more than 60 miles from the meeting location the SEC shall record in its minutes (1) the SEC's approval of the member's remote participation; and (2) a general description of the remote location from which the member participated.*
- B. *If the member is allowed to participate remotely due to a personal matter, such matter shall be cited in the minutes with specificity, as well as how many times the member has attended remotely due to a personal matter and a general description of the remote location from which the member participated.*
- C. *If a member's request to participate remotely is disapproved, the disapproval, including the grounds upon which the requested participation violates this policy or the Virginia Freedom of Information Act, shall be recorded in the minutes with specificity.*

#### **2.1.2.4.5 Dealing with Objections to Electronic Member Participation**

*It shall be assumed that a member can participate under the permissions listed above unless another member objects once the Chair states it at the beginning of the meeting. At such time, if any other member objects, the Chair shall call for a vote on the matter. If a member disapproves of electronic participation due to a violation of the SEC's electronic participation and meeting policy, then it will be recorded with specificity. If the vote is such that the member will not be permitted to participate electronically, the member should be advised that they may only monitor/witness the meeting, and the member is not permitted to participate (e.g., vote, discuss). The outcome of any vote on the member's electronic participation shall be documented in the minutes accordingly.*

#### **2.1.2.4.6 Closed session**

*If the SEC goes into closed session, the member participating remotely shall ensure that no third party can hear or otherwise observe the closed meeting.*

#### **2.1.2.4.7 Strict and uniform application of this policy**

*This Policy shall be applied strictly and uniformly, without exception, to the entire membership and without regard to the identity of the member requesting remote participation or the matters that will be considered or voted on at the meeting. The Chair shall maintain the member's written request to participate remotely and the written response for one year or other such time required by records retention laws, regulations, and policies.*

### **2.1.3.5 Council Subcommittees**

*Any committee, subcommittee, or other entity designated by the SEC to perform delegated functions of the SEC or to advise the SEC shall comply with this policy regarding electronic member participation.*

### **2.1.3.6 Policy Review**

*The State Executive Council for Children's Services shall review and readopt this policy annually as required by [§2.2-3708.3.D](#).*

# State Executive Council (SEC) for Children's Services

## Notice of Intent to Develop/Revise Policy

**Approved for Public Comment by the SEC:** March 13, 2025

**Public Comment Period Ends:** 5:00 PM, May 1, 2025

### **Number and Name of Proposed/Revised Policy:**

Policy 5.1 "Data Set" (Adopted 6/12/2008; Rev June 2010; Rev March 2011; Technical edits December 2011, July 2016, July 2021)

### **Basis and Purpose of the Proposed/Revised Policy:**

The authority for the SEC to develop a policy for public participation falls is provided for in §2.2-2648.D.9. of the *Code of Virginia*, which states that the State Executive Council for Children's Services shall: *"Provide administrative support and fiscal incentives for the establishment and operation of local comprehensive service systems."* Additionally, Section 2.2-2648.D.3 of the Code of Virginia requires the State Executive Council to *"provide for the establishment of interagency programmatic and fiscal policies developed by the Office of Children's Services, which support the purposes of the Children's Services Act (§ 2.2-5200 et seq.), through the promulgation of regulations by the participating state boards or by administrative action, as appropriate."*

**The proposed repeal** of Policy 5.1 removes a policy that is no longer technically appropriate as the CSA Dataset ceased to exist with the implementation of the Local Expenditure and Data Reimbursement System (LEDRS). Additionally, [Executive Order 19](#) calls for a 25% reduction in regulatory requirements. In examining policies that are discretionary and not currently relevant, the SEC is fulfilling the requirements of the Executive Order and acting in the spirit of the guidance set forth by the Office of Regulatory Management.

### **Summary of the Proposed/Revised Policy:**

Policy 5.1 outlines and defines three different local match rates for specific services (community-based, base, and residential) as defined in Item 268 Paragraph C.2, C.3.a, and C.3.b of the Appropriation Act.

**Preliminary Fiscal Impact Analysis:**

The repeal of this policy will have no fiscal impact if Policy 4.5.6, which is proposed in companion to the repeal of Policy 5.1, is adopted. Policy 4.5.6 includes the same local match rates and updated service language.

## POLICY 5.1

### CSA DATA SET

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#### 5.1.1 Service Placement Types (Adopted 6/12/2008; Rev June 2010; Rev March 2011; Technical edits December 2011, July 2016, July 2021)

##### COMMUNITY BASED SERVICES (50% of local base match rate)

~~**Community-Based Services:** Community services provided to youth while living at home, in the home of extended family, in a regular foster family home, or in an independent living arrangement. This category includes community services provided to the youth's planned permanent caregiver in the family home or home community. (It does not include basic or enhanced maintenance payments for family foster care, basic activities, independent living stipends, or independent living arrangements. These payments are reported under the categories specific to those services.)~~

~~**Community Transition Services:** Community transition services are provided directly to the planned permanent caregiver (e.g., parents, relatives, and foster families) of youth in congregate/residential placements for the primary purpose of preparing the planned permanent caregiver and youth for the youth's discharge and transitioning from a residential/congregate care setting to the family's home. The settings for these services are primarily in the planned permanent caregiver's home and home community, but may also be in the residential care setting or its local community if provided directly to the planned permanent caregiver with the primary purpose of helping transition the youth home.~~

~~**Intensive In-home Services:** Services are provided to youth and their families when they are living at home. Intensive in-home services are typically provided, but not solely, in the residence of a youth who is at risk of being removed from the home or being transitioned home from an out of home placement. These services may include crisis intervention/treatment, individual and family counseling, life, parenting, and communication skills, and 24-hour per day emergency response. By delivering the service in the home, clinicians can address family system issues and support parents in effective behavioral techniques.~~

~~**Intensive Care Coordination:** Services conducted by an intensive care coordinator, as defined under the State Executive Council guidelines, for youth at risk of entering or placed in residential care. (Community-based services provided concurrent to Intensive Care Coordination are to be reported in the community-based services category.)~~

## **EDUCATION SERVICES & FOSTER CARE SERVICES (Local base match rate)**

**~~Special Education Private Day Placement:~~** Educational services for students with disabilities receiving special education and related services in a private day school in accordance with the placement decision in the IEP. *(Non IEP services provided to a youth in a private day placement are to be reported as Community-based services or as Wrap-Around Services for Students with Disabilities, as determined appropriate by the FAPT.)*

**~~Wrap-Around Services for Students with Disabilities:~~** Non IEP services in the IFSP and approved by the FAPT provided to a student with a disability and/or the student's family which are necessary to keep the student out of a more restrictive placement. Wrap-around services are non-residential and are provided outside of the school setting in the home and community when the needs associated with the student's disability extend beyond the school setting and threaten the student's ability to be maintained in the home, community, or school setting. The wrap-around services may be provided to a student placed in a public school setting, a private day school, or being transitioned back to the community from a residential educational program or a juvenile correction center.

**~~Family Foster Care Basic Maintenance and Activities Payments:~~** Payments for basic maintenance for foster care youth living in a local agency foster home. The families are receiving foster care maintenance payments consistent with Title IV-E definitions (i.e., room, board, daily basic supervision, school supplies, youth's personal incidentals, the basic clothing allowance, child care and/or travel costs), and the youth do not meet requirements for Title IV-E funding. *(Community-based services provided directly to the child and/or biological/adoptive family should be reported in the Community-Based Services category. Educational placements and non-instructional services in the public schools provided to these children should be reported in the Special Education Private Day Placement category or Wraparound Services for Students with Disabilities. The Foster Care Supplemental Clothing Allowance is reported as a Community Based Service in this expenditure category.)*

**~~Family Foster Care Enhanced Maintenance:~~** Payments in this category are for foster care youth in a local agency foster home and include the enhanced maintenance payment (currently determined by the VEMAT) for additional daily supervision as well as the basic maintenance payment, and the youth do not meet requirements for Title IV-E. *(Community-based services provided directly to the child and/or biological/adoptive family should be reported in the appropriate expenditure category (either Community-based services or the Foster Care Maintenance as detailed in the CSA Pool Fund Expenditure Categories and Definitions document). Educational placements and non-instructional services in the public schools provided to these children should be*

~~reported in the Special Education Private Day Placement category or Wraparound Services for Students with Disabilities.)~~

**Specialized Foster Care:** This category has been retired.

**Treatment Foster Care:** Payment for services and treatment of children living in a foster home where a trained foster parent provides care through a licensed child-placing agency or local agency's defined treatment foster care program. The package of services included in the treatment payment rate may include assessment; development of the case plan, home visits; referral to services; direct provision of services, treatment, and counseling for children, parents, and/or substitute care providers in their own homes or outside of their homes; respite care; parent support services; 24-hour supervision and crisis intervention; casework, case management, and supervision; placement of the child; preparing and participating in judicial determination; recruitment and training. This category includes all services, including any community-based services, provided to these children while they live in the treatment foster home, except as provided below. ~~(Community-based services provided directly to the child and/or biological/adoptive family should be reported in the appropriate expenditure category, either Community-Based Services or the Treatment Foster Care, as detailed in the CSA Pool Fund Expenditure Categories and Definitions document. Educational placements and non-instructional services in the public schools provided to these children should be reported in the Special Education Private Day Placement category or Wraparound Services for Students with Disabilities.)~~

