Tuesday, June 24, 2025
*Charles County Board of County Commissioners Regular Session (Legislative Day)

Charles County Commissioners' Meeting-Hybrid Virtual/In-Person

The County Commissioners will be holding these public meetings virtually and limited in-person. The public can watch this meeting on Comcast 95 (SD) and 1070 (HD), Verizon FIOS 10, Roku or Apple TV streaming devices (Charles County Government), and the web at www.CharlesCountyMD.gov. Residents without internet service can listen to the meeting at 301-645-0500.

Link: Live Streaming (Day of Meeting)

Link: Meetings on Demand (Previously Recorded Meetings)

[11:00 a.m.] Open Session (Hybrid- Virtual and Limited In Person - Government Building Conference Room, 200 Baltimore Street, La Plata, MD 20646)

- **Call to Order/Pledge of Allegiance**
- **Roll Call**

Commissioners' Comments

Approval of the Minutes

- **Minutes of June 10, 2025**

- **Notice of Attendance Summaries**

06.05.25 Notice of Attendance Summary.pdf
06.09.25 Notice of Attendance Summary.pdf

Announcement(s)

- **Next Scheduled Session(s): July 8-9, 2025**

Approval Items

- **Budget Amendment(s) and Budget Transfer(s):**
(Ms. Samantha Chiriaco, Chief of Budget Department of Fiscal and Administrative)

FY2025 Budget Amendment Increase #213 DES Billing Contract Account Overrunc.pdf
FY2025 Budget Amendment Increase #174 Support Credit Card Processing Budget Inspections and Review Fundc.pdf
FY2025 Budget Transfer Request #626 Cover FY2025 Year End Expenses Building Inspectionsc.pdf
FY2025 Budget Transfer Request #186 Move Old Washington Road Sewer Budget to Sewer Contingency Project Budgetc.pdf
FY2025 Budget Transfer Request #821 Consultant Streamline Review Process Infrastructure Managementc.pdf
IM and Planning Review Process Integration Presentation - Final.pdf

- **Change Order #35 Mattawoman Flow Equalization Basin ITB 20-35**
  (Mr. Olin Straus, Senior Project Manager-Utilities, Mr. James Sizemore, Acting Deputy Director-Utilities, and Mr. Martin Harris, Director, Department of Public Works)

  ITB 20-35 Change Order 35 Approval Request (004)_encrypted_.pdf
  FY2025 Budget Amendment Increase #915 MWWTP Flow Equalization (Munis #7409000000)c.pdf

- **Board of Education FY2025 Inter-Category Budget Transfer Request**
  (Mr. Jacob Dyer, Director, and Ms. Samantha Chiriaco, Chief of Budget, Department of Fiscal and Administrative Services; Ms. Sherri Fischer-Davis, Budget Manager, and Ms. Karen Acton, Chief Financial Officer)

  BOARD-ACTION-ITEM-Budget Q4 Expense Movement_6.24 (002).pdf

- **FY2026 Board of Education Budget**
  (Mr. Jacob Dyer, Director, and Ms. Samantha Chiriaco, Chief of Budget, Department of Fiscal and Administrative Services; Ms. Sherri Fischer-Davis, Budget Manager, and Ms. Karen Acton, Chief Financial Officer)

  FY2026 CCPS Approved Budget.pdf

- **Letter of Intent: College of Southern Maryland for FY2027 Renovation of Campus Center and Bookstore Project and Petition for Grant**
  (Dr. Bill Comey, Vice President Division of Operations and Planning, Dr. Yolanda Wilson, President, Ms. Judith Mills, Vice President Financial Services, College of Southern Maryland (CSM))

  CIP Form O BK & CC Renovation2.pdf
  CIP Forms M for BK and CC Renovation2.pdf

- **Approval of Collective Bargaining Agreements for Fraternal Order of Police (FOP)and the Charles County Correctional Officers Association (CCCOA)**
  (Ms. Jenifer Ellin, Acting Deputy County Administrator, Office of the County Administrator; Ms. Alexis Blackwell, Director, and Ms. Megan Donnick, Deputy Director, Department of Human Resources; Mr. Jacob Dyer, Director, Department of Fiscal and Administrative Services; and Mr. Eric Paltell, Outside Counsel)

Briefings-Morning

- **Quarterly Update: Impact of Federal Executive Orders on Charles County**
  (Ms. Michelle Frye, Acting Director, Department of Economic Development, and Mr. Jeffrey Barnett, Chief of Transit, Department of Planning and Growth Management ; Mr. George Clark,

Acting Transportation Director, and Ms. Ruthy Davis, Workforce Director, Tri-County Council for Southern Maryland (TCCSMD); and Mr. Everett Kelley, National President, American Federation of Government Employees)

Federal Workforce Transition Impact_EDD_06242025.pdf
CCEDD Federal Gov Transition Flyer.pdf
Chas Co Presentation Federal Separations 06-24-25.pdf

- **Discussion: Virginia Department of Transportation Toll on the Woodrow Wilson Bridge**
  (Mr. George Clark, Transportation Director, Southern Maryland Tri-County Council (SMDTCC); and Mr. Jason Groth, Director, Department of Planning and Growth Management, Mr. Jeffry Barnett, Chief of Transit; and Mr. Robert Romero, Transit System Administrator, Department of Planning and Growth Management)

Charles Co VDOT Presentation 6.24.2025.pdf
VDOT Letter of Support.pdf

- **Briefing: Review the Equity Assessment Findings**
  (Ms. Renesha Miles, Chief Equity Officer, and Ms. Elaine Pollard, DEI/HR Coordinator, Department of Human Resources; Zunilda Rodriquez, Director, MGT; and Ms. Janice Banks, President/CEO, Small Planet Works, Inc.)

Charles County Board of Commissioners Presentation_DEI Assessment FINAL_6.24.25.pdf
Charles County DEI Assessment Report_FINAL.pdf

[2:00 p.m.] Closed Session (Hybrid- Virtual and In Person - Government Building Conference Room, 200 Baltimore Street, La Plata, MD 20646)

Closed Session: All or a portion of this session may be closed pursuant to Section 3-305(b)(3)(7) of the General Provisions Article of the Annotated Code of Maryland.

[4:00 p.m.] Open Session (Hybrid- Virtual and Limited In Person - Government Building Conference Room, 200 Baltimore Street, La Plata, MD 20646)

- **Roll Call**

Charles County Boards and Commissions Annual Update

- **Briefing: Annual Update from the Ethics Commission**

2024 Annual Report.pdf

- ***TO BE RESCHEDULED* Briefing: Annual Update from Charles County Commission for Women**

- **Briefing: Annual Update from Charles County Commission for Veterans Affairs**

CVA Annual Report 2024.pdf

Briefings-Afternoon

- **Update: Fire Suppression Task Force**
  (Ms. Michelle Lilly, Director, Department of Emergency Services, and Mr. Wes Adams, County Attorney, Office of the County Attorney for Charles County)

- **Work Session: 2025 Local Legislative Proposals**
  (Ms. Danielle Mitchell, Assistant Deputy County Attorney, Office of the County Attorney for Charles County)

  2025 Local Proposals.pdf

Commissioners' New Business

***TO BE RESCHEDULED*[6:00 p.m.] Board of County Commissioners Quarterly Town Hall Meeting (In-Person, Charles County Government Building, 200 Baltimore Street, La Plata, MD 20646)**

This meeting is **in-person only.** There is no virtual speaking option for this meeting. In-person speaker sign in begins at 5:30 p.m.
If you have any questions regarding the Board of Commissioners Joint Town Hall Meeting, please contact the Commissioners Office at (301) 645-0550
or Commissioners@CharlesCountyMD.gov.

Submit Advance Questions Here

Adjournment

AGENDAS ARE TENTATIVE AND SUBJECT TO CHANGE WITHOUT NOTICE

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto

ITEM TYPE: Minutes

AGENDA SECTION: Approval of the Minutes

SUBJECT:

- **Minutes of June 10, 2025**

SUGGESTED ACTION:

ATTACHMENTS:

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto

ITEM TYPE: Minutes

AGENDA SECTION: Approval of the Minutes

SUBJECT:

- **Notice of Attendance Summaries**

SUGGESTED ACTION:

ATTACHMENTS:
06.05.25 Notice of Attendance Summary.pdf
06.09.25 Notice of Attendance Summary.pdf

Notice of Attendance Summary

A Notice of Attendance was sent for a Meeting with three (3) or more Commissioners in attendance.

Thursday June 5, 2025

Public Meeting with Maryland Transit Administration on the Planning Phase of the Southern Maryland Rapid Transit (SMRT) Project

Reuben B. Collins II, Esq., President, County Commissioner
Thomasina O. Coates, M.S., County Commissioner
Ralph Patterson, II, M.A., Vice President, County Commissioner
Jason Groth, Director of Planning and Growth Management
Danielle Mitchell, Associate County Attorney
John Adelodun, Assistant Clerk to the Commissioners

The Commissioners participated in a Public Meeting with Maryland Transit Administration on the Planning Phase of the Southern Maryland Rapid Transit (SMRT) Project.

Notice of Attendance Summary

A Notice of Attendance was sent for a Meeting with three (3) or more Commissioners in attendance.

Monday June 9, 2025

Mozambique Delegation Visit - Informal Welcome Dinner

Reuben B. Collins II, Esq., President, County Commissioner
Thomasina O. Coates, M.S., County Commissioner
Amanda M. Stewart, M.Ed., County Commissioner
Ralph Patterson, II, M.A., Vice President, County Commissioner
Deborah Hall, Acting County Administrator
Wesley Adams, County Attorney
Carol DeSoto, Clerk to the Commissioners

The Commissioners were joined by the Matola City Mozambique delegation for dinner at Prime Street Grille in White Plains, Maryland. Staff from the Department of Economic Development, Planning and Growth Management, and Media Services were also in attendance.

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE:	June 24, 2025
SUBMITTED BY:	Carol DeSoto
ITEM TYPE:	Announcement: Next Scheduled Commissioners' Session(s)
AGENDA SECTION:	Announcement(s)
SUBJECT:	• **Next Scheduled Session(s): July 8-9, 2025**
SUGGESTED ACTION:	
ATTACHMENTS:	

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto, Department of Fiscal and Administrative Services

ITEM TYPE: Approval Item(s)

AGENDA SECTION: Approval Items

SUBJECT:

- **Budget Amendment(s) and Budget Transfer(s):**
  (Ms. Samantha Chiriaco, Chief of Budget Department of Fiscal and Administrative)

SUGGESTED ACTION:

ATTACHMENTS:
FY2025 Budget Amendment Increase #213 DES Billing Contract Account Overrunc.pdf
FY2025 Budget Amendment Increase #174 Support Credit Card Processing Budget Inspections and Review Fundc.pdf
FY2025 Budget Transfer Request #626 Cover FY2025 Year End Expenses Building Inspectionsc.pdf
FY2025 Budget Transfer Request #186 Move Old Washington Road Sewer Budget to Sewer Contingency Project Budgetc.pdf
FY2025 Budget Transfer Request #821 Consultant Streamline Review Process Infrastructure Managementc.pdf
IM and Planning Review Process Integration Presentation - Final.pdf

Budget Transfer/Amendment Request Form

Please complete the form and **attach it** to your transfer/amendment request in MUNIS.

Date	06/09/2025
Submitted by	DFAS
Department	Emergency Services

Funding Request: $166,400

Fiscal Year:

FY2025

Category:

Operating

Fund:

General Fund (01)

Reason transfer/amendment is requested?

DES Billing Contract (01269700.530040) account is overrun by $138,311 and is estimated to be overrun by $166,340 by FY25 YE. This expense account is tied to the EMS Billing Fee (01269700.466000) account that records revenue from ambulance rides. Revenue collected has exceeded the budget by $437,242 which has also caused an increase in the billing contract fees. Requesting increase of $166,400 in the Billing Contract account and the EMS Billing Fee account.

Reason for availability of funds?

Revenue from EMS Billing Fee (01269700.466000) is $437,242 above the budget of $3,250,000.

YEAR-TO-DATE BUDGET REPORT

FOR 2025 13

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
01269700 Career Em Medical Srvc							
01269700 466000 EMSBillingFee	-3,250,000	0	-3,250,000	-3,687,241.44	.00	437,241.44	113.5%
01269700 530040 BillingContract	170,000	0	170,000	308,310.77	.00	-138,310.77	181.4%*
TOTAL Career Em Medical Srvc	-3,080,000	0	-3,080,000	-3,378,930.67	.00	298,930.67	109.7%
TOTAL REVENUES	-3,250,000	0	-3,250,000	-3,687,241.44	.00	437,241.44	
TOTAL EXPENSES	170,000	0	170,000	308,310.77	.00	-138,310.77	
GRAND TOTAL	-3,080,000	0	-3,080,000	-3,378,930.67	.00	298,930.67	109.7%

** END OF REPORT - Generated by Megan Moorman **

FY25 YE ESTIMATE

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	REVISED BUDGET	YTD EXPENDED	AVAILABLE BUD	% USED	YE Estimate	YE Overage
01269700	530040	BillingContract	170,000	170,000	308,310.77	-138,311	181.40	336,339	(166,339)

YE Estimate = YTD Acutals / 11 Months * 12 Months

Budget Transfer/Amendment Form

Please fill the form out **completely** and **attach** to your transfer/amendment request in MUNIS.

Date	June 10, 2025
Submitted by	DFAS - Budget
Department	Fiscal & Administrative Services

Funding Request: $216,000
Fiscal Year:
FY2025 (Current)
Category:
Operating
Fund:
Inspection and Review Fund (07)

Reason transfer/amendment is requested?

Based on the April Inspection & Review Fund monthly statement, a budget amendment of $216,000 is needed to support the Credit Card Processing budget under 07070090.539000.

Reason for availability of funds?

Budget is available in the Fund Balance, which is estimated to end the year at $8.35 million.

INSPECTION AND REVIEW ENTERPRISE FUND
APRIL 2025 BUDGET REPORT
Annual Operating Budget = $10,438,300

Prepared by: Department of Fiscal and Administrative Services, Budget Division, June 10, 2025

The Inspection and Review Enterprise Fund was established to account for all the building activity in Charles County. The fund operations are managed by Planning & Growth Management which includes their Codes, Permits, and Inspection Services Division, providing inspection services during various stages of construction, examination of plans to verify compliance with requirements of the various development regulations, and permitting services related to new building, remodeling, renovation, and repair. The fund also includes a technology component as it accounts for all technology fee revenues. These revenues support technology upgrades and maintenance for the department. Lastly, the fund accounts for administration costs to administer the program.