**Independent Living Stipend:** The standard statewide payment rate made for the care and support of youth over age 16 placed in independent living status. Covered costs are not limited to but generally include room and board, rent, household equipment, utilities, clothing, personal care, and transportation. Payment cannot be made from Title IV-E funds; it is made from CSA pool funds. Payments may be made directly to the youth, or if the youth is living with an individual to whom the youth pays rent, the costs may be paid to that individual. The method of payment must be in a written agreement signed by the youth. ~~(Community-based services provided to these youth or their families while the children receive an independent living stipend are to be reported in the community-based services category. Educational placements and non-instructional services in the public schools provided to these children should be reported in the Special Education Private Day Placement category or Wraparound Services for Students with Disabilities.)~~

**Independent Living Arrangement:** Payment for foster care youth at least 16 years of age who have been placed by the local DSS board or licensed child-placing agency in a living arrangement in which the child does not have daily substitute parental supervision (e.g., college dormitory, individual apartment, apartments licensed by child-placing agencies). This category does not include apartments located in one complex where daily substitute parental supervision is provided, and the programs are licensed as group homes. It does



~~not include group homes or residential facilities. (Community-based services provided to the youth or planned permanent caregiver should be reported in the community based services category. Private educational placements are to be reported in the Special Education Private Day Placement category or Wraparound Services for Students with Disabilities.)~~

~~**Psychiatric Hospital/Residential Crisis Stabilization Unit:** Placement of youth outside of their family home for acute care in an acute care psychiatric unit of a licensed medical hospital or licensed free-standing psychiatric hospital or a crisis stabilization unit for 24 hours or more (i.e., for crisis stabilization of harmful behaviors to self or others and/or serious mental health issues). This category includes all services provided to the youth while staying in the psychiatric hospital/crisis unit. Residential Crisis Stabilization length of stay should not exceed 15 days per incident. (Community-based services provided directly to the youth and/or planned permanent caregiver in the family's home should be reported in the Community based Services category.)~~

~~**Congregate Care Educational Services for Medicaid Funded Placements:** Educational services provided to youth who are placed in a residential setting for non-educational purposes or who have an IEP written for residential educational services. The youth is Medicaid eligible and placed in a Medicaid facility, but Medicaid funds cannot be used to pay for the educational services.~~

~~**Congregate Care Educational Services for Non-Medicaid Funded Placements:** Educational services provided to youth who are placed in a residential setting for non-educational purposes or who have an IEP written for residential educational services. The youth is not eligible for Medicaid or is not placed in a Medicaid-funded placement because appropriate Medicaid programs are not available to meet the youth's needs.~~

#### **RESIDENTIAL/CONGREGATE CARE (25% above local base match rate)**

~~**Temporary Care Facility and Services:** Placement of children outside of their family homes in licensed facilities or emergency shelters that serve groups of youth and are specifically approved to provide a range of services, as needed, on an individual basis not to exceed 90 days. Includes all services provided to children while they are living in the temporary care facility, except as specified. (Community and community transition services provided directly to the child and/or family for the primary purpose of discharging and transitioning the child home from residential care should be reported in the appropriate community-based services category. Educational services provided in this setting should be reported in the Educational Services – Congregate Care category. Does not include secure detention facilities.)~~

~~**Group Home:** Placement of children outside of their family homes in licensed residential programs that are characterized by a supervised homelike environment in a single-family residence that serves groups of children (up to 8 youth) who have behavioral/emotional~~

difficulties and/or physical or mental disabilities. This includes the placement of children in apartments located in one complex where daily substitute parental supervision is provided, and the programs are licensed as residential programs. Group homes may provide social, life, or vocational skills training. They may provide emergency placements. Includes all services provided to children while living in the group home, except as specified. *(Community-based services provided directly to the youth and/or planned permanent caregiver in the home where the youth will be living are to be reported in the Transition Services Category. Transition services provided directly to the planned permanent caregiver for the primary purpose of discharging and transitioning the child home from residential care are to be reported in the Community Transition Services category. Educational services provided in the group home setting are to be reported in either the Educational Services – Congregate Care category.)*

**Residential Facility:** Placement of youth outside of their family homes in licensed residential care programs that provide 24 hour supervised care to groups of youth (e.g., secure residential treatment facilities, campus style residential programs, group homes on the campus of a residential facility, group homes that serve more than nine youth). Programs may provide intensive treatment services such as medication management, nursing care, occupational therapy, crisis stabilization, assessment, social skills training, group therapy, individual therapy, family therapy, etc. This category includes services provided to youth while living in the residential program (e.g., outpatient, respite care, crisis stabilization, assessment, child behavioral aides) and includes services that are provided in the residential facility and residential facility community to the youth's family. This category does not include secure detention facilities. *(Community-based services provided directly to the youth and/or planned permanent caregiver in the home where the youth will be living are to be reported in the Transition Services category. Transition services provided directly to the planned permanent caregiver for the primary purpose of discharging and transitioning the child home from residential care are also to be reported in the Community Transition Services category. Educational services provided in the group home setting are to be reported in either the Educational Services – Congregate Care category.)*

# State Executive Council (SEC) for Children's Services

## Notice of Intent to Develop/Revise Policy

Approved for Public Comment by the SEC: March 13, 2025

Public Comment Period Ends: 5:00 PM, May 1, 2025

### Number and Name of Proposed/Revised Policy:

Policy 4.5.6 "Local Match Rates"

### Basis and Purpose of the Proposed/Revised Policy:

The authority for the SEC to develop a policy for public participation falls is provided for in §2.2-2648.D.9. of the *Code of Virginia*, which states that the State Executive Council for Children's Services shall: "*Provide administrative support and fiscal incentives for the establishment and operation of local comprehensive service systems.*" Additionally, Section 2.2-2648.D.3 of the Code of Virginia requires the State Executive Council to "provide for the establishment of interagency programmatic and fiscal policies developed by the Office of Children's Services, which support the purposes of the Children's Services Act (§ 2.2-5200 et seq.), through the promulgation of regulations by the participating state boards or by administrative action, as appropriate." Furthermore, the Appropriation Act calls for varying local match rates for services. Specifically:

1. Item 268, Paragraph C.2 of the Appropriation Act states, "All localities are required to appropriate a local match for the base year funding consisting of the actual aggregate local match rate based on actual total 1997 program expenditures for the Children's Services Act. This local match rate shall also apply to all reimbursements from the state pool of funds in this Item and carryforward expenditures submitted prior to September 30 each year for the preceding fiscal year, including administrative reimbursements under paragraph C.4. in this Item."
2. Item 268, Paragraph C.3.a of the Appropriation Act states, "...Notwithstanding the provisions of C.2. of this Item, beginning July 1, 2008, the local match rate for community-based services for each locality shall be reduced by 50 percent."

3. Item 268, Paragraph C.3.b of the Appropriation Act states, “Localities shall review their caseloads for those individuals who can be served appropriately by community-based services and transition those cases to the community for services. Beginning July 1, 2009, the local match rate for non-Medicaid residential services for each locality shall be 25 percent above the fiscal year 2007 base. Beginning July 1, 2011, the local match rate for Medicaid residential services for each locality shall be 25 percent above the fiscal year 2007 base.”
4. Item 268, Paragraph C.3.e of the Appropriation Act states, “The local match rate for all non-Medicaid services provided in the public schools after June 30, 2011 shall equal the fiscal year 2007 base.”

Additionally, [Executive Order 19](#) calls for a 25% reduction in regulatory requirements. By systematically examining policies, the SEC is fulfilling the requirements of the Executive Order and acting in the spirit of the guidance set forth by the Office of Regulatory Management.

#### **Summary of the Proposed/Revised Policy:**

Policy 4.5.6.1 outlines specific local match rates for services as defined in Item 268 of the Appropriation Act. Policy 4.5.6.1 would replace Policy 5.1 Data Set, which is currently under consideration for repeal by the State Executive Council.

#### **Preliminary Fiscal Impact Analysis:**

Passage of this policy has no fiscal impact, as the defined match rates are already allotted in Policy 5.1.

## POLICY 4.5.6

### LOCAL MATCH RATES

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#### 4.5.6.1 Purpose

To provide guidance to local Children's Services Act (CSA) programs about local match rates for specific services.

#### 4.5.6.2 Authority

- A. Section [2.2-2648.D.3](#) of the Code of Virginia requires the State Executive Council to "provide for the establishment of interagency programmatic and fiscal policies developed by the Office of Children's Services, which support the purposes of the Children's Services Act (§ [2.2-5200](#) et seq.), through the promulgation of regulations by the participating state boards or by administrative action, as appropriate."
- B. Section [2.2-2648.D.9](#) of the Code of Virginia requires the State Executive Council to "provide administrative support and fiscal incentives for the establishment and operation of local comprehensive service systems."
- C. [Item 268, Paragraph C.2 of the Appropriation Act](#) states "All localities are required to appropriate a local match for the base year funding consisting of the actual aggregate local match rate based on actual total 1997 program expenditures for the Children's Services Act. This local match rate shall also apply to all reimbursements from the state pool of funds in this Item and carryforward expenditures submitted prior to September 30 each year for the preceding fiscal year, including administrative reimbursements under paragraph C.4. in this Item."
- D. [Item 268, Paragraph C.3.a of the Appropriation Act](#) states, "...Notwithstanding the provisions of C.2. of this Item, beginning July 1, 2008, the local match rate for community-based services for each locality shall be reduced by 50 percent."
- E. [Item 268, Paragraph C.3.b of the Appropriation Act](#) states "Localities shall review their caseloads for those individuals who can be served appropriately by community-based services and transition those cases to the community for services. Beginning July 1, 2009, the local match rate for non-Medicaid residential services for each locality shall be 25 percent above the fiscal year 2007 base. Beginning July 1, 2011, the local match rate for Medicaid residential services for each locality shall be 25 percent above the fiscal year 2007 base."
- F. [Item 268, Paragraph C.3.e of the Appropriation Act](#) states "The local match rate for all non-Medicaid services provided in the public schools after June 30, 2011 shall equal the fiscal year 2007 base."