NET INCOME/(LOSS):

- The Inspection and Review Fund ended April with a net gain of $1,515,100.
- The fund is expected to finish this fiscal year with a net gain of $555,400.

REVENUES:

- Inspection and Review revenues through April equal $10 million which is 4% greater than FY2024 and is 96% of the FY2025 budget.
- Technology Fee revenues finished April at $887,700 which is 7% greater than this time FY2024 and 77% of the FY2025 budget.
- Overall, total revenues are projected to finish the year at $12.2 million.
  - Revenues include the use of fund balance to support current-year expenditures associated with fees collected in the prior fiscal year.
- The revenues will be redefined as the year progresses.

EXPENSES:

- Inspection and Review expenditures for April were $8.5 million which is 19% greater than FY2024 and is 82% of the FY2025 budget.
- Technology expenditures finished April at $1 million which is 38% greater than this time in FY2024 and 91% of the FY2025 budget.
- Overall, total expenditures are projected to end the fiscal year at $11.4 million.
- Expenditure estimates will be redefined as the year progresses.

OTHER:

- Fund balance is estimated to end the year at $8.3 million.
  - The Technology Fee Reserve is estimated to end the year at $140,300.
  - Net Cash is estimated to end the year at $8.1 million.

INSPECTION AND REVIEW FUND
SUMMARY AS OF APRIL 30, 2025

	FY25 AMENDED BUDGET	FY25 YR-END ESTIMATE	FY25 ACTUAL @ 04/30/2025	FY25 % OF BUDGET	PERCENT CHANGE	FY24 ACTUAL @04/30/2024	FY24 YR-END AUDITED
SUMMARY:							
TOTAL REVENUES	$10,438,300	$12,249,400	$10,034,346	96.1	4.4	$9,613,410	$12,178,654
TOTAL EXPENSES	10,438,300	11,444,010	8,519,277	81.6	19.2	7,144,908	9,496,970
Net Income/(Loss)	**$0**	**$805,400**	**$1,515,069**			**$2,468,502**	**$2,681,683**
Less: Use of Fund Balance		(250,000)	0			0	0
Adjusted Net Income/(Loss)		**$555,400**	**$1,515,069**			**$2,468,502**	**$2,681,683**

FUND EQUITY:	AUDITED 6/30/2024	ESTIMATE 6/30/2025
Fund Balance	$7,790,649	$8,331,262
Add: Long-Term Debt Liability	198,683	137,383
Adjusted Fund Balance	**$7,989,332**	**$8,468,644**
Net Fixed Assets	175,711	99,624
Health Ins. Rate Stabilization	25,173	25,173
Worker's Compensation	127,261	127,261
Technology Fee Reserve	424,041	140,331
Net Cash	7,237,146	8,076,256
Adjusted Fund Balance	**$7,989,332**	**$8,468,644**

Inspection and Review Programs

Operating Costs include: $930,000 for BTR #626 ($250,000 from Contingency + $680,000 Contract Services)

$64,500 Contract Services for BTR #821

Technology Upgrades

Operating Costs include: $216,000 Credit Card Processing for BTR #174

INSPECTION AND REVIEW PROGRAMS							
Revenues							
Building Inspection Fee	$5,400,000	$6,867,200	$5,722,677	106.0	1.5	$5,638,359	$7,020,676
County Staff Inspections	1,850,000	2,137,600	1,781,315	96.3	6.7	1,669,336	2,354,715
Development Serv Plan Review	950,000	1,093,100	910,955	95.9	10.5	824,567	1,004,539
Building Permit Plan Review	650,000	650,000	576,311	88.7	2.8	560,696	664,685
Permit Extension Fee	0	0	0	0.0	0.0	0	0
Building Code Inspections	15,000	1,300	1,260	8.4	-7.9	1,368	1,428
Planning Site Inspections	82,500	66,100	55,080	66.8	2.8	53,562	69,236
Antenna Review Fee	88,000	118,900	99,083	112.6	180.6	35,316	44,145
Other	0	0	0		0.0	0	0
Operating Revenues:	$9,035,500	$10,934,200	$9,146,680	101.2	4.1	$8,783,205	$11,159,424
Fund Balance Appropriation	250,000	250,000					
Total Adjusted Revenue:	$9,285,500	$11,184,200	$9,146,680			$8,783,205	$11,159,424
Expenses							
Personnel Services	$1,832,400	$1,697,300	$1,268,275	69.2	7.8	$1,175,998	$1,519,373
Fringe Benefits	559,000	509,200	451,254	80.7	19.6	377,430	462,698
Operating Costs	6,576,400	7,820,900	5,689,561	86.5	19.8	4,751,191	6,475,860
Debt Service	67,700	67,700	65,012	96.0	-20.0	81,303	81,937
Operating Contingency	250,000	0	0	0.0	0.0	0	
Total Expenses:	$9,285,500	$10,095,100	$7,474,102	80.5	17.0	$6,385,923	$8,539,869
Net Income/(Loss)	**$0**	**$1,089,100**	**$1,672,578**			**$2,397,282**	**$2,619,556**
TECHNOLOGY UPGRADES							
Revenues							
Technology Fee	$1,152,800	$1,065,200	$887,666	77.0	6.9	$830,206	$1,019,229
Total Revenues:	$1,152,800	$1,065,200	$887,666			$830,206	$1,019,229
Expenses							
Personnel Services	$371,300	$351,400	$284,068	76.5	9.2	$260,144	$337,250
Fringe Benefits	34,700	34,710	26,419	76.1	28.0	20,641	25,922
Operating Costs	746,800	962,800	734,688	98.4	53.6	478,200	593,930
Operating Contingency	0	0	0		0.0	0	0
Total Expenses:	$1,152,800	$1,348,910	$1,045,175	90.7	37.7	$758,985	$957,102
Net Income/(Loss)	**$0**	**($283,710)**	**($157,509)**			**$71,221**	**$62,128**

Technology Fee

07070090.539000 | 10.79% | $9,869,000

	FY2015 Actual	FY2016 Actual	FY2017 Actual	FY2018 Actual	FY2019 Actual	FY2020 Actual	FY2021 Actual	FY2022 Actual	FY2023 Actual	FY24 Actual	FY25 YTD	FY2025 Estimate
Revenues												
Technology Fee	$238,167	$175,994	$165,518	$156,767	$157,888	$184,274	$524,131	$689,240	$724,085	$1,019,229	$887,666	$1,065,200
Total Revenues	$238,167	$175,994	$165,518	$156,767	$157,888	$184,274	$524,131	$689,240	$724,085	$1,019,229	$887,666	$1,065,200
Expenses												
Salaries & Fringe	$0	$0	$58,539	$0	$0	$0	$102,368	$187,705	$248,824	$363,172	$248,824	$386,110
Maintenance Agreement	0	0	0	101,679	105,114	109,372	114,023	161,705	64,527	86,193	206,673	207,800
Credit Card Fees					23,807	62,033	99,886	141,638	232,454	438,062	519,250	665,668
Other Operating						500	1,579	4,543	19,650	69,675		100
Indirect Cost												0
Consultant	0	4,053	29,254	10,050	0	0	0	0	0	0		0
IT Equipment (0505.011)	0	14,250	15,292	27,068	0	0	0	0	0	0		0
Equipment (0505.000)										0		0
Software/Hardware	0	0	294,243	295,472	98,183	0	25,961	0	0	0		0
Debt	6,586	(6,205)	0	0								0
Total Operating Expenses	$6,586	$12,098	$397,327	$434,268	$227,103	$171,906	$343,817	$495,590	$565,456	$957,102		$1,433,109
Est. Surplus/(Deficit)	$231,581	$163,896	($231,810)	($277,501)	($69,215)	$12,368	$180,314	$193,651	$158,630	$62,128		($367,909)

FY2025	
July	53,060.78
August	52,209.58
September	47,445.80
October	42,065.34
November	47,673.60
December	51,098.26
January	50,110.72
February	46,059.63
March	54,413.35
April	75,112.48
May	
June	

YTD
519,249.54

FY2024	
July	27,908.02
August	29,446.26
September	35,377.44
October	28,888.26
November	22,999.12
December	20,726.68
January	25,332.94
February	40,301.79
March	48,072.19
April	62,653.83
May	42,900.67
June	53,454.34
Actuals	438,061.54

2024

April 2024 YTD	$	341,706.53
FY2024 Actuals	$	438,061.54
% thru April		78%

2025

April 2025 YTD	$	519,249.54
% thru April		78%
FY2025 Estimated YE	$	665,668.44
Budget	$	450,000.00
Amount Needed	$	215,668.44
Rounded	**$**	**216,000**

FY24 YTD
341,706.53

Charles County County Commissioners

YEAR-TO-DATE BUDGET REPORT

FOR 2025 13

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
07070090 Technology Fee							
07070090 490000 FundBalan	0	0	0	.00	.00	.00	.0%
07070090 539000 CreditCard	450,000	0	450,000	949,186.71	.00	-499,186.71	210.9%*
TOTAL Technology Fee	450,000	0	450,000	949,186.71	.00	-499,186.71	210.9%
TOTAL EXPENSES	450,000	0	450,000	949,186.71	.00	-499,186.71	
GRAND TOTAL	450,000	0	450,000	949,186.71	.00	-499,186.71	210.9%

** END OF REPORT - Generated by Marissa Russell **

Budget Transfer/Amendment Form

Please fill the form out **completely** and **attach** to your transfer/amendment request in MUNIS.

Date	June 9, 2025
Submitted by	Jason Groth / Ray Shumaker
Department	Planning and Growth Management - CPIS

Funding Request: $930,000

Fiscal Year:

FY2025 (Current)

Category:

Operating

Fund:

Inspection and Review Fund (07)

Reason transfer/amendment is requested?

Funds are being requested to cover the expenses through the of end FY25. The Contract Services account is overrun due to the increase of building throughout the County, bringing a heavy volume of inspections.

This $930,000 request will cover the existing deficit of $108,234.85 and anticipated invoices through the end of the fiscal year. Based on the monthly average of $458,052.97, $916,105.94 is the estimated cost for May and June. As of May 15, 2025, $117,930.09 of May invoices were paid. This leaves an outstanding balance of $798,175.85. The request also includes $23,590 to pay for additional unforeseen invoices.

Reason for availability of funds?

An increase in the Building Inspections account has resulted in an increase in collected fees. The Contingency Fund is funds budgeted for unexpected encumbrances through the fiscal year.

INSPECTION AND REVIEW ENTERPRISE FUND
APRIL 2025 BUDGET REPORT
Annual Operating Budget = $10,438,300

Prepared by: Department of Fiscal and Administrative Services, Budget Division, June 10, 2025

The Inspection and Review Enterprise Fund was established to account for all the building activity in Charles County. The fund operations are managed by Planning & Growth Management which includes their Codes, Permits, and Inspection Services Division, providing inspection services during various stages of construction, examination of plans to verify compliance with requirements of the various development regulations, and permitting services related to new building, remodeling, renovation, and repair. The fund also includes a technology component as it accounts for all technology fee revenues. These revenues support technology upgrades and maintenance for the department. Lastly, the fund accounts for administration costs to administer the program.

NET INCOME/(LOSS):

- The Inspection and Review Fund ended April with a net gain of $1,515,100.
- The fund is expected to finish this fiscal year with a net gain of $555,400.

REVENUES:

- Inspection and Review revenues through April equal $10 million which is 4% greater than FY2024 and is 96% of the FY2025 budget.
- Technology Fee revenues finished April at $887,700 which is 7% greater than this time FY2024 and 77% of the FY2025 budget.
- Overall, total revenues are projected to finish the year at $12.2 million.
  - Revenues include the use of fund balance to support current-year expenditures associated with fees collected in the prior fiscal year.
- The revenues will be redefined as the year progresses.

EXPENSES:

- Inspection and Review expenditures for April were $8.5 million which is 19% greater than FY2024 and is 82% of the FY2025 budget.
- Technology expenditures finished April at $1 million which is 38% greater than this time in FY2024 and 91% of the FY2025 budget.
- Overall, total expenditures are projected to end the fiscal year at $11.4 million.
- Expenditure estimates will be redefined as the year progresses.

OTHER:

- Fund balance is estimated to end the year at $8.3 million.
  - The Technology Fee Reserve is estimated to end the year at $140,300.
  - Net Cash is estimated to end the year at $8.1 million.