**Adopted:** TBD  
**Effective:** TBD  
**Revised:** TBD  
**Page 1 of 3**

### **4.5.6.3 Definitions**

*“Community-based services match rate” means a locality’s match rate for community-based services provided to children living at home, in the home of extended family, in a local agency foster home, or in independent living that is 50% of the local base match rate.*

*“Local base match rate” means each locality’s match rate for special education and foster care services, determined by the funding formula in the (FY1997) Appropriation Act.*

*“Residential/congregate care services match rate” means a locality’s match rate for services that place a child outside of the family home in licensed facilities, residential care programs that provide 24-hour supervised care, or emergency shelters that are 25% above the local base match rate.*

### **4.5.6.4 Service Placement Types and Corresponding Match Rates**

*The following CSA Service Placement |Types have been assigned the corresponding match rate. The OCS website provides extended definitions of each type.*

#### **A. Community- Based Services Match Rate (50% of local base match rate)**

- *Community-Based Services*
- *Community Transition Services*
- *Intensive Care Coordination*
- *Intensive In-Home Services*

#### **B. Local Base Match Rate**

- *Special Education Private Day Placement*
- *Wrap-Around Services for Students with Disabilities*
- *Family Foster Care Basic Maintenance and Activities Payments*
- *Specialized Foster Care*
- *Treatment Foster Care*
- *Independent Living Stipend*
- *Independent Living Arrangement*
- *Psychiatric Hospital/Residential Crisis Stabilization Unit*
- *Congregate Care Educational Services for Medicaid Funded Placements*
- *Congregate Care Educational Services for Non-Medicated Funded Placements*

**C. Residential/Congregate Care Services Match Rate (25% above local base match rate)<sup>1</sup>**

- Temporary Care Facility and Services
- Group Home
- Residential Treatment Facility

#### **4.5.6.5 Policy Review**

*This policy will be subject to periodic review by the State Executive Council for Children’s Services.*

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<sup>1</sup> Community and community transition services provided directly to the child and/or family for the primary purpose of discharging and transitioning the child home from residential care are reported in the appropriate community-based services category. Educational services provided in this setting are reported in the Educational Services – Congregate Care category.

**BYLAWS**  
**State and Local Advisory Team for the Children's Services Act**

**ARTICLE I – Name**

This entity's name shall be the "State and Local Advisory Team," hereinafter referred to as the "SLAT."

**ARTICLE II – Purpose and Powers**

The SLAT was created by the 1992 General Assembly of the Commonwealth of Virginia as the State Management Team, as set forth in Chapter 46 Section 2.1-747 of the *Code of Virginia* of 1950. The 2000 General Assembly renamed the State Management Team the State and Local Advisory Team and modified its duties. Its activities shall be conducted ~~in all respects~~ in accordance with Virginia law and regulations.

In accordance with ~~Section~~ [§2.2-5201](#) of the *Code of Virginia*, the SLAT has developed bylaws to govern its operations which have been approved by the State Executive Council for Children's Services, hereinafter referred to as the "SEC."

Specifically, the SLAT was established to better serve the needs of youth and their families by advising the SEC on managing cooperative efforts at the state level and providing support to community efforts. Pursuant to ~~Section~~ [§2.2-5202](#), COV the SLAT may:

1. Advise the SEC on state interagency program policies that promote and support cooperation and collaboration in the provision of services to youth and their families at the state and local levels;
2. Advise the SEC on state interagency fiscal policies that promote and support cooperation and collaboration in the provision of services to youth and their families at the state and local levels;
3. Advise state agencies and localities on training and technical assistance necessary for the provision of efficient and effective services that are responsive to the strengths and needs of youth and their families; and
4. Advise the SEC on the effects of proposed policies, regulations, and guidelines.



### **ARTICLE III – Membership and Terms**

The SLAT shall be appointed by and be responsible to the SEC as set forth in Section §2.2-5201, *Code of Virginia*. The membership and terms of appointment shall be as delineated in [§2.2-5201](#). Each organization and/or association may recommend up to two alternates. The primary representative shall have primary responsibility for full participation. Each alternate shall also be appointed by the SEC and shall serve the same term as the member.

Any person serving on the SLAT who does not represent a public agency shall file a statement of economic interests as set out in Section [§2.2-3117](#), *Code of Virginia* (State and Local Government Conflict of Interests Act). If required, persons representing public agencies shall file such statements pursuant to the State and Local Government Conflict of Interests Act.

### **ARTICLE IV – Duties of Membership**

The state agencies represented on the SLAT shall support developing and implementing a collaborative system of services and funding. This support shall include, but not be limited to, the provision of timely fiscal information, aggregate data on youth, families, and services, and assistance in training local agency personnel on the system of services and funding.

A majority vote shall establish and approve official positions regarding SLAT policy and procedure. SLAT members should be cognizant of these positions and reflect on them when appropriate while representing the SLAT at public meetings and functions.

### **ARTICLE V – Officers**

The SLAT shall annually elect a chair from among the local government representatives, including the members who are representatives of one of the different participants of community policy and management teams and the local Children’s Services Act coordinator or program manager. The chair shall be responsible for convening the SLAT and presiding over all meetings, setting the agenda, making assignments, and serving as a voting member of the SEC. The SLAT shall also annually elect a vice-chair. In the absence of the chair, the vice-chair will assume the role of the chair with all powers and responsibilities.

### **ARTICLE VI – Election of Officers**

A nominating committee for the selection of officers for the next ~~fiscal year~~ *two-year term* shall be appointed by the chair no later than the penultimate meeting in any given ~~fiscal election~~ year. It shall be the duty of the nominating committee to nominate candidates for the offices of chair and vice-chair and to report these nominations no later than the final meeting of ~~any~~ *the fiscal year in which the chair and vice-chair term ends*. The election of officers shall occur at the final meeting held in the ~~fiscal year~~ *term*

year. Before the election, additional nominations from the floor shall be permitted for all offices (provided the nominee consents). Officers ~~shall assume office~~ *terms shall begin* on July 1 *of the first term year*. If appointments are delayed, the SLAT may modify this schedule and appoint an interim chair.

The term of office shall be for ~~one~~ *two* years. Officers shall serve until their term expires or a successor is elected, whichever last occurs. No officer may serve more than ~~three~~ *two* consecutive terms in the same office. The election shall be by ballot if there is more than one nominee for the same office. A quorum must be present and voting to constitute an election.

If a vacancy occurs in one of the elected offices, the vacancy shall be filled by a special election for the unexpired term by a majority vote of all SLAT members present at the first meeting following the announcement of the vacancy or as soon thereafter as possible.

### **ARTICLE VII – Meetings**

A meeting of the SLAT occurs when a majority of the membership sits as a body or as an informal assemblage, wherever held. Minutes shall be taken of all meetings.

All meetings shall be conducted in an orderly manner subject to Robert's Rules of Order and any applicable state law (e.g., the [Virginia Freedom of Information Act](#)).

An annual meeting schedule for the coming year shall be set at the final meeting of any fiscal year.

Regular SLAT and executive committee meetings shall be held as described or published on the [Commonwealth Calendar](#) and at a time and location convenient to members.

All SLAT and executive committee meetings are open to the public and all interested parties.

Special meetings shall be convened at the chair's discretion as the need arises and at the written request of at least two members of the SLAT.

*Members or designated alternates will follow the parameters of State Executive Council for Children's Services Policy 2.1.3 governing individual participation in SLAT meetings by electronic means.*

~~The presence of a majority of the SLAT membership (in person or through approved virtual participation) shall constitute a quorum. When less than a quorum is present, meetings may be held for purposes of information sharing, determining SLAT business, etc., but in no instance may any voting take place with less than a quorum present.~~

*A quorum is formed when a majority of the SLAT membership (in person or through approved virtual participation) is present. When less than a quorum is present, meetings may be held to share information, determine SLAT business, etc., but voting may not take place.*

All decisions regarding the establishment and implementation of SLAT policy and procedure, including all motions presented and acted upon, will be accomplished by a majority vote of the membership as signified by the chair and recorded by the Office of Children's Services.

Members or designated alternates must be present (in person or through approved virtual participation) to record their votes. Each state and non-state agency member shall have one vote by the primary member or designated alternate. All questions of parliamentary procedure and voting on all motions and amendments shall be governed by the guidelines outlined in Robert's Rules of Order.

Individual members will endeavor to attend all officially called or scheduled meetings of the SLAT. When unable to be present, they will be represented by their designated alternate, who shall act with all the authority of the appointed member, including the right to vote on all matters coming before the SLAT.

All notices of meetings and minutes will be distributed to the membership before the convening of the following or subsequent meeting.

The Office of Children's Services (OCS) is responsible for recording and producing minutes from each meeting, preparing correspondence when required, and serving as the official record keeper for the SLAT.

### **ARTICLE VIII – Executive Committee, Purpose, Function, and Membership**

The executive committee shall be composed of the chair and vice-chair. The Executive Director-of OCS, or their designee shall serve in an ex-officio capacity. The immediate past chair may serve in an ex-officio capacity by action of the SLAT.

Executive committee meetings will be open to the public and published as appropriate. SLAT members are invited to attend executive committee meetings.

The purpose of the Executive Committee shall be to enhance the efficiency and effectiveness of the work of the SLAT by:

1. Establishing the agenda, scheduling the meetings, and managing the flow and distribution of work;
2. Monitoring the progress of SLAT committees on assigned tasks and integrating the work of various committees through coordination with committee chairs;
3. Serving as a facilitator by reviewing and making recommendations on options to resolve a lack of consensus on issues under consideration;

4. Assuring representation of the SLAT at all meetings of the SEC; and
5. Representing the SLAT in matters that cannot be addressed at regular meetings. This responsibility shall not extend beyond existing policies, procedures, or decisions previously made or established by the SLAT.

#### **ARTICLE IX – Committees**

The chair may form committees as required after appropriate consultation with the membership. A committee chair and an acceptable number of committee members shall be appointed. Each committee may be dissolved at the discretion of the SLAT-chair once its appointed task is completed.

#### **ARTICLE X – Notice and Waiver of Notice**

Any notice required by these Bylaws may be given by electronic mail, mailing, or delivering the same to the person entitled thereto at his or her address recorded with the OCS, and such notice shall be deemed to have been given at the time of such mailing or delivery. Any notice required by these Bylaws to be given may be waived by the person entitled to such notice.

#### **ARTICLE XI – Amendments**

These Bylaws may be amended at any regular meeting of the SLAT by an affirmative vote of a majority of the members, provided that the membership is notified in writing of any proposed amendment to said Bylaws before the convening of the meeting when such amendment is discussed and acted upon. **The Bylaws shall revise the Bylaws, or an appointed subcommittee as required but** no less than once every three years from the date of their adoption, provided that all amendments to these Bylaws must be approved by the SEC.

#### **ARTICLE XII – Severability**

It is hereby declared to be the intention of the SLAT that the articles, paragraphs, sentences, clauses, and phrases of these Bylaws are severable, and if any phrase, clause, sentence, paragraph, or article of these Bylaws shall be determined by an administrative agency or court of competent jurisdiction to be in violation of the laws of the Commonwealth of Virginia or the United States of America, of no effect, but the remaining phrases, clauses, sentences, paragraphs, and articles shall remain in full effect.

The foregoing Bylaws of the State and Local Advisory Team for the Children's Services Act were duly adopted by the State and Local Advisory Team on ~~August 3, 2023,~~ *February 7, 2025*, and approved by the State Executive Council on ~~September 14, 2023,~~ *March 13, 2025*.

\_\_\_\_\_  
Chair  
State Executive Council for Children's Services

\_\_\_\_\_  
Chair  
State and Local Advisory Team

Date: \_\_\_\_\_

Date: \_\_\_\_\_

2025 Regular Session

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SB801 Children's Services Act; changes to state pool of funds.

Add bill to watchlist

Status: Awaiting Signature

Patrons

All Patrons

Introduced by: Barbara A. Favola (Chief Patron)

All Summaries

Summary As Passed Senate

**Children's Services Act; state pool of funds.** Makes a number of changes to the Children's Services Act state pool of funds for the provision of public or private nonresidential or residential services for troubled youth and families, including (i) removing from the purpose of the state pool of funds the consolidation of categorical agency funding and the institution of community responsibility for the provision of services; (ii) removing language specifying that references to funding sources and current placement authority for the target population served by the state pool of funds are for the purpose of accounting for the funds and should not be intended to categorize children and youth into funding streams in order to access services; (iii) modifying the target population served by the state pool of funds by (a) removing references to the Department of Education's private tuition assistance and the Interagency Assistance Fund for Noneducational Placement for Handicapped Children and (b) adding children and youth who are determined to be a child in need of services, as such term is defined in relevant law; (iv) removing the requirement that the financial and legal responsibility for certain special education services remains with the placing jurisdiction, unless the placing jurisdiction has transitioned all appropriate services; (v) requiring that the uniform assessment instrument used to determine eligibility for funding through the state pool of funds be approved by the State Executive Council for Children's Services; and (vi) modifying the eligibility criteria for funding through the state pool of funds by adding language that (a) specifies that the child or youth's emotional or behavioral problems have resulted in the child or youth, or place the child or youth at imminent risk of, entering purchased residential care and (b) includes the determination by a court that the child or youth is a child in need of services, as such term is defined in relevant law. The bill also includes technical changes. As introduced, this bill was a recommendation of the Virginia Commission on Youth.

Bill Versions

Show All Versions

Senate	Enrolled	PDF
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History

12/28/2024	Senate	Prefiled and ordered printed; Offered 01-08-2025 25101352D
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12/28/2024	Senate	Referred to Committee on Rehabilitation and Social Services
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1/17/2025	Senate	Reported from Rehabilitation and Social Services with amendments (15-Y 0-N)
1/20/2025	Senate	Rules suspended
1/20/2025	Senate	Constitutional reading dispensed (on 1st reading) (40-Y 0-N)
1/20/2025	Senate	Passed by for the day
1/21/2025	Senate	Fiscal Impact Statement from Department of Planning and Budget (SB801)
1/21/2025	Senate	Read second time
1/21/2025	Senate	Reading of amendments waived
1/21/2025	Senate	Rehabilitation and Social Services Amendments agreed to
1/21/2025	Senate	Engrossed by Senate as amended
1/21/2025	Senate	Printed as engrossed 25101352D-E
1/22/2025	Senate	Read third time and passed Senate (40-Y 0-N)
2/4/2025	House	Placed on Calendar
2/4/2025	House	Read first time
2/4/2025	House	Referred to Committee on General Laws
2/4/2025	House	Referred from General Laws and referred to Health and Human Services (Voice Vote)
2/4/2025	House	Assigned sub: Social Services
2/6/2025	House	Subcommittee recommends reporting (8-Y 0-N)
2/6/2025	House	Reported from Health and Human Services (21-Y 1-N)
2/10/2025	House	Read second time

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2/11/2025	House	Passed by for the day
2/12/2025	House	Read third time
2/12/2025	House	Passed House (97-Y 0-N)
2/17/2025	Senate	Enrolled
2/17/2025	Senate	Bill text as passed Senate and House (SB801ER)

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# 2025 General Assembly Session - Summary of CSA-Related Legislation<sup>1</sup>

Bill # / Title	Chief Patron	Bill Summary
<p><a href="#">SB 801</a> – Children’s Services Act; changes to state pool funds.</p>	<p>Favola</p>	<p>This bill makes a number of changes to the Children's Services Act state pool of funds for the provision of public or private nonresidential or residential services for troubled youth and families, including (i) removing from the purpose of the state pool of funds the consolidation of categorical agency funding and the institution of community responsibility for the provision of services; (ii) removing language specifying that references to funding sources and current placement authority for the target population served by the state pool of funds are for the purpose of accounting for the funds and should not be intended to categorize children and youth into funding streams in order to access services; (iii) modifying the target population served by the state pool of funds by (a) removing references to the Department of Education's private tuition assistance and the Interagency Assistance Fund for Noneducational Placement for Handicapped Children and (b) adding children and youth who are determined to be a child in need of services, as such term is defined in relevant law; (iv) removing the requirement that the financial and legal responsibility for certain special education services remains with the placing jurisdiction, unless the placing jurisdiction has transitioned all appropriate services; (v) requiring that the uniform assessment instrument used to determine eligibility for funding through the state pool of funds be approved by the State Executive Council for Children's Services; and (vi) modifying the eligibility criteria for funding through the state pool of funds by adding language that (a) specifies that the child or youth's emotional or behavioral problems have resulted in the child or youth, or place the child or youth at imminent risk of, entering purchased residential care and (b) includes the determination by a court that the child or youth is a child in need of services, as such term is defined in relevant law. The bill also includes technical changes. This bill was a recommendation of the Virginia Commission on Youth.</p>
<p><a href="#">HB 1733/SB 1372</a>— Children; petition for relief of care &amp; custody, investigation by local department of social services.</p>	<p>Cole Suetterlein</p>	<p>This bill requires a local department of social services, as a part of its investigation after the referral of a request for a petition for relief of the care and custody of a child, to (i) refer the parent to the local family assessment and planning team and (ii) create a written report. The bill directs the Department of Social Services, in coordination with the Virginia League of Social Services Executives, to create a template for and provide guidance on what should be included in such a written report.</p> <p>The bill also directs the Office of the Children's Ombudsman to convene a work group composed of relevant stakeholders to (a) determine the factors a court should consider when determining whether there is good cause shown for a petitioner's desire to be relieved of the care and custody of a child and (b) explore the potential benefits and considerations of raising the standard of evidence for granting temporary relief of custody from the current standard of preponderance of the evidence to clear and convincing evidence. The bill directs the workgroup to submit a report of its findings and recommendations to the Chairs of the House and Senate Committees for Courts of Justice and the Virginia Commission on Youth by November 1, 2025. Certain provisions of the bill have a delayed effective date of January 1, 2026. This bill was a recommendation of the Virginia Commission on Youth.</p>

<sup>1</sup> Pending Governor’s actions.