INSPECTION AND REVIEW FUND
SUMMARY AS OF APRIL 30, 2025

	FY25 AMENDED BUDGET	FY25 YR-END ESTIMATE	FY25 ACTUAL @ 04/30/2025	FY25 % OF BUDGET	PERCENT CHANGE	FY24 ACTUAL @04/30/2024	FY24 YR-END AUDITED
SUMMARY:							
TOTAL REVENUES	$10,438,300	$12,249,400	$10,034,346	96.1	4.4	$9,613,410	$12,178,654
TOTAL EXPENSES	10,438,300	11,444,010	8,519,277	81.6	19.2	7,144,908	9,496,970
Net Income/(Loss)	**$0**	**$805,400**	**$1,515,069**			**$2,468,502**	**$2,681,683**
Less: Use of Fund Balance		(250,000)	0			0	0
Adjusted Net Income/(Loss)		**$555,400**	**$1,515,069**			**$2,468,502**	**$2,681,683**

FUND EQUITY:	AUDITED 6/30/2024	ESTIMATE 6/30/2025
Fund Balance	$7,790,649	$8,331,262
Add: Long-Term Debt Liability	198,683	137,383
Adjusted Fund Balance	**$7,989,332**	**$8,468,644**
Net Fixed Assets	175,711	99,624
Health Ins. Rate Stabilization	25,173	25,173
Worker's Compensation	127,261	127,261
Technology Fee Reserve	424,041	140,331
Net Cash	7,237,146	8,076,256
Adjusted Fund Balance	**$7,989,332**	**$8,468,644**

Inspection and Review Programs

Operating Costs include: $930,000 for BTR #626 ($250,000 from Contingency + $680,000 Contract Services)

$64,500 Contract Services for BTR #821

Technology Upgrades

Operating Costs include: $216,000 Credit Card Processing for BTR #174

INSPECTION AND REVIEW PROGRAMS							
Revenues							
Building Inspection Fee	$5,400,000	$6,867,200	$5,722,677	106.0	1.5	$5,638,359	$7,020,676
County Staff Inspections	1,850,000	2,137,600	1,781,315	96.3	6.7	1,669,336	2,354,715
Development Serv Plan Review	950,000	1,093,100	910,955	95.9	10.5	824,567	1,004,539
Building Permit Plan Review	650,000	650,000	576,311	88.7	2.8	560,696	664,685
Permit Extension Fee	0	0	0	0.0	0.0	0	0
Building Code Inspections	15,000	1,300	1,260	8.4	-7.9	1,368	1,428
Planning Site Inspections	82,500	66,100	55,080	66.8	2.8	53,562	69,236
Antenna Review Fee	88,000	118,900	99,083	112.6	180.6	35,316	44,145
Other	0	0	0		0.0	0	0
Operating Revenues:	$9,035,500	$10,934,200	$9,146,680	101.2	4.1	$8,783,205	$11,159,424
Fund Balance Appropriation	250,000	250,000					
Total Adjusted Revenue:	$9,285,500	$11,184,200	$9,146,680			$8,783,205	$11,159,424
Expenses							
Personnel Services	$1,832,400	$1,697,300	$1,268,275	69.2	7.8	$1,175,998	$1,519,373
Fringe Benefits	559,000	509,200	451,254	80.7	19.6	377,430	462,698
Operating Costs	6,576,400	7,820,900	5,689,561	86.5	19.8	4,751,191	6,475,860
Debt Service	67,700	67,700	65,012	96.0	-20.0	81,303	81,937
Operating Contingency	250,000	0	0	0.0	0.0	0	
Total Expenses:	$9,285,500	$10,095,100	$7,474,102	80.5	17.0	$6,385,923	$8,539,869
Net Income/(Loss)	**$0**	**$1,089,100**	**$1,672,578**			**$2,397,282**	**$2,619,556**
TECHNOLOGY UPGRADES							
Revenues							
Technology Fee	$1,152,800	$1,065,200	$887,666	77.0	6.9	$830,206	$1,019,229
Total Revenues:	$1,152,800	$1,065,200	$887,666			$830,206	$1,019,229
Expenses							
Personnel Services	$371,300	$351,400	$284,068	76.5	9.2	$260,144	$337,250
Fringe Benefits	34,700	34,710	26,419	76.1	28.0	20,641	25,922
Operating Costs	746,800	962,800	734,688	98.4	53.6	478,200	593,930
Operating Contingency	0	0	0		0.0	0	0
Total Expenses:	$1,152,800	$1,348,910	$1,045,175	90.7	37.7	$758,985	$957,102
Net Income/(Loss)	**$0**	**($283,710)**	**($157,509)**			**$71,221**	**$62,128**

YEAR-TO-DATE BUDGET REPORT

FOR 2025 13

		ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
07074700 Building Permits & Enforcement								
07074700 490000	FundBalan	0	0	0	.00	.00	.00	.0%
07074700 530000	CntrctSrv	4,700,000	0	4,700,000	4,808,234.85	.00	-108,234.85	102.3%*
07074700 560000	ReserveFo	0	0	0	.00	.00	.00	.0%
07075700 Inspections								
07075700 490000	FundBalan	-250,000	0	-250,000	.00	.00	-250,000.00	.0%*
07075700 530000	CntrctSrv	350,000	0	350,000	254,805.96	.00	95,194.04	72.8%
07075700 560000	ReserveFo	250,000	0	250,000	.00	.00	250,000.00	.0%
	GRAND TOTAL	5,050,000	0	5,050,000	5,063,040.81	.00	-13,040.81	100.3%

** END OF REPORT - Generated by Marissa Russell **

07074700.530000 Contract Services

Budgeted Amount:	$4,700,000.00			
July	$669,609.44			
August	$479,233.55			
September	$389,241.54			
October	$488,141.75			
November	$353,821.44			
December	$372,698.50			
January	$445,136.73			
February	$362,333.81			
March	$533,593.43			
April	$486,719.50			
May				
June				
Total Paid thru April:	$4,580,529.69	[Avg.per month	$458,052.97	]
Est needed May-June	$916,105.94			
Inv. paid in May so far	$117,930.09			
	$798,175.85			
Less remaining balance	-$108,234.85			
Amount needed	-$906,410.70			
Expected extra Inspections	-$23,590.00			
Amount Needed	-$930,000.70			

Budget Transfer/Amendment Form

Please fill the form out **completely** and **attach** to your transfer/amendment request in MUNIS.

Date	May 27, 2025
Submitted by	DFAS – Budget
Department	DPW Utilities – Capital Services

Funding Request: $2,111,570

Fiscal Year:

FY2025 (Current)

Category:

Capital Improvement Project - W&S

Fund:

Capital Projects (02)

Reason transfer/amendment is requested?

Requesting to close Old Washington Road Sewer (WURC) CIP (#7401007115). This project is no longer needed. The Zekiah Interceptor Sewer Upgrades (#7071007109), WURC: Zekiah Pump Station Upgrade (#7076007107), and WURC: Zekiah Pump Station Forcemain (#7076007108) CIP projects will take care of the sewer flows in the majority of the Waldorf Urban Redevelopment Corridor (WURC) for the foreseeable future. The system will continue to be evaluated by PGM/DPW staff for needed improvements beyond the scope of these projects as development occurs. This transfer will move the remaining budget in CIP 7401007115 to the Sewer Contingency project (CIP 7040007999) so it may be cancelled.

Reason for availability of funds?

Per the county's close out procedures, the remaining budget is no longer needed and will be transferred to the Sewer Contingency project (CIP 7040007999).

Marissa Russell

From: Jennifer Suite
Sent: Tuesday, January 14, 2025 8:12 AM
To: Marissa Russell; Britta M. Hertling
Cc: Jacob Dyer; Estid Reedy; Martin Harris; Terri D. Kahouk
Subject: RE: DPW CIP Updates - December FY2025

Good morning Marissa,

Capital Services would like to confirm that these projects are complete and can be closed:

- 2404002267 – Billingsley Road/St. Patrick's Drive Traffic Signal Improvements
- 8401008085 – NPDES Bridle Path Stream Restoration
- 8401008086 – NPDES Ruth Swann Stream Restoration

The project below should be canceled (project will not be moving forward) and closed:

- 7401007115 – Old Washington Road Sewer (WURC)

Pls let us know if you have any questions.
Thank you,
Jennifer

From: Marissa Russell <RussellM@charlescountymd.gov>
Sent: Monday, January 13, 2025 2:54 PM
To: Jennifer Suite <SuiteJ@charlescountymd.gov>; Britta M. Hertling <HertlingB@charlescountymd.gov>
Cc: Jacob Dyer <DyerJ@charlescountymd.gov>; Estid Reedy <ReedyE@charlescountymd.gov>; Martin Harris <HarrisM@charlescountymd.gov>; Terri D. Kahouk <KahoukT@charlescountymd.gov>
Subject: RE: DPW CIP Updates - December FY2025

Good afternoon,

Please confirm the work on the following projects has been completed and that the projects may be closed:

- 2404002267 – Billingsley Road/St. Patrick's Drive Traffic Signal Improvements
- 7401007115 – Old Washington Road Sewer
- 8401008085 – NPDES Bridle Path Stream Restoration
- 8401008086 – NPDES Ruth Swann Stream Restoration

Thank you,

Marissa Russell
Budget Analyst

Charles County Government
Department of Fiscal and Administrative Services
200 Baltimore Street

La Plata, MD 20646

From: Jennifer Suite <SuiteJ@charlescountymd.gov>
Sent: Thursday, January 9, 2025 4:02 PM
To: Marissa Russell <RussellM@charlescountymd.gov>
Cc: Jacob Dyer <DyerJ@charlescountymd.gov>; Estid Reedy <ReedyE@charlescountymd.gov>; Martin Harris <HarrisM@charlescountymd.gov>; Bernard Cochran <CochranB@charlescountymd.gov>; John Earle <EarleJ@charlescountymd.gov>; Doremus Jenkins <JenkinsD@charlescountymd.gov>; Terri D. Kahouk <KahoukT@charlescountymd.gov>; Brian Kagarise <KagarisB@charlescountymd.gov>; Britta M. Hertling <HertlingB@charlescountymd.gov>
Subject: RE: DPW CIP Updates - December FY2025

Hello Marissa,

Attached is the Capital Services status updates for December FY2025 as requested.

Pls let me know if you have any questions.

Thank you,
Jennifer

From: Marissa Russell <RussellM@charlescountymd.gov>
Sent: Monday, December 9, 2024 11:34 AM
To: Britta M. Hertling <HertlingB@charlescountymd.gov>; Martin Harris <HarrisM@charlescountymd.gov>; Bernard Cochran <CochranB@charlescountymd.gov>; John Earle <EarleJ@charlescountymd.gov>; Terri D. Kahouk <KahoukT@charlescountymd.gov>; Brian Kagarise <KagarisB@charlescountymd.gov>; Doremus Jenkins <JenkinsD@charlescountymd.gov>; Frances Sherman <ShermanF@charlescountymd.gov>; David R. Defalco <DefalcoD@charlescountymd.gov>; Samuel Walter <WalterS@charlescountymd.gov>; Ed Gorham <GorhamE@charlescountymd.gov>; Charles Strawberry <StrawbeC@charlescountymd.gov>; Stephen T. Staples <StaplesS@charlescountymd.gov>
Cc: Jennifer Suite <SuiteJ@charlescountymd.gov>; Lisa Connell <ConnellL@charlescountymd.gov>; Carmen Chicwak <ChicwakC@charlescountymd.gov>; Jacob Dyer <DyerJ@charlescountymd.gov>; Estid Reedy <ReedyE@charlescountymd.gov>
Subject: DPW CIP Updates - December FY2025
Importance: High

Good morning,

Your assistance is requested to update the status of the projects in our Capital Improvement Program. Attached is a list of projects for which your department is responsible. In the attached spreadsheet, please make and highlight changes to the following columns:

Column E – Project Status (A-Active, I-Inactive, SC-Substantially Complete, PC-Pending Complete, CU-Complete - Under Warranty, C-Complete, and CAN-Cancel a Non-Completed Project); a legend with status definitions is attached.

Column G – Project Phase (preliminary design, design, construction, post-construction, etc.)

Column H – Additional information, if any, that is relevant to the project

Column I – Project manager name

This information will be used to update the 2nd quarter CIP Monitoring Book. The book can be found in the Budget section of the County's website: https://www.charlescountymd.gov/government/departments/fiscal-and-administrative-services/budget-division

Please return changes by Friday, January 10, 2025.

Thank you,

Marissa Russell

Budget Analyst

Charles County Government
Department of Fiscal and Administrative Services
200 Baltimore Street
La Plata, MD 20646

PROJECT: **Old Washington Road Sewer**

The existing sewer system has aged and is unreliable to facilitate the proposed growth. The project will design and construct approx. 5,800 l.f. of new sewer line from along Old Washington Road from Md. Route 5 to Acton Lane based on a study performed in 2013.

PROJECT STATUS AS OF **31-Mar-25**

PROJECT NUMBER **7401007115**

PROJECT TYPE: SEWER

STATUS: INACTIVE

PROJECT RESPONSIBILITY: DPW

	LIFE TO DATE STATUS				
REVENUE BUDGET	ACTUAL LTD FUNDING	APPROVED LTD BUDGET	REMAINING BALANCE	% OF BUDGET	ACCOUNT NUMBER
FEDERAL	$0.00	$0.00	$0.00		
STATE	0.00	0.00	0.00		
REVOLVING	0.00	0.00	0.00		
WSSC	0.00	0.00	0.00		
BOND PROCEEDS	264,409.71	2,376,000.00	2,111,590.29	11%	7401007115.40389
PAY-GO	0.00	0.00	0.00		
TOTAL	$264,409.71	$2,376,000.00	$2,111,590.29	11%	

EXPENSE BUDGET	ACTUAL LTD EXPENSE	APPROVED LTD BUDGET	REMAINING BALANCE	% OF BUDGET	ACCOUNT NUMBER
INSPECTION	$62,686.00	$70,000.00	$7,314.00	90%	7401007115.50437
ADMINISTRATION	87,189.64	151,000.00	63,810.36	58%	7401007115.50441
A&E	1,926.07	160,000.00	158,073.93	1%	7401007115.50443
LAND & ROW	87,856.00	210,000.00	122,144.00	42%	7401007115.50444
CONSTRUCTION	0.00	1,600,000.00	1,600,000.00	0%	7401007115.50450
CONTINGENCY	0.00	160,000.00	160,000.00	0%	7401007115.50468
MISCELLANEOUS	24,752.00	25,000.00	248.00	99%	7401007115.50469
EQUIPMENT	0.00	0.00	0.00		
TOTAL	$264,409.71	$2,376,000.00	$2,111,590.29	11%	

PROJECT BALANCE	$0.00	$0.00

BUDGET HISTORY

203,000.00	FY15 Original Budget, Bonds
2,173,000.00	FY16 Original Budget, Bonds
2,376,000.00	Total LTD Budget

BOND FUNDING HISTORY

20,048.21	2015 Bond Issue (30YR)
50,000.00	2016 Bond Issue (30YR)
86,046.45	2017 Bond Issue
14,297.07	2018 Bond Issue
50,000.00	2019 Bond Issue
35,000.00	2020 Bond Issue
9,017.98	2021 Bond Issue
264,409.71	Total Funding to Date

	Bonded	Expended	%
15	20,048	20,048	100%
16	50,000	50,000	100%
17	86,046	86,046	100%
18	14,297	14,297	100%
19	50,000	50,000	100%
20	35,000	35,000	100%
21	9,018	9,018	100%

COMMENTS:

PROJECT IS FULLY BUDGETED.