<a href="#">HB 2260</a> – Child in need of services; expands definition.	Delaney	This bill expands the definition of a "child in need of services" for purposes of juvenile and domestic relations district courts to include a child who remains away from, deserted, or abandoned his family or lawful custodian during one occasion and is at demonstratively at risk of coercion, exploitation, abuse, or manipulation or has been lured from his parent or lawful custodian by means of trickery or misrepresentation or under false pretenses.
<a href="#">HB 1600</a> – Budget Bill	Torian	<p>Amends and adds items to Chapter 2 of the Acts of Assembly of 2024, Special Session I.</p> <p>Specific to CSA, this amendment decreases CSA funding by \$5,000,000 (from \$503,650,250 to \$498,650,250) to reflect general fund savings from a 5.0% limit on the growth rate in state reimbursement to localities for private day special education services in the second year. The introduced budget included the language imposing a limit but did not reflect any savings in the CSA budget. This one-time action redirects the savings to fund special education services in public schools to help support children in the least restrictive environment.</p> <p>This amendment also adds reporting requirements for the Office of Children’s Services, in coordination with the Department of Education, regarding the transition of students from private day education services to local education agencies. This report is to be delivered to the General Assembly by October 1 of each year and shall include “(i) recommendations made to each LEA and progress made in improving the LEA's ability to serve students; (ii) an assessment of barriers to students returning to a LEA from a private day placement including instances when the LEA refuses or is unable to provide a less restrictive environment due to a lack of available transition services and recommendations for returning students to public school who are deemed eligible; and (iii) trends in behavioral and emotional diagnoses including students on home-based instruction that may require private day placements.”</p>

## 2024 – 2025 SEC Strategic Plan – Status as of 3/1/2025

### 1. Policy and Oversight

#### 1.1 **With input from the SLAT and other stakeholders, the SEC will complete a comprehensive review of the current CSA Policy Manual to allow for improved uniformity, flexibility, and alignment (internally and across partners).**

1.1.1 The SEC will systematically review the existing policy manual to ensure policies are uniform in format and aligned internally and with the policies and practices of CSA agency partners. (Policy Review/Update)

- Ongoing (Kristi Schabo)

1.1.2 The SEC will review current practices to ensure alignment with relevant policies. (Review Practice for Alignment)

- Ongoing (Kristi Schabo)

#### 1.2 **The SEC will establish a process for soliciting/generating ideas for new/ revised CSA policies and practices to enhance program effectiveness and efficiency.**

1.2.1 The SEC will work with stakeholders, including the SLAT, CSA Coordinator Network-Policy Committee, VACO, and VML, to develop a process for promoting policy revisions to enhance local CSA programs. (Policy Revision Process)

- Ongoing (Kristi Schabo, CSA Coordinators Policy Committee, VACO, VML)

#### 1.3. **The SEC will provide oversight of local CSA programs through the receipt of regular reports on local CSA program audits and technical assistance activities, highlighting both problematic (specific localities and activities) and positive aspects (areas of excellence and innovation).**

1.3.1 The SEC will receive electronic notification of the publication of audits, review quarterly and annual audit summary reports prepared by the Office of Children’s Services, and recommend actions as appropriate. (Audit Reporting)

- Ongoing – 2<sup>nd</sup> Written Report – March 2025

1.3.2. The SEC will receive quarterly updates on technical assistance activities. (ETA Reporting)

- Ongoing – 2<sup>nd</sup> Written Report – March 2025

1.3.3. The SEC will develop a process to acknowledge areas of local excellence and best practices. (Acknowledge Local Excellence)

- Implementation March 2025

### 2. Leadership and Collective Action

#### 2.1 **The SEC, SLAT, and member entities will enhance the availability of and access to services for youth and families by supporting and championing statewide, cross-agency initiatives.**

2.1.1. The SEC and SLAT will support enhanced community capacity by supporting outcome-driven practices in localities. (Support outcome-driven practice through OCS / SLAT)

- Evidence-Based Program Bench Card completed
- OCS participating in the DMAS-led behavioral health redesign process to replace legacy services

2.1.2. With the SLAT and OCS, the SEC will develop resources/tools to assist localities in implementing outcome-driven practices and decision-making. (Resources to assist localities through OCS / SLAT)

- Model Strategic Plan Template. (SLAT workgroup currently in progress, expected by June 2025)

2.1.3. The SEC will receive updates from lead agencies to determine the most appropriate supportive actions from the SEC, the SLAT, and OCS. (Agency updates)

- Right Help, Right Now and Safe and Sound – June 2024
- Regular updates at SEC meetings (ongoing)

- 2.1.4. The SEC will receive annual updates on service needs assessments completed by participating agencies. (Service Needs updates)
  - DBHDS Substance Use Disorder Needs Assessment and Strategic Plan – March 2025
  - 2025 CSA Service Gap Survey – Spring 2025
- 2.1.5. The SEC and SLAT members should educate their respective agencies, highlighting policy issues and best practices. (Members educate their agencies/constituents)
  - Ongoing

### **3. Empowering Families and Communities**

#### **3.1 The SEC will support family engagement and a child-centered, family-focused, trauma-informed, and community-based system of care through:**

- **Training and coaching by OCS and SEC member agencies on youth and family engagement for local CSA teams and other system partners.**
- **Continuing OCS' role as a key training partner for evidence-based and outcomes-driven practices.**

- 3.1.1. The SEC, in collaboration with the SLAT, OCS, and other stakeholders, will develop tools for youth and families, such as a family guide brochure, model intake form, and family experience video, to build understanding about access to needed services.
  - Family Video – Completed Spring 2024
  - Family Guide Brochure – Completed June 2024
  - Model Intake Form – Completed and distributed to local CSA programs in November 2024

#### **3.2 In collaboration with the SLAT and other partners, the SEC will work to increase parent participation at the state and local levels.**

- 3.2.1. The SEC and SLAT will explore the barriers and challenges to eliciting parent representation at the state and local levels and brainstorm ways to overcome these barriers. (Explore barriers)
  - TBD
- 3.2.2. In collaboration with the SLAT and OCS, the SEC will support parent representative empowerment by developing focused training opportunities for parent representatives on the CPMT and FAPT.
  - Complementary registrations provided for the 2024 Annual CSA Conference. To be continued in 2025.
  - Four CSA Parent Representatives were invited to and completed Advanced Parent Leadership Training offered by the Virginia Family Network (VFN).
  - OCS is working with VFN to deliver virtual training for CSA Parent Representatives focusing on leadership, “sharing your story,” and advocacy. This training will launch in the spring of 2025.
- 3.2.3. The SEC, in collaboration with the SLAT, OCS, and other stakeholders, will survey local CSA programs to determine how they evaluate family perceptions of and satisfaction with the CSA process.
  - Local survey complete and findings presented to the SLAT and SEC (December 2024)
- 3.2.4. The SEC, in collaboration with the SLAT, OCS, and other stakeholders, will develop and disseminate a model “Youth and Family Engagement Survey” and recommend practices for gathering youth and family input from local CSA programs.
  - Develop a model survey to include a version for youth input (Kristi Schabo, expected Spring 2025)
  - Recommend best practices for gathering input



**Program Audit Activity Update**  
**March 13, 2025**

The Program Audit function provides management of the Children’s Services Act (CSA) programs and the Office of Children’s Services (OCS) with independent, risk-based, and objective assurance, advice, insight, and foresight to strengthen their ability to create, protect, and sustain value. This report summarizes those activities from July 1, 2024 to February 28, 2025.

<b>AUDIT PLAN &amp; RESOURCE ALLOCATIONS:</b>	Completion of the audit plan has been hindered due to resource limitations resulting from staff turnover. One of the three program auditor positions has experienced high turnover since being vacated in June 2021. The most recent new hire began employment on August 25, 2024. Due to the complex nature of CSA, significant time and resources are allocated to provide comprehensive and CSA-specific training to new staff to ensure that we maintain highly competent and qualified staff to conduct the scheduled audit engagements.					
	<b>Status</b>		<b>Onsite</b>		<b>Self-Assessment Validations (SAV)</b>	
			<b>FY 2024 Carry-overs</b>	<b>FY 2025</b>	<b>FY 2024 Carry-overs</b>	<b>FY 2025*</b>
	<b>Planned</b>		<b>11</b>	<b>5</b>	<b>21</b>	<b>35</b>
	Completed		11	0	12	0
	In-Progress		0	3	9	0
Not Started		0	2	0	35	
*Due to the delay in completing the FY 2024 engagements, the initial due date to submit completed SAV Workbooks to OCS was established as 2/15/2025.						
Click the link to review the completed audit reports: <a href="https://csa.virginia.gov/LocalGovernment/Index/1">https://csa.virginia.gov/LocalGovernment/Index/1</a>						

<b>AUDIT OBSERVATIONS SUMMARY – REPORTS ISSUED JULY 2024 – FEBRUARY 2025</b>		
<b>Systemic Observations</b>	<b>Non-Compliance Level<sup>Note2</sup> (SEC Policy 4.7 Response to Audit Findings)</b>	<b># of Local Programs<sup>Note1</sup></b>
CSA funds were improperly expended for services eligible for an alternate funding source (Title IV-E, Medicaid, Local Agency, etc.). <b>Code of Virginia (COV) § 2.2-5206, § 2.2-5211, and CSA Policy 4.5</b>	Level 3	10
Services that were not documented in an approved service plan were funded by CSA. <b>COV § 2.2-5208 and CSA Policy 3.5</b>	Level 3	3
CSA funds were improperly expended for ineligible transactions, including duplicate payments or overpayment of established rates. <b>COV § 2.2-5206 and CSA Policy 4.5</b>	Level 3	2
Financial reports included data irregularities such as mandate type, service name description, expenditure category, and refunds that may also affect the application of the match rate. <b>COV § 2.2-5206 and CSA Policy 4.5</b>	Level 2	14