Water Funding	**Funding Source**	
0%	UF 55%	Other:
Sewer Funding	FF	
100%	CF 45%	

CIP 7401007115 is 55% User Fee and 45% Connection Fee. Therefore, 55% of the remaining bond proceeds will be moved to the Sewer Contingency User Fee Bonds and 45% will be moved to the Sewer Contingency Connection Fee Bonds. MR

PROJECT: **Zekiah Pump Station Upgrade**

Design and construct to expand the capacity of the Zekiah Pumping Station from approximately 3.0 MGD to 10.5 MGD. The developer of Adams Crossing previously expanded the Zekiah Pump Station from 1 MGD to approximately 3.0 MGD. To accomplish this expansion, the existing pump station will be fully replaced.

PROJECT STATUS AS OF **31-Mar-25**

PROJECT NUMBER **7076007107**

PROJECT TYPE: SEWER

STATUS: ACTIVE

PROJECT RESPONSIBILITY: PGM

LIFE TO DATE STATUS

REVENUE BUDGET	ACTUAL LTD FUNDING	APPROVED LTD BUDGET	REMAINING BALANCE	% OF BUDGET	ACCOUNT NUMBER
FEDERAL	$0.00	$0.00	$0.00		
STATE	0.00	0.00	0.00		
REVOLVING	0.00	0.00	0.00		
OTHER: WSSC	0.00	0.00	0.00		
BOND PROCEEDS	60,012.98	3,773,000.00	3,712,987.02	2%	7076007107.40389
PAY-GO	0.00	0.00	0.00		
TOTAL	$60,012.98	$3,773,000.00	$3,712,987.02	2%	

EXPENSE BUDGET	ACTUAL LTD EXPENSE	APPROVED LTD BUDGET	REMAINING BALANCE	% OF BUDGET	ACCOUNT NUMBER
INSPECTION	$10,734.00	$36,000.00	$25,266.00	30%	7076007107.50437
ADMINISTRATION	29,205.82	176,000.00	146,794.18	17%	7076007107.50441
FAS ADMINISTRATION	10,638.98	19,000.00	8,361.02	56%	7076007107.50442
A&E	4,767.79	2,000,000.00	1,995,232.21	0%	7076007107.50443
LAND & ROW	0.00	100,000.00	100,000.00		
CONSTRUCTION	0.00	1,000,000.00	1,000,000.00	0%	7076007107.50450
PGM CONSTRUCTION	0.00	0.00	0.00		
CONTINGENCY	0.00	400,000.00	400,000.00	0%	7076007107.50468
MISCELLANEOUS	5,723.27	42,000.00	36,276.73	14%	7076007107.50469
EQUIPMENT	0.00	0.00	0.00		
TOTAL	$61,069.86	$3,773,000.00	$3,711,930.14	2%	

PROJECT BALANCE	($1,056.88)	$0.00

BUDGET HISTORY

221,000.00	FY14 Original Budget, Bonds
598,000.00	FY16 Original Budget, Bonds
598,000.00	FY20 Original Budget, Bonds
15,000.00	FY23 Original Budget, Bonds
1,635,000.00	FY24 Original Budgets, Bonds
706,000.00	FY25 Original Budget, Bonds
3,773,000.00	Total LTD Budget

BOND FUNDING HISTORY

51,000.00	2014 Bond Issue (30YR)
9,012.98	2021 Bond Issue
60,012.98	Total Funding to Date

	Bonded	**Expended**	**%**
14	51,000	51,000	100%
21	9,013	9,013	100%

COMMENTS:

Water Funding	**Funding Source**	
0%	UF 23%	Other:
Sewer Funding	FF	
100%	CF 77%	

Per Approved FY25-FY29 CIP

2026	**2027**	**2028**	**2029**	**Beyond 2029**	**Est. Total Project Cost**
$6,036,000	$5,886,000	$3,436,000	$0	$0	**$19,131,000**

PROJECT: **Zekiah Pump Station Forcemain**

Design and construct approximately 7,000 l.f. of 18" force main from Zekiah Pump Station. This project is necessary to accommodate the increased flows generated when the Zekiah Pump Station is upgraded to 10.5 MGD. The new forcemain will run from the existing Zekiah Pump Station along Acton Lane to the intersection of Acton Lane and US Route 301.

PROJECT STATUS AS OF **31-Mar-25**

PROJECT NUMBER **7076007108**

PROJECT TYPE: SEWER

STATUS: ACTIVE

PROJECT RESPONSIBILITY: PGM

	LIFE TO DATE STATUS				
REVENUE BUDGET	ACTUAL LTD FUNDING	APPROVED LTD BUDGET	REMAINING BALANCE	% OF BUDGET	ACCOUNT NUMBER
FEDERAL	$0.00	$0.00	$0.00		
STATE	0.00	0.00	0.00		
REVOLVING	0.00	0.00	0.00		
OTHER: WSSC	0.00	0.00	0.00		
BOND PROCEEDS	76,776.47	2,390,000.00	2,313,223.53	3%	7076007108.40389
PAY-GO	0.00	0.00	0.00		
TOTAL	$76,776.47	$2,390,000.00	$2,313,223.53	3%	

EXPENSE BUDGET	ACTUAL LTD EXPENSE	APPROVED LTD BUDGET	REMAINING BALANCE	% OF BUDGET	ACCOUNT NUMBER
INSPECTION	$10,734.00	$39,000.00	$28,266.00	28%	7076007108.50437
ADMINISTRATION	22,668.57	154,000.00	131,331.43	15%	7076007108.50441
FAS ADMINISTRATION	17,273.00	25,000.00	7,727.00	69%	7076007108.50442
A&E	4,047.78	450,000.00	445,952.22	1%	7076007108.50443
LAND & ROW	17,490.00	500,000.00	482,510.00	3%	7076007108.50444
CONSTRUCTION	0.00	1,000,000.00	1,000,000.00	0%	7076007108.50450
PGM CONSTRUCTION	0.00	0.00	0.00		
CONTINGENCY	0.00	200,000.00	200,000.00	0%	7076007108.50468
MISCELLANEOUS	5,620.00	22,000.00	16,380.00	26%	7076007108.50469
EQUIPMENT	0.00	0.00	0.00		
TOTAL	$77,833.35	$2,390,000.00	$2,312,166.65	3%	

PROJECT BALANCE	($1,056.88)	$0.00

BUDGET HISTORY

232,000.00	FY14 Original Budget, Bonds
706,000.00	FY16 Original Budget, Bonds
164,000.00	FY17 Original Budget, Bonds (30 yr)
164,000.00	FY18 Original Budget, Bonds (30 yr)
598,000.00	FY20 Original Budget, Bonds (30 yr)
15,000.00	FY23 Original Budget, Bonds (30 yr)
340,000.00	FY24 Original Budget, Bonds
171,000.00	FY25 Original Budget, Bonds
2,390,000.00	Total LTD Budget

BOND FUNDING HISTORY

22,000.00	2014 Bond Issue (30YR)
44,000.00	2016 Bond Issue (30YR)
10,776.47	2021 Bond Issue
76,776.47	Total Funding to Date

	Bonded	Expended	%
14	22,000	22,000	100%
16	44,000	44,000	100%
21	10,776	11,833	110%

COMMENTS:

Water Funding	**Funding Source**	
0%	UF 23%	Other:
Sewer Funding	FF	
100%	CF 77%	

Per Approved FY25-FY29 CIP

2026	**2027**	**2028**	**2029**	**Beyond 2029**	**Est. Total Project Cost**
$1,211,000	$1,184,000	$0	$0	$0	**$4,785,000**

PROJECT: **Zekiah Interceptor Sewer Upgrades**

Design and construct approximately 6,500 l.f. of 36" gravity sewer to provide additional capacity in the sewer system to serve the future development of the Zekiah service area.

PROJECT STATUS AS OF **31-Mar-25**

PROJECT NUMBER **7071007109**

PROJECT TYPE: SEWER

STATUS: ACTIVE

PROJECT RESPONSIBILITY: PGM

	LIFE TO DATE STATUS				
REVENUE BUDGET	ACTUAL LTD FUNDING	APPROVED LTD BUDGET	REMAINING BALANCE	% OF BUDGET	ACCOUNT NUMBER
FEDERAL	$0.00	$0.00	$0.00		
STATE	0.00	0.00	0.00		
REVOLVING	0.00	0.00	0.00		
OTHER: WSSC	0.00	0.00	0.00		
BOND PROCEEDS	128,210.55	4,164,000.00	4,035,789.45	3%	7071007109.40389
PAY-GO	0.00	0.00	0.00		
TOTAL	$128,210.55	$4,164,000.00	$4,035,789.45	3%	

EXPENSE BUDGET	ACTUAL LTD EXPENSE	APPROVED LTD BUDGET	REMAINING BALANCE	% OF BUDGET	ACCOUNT NUMBER
INSPECTION	$12,534.00	$91,000.00	$78,466.00	14%	7071007109.50437
ADMINISTRATION	24,012.57	256,000.00	231,987.43	9%	7071007109.50441
FAS ADMINISTRATION	17,273.00	25,000.00	7,727.00	69%	7071007109.50442
A&E	137,937.60	700,000.00	562,062.40	20%	7071007109.50443
LAND & ROW	17,490.00	200,000.00	182,510.00	9%	7071007109.50444
CONSTRUCTION	0.00	2,600,000.00	2,600,000.00	0%	7071007109.50450
CONTINGENCY	0.00	260,000.00	260,000.00	0%	7071007109.50468
MISCELLANEOUS	8,964.00	32,000.00	23,036.00	28%	7071007109.50469
EQUIPMENT	0.00	0.00	0.00		
TOTAL	$218,211.17	$4,164,000.00	$3,945,788.83	5%	

PROJECT BALANCE	($90,000.62)	$0.00

BUDGET HISTORY

417,000.00	FY14 Original Budget, Bonds
799,000.00	FY16 Original Budget, Bonds
799,000.00	FY17 Original Budget, Bonds (30 yr)
799,000.00	FY18 Original Budget, Bonds (30 yr)
799,000.00	FY20 Original Budget, Bonds (30 yr)
305,000.00	FY24 Original Budget, Bonds (30yr)
246,000.00	FY25 Original Budget, Bonds (30 yr)
4,164,000.00	Total LTD Budget

BOND FUNDING HISTORY

26,000.00	2014 Bond Issue (30YR)
46,000.00	2016 Bond Issue (30YR)
11,000.00	2017 Bond Issue (30YR)
25,210.55	2021 Bond Issue
20,000.00	2024 Bond Issue
128,210.55	Total Funding to Date

	Bonded	**Expended**	**%**
14	26,000	26,000	100%
16	46,000	46,000	100%
16	11,000	11,000	100%
21	25,211	25,211	100%
24	20,000	20,000	100%

COMMENTS:

Water Funding	**Funding Source**	
0%	UF 23%	Other:
Sewer Funding	FF	
100%	CF 77%	

Per Approved FY25-FY29 CIP

2026	**2027**	**2028**	**2029**	**Beyond 2029**	**Est. Total Project Cost**
$2,816,000	$0	$0	$0	$0	**$6,980,000**

PROJECT BUDGET REPORT

FOR 06/01/2020 - 05/31/2025

	Original Budget	Net Budget Amendments	Revised Budget	Requisitions	Encumbrances	Actuals	Available Budget	Percent Used
Project: 7040007999 - Sewer Contingency								
F 7040007999.40346	0.00	-115,000.00	-115,000.00	0.00	0.00	0.00	-115,000.00	0.00%
Sewer Contingency WSSC								
F 7040007999.40388	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%
Sewer Contingency Other ACPT								
F 7040007999.40389	0.00	-1,230,430.00	-1,230,430.00	0.00	0.00	0.00	-1,230,430.00	0.00%
Sewer Contingency Bonds								
F 7040007999.40390	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00%
Sewer Contingency PayGo								
F 7040007999.42389	-4,067,730.00	-1,014,731.00	-5,082,461.00	0.00	0.00	0.00	-5,082,461.00	0.00%
Sewer Contingency CF Bonds								
F 7040007999.42390	-230,530.00	-170,290.00	-400,820.00	0.00	0.00	-107,722.89	-293,097.11	26.88%
Sewer Contingency CF PayGo								
F 7040007999.43389	-8,577,640.00	-141,259.00	-8,718,899.00	0.00	0.00	0.00	-8,718,899.00	0.00%
Sewer Contingency UF Bonds								
F 7040007999.43390	-184,570.00	0.00	-184,570.00	0.00	0.00	-131,110.67	-53,459.33	71.04%
Sewer Contingency UF PayGo								
F 7040007999.4P390	0.00	-23,010.00	-23,010.00	0.00	0.00	0.00	-23,010.00	0.00%
SewerContingency-PGMPayGo								
E 7040007999.50468	13,060,470.00	2,671,710.00	15,732,180.00	0.00	0.00	0.00	15,732,180.00	0.00%
Sewer Contingency- Contingency								
E 7040007999.52468	0.00	23,010.00	23,010.00	0.00	0.00	0.00	23,010.00	0.00%
Sewer Contingency PGM								
FUNDING SOURCE TOTALS for Project: 7040007999 - Sewer Contingency	-13,060,470.00	-2,694,720.00	-15,755,190.00	0.00	0.00	-238,833.56	-15,516,356.44	1.52%
EXPENSE TOTALS for Project: 7040007999 - Sewer Contingency	13,060,470.00	2,694,720.00	15,755,190.00	0.00	0.00	0.00	15,755,190.00	0.00%
TOTALS for Project: 7040007999 - Sewer Contingency	0.00	0.00	0.00	0.00	0.00	-238,833.56	238,833.56	
Project: 7401007115 - WURC: Old Washington Road Sewe								
F 7401007115.40389	-2,376,000.00	0.00	-2,376,000.00	0.00	0.00	-264,409.71	-2,111,590.29	11.13%
WURC Old WashRd Swr Bonds								
E 7401007115.50437	70,000.00	0.00	70,000.00	0.00	0.00	62,686.00	7,314.00	89.55%
WURC Old WashRd Swr Inspection								
E 7401007115.50441	151,000.00	0.00	151,000.00	0.00	0.00	87,189.64	63,810.36	57.74%
WURC Old WashRd Swr Admin								
E 7401007115.50443	160,000.00	0.00	160,000.00	0.00	0.00	1,926.07	158,073.93	1.20%
WURC Old WashRd Swr A&E								
E 7401007115.50444	210,000.00	0.00	210,000.00	0.00	0.00	87,856.00	122,144.00	41.84%
WURC Old WashRd Swr Land&Row								

PROJECT BUDGET REPORT

FOR 06/01/2020 - 05/31/2025

	Original Budget	Net Budget Amendments	Revised Budget	Requisitions	Encumbrances	Actuals	Available Budget	Percent Used
E 7401007115.50450 . .			WURC Old WashRd Swr Construct					
	1,600,000.00	0.00	1,600,000.00	0.00	0.00	0.00	1,600,000.00	0.00%
E 7401007115.50468 . .			WURC Old WashRd Swr Contingy					
	160,000.00	0.00	160,000.00	0.00	0.00	0.00	160,000.00	0.00%
E 7401007115.50469 . .			WURC Old WashRd Swr Misc					
	25,000.00	0.00	25,000.00	0.00	0.00	24,752.00	248.00	99.01%
FUNDING SOURCE TOTALS for Project: 7401007115 - WURC: Old Washington Road Sewe								
	-2,376,000.00	0.00	-2,376,000.00	0.00	0.00	-264,409.71	-2,111,590.29	11.13%
EXPENSE TOTALS for Project: 7401007115 - WURC: Old Washington Road Sewe								
	2,376,000.00	0.00	2,376,000.00	0.00	0.00	264,409.71	2,111,590.29	11.13%
TOTALS for Project: 7401007115 - WURC: Old Washington Road Sewe								
	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
TOTALS FOR FUNDING SOURCE STRINGS								
	-15,436,470.00	-2,694,720.00	-18,131,190.00	0.00	0.00	-503,243.27	-17,627,946.73	
TOTALS FOR EXPENSE STRINGS								
	15,436,470.00	2,694,720.00	18,131,190.00	0.00	0.00	264,409.71	17,866,780.29	

REPORT TOTAL						
Original Budget	Net Budget Amendments	Revised Budget	Requisitions	Encumbrances	Actuals	Availab Budg
0.00	0.00	0.00	0.00	0.00	-238,833.56	238,833.