**Program Audit Activity Update  
March 13, 2025**

<b>AUDIT OBSERVATIONS SUMMARY – REPORTS ISSUED JULY 2024 – FEBRUARY 2025</b>		
<b>Systemic Observations</b>	<b>Non-Compliance Level<sup>Note2</sup> (SEC Policy 4.7 Response to Audit Findings)</b>	<b># of Local Programs<sup>Note1</sup></b>
Sufficient documentation was not maintained to validate statutory and policy compliance, whether specific to CSA or other agencies. [Virginia Enhanced Maintenance Assessment Tool (VEMAT), copay assessments, eligibility determinations (Child in Need of Services, IVE, community-based behavioral health services), treatment plans, progress reports, invoices/receipts, purchases orders, CSA parental agreements, or IEPs for wrap funds). <b>CSA Policy 3.5 and 4.6</b>	Level 2	9
Key elements of service planning were not sufficiently captured within the approved service plan. Omitted data elements included measurable goals/objectives, parental participation/signed consent, discharge planning, duration of services, and FAPT signatures. <b>COV § 2.2-5208 and CSA Policy 3.5</b>	Level 2	7
Utilization review activities (client level) performed by FAPT were not evidenced. <b>COV § 2.2-5208</b>	Level 2	4
Child and Adolescent Needs and Strengths (CANS) assessment policy compliance (i.e., frequency and validity). <b>CSA Policy 3.6.5</b>	Level 2	4
Consent to exchange information forms was not obtained. <b>COV § 2.2-5210</b>	Level 2	4
Continuous Quality Improvement/Utilization Management activities performed by CPMT were not evidenced. <b>COV § 2.2-5206</b>	Level 1	12
Statement of Economic Interest Forms were not completed and filed by applicable Community Policy and Management (CPMT) or Family Assessment and Planning Team (FAPT) members. <b>COV § 2.2-5205 and § 2.2-5207</b>	Level 1	9
Coordinated long-range plans had not been documented, outdated, or monitored for progress toward achievement. <b>COV § 2.2-5206</b>	Level 1	8
CPMT/FAPT membership did not include parent or private provider representatives. <b>COV § 2.2-5205 and § 2.2-5207</b>	Level 1	3

**Note 1: Includes completed engagements only.**

**Note 2: Explanations of non-compliance levels**

- Level Three Noncompliance Finding**  
General Parameters: Audit findings in this category are case-specific and occur when CSA state pool funds have been reimbursed when the expenditure is not authorized by statute, regulation, or policy.
- Level Two Noncompliance Finding**  
General Parameters: Findings in this category are case specific and involve a violation of an applicable statute, regulation, or policy but, had the requirements been followed, would have been eligible for reimbursement through state pool funds. Findings may be mitigated by corrective action already implemented on a case-specific basis (e.g., FAPT or CPMT action was not timely made but was taken in a reasonable time thereafter).
- Level One Noncompliance Finding**  
General Parameters: Audit findings in this category are not case-specific but represent a failure to meet administrative and operational standards required by statutory, regulatory, or policy requirements.



# Program Audit Charter for the Office of Children's Services

## Purpose

The purpose of the program audit function is to strengthen the Children's Services Act (CSA), Office of Children's Services (OCS) ability to create, protect, and sustain value by providing CSA/OCS management with independent, risk-based, and objective assurance, advice, insight, and foresight.

The program audit function enhances CSA/OCS':

- Successful achievement of its objectives.
- Governance, risk management, and control processes.
- Decision-making and oversight.
- Reputation and credibility with its stakeholders.
- Ability to serve the public interest.

OCS' program audit function is most effective when:

- Program auditing is performed by competent professionals in conformance with The IIA's Global Internal Audit Standards™, which are set in the public interest.
- The program audit function is independently positioned with direct accountability to CSA/OCS' executive director.
- Program auditors are free from undue influence and committed to making objective assessments.

### ***Commitment to Adhering to the Global Internal Audit Standards***

OCS' program audit function will adhere to the mandatory elements of The Institute of Internal Auditors' International Professional Practices Framework, which are the Global Internal Audit Standards and Topical Requirements. The chief audit executive will report annually to OCS' executive director and senior management regarding the program audit function's conformance with the Standards, which will be assessed through a quality assurance and improvement program.

## Mandate

### ***Authority***

CSA/OCS' program audit function mandate is in the Code of Virginia § 2.2-2649. Office of Children's Services established; powers and duties, which states "B. The director of the Office of Children's Services shall:

3. Develop and provide for the consistent oversight for program administration and compliance with state policies and procedures; and



19. Provide for the effective implementation of the Children's Services Act (§ [2.2-5200](#) et seq.) in all localities by (i) regularly monitoring local performance measures and child and family outcomes; (ii) using audit, performance, and outcomes data to identify local programs that need technical assistance; and (iii) working with local programs that are consistently underperforming to develop a corrective action plan for submission to the Office and the Council.”

The program audit function's authority is created by its direct reporting relationship to OCS' executive director. Such authority allows for unrestricted access to the CSA/OCS.

OCS' executive director authorizes the program audit function to:

- Have full and unrestricted access to all functions, data, records, information, physical property, and personnel pertinent to program audit responsibilities. Program auditors are accountable for confidentiality and safeguarding records and information.
- Allocate resources, set frequencies, select subjects, determine scopes of work, apply techniques, and issue communications to accomplish the function's objectives.
- Obtain assistance from the necessary personnel of CSA/OCS and other specialized services from within or outside the CSA/OCS to complete program audit services.

#### ***Independence, Organizational Position, and Reporting Relationships***

The chief audit executive will be positioned at a level in the organization that enables program audit services and responsibilities to be performed without interference from management, thereby establishing the independence of the program audit function. (See “Mandate” section.) The chief audit executive will report functionally and administratively to the executive director of the Office of Children’s Services. This positioning provides the organizational authority and status to bring matters directly to senior management and escalate issues to the executive director, when necessary, without interference and supports the program auditors’ ability to maintain objectivity.

The chief audit executive will confirm the organizational independence of the program audit function with OCS's executive director at least annually. If the governance structure does not support organizational independence, the chief audit executive will document the characteristics of the governance structure limiting independence and any safeguards employed to achieve the principle of independence. The chief audit executive will disclose to the OCS executive director any interference program auditors encounter related to the scope, performance, or communication of program audit work and results. The disclosure will include communicating the implications of such interference on the program audit function’s effectiveness and ability to fulfill its mandate.

#### ***Changes to the Mandate and Charter***

Circumstances may justify a follow-up discussion between the chief audit executive, OCS executive director, and senior management on the program audit mandate or other aspects of the program audit charter. Such circumstances may include but are not limited to:



- A significant change in the Global Internal Audit Standards.
- A significant reorganization within the organization.
- Significant changes in the chief audit executive, OCS executive director, and/or senior management.
- Significant changes to the organization's strategies, objectives, risk profile, or the organization's environment.
- New laws or regulations that may affect the nature and/or scope of program audit services.

## **Organizational Oversight**

To establish, maintain, and ensure that OCS' program audit function has sufficient authority to fulfill its duties, OCS' Executive Director will:

- Discuss with the chief audit executive and senior management the program audit function's appropriate authority, role, responsibilities, scope, and services (assurance and/or advisory).
- Ensure the chief audit executive has unrestricted access to and communicates and interacts directly with OCS' executive director, including in private meetings without senior management present (in accordance with laws and/or regulations applicable to public records).
- Discuss other topics that should be included in the program audit charter with the chief audit executive and senior management.
- Participate in discussions with the chief audit executive and senior management about the "essential conditions," described in the Global Internal Audit Standards, which establish the foundation that enables an effective internal audit function.
- Approve the program audit function's charter, which includes the program audit mandate and the scope and types of internal audit services.
- Review the program audit charter annually with the chief audit executive to consider changes affecting the organization, such as the employment of a new chief audit executive or changes in the type, severity, and interdependencies of risks to the organization; and approve the internal audit charter annually.
- Approve the risk-based internal audit plan.
- Advocate for and submit budgetary requests to the legislature for sufficient budgets and resources, allowing the program audit function to fulfill its mandate and accomplish its audit plan.
- Review the program audit function's expenses.
- Appoint and remove the chief audit executive, ensuring adequate competencies and qualifications and conformance with the Global Internal Audit Standards.
- Review the chief audit executive's performance.
- Receive communications from the chief audit executive about the program audit function, including its performance relative to its plan.



- Ensure a quality assurance and improvement program has been established and review the results annually.
- Inquire appropriately of senior management and the chief audit executive to determine whether scope or resource limitations are inappropriate.

## **Chief Audit Executive Roles and Responsibilities**

### ***Ethics and Professionalism***

The chief audit executive will ensure that program auditors:

- Conform with the Global Internal Audit Standards, including the principles of Ethics and Professionalism: integrity, objectivity, competency, due professional care, and confidentiality.
- Understand, respect, meet, and contribute to the legitimate and ethical expectations of the organization and be able to recognize conduct that is contrary to those expectations.
- Encourage and promote an ethics-based culture in the organization.
- Report organizational behavior inconsistent with the organization's ethical expectations, as described in applicable policies and procedures.