** END OF REPORT - Generated by Marissa Russell **

Budget Transfer/Amendment Form

Please fill the form out **completely** and **attach** to your transfer/amendment request in MUNIS.

Date	June 17, 2025
Submitted by	DFAS – Budget
Department	PGM – Infrastructure Management

Funding Request: $64,500.00

Fiscal Year:

FY2025 (Current)

Category:

Operating

Fund:

Inspection and Review Fund (07)

Reason transfer/amendment is requested?

The FY2025 General Fund adopted budget included onetime funding of $100,000 to procure a process improvement consultant to assist the Planning & Growth Management (PGM) Department with streamlining their review processes. PGM is now estimating the cost to procure this consultant is $164,500. To support this additional cost, staff is requesting to transfer funds from within the Inspection & Review Enterprise fund. This Enterprise fund will receive a benefit from this process improvement.

In addition, staff is requesting that any unused FY2025 funds from both the General Fund and Inspection & Review be carried over to FY2026 to allow this work to continue.

Reason for availability of funds?

Budget is available in the Infrastructure Management full-time salary account (07076500.500100) due to salary savings.

Infrastructure Management and Planning Review Process Integration

Presenters:

- **Andy Balchin, P.E.; Chief of Infrastructure Management**

June 10, 2025

Background

- The Infrastructure Management Division of PGM was approved for $100,000 in the FY25 budget to hire a consultant to combine the Infrastructure Management and Planning Divisions' plan review process.

Goals of the Project:



Concurrent Review Process

Improved Communication

Unified Review Documentation

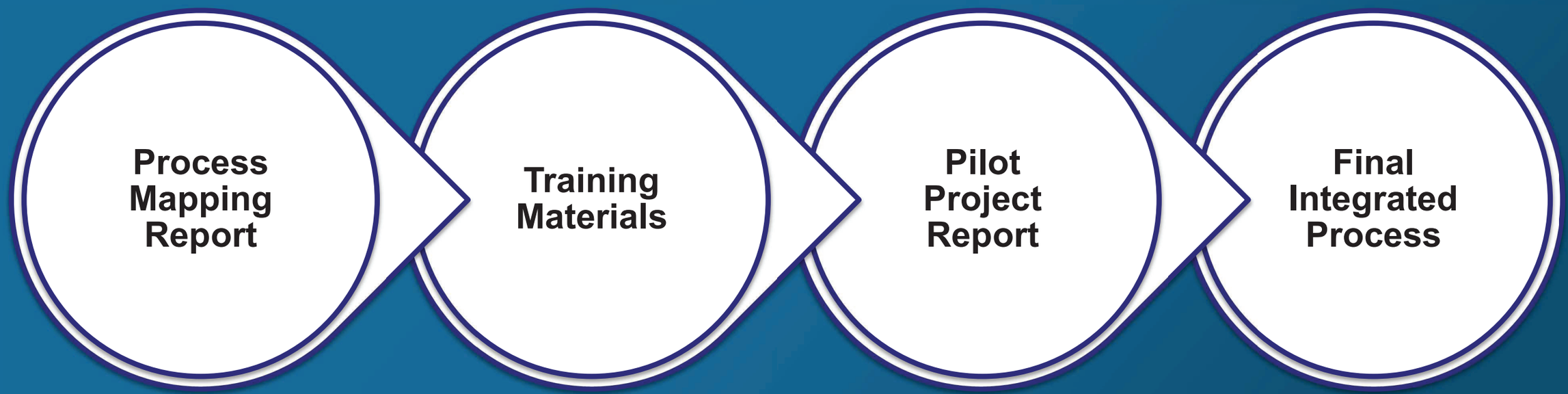
Enhanced Compliance

Scope of Work

- **Review and Evaluation**
  - Stormwater management requirements
  - Ordinance requirements for grading, water, sewer, storm drainage, and erosion and sediment control
  - Preliminary planning, site development plan, and final site plan approval requirements
  - Plan preparation package and county ordinances
  - Review timelines
  - Checklists

- **Additional Plan Review Considerations**
  - Submission of bonding
  - On-site and offsite easements and dedication documents

Deliverables



Current Project Status

RFP 25-015 was posted on October 30, 2024

No bids were received

EA Engineering was asked to submit a sole source bid

EA Engineering’s bid - $164,500

Request for Approval

- The Infrastructure Management Division requests that the Board of County Commissioners approve the transfer of $64,500 to award the contract to the selected consultant.

Presented By:

Charles County Government

Department of Planning and Growth Management

200 Baltimore Street, La Plata, Maryland 20646

301-645-0692

MD Relay Service: 7-1-1

Equal Opportunity Employer

It is the policy of Charles County to provide equal employment opportunity to all persons regardless of race, color, sex, age, national origin, religious or political affiliation or opinion, disability, marital status, sexual orientation, genetic information, gender identity or expression, or any other status protected by law.

www.CharlesCountyMD.gov/PGM

BUDGET AMENDMENT REQUEST FORM

Requestor: Shelby McKimmie **Date:** 05/28/2025

BA Label: IM & Planning Review Integration

Project Name & Number (if applicable): _____

Amendment Type:

☒ 1 – Exp to Exp or Rev to Rev Transfer
USE THIS FOR BUDGET TRANSFERS

☐ 2 – Rev to Exp Transfer
USE THIS FOR AMENDMENTS (Increase budget accounts)

PLEASE NOTE: Option# 3-9 in Munis do not apply to PGM. If you choose one of these options, your BA will be rejected.

Why Budget Transfer is Needed Justification:

A transfer is needed due to not having adequate funds to complete the Review Integration Process between Infrastructure Management an Planning. There is currently $199,912.00 in the account however, $99,912.00 is to be used for the SWM Ordianance update. We need the additional $64,500 to cover the proposal we receieved for the integration process.

Why Funds Are Available in the "From" Account Justification:

Funds are available due to salary savings.

Account # FROM	Amount	Account # TO	Amount
07076500.500100	$64,500.00	07076500.530000	$64,500.00

ATTACHMENTS: Please list attachments provided here

Andy Balchin
Approver Name

Chief of Infrastructure Management
Approver Title

Signature

May 28, 2025
Date

Scope of Work

1 Project Understanding

It is **EA Engineering, Science, and Technology, Inc., PBC (EA)'s** understanding that the Charles County Department of Planning and Growth Management is aiming to enhance the efficiency and effectiveness of their planning and Infrastructure Management (IM) plan review process, by integrating the concept, site, and final review phases. The goal of the project is to streamline the review process, reduce administrative burdens, and help ensure comprehensive development and evaluation of plans, by combining the three design review phases. EA has been supporting Charles County for over 10 years with review services for all three review phases and will leverage our experience as we work collaboratively with County staff. EA will provide professional services to support the Charles County Department of Planning and Growth Management in developing an integrated system that combines the IM review process with the Planning Division Review Process.

The following proposal describes the scope prepared by EA to review and develop a detailed strategy for the integration and implementation of the IM review process with the Planning Division Review Process based upon the RFP and email correspondence dated 27 February 2025.

2 Qualified Team

EA has developed a project team of key staff that will be dedicated to the project to support Charles County with this project. Additional staff will be supporting the key staff noted below to provide additional bandwidth and support in achieving the County's timeline. Key staff for this project are as follows:

Ms. Lindsay Ondrako is proposed as the Project/Task Manager leading the work activities and coordination with County staff. Ms. Ondrako has been performing stormwater reviews on behalf of Charles County for over 10 years through all review phases including the concept, site, and final review phases. She is an expert in stormwater management, erosion and sediment control, zoning, and site development requirements in Maryland and Charles County.

Mr. Bill Brooks, P.E., LEED AP BD+C will act as the Site Civil/Environmental Engineering Lead for the project. He is a licensed Professional Engineer in Maryland with 18 years of experience leading site development projects for both state, local, and private clients. He is experienced with land use planning, zoning, and development processes across Maryland as well as Charles County. Additionally, he is experienced with environmental, stormwater, floodplain, and sustainability regulations that will be applicable for this project.

Mr. Mark Dhruv, GISP will support the project as a GIS Specialist. Mr. Dhruv leads EA's GIS group and is an expert in geographic information systems, mapping, as well as data associated with planning, zoning, and infrastructure.

Ms. Ondrako will coordinate with County staff to seek input and provide routine updates throughout all facets of the project. With this project being collaborative, it is our understanding that the County will provide a Planner from their Planning Department, as needed, to support the Project Team on specific planning and zoning items. EA's team is skilled with Planning and Zoning requirements; however, getting the direct support from the County to assist with key items will be important to meet project goals and timelines. Ms. Ondrako will be responsible for the daily management and coordination of EA resources and will work to develop processes and procedures to ensure the objectives of the project are satisfied.

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3 Scope of Services

IM and Planning Review Process Integration

The goals of the Review Process Integration are to provide a more concurrent review process, where planning, zoning, and engineering reviews are conducted simultaneously, to improve communication between teams, create unified review documentation, and enhanced compliance across all relevant disciplines. Combining these goals will ultimately result in a more efficient, coordinated, and comprehensive approach to the permitting and review processes, benefiting the County and developers.

Over the course of the project, EA will meet with the County monthly, via teams, to coordinate phases and progress. EA will prepare agendas prior to each meeting and provide meeting minutes following the meeting. Based on the preliminary schedule provided in the RFP, EA assumes 8, one-hour meetings are included in this scope of work. EA will provide any schedule updates as needed throughout the Project.

Phase 1 - Process Mapping:

Upon award, EA will schedule a project kickoff meeting with the County staff via a Microsoft Teams meeting. During the initial meeting, EA will introduce the project team, discuss the schedule, and identify data needs from Charles County for proceeding with the work activities.

Following the kick-off meeting, EA will work with the County to develop the integrated review process that ensures all plans are reviewed in accordance with the current version of the County's Codes, Ordinances, and Regulatory Documents that govern infrastructure and development in Charles County. EA will do a thorough review of all the Charles County regulatory documents as well as any other local, state, and federal requirements in relation to each of the three-design submission and review phases, concept, site development, and final. EA's review will focus on the Stormwater Management Ordinance, Storm Drainage Ordinance, Zoning Ordinance and applicable codes, Preliminary Planning approval requirements, Site Development Plan requirements, and the current Charles County Plan Preparation Package (Concept, Site Development, and Final Site Plan Requirements).

EA is experienced with the County's current submittal requirements for each of the three phases; however, it is crucial to get the perspective of key County staff in terms of critical elements of each stage, including any details of the review process or requirements that need to be updated/improved, and/or any components of the permitting process that have been challenging for staff. EA will work to setup a Microsoft Teams meeting with Infrastructure Management, Codes, Permits & Inspection Services, Planning, Environmental Resources, Roads, and other departments identified by the County individually, including third party reviewers. We believe having a focused meeting with each department will allow for a more robust conversation about the key items that are crucial to each group. EA has assumed that a total of six 2-hour meetings will occur as part of the coordination with the County staff. EA will utilize this information as part of the integration evaluation process.

Upon completion of the review of County requirements, permitting processes, meetings with key County staff, and EA's review of other key guidance documents, EA will create a Process Mapping Report, outlining the current and proposed workflows both with a narrative and flowcharts. The Process Mapping Report will also outline, and challenges and recommendations identified during the focus meetings held with the County Departments. The report will identify current County challenges as well as recommendations for addressing these issues for improvement. EA will provide the Process Mapping Report to the County for review and comment. Upon receipt of consolidated comments, EA will utilize the feedback for guidance of Phase 2 work activities.

As part of this Phase, EA will also prepare a Public Outreach and Engagement Plan for the County to review and provide feedback and guidance. The Public Outreach and Engagement Plan will create an opportunity for the engineering and development community to participate in the process. The Plan narrative will be prepared and provided to the County under this Phase; however, meetings and communications with the development community will occur throughout other phases of this scope of work.

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Phase 1 Deliverables:

- EA will provide a draft and final Process Mapping Report to the County electronically and will consist of a narrative and two flow chart diagrams.
- EA will provide a draft and final Public Outreach and Engagement Plan Narrative.

Phase 1 Assumptions:

- EA will submit the Process Mapping Report including flowcharts to all departments for concurrent reviews, one round of comments will be addressed and implemented into a final Process Mapping Report.
- Based on the schedule provided in the RFP and the length of this phase, it is assumed that 2 virtual progress meetings are included under this phase
- It is assumed that 3 of the 2-hour coordination meetings with the different County departments will occur in person on the same day.
- EA will submit the Public Outreach and Engagement Plan to all departments for concurrent reviews, one round of comments will be addressed under this phase.

Phase 2 – System Development:

Utilizing the Process Mapping Report, as well as the RFP and input and recommendations from the County Staff described in Phase 1, EA will proceed forward with system development aspect of updating the review process as well as key documentation such as checklists, and any internal work flow checklists or guidance documents. EA anticipates performing the following per review phase:

1. Concept
    a. Preparation of a narrative of the proposed changes and necessary elements within this submittal
    b. Review of current review process timelines and possible improvements, if any.
    c. Revised checklist documents for outside consultants to use that outlines all requirements for the Concept Submission
    d. List of potential changes needed to the Plan Preparation Package and recommended Ordinance Updates that correspond to deliverables prepared under this scope of work.
2. Site Development
    a. Preparation of a narrative of the proposed changes and necessary elements within this submittal
    b. Review of current review process timelines and possible improvements, if any.
    c. Revised checklist documents for outside consultants to use that outlines all requirements for the Site Development Submission
    d. List of potential changes needed to the Plan Preparation Package and recommended Ordinance Updates that correspond to deliverables prepared under this scope of work.
3. Final Plan
    a. Preparation of a narrative of the proposed changes and necessary elements within this submittal
    b. Review of current review process timelines and possible improvements, if any.
    c. Revised checklist documents for outside consultants to use that outlines all requirements for the Development Services Plan Submission
    d. List of potential changes needed to the Plan Preparation Package and recommended Ordinance Updates that correspond to deliverables prepared under this scope of work.
    e. Submission timing of key agreements, fees, and documents (i.e., bonding, easements, dedications). This item does not include the Plat review process.

EA will provide recommendations to establish a concurrent electronic review process allowing for a coordinated evaluation of development projects across planning, zoning, and engineering reviews, including the Erosion and Sediment Control Review. Recommendations will include a timeline for each of the reviews at each submittal milestone.

EA will develop checklists in accordance with the Charles County Plan Preparation Package and County Ordinances for each of the review stages that will outline all requirements, to distribute to internal staff and outside consultants.

As part of the updates to the review process, EA will also perform a GIS review of the County's current GIS system for tracking development projects. EA will include suggested actions for the County GIS Team to implement as part of the

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improvements to the review process to enhance tracking and communication. EA does not anticipate any additional GIS support as part of this project, but can support the County, if requested.

It is assumed that one checklist per design phase will be provided to the County, totaling three checklists. EA will provide the checklists to the County for review and comment, and EA will address one round of comments.

As part of the Public Outreach and Engagement Plan prepared in Phase 1, EA will develop a survey to release to the development community, highlighting the proposed integrated review process, improvements to the submission process, and requesting feedback on issues faced or recommendations to improve the process. It is assumed that the development community will receive up to 14 days to complete and submit survey responses. EA will process the received feedback and coordinate with the county to incorporate any necessary revisions into the Integrated Review Process system.

Phase 2 Deliverables:

- EA will provide a report including a narrative section on the proposed changes and requirements for each of the three review phases: concept, site development and final (Development Services Permit).
- Each of the three review phases will also include a proposed checklist prepared as a fillable PDF form.
- A timeline will be prepared for all three review phases with appropriate details within each for key items such as agreements, fees, and documents to be submitted to the County.
- Development of a Survey to be provided to the Development Community.

Phase 2 Assumptions:

- EA will submit the checklists and reports to all departments for concurrent reviews, one round of comments will be addressed and implemented into a final checklist.
- Based on the schedule provided in the RFP and the length of this phase, it is assumed that 3 virtual progress meetings are included under this phase.
- This Phase includes up to 8 hours to revise the Public Outreach and Engagement Plan, as needed based on feedback from the Development Community or revisions necessary as the System Development process progresses.
- EA will submit the survey questions to all departments for concurrent reviews, one round of comments will be addressed and implemented into a final checklist.

Phase 3 – Training and Pilot Implementation:

In addition to the checklists developed in the previous development phase and the Phase 1 process mapping report, EA will create training materials (i.e., power point presentations) and conduct training sessions for County staff and third-party reviewers to present the new integrated review processes.

The training sessions will assist all staff across planning, zoning, and engineering reviews understand the integrated review process and the requirements at each review stage for all the departments. Having a broad understanding of the comprehensive requirements will allow for better communication between the various aspects of the preliminary plan, site plans, stormwater management, other engineering discipline reviews, erosion and sediment control, and planning.

EA assumes three 1-hour training sessions will be provided to County staff and third-party reviewers. A session will be provided for each of the design review stages.

EA will develop protocols for communication and collaboration between planning, zoning, and engineering teams throughout the review process, with the assistance of the feedback provided by County staff and third-party reviewers in the previous phases.

Currently the County utilizes Energov software (by Tyler Tech) in conjunction with Bluebeam Revu, for tracking and assigning and performing reviews, providing comments, and updating status of the reviews at each stage and eventually permit issuance. The Energov software and integrated Bluebeam Revu have many functions already built-in that allow for communication and collaboration between reviewers. Bluebeam allows for a studio-based review processes. The software also has the capability of generating review comment letters directly from the filtered Bluebeam comments and recommendations. These features allow all departments to have access to the same information and real-time markups, including internal communication at all times for coordination between all assigned reviewers. EA will work with the County

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to coordinate with Energov to confirm the current functioning options, new features that have been added/updated and to make these options available to the County and Reviewers. EA will provide guidance on implementation, as necessary.

Phase 3 also includes a Pilot Implementation aspect. The pilot program will choose a new permit submission at each stage of the review process (Concept, Site, Final) that is submitted during the time frame of this Phase. A review will be conducted under current processes but will also follow concurrently through the proposed integrated review system. This will allow the County to still process reviews as they are received but will also allow a real example of how the new system will work and be receptive to potential issues or improvements throughout the review departments and disciplines. It is expected that the Pilot program may extend past the time duration identified in the schedule in the RFP, however EA will actively update the schedule and notify the County during the monthly progress meetings.

Lastly, this Phase will also include a presentation to the Commissioners of Charles County for a briefing on the Integration Process Development and prepared documents. EA will prepare the presentation for the Commissioners briefing, this will highlight the developed materials and also the pilot program implementation and results.

Phase 3 Deliverables:

- EA will provide the Training Materials to the County for review and Comment prior to conducting the training sessions with internal staff and prior to the County Commissioner Meeting.
- EA will develop a Technical Memorandum for Communication and Coordination Protocols.
- EA will develop a narrative outlining the Pilot Implementation which will include any feedback, lessons learned , and any modifications proposed to the Integrated Review Process before Final release of the program.
- EA will develop a presentation for the County Commissioners' Meeting.

Phase 3 Assumptions:

- The cost assumes the training sessions will occur in person and the County will reserve and set up the meeting room; however, the sessions can be virtual if preferred by the County.
- EA assumes the training sessions will take place on the same day or next subsequent day from the County Commissioners' meeting.
- Based on the schedule provided in the RFP and the length of this phase, it is assumed that 2 virtual progress meetings are included under this phase.
- Per the RFP, the date and time of the County Commissioners Meeting will be provided to EA.

Phase 4 – Full Implementation:

In addition to educating County staff on the functionality and implementation of the new processes as outlined in the previous Phases and as part of the public outreach and engagement plan developed in Phase 1, the integrated review documents (process mapping and checklists) will be released to the public/development community for comment and feedback. It is assumed that the development community will receive up to 14 days to review and provide feedback. EA will process the received feedback and coordinate with the county to incorporate any necessary revisions into the Integrated Review Process system and corresponding documents.

Per the RFP, it is assumed that EA will participate and/or present during a one-time in person meeting and one virtual meeting with the engineering and development community to present the integrated review process and documents developed under the previous phases.

Phase 4 Deliverables:

- EA will provide 1 in person meeting/training and 1 meeting/training via Microsoft Teams with the development community. It is assumed that each meeting is up to 2 hours.
- EA will prepare a Presentation to be utilized for the meetings with developers.

Phase 4 Assumptions:

- EA will provide paper copies of training materials for the Development Community In-Person Meeting.
- This Phase has budgeted up to 24 hours for follow up questions and/or virtual meetings following the Development Communities Training Sessions with the development community or County staff.

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- Based on the schedule provided in the RFP and the length of this phase, it is assumed that 1 virtual progress meeting is included under this phase.

Phase 5 – Feedback and Continuous Improvement:

Per the RFP, regular interaction with the PGM roundtable including the public and members of the Charles County Chapter of the Maryland Building Industry Association is expected. This Phase includes up to four, one-hour meetings with the PGM roundtable.

This phase includes up to 40 hours for feedback over the time period of 6 months to address feedback and/or any issues identified during the Full Implementation of the Integrated Review Process, which may require revisions to the Checklists or Process Mapping.

Phase 5 deliverables:

- Revised/Finalized checklists or permit guidance documents per feedback received or issues at the direction of the County.

Phase 5 Assumptions:

- EA has assumed up to 40 hours to make minor revisions to checklists or permit guidance documents per feedback received or issues at the direction of the County.
- EA has assumed 4, 1-hour meetings with PGM Roundtable.
- EA assumes up to 6 months for Feedback and Continuous Improvements.
- This phase includes 2, 1-hour virtual meetings with County Staff for Feedback and Continuous Improvements needed.
- This Phase will include 1, 1-hour progress meeting.

4 Schedule

EA's anticipated schedule was developed to align with tasks and schedule provided in the RFP provided by the County and is included below. EA is prepared to fully staff and begin working on this project immediately upon issuance of a Task Order.

Upon receipt of a Task Order, EA will prepare a detailed schedule for the kickoff meeting and provide a schedule update during each routine progress meeting for the project. EA understands the project schedule is as follows over an approximate 8 Month schedule:

1. **Phase 1: Process Mapping – 2 Months**
2. **Phase 2: System Development – 3 Months**
3. **Phase 3: Training and Pilot Implementation – Minimum 2 Months**
4. **Phase 4: Full Implementation – 1 Month**
5. **Phase 5: Feedback and Continuous Improvement – Ongoing (6 Months)**

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5 Price

EA proposes to perform the Services as a lump sum price of $164,500 as shown in Table 1 below and will be invoiced monthly as percent complete as tasks are performed. As referenced in the RFP, EA can provide additional support services under a separate scope of work, as requested.

TABLE 1 - TOTAL PROJECT COST SUMMARY BY TASK

BASE ITEMS			
A-1	IM and Planning Review Process Integration	Lump Sum	$164,500
Base Bid Subtotal (Item No. A-1)			$164,500

Use or disclosure of data on this page is subject to the restriction on the title page of this document.

EA Engineering, Science, and Technology, Inc., PBC

225 Schilling Circle, Suite 400
Hunt Valley, MD 21031
Telephone: 410-584-7000
Fax: 410-771-1625
www.eaest.com

April 17, 2025

Mr. Andrew Balchin
Charles County
Planning and Growth Management
200 Baltimore Street
La Plata, Maryland 20646

Subject: IM and Planning Review Process Integration;
EA Proposal No. 0791963

Dear Mr. Balchin:

EA Engineering, Science, and Technology, Inc., PBC (EA) is pleased to submit this letter proposal to the Charles County Planning and Growth Management (County) to provide professional services to support in developing an integrated review system that combines the Infrastructure Management (IM) review process with the Planning Division Review Process.

Scope of Work—EA will support the County in developing a more concurrent review process, where planning, zoning, and engineering reviews are conducted simultaneously with the goal of increasing communication and efficiency across all relevant discipline reviews. A more detailed scope of work for the review process integration is presented in the attached Scope of Work.

Fee—EA proposes to complete the work with the bid items as follows:

Site	Base Price (Lump Sum)
IM and Planning Review Process Integration	$164,500

The work described under this proposal will be performed as a Task Order under EA's current Stormwater Management Plan Review Services Contract #22-17 with Charles County dated January 28, 2022. Charles County can authorize EA by issuing a purchase order.

Schedule – EA is available to commence work on the project immediately upon receipt of the notice to proceed and anticipates the project would have a schedule in accordance with the RFP. EA can discuss with the County at the kickoff meeting.

We appreciate the opportunity to continue our history of working with Charles County on stormwater management support and professional services and intend to act as a valuable and reliable extension of your staff. Feel free to contact me at (410) 329-5131 with any questions.