### ***Objectivity***

The chief audit executive will ensure that the program audit function remains free from all conditions that threaten the ability of program auditors to carry out their responsibilities in an unbiased manner, including matters of engagement selection, scope, procedures, frequency, timing, and communication. If the chief audit executive determines that objectivity may be impaired in fact or appearance, the details of the impairment will be disclosed to appropriate parties.

Program auditors will maintain an unbiased mental attitude that allows them to perform engagements objectively. They believe in their work product, do not compromise quality, and do not subordinate their judgment on audit matters to others, either in fact or appearance.

Program auditors will have no direct operational responsibility or authority over any activities they review. Accordingly, program auditors will not implement internal controls, develop procedures, install systems, or engage in other activities that may impair their judgment, including:

- Assessing specific operations for which they had responsibility within the previous year.
- Performing operational duties for CSA/OCS or its affiliates.
- Initiating or approving transactions external to the program audit function.
- Directing the activities of any CSA/OCS employee not employed by the program audit function, except to the extent that such employees have been appropriately assigned to program audit teams or to assist program auditors.

Program auditors will:

- Disclose impairments of independence or objectivity, in fact or appearance, to appropriate parties and at least annually, such as the chief audit executive, OCS' executive director, management, or others.
- Exhibit professional objectivity in gathering, evaluating, and communicating information.
- Make balanced assessments of all available and relevant facts and circumstances.
- Take necessary precautions to avoid conflicts of interest, bias, and undue influence.

### ***Managing the Program Audit Function***

The chief audit executive has the responsibility to:

- At least annually, develop a risk-based program audit plan considering the input of the OCS executive director and senior management. Discuss the plan with the OCS executive director and senior management and submit the plan to OCS' executive director for review and approval.
- Communicate the impact of resource limitations on the internal audit plan to OCS' executive director and senior management.
- Review and adjust the program audit plan, as necessary, in response to changes in CSA/OCS' business, risks, operations, programs, systems, and controls.
- Communicate with OCS' executive director and senior management if the program audit plan undergoes significant interim changes.
- Ensure program audit engagements are performed, documented, and communicated in accordance with the Global Internal Audit Standards and laws and/or regulations.
- Follow up on engagement findings, confirm the implementation of recommendations or action plans, and communicate the results of program audit services to OCS' executive director and senior management periodically and for each engagement as appropriate.
- Ensure the program audit function collectively possesses or obtains the knowledge, skills, and other competencies and qualifications needed to meet the Global Internal Audit Standards requirements and fulfill the internal audit mandate.
- Identify and consider trends and emerging issues that could impact CSA/OCS and communicate as appropriate to OCS' executive director and senior management.
- Consider emerging trends and successful practices in internal auditing.
- Establish and ensure adherence to methodologies designed to guide the program audit function.
- Ensure adherence to CSA/OCS' relevant policies and procedures unless such policies and procedures conflict with the program audit charter or the Global Internal Audit Standards. Any such conflicts will be resolved, documented, and communicated to OCS' executive director and senior management.



- Coordinate activities and consider relying upon the work of other internal and external providers of assurance and advisory services. If the chief audit executive cannot achieve appropriate coordination, the issue must be communicated to senior management and, if necessary, escalated to OCS' executive director.

### ***Communication with OCS' Executive Director] and Senior Management***

The chief audit executive will report periodically to OCS' executive director and senior management regarding:

- The program audit function's mandate.
- The program audit plan and performance relative to its plan.
- Significant revisions to the program audit plan.
- Potential impairments to independence, including relevant disclosures as applicable.
- Results from the quality assurance and improvement program, including the program audit function's conformance with The IIA's Global Internal Audit Standards and action plans to address the program audit function's deficiencies and opportunities for improvement.
- Significant risk exposures and control issues, including fraud risks, governance issues, and other areas of focus for the SEC that could interfere with achieving CSA/OCS' strategic objectives.
- Results of assurance and advisory services.
- Resource requirements.
- Management's responses to risk that the program audit function determines may be unacceptable or risk acceptance beyond CSA/OCS' risk appetite.

### ***Quality Assurance and Improvement Program***

The chief audit executive will develop, implement, and maintain a quality assurance and improvement program that covers all aspects of the program audit function. The program will include external and internal assessments of the program audit function's conformance with the Global Internal Audit Standards and performance measurement to assess the program audit function's progress toward achieving its objectives and promoting continuous improvement. The program also will assess, if applicable, compliance with laws and/or regulations relevant to internal auditing. Also, if applicable, the assessment will include plans to address the program audit function's deficiencies and opportunities for improvement.

Annually, the chief audit executive will communicate with the OCS' executive director and senior management about the program audit function's quality assurance and improvement program, including the results of internal assessments (ongoing monitoring and periodic self-assessments) and external assessments. External assessments will be conducted at least once every five years by a qualified, independent assessor or assessment team from outside OCS; qualifications must include at least one assessor holding an active Certified Internal Auditor.



examinations of evidence to provide independent assurance and advisory services to OCS' executive director and CSA management on the adequacy and effectiveness of governance, risk management, and control processes for CSA/OCS.

The nature and scope of advisory services may be agreed upon with the party requesting the service, provided the program audit function does not assume management responsibility. During advisory engagements, opportunities for improving the efficiency of governance, risk management, and control processes may be identified. These opportunities will be communicated to the appropriate level of management.

Program audit engagements may include evaluating whether:

- Risks relating to achieving CSA/OCS' strategic objectives are appropriately identified and managed.
- The actions of CSA/OCS' officers, directors, management, employees, contractors, or other relevant parties comply with CSA/OCS' policies, procedures, and applicable laws, regulations, and governance standards.
- The results of operations and programs are consistent with established goals and objectives.
- Operations and programs are being carried out effectively, efficiently, ethically, and equitably.
- Established processes and systems enable compliance with the policies, procedures, laws, and regulations that could significantly impact CSA/OCS.
- The integrity of information and the means used to identify, measure, analyze, classify, and report such information is reliable.
- Resources and assets are acquired economically, used efficiently and sustainably, and protected adequately.

**Approved by the executive director of the Office of Children's Services  
on February 24, 2025**

**Acknowledgments/Signatures**

  
\_\_\_\_\_  
Program Audit Manager/Chief Audit Executive

2/24/2025  
Date

  
\_\_\_\_\_  
Executive Director, Office of Children's Services

2/24/2025  
Date



**Office of Children's Services**  
Empowering communities to serve youth

# ***Audit Plan***

***Fiscal Years 2024 - 2026***

***August 7, 2023***

***Updated November 14, 2024***



# COMMONWEALTH of VIRGINIA

Scott Reiner, M.S.  
Executive Director

OFFICE OF CHILDREN'S SERVICES  
*Administering the Children's Services Act*

## MEMORANDUM

TO: Scott Reiner, Executive Director

FROM: Stephanie S. Bacote, Program Audit Manager *Stephanie S. Bacote*

DATE: August 7, 2023

SUBJECT: Fiscal Years (FY) 2024 - 2026 Audit Work Plan

The Fiscal Years 2024-2026 Audit Work Plan for the Office of Children's Services (OCS) Program Audit Activity is enclosed. The workload is divided into three audit engagement types:

- On-Site Audits
- Self-Assessment Validations
- Special Projects

The scope of these audits is to conduct an independent, objective evaluation of locally administered Children's Services Act (CSA) programs to provide reasonable assurance that the mission, vision, goals and objectives of CSA and OCS are accomplished. The basis for the audit selections included risk assessment, management input, and the established audit cycle (every three years). In addition, due consideration was given to the availability of resources to successfully execute this plan.

In accordance with the Institute of Internal Auditors, Standards for the Professional Practice of Internal Auditing, we are submitting this plan for your approval.

Approved

Handwritten signature of Scott Reiner in blue ink.

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Scott Reiner, Executive Director

## INTRODUCTION

The Program Audit Activity of the Office of Children's Services (OCS) is responsible for evaluating the adequacy and effectiveness of the systems of internal control and quality of performance in meeting mission requirements established by the State Executive Council (SEC) and the locally administered programs of the Children's Services Act (CSA). To accomplish our objective of promoting effective controls, high standards for sound fiscal accountability, and responsible use of taxpayer funds, our audits provide analyses, appraisals, recommendations, counsel, and information concerning various activities of CSA to assist CSA employees, partners, and other stakeholders to effectively administer CSA.

We will add value to OCS goals by:

- Reviewing the adequacy of CSA risk management, governance, and control processes.
- Determining whether the established goals and objectives of CSA are accomplished.
- Determining the extent of compliance with CSA laws, statutes, policies, and procedures, etc.
- Reviewing the reliability and integrity of CSA program and financial information.
- Evaluating the controls governing the safeguarding of CSA assets and/or data.
- Appraising whether CSA resources are used effectively and efficiently.
- Recommending operational improvements.

Program Audit personnel possess the training, expertise, and experience to effectively evaluate locally administered CSA programs. Auditors are required to comply with the continuing professional education criteria established by the Institute of Internal Auditors. Personnel are encouraged to pursue professional certification as Certified Internal Auditors.

We will continue to look for ways to improve our audit programs to ensure that we consistently add value to the Office of Children's Services.