Respectfully yours,

Lindsay Ondrako

Lindsay Ondrako
Project Manager

G/L ACCOUNT - MASTER INQUIRY

Org code: 07076500 Insp Infrastructure Management Type: E
Object code: 500100 Full-TimeStaffSalaries Status: A
Project code: Budgetary: Y

Fund	07	Inspections & Review
Function	11	Planning & Growth Management
Department	07	Planning & Growth Mgmt
Division	065	Infrastructure Management
Sub-Division	000	Undefined
Program	0000	Undefined
Funding Src	0000	Undefined
Locations	0000	Undefined

Full description: Full-TimeStaffSalaries Short desc: Full-Time
Reference Acct: Auto-encumber? (Y/N) N

CURRENT YEAR MONTHLY AMOUNTS

PER	ACTUAL	ENCUMBRANCE	BUD TRANSFER	BUDGET
00	.00	.00	.00	.00
01	15,224.62	.00	.00	516,800.00
02	26,846.11	.00	.00	.00
03	25,123.37	.00	.00	.00
04	25,168.67	.00	.00	.00
05	34,914.33	.00	.00	.00
06	26,324.27	.00	.00	.00
07	30,923.95	.00	.00	.00
08	29,510.65	.00	.00	.00
09	27,565.39	.00	.00	.00
10	27,444.69	.00	.00	.00
11	27,686.20	.00	.00	.00
12	.00	.00	.00	.00
13	.00	.00	.00	.00
Tot:	296,732.25	.00	.00	516,800.00

CURRENT YEAR TOTAL AMOUNTS

Actual (Memo)	296,732.25	Original Budget	516,800.00
Encumbrances	.00	Budget Tranfr In	.00
Requisitions	.00	Budget Tranfr Out	.00
Total	296,732.25	Carry Fwd Budget	.00
Available Budget	220,067.75	Carry Fwd Bud Tfr	.00
Percent Used	57.42	Revised Budget	516,800.00
Inceptn to SOY	.00	Inceptn Orig Bud	.00
		Inceptn Revsd Bud	.00
Encumb-Last Yr	.00		397,400.00
Actual-Last Yr	.00		397,400.00
Estim-Actual	516,800.00		396,800.00
	.00		396,800.00
			516,800.00

G/L ACCOUNT - MASTER INQUIRY

LAST YEAR MONTHLY AMOUNTS

PER	ACTUAL	ENCUMBRANCE	BUDGET
00	.00	.00	.00
01	13,287.01	.00	375,900.00
02	26,646.75	.00	.00
03	26,719.48	.00	.00
04	28,416.43	.00	.00
05	32,151.17	.00	.00
06	44,364.72	.00	.00
07	30,016.14	.00	.00
08	30,585.08	.00	.00
09	30,142.96	.00	.00
10	30,142.80	.00	.00
11	45,214.20	.00	.00
12	45,310.46	.00	.00
13	.00	.00	.00
Tot:	382,997.20	.00	375,900.00

PRIOR YEARS TOTAL AMOUNTS

2024 Actual	382,997.20	2024 Orig Budget			375,900.00
2024 Closed @ YE	382,997.20	2024 Bud Tfr In			.00
2024 Encumbrance	.00	2024 Bud Tfr Out			.00
2024 Memo Bal	382,997.20	2024 C Fwd Budget			.00
2023 Actual	.00	2024 Revsd Budget			375,900.00
2022 Actual	.00				
2021 Actual	.00	2023 Orig Budget			.00
2020 Actual	.00	2023 Revsd Budget			.00
2019 Actual	.00	2022 Orig Budget			.00
2018 Actual	.00	2022 Revsd Budget			.00
2017 Actual	.00				
2016 Actual	.00	2024	0.00		
2015 Actual	.00	2023	0.00		
		2022	0.00		

FUTURE YEAR AMOUNTS

PER	2026 BUDGET		BUDGET	
00	.00	2026	.00	.00
01	.00	2026	.00	.00
02	.00	2026	.00	.00
03	.00	2026	.00	.00
04	.00	2026	.00	.00
05	.00	2026 Revised	.00	
06	.00	2027 Estimate	.00	.00
07	.00	2028 Estimate	.00	.00
08	.00	2029 Estimate	.00	.00
09	.00	2030 Estimate	.00	.00
10	.00			
11	.00	2026 Memo Bal	.00	
12	.00	2026 Encumbrance	.00	
13	.00	2026 Requisition	.00	
Tot:	.00			

ACCOUNT NOTES

** END OF REPORT - Generated by Shelby Mckimmie **

G/L ACCOUNT - MASTER INQUIRY

```
Org code:     01076500  PGM Infrastructure Management        Type:     E
Object code:  530000    ContractServices                    Status:     A
Project code:                                               Budgetary:  Y

  Fund         01     General Fund
  Function     11        Planning & Growth Management
  Department   07        Planning & Growth Mgmt
  Division     065       Infrastructure Management
  Sub-Division 000       Undefined
  Program      0000      Undefined
  Funding Src  0000      Undefined
  Locations    0000      Undefined

Full description:  ContractServices                 Short desc: CntrctSrv
Reference Acct:                                   Auto-encumber? (Y/N)  N

              --------- CURRENT YEAR MONTHLY AMOUNTS ----------
PER             ACTUAL       ENCUMBRANCE      BUD TRANSFER            BUDGET
 00                .00               .00               .00               .00
 01                .00               .00               .00        200,000.00
 02                .00               .00               .00               .00
 03                .00               .00               .00               .00
 04                .00               .00               .00               .00
 05              88.00               .00               .00               .00
 06                .00               .00               .00               .00
 07                .00               .00               .00               .00
 08                .00               .00               .00               .00
 09                .00               .00               .00               .00
 10                .00               .00               .00               .00
 11                .00               .00               .00               .00
 12                .00               .00               .00               .00
 13                .00               .00               .00               .00
Tot:             88.00               .00               .00        200,000.00

              ---------- CURRENT YEAR TOTAL AMOUNTS -----------
Actual (Memo)                 88.00  Original Budget            200,000.00
Encumbrances                    .00  Budget Tranfr In                  .00
Requisitions                    .00  Budget Tranfr Out                 .00
  Total                       88.00  Carry Fwd Budget                  .00
Available Budget          199,912.00  Carry Fwd Bud Tfr                 .00
Percent Used                    .04  Revised Budget             200,000.00

Inceptn to SOY                  .00  Inceptn Orig Bud                  .00
                                     Inceptn Revsd Bud                 .00

Encumb-Last Yr                  .00                                    .00
Actual-Last Yr                  .00                                    .00
Estim-Actual              200,000.00                                   .00
                              .00                                      .00
                                                                 200,000.00
```

$99,912.00 will be used for the SWM Ordinance Update.
These funds are not available for the Review Integration Process.

G/L ACCOUNT - MASTER INQUIRY

LAST YEAR MONTHLY AMOUNTS

PER	ACTUAL	ENCUMBRANCE	BUDGET
00	.00	.00	.00
01	.00	.00	.00
02	.00	.00	.00
03	.00	.00	.00
04	.00	.00	.00
05	.00	.00	.00
06	.00	.00	.00
07	.00	.00	.00
08	.00	.00	.00
09	.00	.00	.00
10	.00	.00	.00
11	.00	.00	.00
12	.00	.00	.00
13	.00	.00	.00
Tot:	.00	.00	.00

PRIOR YEARS TOTAL AMOUNTS

2024 Actual	.00	2024 Orig Budget			.00
2024 Closed @ YE	.00	2024 Bud Tfr In			.00
2024 Encumbrance	.00	2024 Bud Tfr Out			.00
2024 Memo Bal	.00	2024 C Fwd Budget			.00
2023 Actual	.00	2024 Revsd Budget			.00
2022 Actual	.00				
2021 Actual	.00	2023 Orig Budget			.00
2020 Actual	.00	2023 Revsd Budget			.00
2019 Actual	.00	2022 Orig Budget			.00
2018 Actual	.00	2022 Revsd Budget			.00
2017 Actual	.00				
2016 Actual	.00	2024	0.00		
2015 Actual	.00	2023	0.00		
		2022	0.00		

FUTURE YEAR AMOUNTS

PER	2026 BUDGET		BUDGET	
00	.00	2026	.00	.00
01	.00	2026	.00	.00
02	.00	2026	.00	.00
03	.00	2026	.00	.00
04	.00	2026	.00	.00
05	.00	2026 Revised	.00	
06	.00	2027 Estimate	.00	.00
07	.00	2028 Estimate	.00	.00
08	.00	2029 Estimate	.00	.00
09	.00	2030 Estimate	.00	.00
10	.00			
11	.00	2026 Memo Bal	.00	
12	.00	2026 Encumbrance	.00	
13	.00	2026 Requisition	.00	
Tot:	.00			

ACCOUNT NOTES

** END OF REPORT - Generated by Shelby Mckimmie **

Shelby Mckimmie

From: Dylan Moyer
Sent: Wednesday, May 28, 2025 11:19 AM
To: Samantha Chiriaco
Cc: Marissa Russell
Subject: Re: Salary Savings?

Good Morning,

There's sufficient salary savings to fund the $64,500.

Thanks,
Dylan

From: Samantha Chiriaco <ChiriacoS@charlescountymd.gov>
Sent: Tuesday, May 27, 2025 12:33 PM
To: Dylan Moyer <MoyerD@charlescountymd.gov>
Cc: Marissa Russell <RussellM@charlescountymd.gov>
Subject: Salary Savings?

Hi Dylan,

Can you please let me know the projected salary savings for:

07076500	500100	Full-TimeStaffs	516,800	0

I will need this so that PGM can set up a BTR. Please let me know as soon as you have time.

Thank you,

Sam

Samantha Chiriaco
Chief of Budget
Department of Fiscal and Administrative Services
Charles County Government
200 Baltimore Street | La Plata, MD 20646
E: ChiriacoS@charlescountymd.gov
O: 240-776-6854 x2854

BTR IM Planning Review Integration

Final Audit Report 2025-05-28

Created:	2025-05-28 (Eastern Daylight Time)
By:	Shelby Mckimmie (MckimmiS@charlescountymd.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAA9VUG1vYb_4RbsjQ3di7Wqo_CdIhwoU1d

"BTR IM Planning Review Integration" History

Document created by Shelby Mckimmie (MckimmiS@charlescountymd.gov)
2025-05-28 - 12:39:03 PM EDT

Document emailed to balchina@charlescountymd.gov for signature
2025-05-28 - 12:39:33 PM EDT

Email viewed by balchina@charlescountymd.gov
2025-05-28 - 12:48:45 PM EDT

Signer balchina@charlescountymd.gov entered name at signing as Andy Balchin
2025-05-28 - 12:49:16 PM EDT

Document e-signed by Andy Balchin (balchina@charlescountymd.gov)
Signature Date: 2025-05-28 - 12:49:18 PM EDT - Time Source: server

Agreement completed.
2025-05-28 - 12:49:18 PM EDT

INSPECTION AND REVIEW ENTERPRISE FUND
APRIL 2025 BUDGET REPORT
Annual Operating Budget = $10,438,300

Prepared by: Department of Fiscal and Administrative Services, Budget Division, June 10, 2025

The Inspection and Review Enterprise Fund was established to account for all the building activity in Charles County. The fund operations are managed by Planning & Growth Management which includes their Codes, Permits, and Inspection Services Division, providing inspection services during various stages of construction, examination of plans to verify compliance with requirements of the various development regulations, and permitting services related to new building, remodeling, renovation, and repair. The fund also includes a technology component as it accounts for all technology fee revenues. These revenues support technology upgrades and maintenance for the department. Lastly, the fund accounts for administration costs to administer the program.

NET INCOME/(LOSS):

- The Inspection and Review Fund ended April with a net gain of $1,515,100.
- The fund is expected to finish this fiscal year with a net gain of $555,400.

REVENUES:

- Inspection and Review revenues through April equal $10 million which is 4% greater than FY2024 and is 96% of the FY2025 budget.
- Technology Fee revenues finished April at $887,700 which is 7% greater than this time FY2024 and 77% of the FY2025 budget.
- Overall, total revenues are projected to finish the year at $12.2 million.
  - Revenues include the use of fund balance to support current-year expenditures associated with fees collected in the prior fiscal year.
- The revenues will be redefined as the year progresses.

EXPENSES:

- Inspection and Review expenditures for April were $8.5 million which is 19% greater than FY2024 and is 82% of the FY2025 budget.
- Technology expenditures finished April at $1 million which is 38% greater than this time in FY2024 and 91% of the FY2025 budget.
- Overall, total expenditures are projected to end the fiscal year at $11.4 million.
- Expenditure estimates will be redefined as the year progresses.

OTHER:

- Fund balance is estimated to end the year at $8.3 million.
  - The Technology Fee Reserve is estimated to end the year at $140,300.
  - Net Cash is estimated to end the year at $8.1 million.

INSPECTION AND REVIEW FUND
SUMMARY AS OF APRIL 30, 2025

	FY25 AMENDED BUDGET	FY25 YR-END ESTIMATE	FY25 ACTUAL @ 04/30/2025	FY25 % OF BUDGET	PERCENT CHANGE	FY24 ACTUAL @04/30/2024	FY24 YR-END AUDITED
SUMMARY:							
TOTAL REVENUES	$10,438,300	$12,249,400	$10,034,346	96.1	4.4	$9,613,410	$12,178,654
TOTAL EXPENSES	10,438,300	11,444,010	8,519,277	81.6	19.2	7,144,908	9,496,970
Net Income/(Loss)	**$0**	**$805,400**	**$1,515,069**			**$2,468,502**	**$2,681,683**
Less: Use of Fund Balance		(250,000)	0			0	0
Adjusted Net Income/(Loss)		**$555,400**	**$1,515,069**			**$2,468,502**	**$2,681,683**

FUND EQUITY:	AUDITED 6/30/2024	ESTIMATE 6/30/2025
Fund Balance	$7,790,649	$8,331,262
Add: Long-Term Debt Liability	198,683	137,383
Adjusted Fund Balance	**$7,989,332**	**$8,468,644**
Net Fixed Assets	175,711	99,624
Health Ins. Rate Stabilization	25,173	25,173
Worker's Compensation	127,261	127,261
Technology Fee Reserve	424,041	140,331
Net Cash	7,237,146	8,076,256
Adjusted Fund Balance	**$7,989,332**	**$8,468,644**

Inspection and Review Programs

Operating Costs include: $930,000 for BTR #626 ($250,000 from Contingency + $680,000 Contract Services)

$64,500 Contract Services for BTR #821

Technology Upgrades

Operating Costs include: $216,000 Credit Card Processing for BTR #174

INSPECTION AND REVIEW PROGRAMS							
Revenues							
Building Inspection Fee	$5,400,000	$6,867,200	$5,722,677	106.0	1.5	$5,638,359	$7,020,676
County Staff Inspections	1,850,000	2,137,600	1,781,315	96.3	6.7	1,669,336	2,354,715
Development Serv Plan Review	950,000	1,093,100	910,955	95.9	10.5	824,567	1,004,539
Building Permit Plan Review	650,000	650,000	576,311	88.7	2.8	560,696	664,685
Permit Extension Fee	0	0	0	0.0	0.0	0	0
Building Code Inspections	15,000	1,300	1,260	8.4	-7.9	1,368	1,428
Planning Site Inspections	82,500	66,100	55,080	66.8	2.8	53,562	69,236
Antenna Review Fee	88,000	118,900	99,083	112.6	180.6	35,316	44,145
Other	0	0	0		0.0	0	0
Operating Revenues:	$9,035,500	$10,934,200	$9,146,680	101.2	4.1	$8,783,205	$11,159,424
Fund Balance Appropriation	250,000	250,000					
Total Adjusted Revenue:	$9,285,500	$11,184,200	$9,146,680			$8,783,205	$11,159,424
Expenses							
Personnel Services	$1,832,400	$1,697,300	$1,268,275	69.2	7.8	$1,175,998	$1,519,373
Fringe Benefits	559,000	509,200	451,254	80.7	19.6	377,430	462,698
Operating Costs	6,576,400	7,820,900	5,689,561	86.5	19.8	4,751,191	6,475,860
Debt Service	67,700	67,700	65,012	96.0	-20.0	81,303	81,937
Operating Contingency	250,000	0	0	0.0	0.0	0	
Total Expenses:	$9,285,500	$10,095,100	$7,474,102	80.5	17.0	$6,385,923	$8,539,869
Net Income/(Loss)	**$0**	**$1,089,100**	**$1,672,578**			**$2,397,282**	**$2,619,556**
TECHNOLOGY UPGRADES							
Revenues							
Technology Fee	$1,152,800	$1,065,200	$887,666	77.0	6.9	$830,206	$1,019,229
Total Revenues:	$1,152,800	$1,065,200	$887,666			$830,206	$1,019,229
Expenses							
Personnel Services	$371,300	$351,400	$284,068	76.5	9.2	$260,144	$337,250
Fringe Benefits	34,700	34,710	26,419	76.1	28.0	20,641	25,922
Operating Costs	746,800	962,800	734,688	98.4	53.6	478,200	593,930
Operating Contingency	0	0	0		0.0	0	0
Total Expenses:	$1,152,800	$1,348,910	$1,045,175	90.7	37.7	$758,985	$957,102
Net Income/(Loss)	**$0**	**($283,710)**	**($157,509)**			**$71,221**	**$62,128**