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Stephanie S. Bacote, CIGA  
Program Audit Manager





# AUDIT WORK PLAN SUMMARY

*Updated November 14, 2024*

FY 2024	FY 2025	FY 2026
Albemarle Alexandria Arlington Bath Bedford County Carroll Charles City/New Kent Charlottesville Chesapeake Clarke Culpeper Cumberland Danville Dickenson Franklin City Goochland Greene Highland King & Queen Louisa Madison Manassas City Manassas Park Middlesex Montgomery Newport News Norfolk Page Powhatan Radford Richmond County Roanoke County Salem Smyth Southampton Stafford Surry Warren Westmoreland Williamsburg	Alleghany/Covington Amelia Bristol/Washington Buchanan Campbell Caroline Charlotte Fairfax/Falls Church Fauquier Floyd Fluvanna Franklin County Giles Halifax Harrisonburg/Rockingham Henrico Henry/Martinsville Hopewell King George Lancaster Lee Lunenburg Lynchburg Mecklenburg Nelson Nottoway Orange Portsmouth Prince William Rappahannock Richmond City Roanoke City Rockbridge/Lexington/Buena Vista Russell Scott Sussex Tazewell Virginia Beach Wise Wythe	Accomack/Northampton Amherst Appomattox Augusta/Staunton/Waynesboro Bland Botetourt Brunswick Buckingham Chesterfield/Colonial Heights Craig Dinwiddie Essex Frederick Fredericksburg Galax Gloucester Grayson Greenville/Emporia Hampton Hanover King William Loudon Mathews Northumberland Norton Patrick Petersburg Pittsylvania Poquoson Portsmouth Prince Edward Prince George Pulaski Shenandoah Spotsylvania Suffolk/Isle of Wight Winchester York



# FY 2025 AUDIT WORK PLAN HOURS

*Updated November 14, 2024*

LOCALITY AUDITS, PROJECTS, AND REVIEWS			
ONSITE AUDITS		SELF-ASSESSMENT VALIDATIONS	
Locality	Planned Work Hours	Locality	Planned Work Hours
Floyd County	160	Alleghany-Covington	64
Franklin County	200	Amelia County	48
Harrisonburg-Rockingham	240	Bristol-Washington	80
Hopewell City	200	Buchanan County	64
Lee County	200	Campbell County	64
		Caroline County	64
		Charlotte County	64
		Fairfax-Falls Church	80
		Fauquier County	64
		Fluvanna County	64
		Giles County	64
		Halifax County	64
		Henrico County	64
		Henry-Martinsville	64
		King George County	64
		Lancaster County	48
		Lunenburg County	48
		Lynchburg City	64
		Mecklenburg County	64
		Nelson County	48
		Nottoway County	48
		Orange County	64
		Portsmouth City	64
		Prince William County	64
		Rappahannock County	48
		Richmond City	80
		Roanoke City	80
		Rockbridge-Lexington-Buena Vista	80
		Russell County	64
		Scott County	64
		Sussex County	48
		Tazewell County	64
		Virginia Beach City	80
		Wise County	64
<b>Total Work Plan Hours</b>			<b>3160</b>



## FY 2026 AUDIT WORK PLAN HOURS

*Updated November 14, 2024*

*Refer to the Audit Work Plan Summary listing planned audits for fiscal year 2026. Classifications of audits as either on-site or self-assessment validation engagement for fiscal year 2026 will be determined per the annual risk assessment results. Pending the yearly risk assessment results, the Audit Work Plan Hours for fiscal year 2026 will be updated and published accordingly.*



# COMMONWEALTH of VIRGINIA

Scott Reiner, M.S.  
Executive Director

OFFICE OF CHILDREN'S SERVICES  
*Administering the Children's Services Act*

## Report on the Enhanced Technical Assistance (ETA) Program

Submitted by: Courtney Sexton, Program Consultant

March 13, 2025

This report summarizes OCS Enhanced Technical Assistance Activities provided under §2.2-2649.19 and initiated in FY2022. The 2024-2025 CSA Strategic Plan, adopted in December 2023 by the State Executive Council, calls for regular updates on technical assistance activities.

**Localities Currently Engaged:** 14

**Consortiums:** 3 (*6 localities*)

**Nature of Engagement:**

**Identified by OCS:** 4

**Self-Referred:** 16

**Localities with Completed Engagements:** 5

**Localities Currently Engaged:**

1. Shenandoah County
2. Sussex County
3. Rockingham County
4. City of Harrisonburg
5. Page County
6. Smyth County
7. Wise County
8. Washington County
9. City of Bristol
10. Lee County
11. Patrick County
12. Warran County
13. Henry County
14. City of Martinsville

## Completed Engagements:

### **1. Franklin County**

Franklin County CSA successfully completed Enhanced Technical Assistance in March 2024. Franklin County was actively engaged in completing the Program Enhancement Plan. Goals in the Program Enhancement Plan included revising the local policy manual, establishing procedures for inviting families and providers to FAPT meetings, and improving the quality of service planning and documentation. Since the close of the engagement, Franklin County CSA has worked to complete all recommended training.

### **2. Lunenburg County**

Lunenburg County successfully completed Enhanced Technical Assistance in July 2024. During the plan year, Lunenburg CPMT revised local policy to ensure consistency between local operations and best practices, worked to improve the quality and timely submission of documentation, and increased providers' and families' participation in FAPT meetings. Since the close of the engagement, Lunenburg has worked to complete all recommended training.

### **3. Floyd County**

Some minor concerns in programmatic operation were identified throughout the engagement in enhanced technical assistance. These were presented to the locality during the observation period. Floyd CSA was responsive to identified concerns and initiated remedial action immediately. Given the limited scope of needs at the close of the observation period, Floyd County CPMT opted to pursue programmatic improvement efforts without formal assistance from OCS.

### **4. City of Hopewell**

The City of Hopewell engaged in Enhanced Technical Assistance beginning in January 2022. Throughout the initial plan year, Hopewell CPMT struggled to monitor the Program Enhancement Plan and make progress toward identified goals. Due to significant turnover in the FAPT and CPMT membership, a second year of engagement was offered to Hopewell CPMT. However, following the issuance of the annual report, the CPMT struggled to develop a new Program Enhancement Plan and became unresponsive to OCS's attempted contact. As a result, the engagement was ended by OCS in October 2024.

### **5. Tazewell County**

In February 2023, Tazewell County requested Enhanced Technical Assistance. A report containing observations and recommendations was provided to the CPMT. Although the OCS Program Consultant attended a meeting to develop the Program Enhancement Plan, CPMT members could not commit to creating a plan. In October 2023, Tazewell County requested an end to the engagement, citing the CPMT's continuing inability to develop a Program Enhancement Plan.

## **Common Themes Identified:**

### A. Policy

1. Local CSA programs lack onboarding policies/procedures and continued training opportunities for case managers, CPMT, and FAPT members.
2. Policy manuals are often out-of-date and/or inconsistent with current programmatic operations. They may also lack clarity on the policies to implement the CSA Program appropriately.
3. Localities lack established procedures or do not adhere to formally established procedures, which regularly results in large, unreimbursable expenditures or avoidable errors.
4. Localities may not utilize appropriate alternative funding streams before accessing CSA Pool funding.
5. Long-range planning is absent or is non-actionable.

### B. Process/Program

1. Family Engagement practices are insufficient to meet the intent of the CSA and System of Care philosophy. Family participation in FAPT meetings is not prioritized.
2. FAPT service planning is minimal and not family or child-specific. Service planning is regularly impeded by substandard assessment and documentation available to the FAPT, provider non-participation in meetings, lack of engagement by FAPT members, and approaches to service planning that are not holistic and/or do not incorporate information from the CANS Assessment. Family Assessment and Planning Teams regularly do not set measurable goals for services.
3. Utilization Review practices are insufficient to provide appropriate monitoring of services.
4. Evidence-based services are often unavailable and/or underutilized when service planning. Rural localities are more likely to experience a shortage of available providers and service types. Mentoring services are heavily utilized in these localities because, often, this is the only service available.
5. Local team members often lack an understanding of the roles and duties assigned to the teams in the Code of Virginia and/or CSA Policy.
6. The CSA Coordinator position experiences a high turnover rate in many of these localities.
7. CSA Programs are viewed solely as a funding stream in many localities. Local CSA stakeholders commonly share the perspective that CSA exists outside of and apart from their regularly assigned duties.
8. Interagency relationship issues within individual Systems of Care inhibit local systems' ability to collaborate on programmatic improvement.

### **OCS Ongoing Response to Identified Needs:**

- a) An initial report from the Program Consultant enumerates observations and recommendations.
- b) Support in the development and implementation of a Program Enhancement Plan.
- c) Quarterly observations of FAPT and CPMT meetings provide immediate feedback to stakeholders.
- d) Modeling is provided in meetings to encourage holistic service planning.
- e) Quarterly updates of the Program Enhancement Plan reflect a progressive assessment of needs.
- f) One-on-one consultation for new CSA Coordinators.
- g) The opportunity for all ETA-engaged CSA Coordinators to attend the annual New CSA Coordinator Academy.
- h) Engaged localities are encouraged to develop and participate in regional CSA groups.
- i) Development of the *Characteristics of a High-Functioning FAPT* document.
- j) Development and distribution of a simplified Utilization Review (UR) Form.
- k) OCS staff will train local stakeholders, including *CPMT and FAPT Roles and Responsibilities, CANS and Service Planning, Family Engagement, and Continuous Quality Improvement and Strategic Planning*. Specialized training is developed and provided to meet specific identified needs.

### **Newly Developed Resources**

- a) Simplified Utilization Review Form
- b) Family Engagement Training for CPMT members, FAPT members, and case managers
- c) Conference Session on the Enhanced Technical Assistance program and process

Respectfully submitted,

Courtney N. Sexton  
Program Consultant