Charles County County Commissioners

YEAR-TO-DATE BUDGET REPORT

FOR 2025 13

		ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
01076500 PGM Infrastructure Management								
01076500 500100	Full-Time	137,700	0	137,700	107,075.33	.00	30,624.67	77.8%
01076500 501000	P-TI	6,800	0	6,800	6,833.98	.00	-33.98	100.5%*
01076500 502000	OvertimeS	0	0	0	.00	.00	.00	.0%
01076500 504000	SalaryAdj	0	0	0	.00	.00	.00	.0%
01076500 504900	Turnover	-3,000	0	-3,000	.00	.00	-3,000.00	.0%*
01076500 505999	New Pos	0	0	0	.00	.00	.00	.0%
01076500 510000	Pension	10,400	0	10,400	8,371.22	.00	2,028.78	80.5%
01076500 511000	FICA	8,500	0	8,500	7,066.62	.00	1,433.38	83.1%
01076500 511200	FICA-Med	2,000	0	2,000	1,652.69	.00	347.31	82.6%
01076500 512000	Health&D	14,200	0	14,200	11,449.11	.00	2,750.89	80.6%
01076500 513000	PEHP	1,800	0	1,800	1,343.21	.00	456.79	74.6%
01076500 514000	LifeInsur	200	0	200	198.58	.00	1.42	99.3%
01076500 515000	WorkersCo	700	0	700	472.54	.00	227.46	67.5%
01076500 516000	LongTerm	500	0	500	257.09	.00	242.91	51.4%
01076500 520000	OfficeSup	2,600	-500	2,100	1,090.52	.00	1,009.48	51.9%
01076500 524000	Printing	1,200	0	1,200	459.00	.00	741.00	38.3%
01076500 524100	Photocopy	700	0	700	.00	.00	700.00	.0%
01076500 530000	CntrctSrv	200,000	0	200,000	88.00	.00	199,912.00	.0%
01076500 530050	Dues&Sub	400	0	400	236.88	.00	163.12	59.2%
01076500 532100	EmployEd	5,700	0	5,700	2,135.57	.00	3,564.43	37.5%
01076500 539100	Recruiting	0	500	500	.00	.00	500.00	.0%
01076500 539999	New Oper	0	0	0	.00	.00	.00	.0%
07076500 Insp Infrastructure Management								
07076500 464001	DevServ	-950,000	0	-950,000	-1,071,640.16	.00	121,640.16	112.8%
07076500 464085	TrafSign	0	0	0	.00	.00	.00	.0%
07076500 500100	Full-Time	516,800	0	516,800	310,514.96	.00	206,285.04	60.1%
07076500 502000	OvertimeS	0	0	0	.00	.00	.00	.0%
07076500 504000	SalaryAdj	0	0	0	.00	.00	.00	.0%
07076500 504900	Turnover	0	0	0	.00	.00	.00	.0%
07076500 505999	New Pos	0	0	0	.00	.00	.00	.0%
07076500 510000	Pension	37,400	0	37,400	23,474.33	.00	13,925.67	62.8%
07076500 511000	FICA	29,500	0	29,500	19,057.70	.00	10,442.30	64.6%
07076500 511200	FICA-Med	7,000	0	7,000	4,456.96	.00	2,543.04	63.7%
07076500 512000	Health&D	53,600	0	53,600	29,214.27	.00	24,385.73	54.5%
07076500 513000	PEHP	9,400	0	9,400	4,157.90	.00	5,242.10	44.2%
07076500 514000	LifeInsur	800	0	800	557.66	.00	242.34	69.7%
07076500 515000	WorkersCo	3,600	0	3,600	1,911.29	.00	1,688.71	53.1%

YEAR-TO-DATE BUDGET REPORT

FOR 2025 13

07076500 Insp Infrastructure Management		ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	PCT USE/COL
07076500 516000	LongTerm	1,700	0	1,700	821.46	.00	878.54	48.3%
07076500 520000	OfficeSup	300	0	300	150.00	.00	150.00	50.0%
07076500 529000	Equipment	4,400	0	4,400	.00	.00	4,400.00	.0%
07076500 529500	Comp-Alloc	9,000	0	9,000	.00	.00	9,000.00	.0%
07076500 530000	CntrctSrv	0	0	0	.00	.00	.00	.0%
07076500 530005	Consultant	0	0	0	.00	.00	.00	.0%
07076500 530050	Dues&Sub	1,700	0	1,700	.00	.00	1,700.00	.0%
07076500 530060	DSPlanRev	400,000	0	400,000	294,383.06	.00	105,616.94	73.6%
07076500 530065	SWMPlanRev	0	0	0	.00	.00	.00	.0%
07076500 530440	TfcSignal	25,000	0	25,000	.00	.00	25,000.00	.0%
07076500 532100	EmployEd	8,800	0	8,800	6,291.63	.00	2,508.37	71.5%
07076500 539900	IndCost	6,900	0	6,900	.00	.00	6,900.00	.0%
07076500 539999	New Oper	0	0	0	.00	.00	.00	.0%
07076500 560000	ReserveFo	0	0	0	.00	.00	.00	.0%
	GRAND TOTAL	556,300	0	556,300	-227,918.60	.00	784,218.60	-41.0%

** END OF REPORT - Generated by Marissa Russell **

YEAR END FULL TIME SALARY PROJECTIONS

INTERNAL DOCUMENT - CONFIDENTIAL

	Expended 04/30/2025	Estimated Year End Expense	Amended Budget	Estimated Savings/ (Shortage)	Est. Percent of Budget 04/30/2025	NOTES:
ENTERPRISE FUNDS						
FUND 7 - INSPECTION AND REVIEW						
Administration	52,759	72,800	85,700	12,900	84.95%	0.15 FTE VACANT
Technology	115,318	150,800	146,300	(4,500)	103.08%	0.0 FTE VACANT
Building Inspections	353,254	472,200	455,900	(16,300)	103.58%	0.9 FTE VACANT
Inspections	582,523	766,900	760,800	(6,100)	100.80%	0.0 FTE VACANT
Infrastructure	269,046	373,400	516,800	143,400	72.25%	1.8 FTE VACANT
TOTAL:	**$1,372,900**	**$1,836,100**	**$1,965,500**	**$129,400**	**93.42%**	

Marissa Russell

From: Samantha Chiriaco
Sent: Wednesday, May 28, 2025 12:43 PM
To: Shelby Mckimmie; Andy Balchin
Cc: Marissa Russell
Subject: RE: BTR Discussed

No problem at all. Thank you!

From: Shelby Mckimmie <MckimmiS@charlescountymd.gov>
Sent: Wednesday, May 28, 2025 11:49 AM
To: Samantha Chiriaco <ChiriacoS@charlescountymd.gov>; Andy Balchin <BalchinA@charlescountymd.gov>
Cc: Marissa Russell <RussellM@charlescountymd.gov>
Subject: RE: BTR Discussed

Thanks Samantha! We truly appreciate your help with this. I will work on getting everything gathered and submitted into Munis.

Thanks,

Shelby McKimmie
Assistant to the Chief

Charles County Government
Planning and Growth Management
240-776-6680
mckimmis@charlescountymd.gov
Request an Appointment
Citizen Self Service Portal (CSS)

From: Samantha Chiriaco <ChiriacoS@charlescountymd.gov>
Sent: Wednesday, May 28, 2025 11:22 AM
To: Andy Balchin <BalchinA@charlescountymd.gov>; Shelby Mckimmie <MckimmiS@charlescountymd.gov>
Cc: Marissa Russell <RussellM@charlescountymd.gov>
Subject: RE: BTR Discussed

Hi Andy and Shelby,

Please see the attached email. There are sufficient savings in 07076500.500100 to cover the additional $64,500 needed. Please attach this to the BTR.

Thank you,

Sam

From: Samantha Chiriaco
Sent: Tuesday, May 27, 2025 10:59 AM
To: Andy Balchin <BalchinA@charlescountymd.gov>; Shelby Mckimmie <MckimmiS@charlescountymd.gov>
Cc: Marissa Russell <RussellM@charlescountymd.gov>
Subject: BTR Discussed

Hi Andy and Shelby!

I talked with Jake and he says we need to do the following:

1. The contract will need to be split between the general fund and the inspection & review fund ($100,000 charged to 01076500.530000 and $64,500 charged to 07076500.530000).
2. A BTR will need to be completed to move the funding into 07076500.530000. There is currently not any budget in the line item. Please move from another expense account to this line item.
3. This will still need to go to the BOCC.
4. Please attach the BTR form, the April 2025 inspection & review fund report, the proposal (to show the amount needed), a YTD budget report showing the $100,000 in 01076500.530000 (please note that the $99,912 is for another cost), and a YTD budget report of the account you are moving monies from.

I am copying @Marissa Russell so that she can get you a copy of the April 2025 report.

Please let me know if you have any questions or if there is anything else you may need.

Thank you!

Sam

Samantha Chiriaco
Chief of Budget
Department of Fiscal and Administrative Services
Charles County Government
200 Baltimore Street | La Plata, MD 20646
E: ChiriacoS@charlescountymd.gov
O: 240-776-6854 x2854

Infrastructure Management and Planning Review Process Integration

Presenters:

- **Andy Balchin, P.E.; Chief of Infrastructure Management**

June 10, 2025

Background

- The Infrastructure Management Division of PGM was approved for $100,000 in the FY25 budget to hire a consultant to combine the Infrastructure Management and Planning Divisions' plan review process.

Goals of the Project:



Concurrent Review Process

Improved Communication

Unified Review Documentation

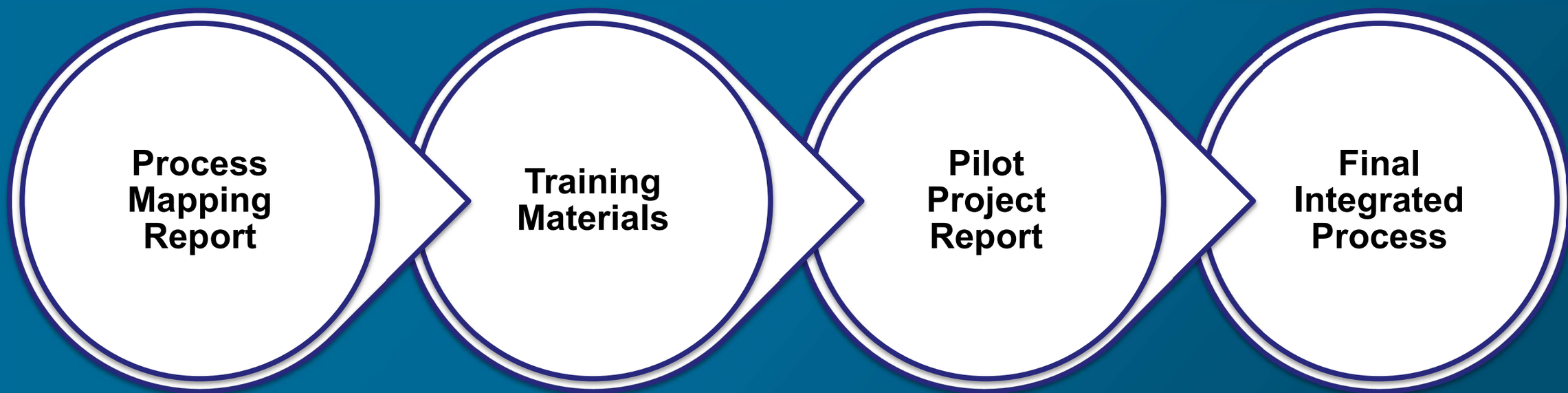
Enhanced Compliance

Scope of Work

- **Review and Evaluation**
  - Stormwater management requirements
  - Ordinance requirements for grading, water, sewer, storm drainage, and erosion and sediment control
  - Preliminary planning, site development plan, and final site plan approval requirements
  - Plan preparation package and county ordinances
  - Review timelines
  - Checklists

- **Additional Plan Review Considerations**
  - Submission of bonding
  - On-site and offsite easements and dedication documents

Deliverables



Current Project Status

RFP 25-015 was posted on October 30, 2024

No bids were received

EA Engineering was asked to submit a sole source bid

EA Engineering’s bid - $164,500

Request for Approval

- The Infrastructure Management Division requests that the Board of County Commissioners approve the transfer of $64,500 to award the contract to the selected consultant.

Presented By:

Charles County Government

Department of Planning and Growth Management

200 Baltimore Street, La Plata, Maryland 20646

301-645-0692

MD Relay Service: 7-1-1

Equal Opportunity Employer

It is the policy of Charles County to provide equal employment opportunity to all persons regardless of race, color, sex, age, national origin, religious or political affiliation or opinion, disability, marital status, sexual orientation, genetic information, gender identity or expression, or any other status protected by law.

www.CharlesCountyMD.gov/PGM

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto, Department of Public Works

ITEM TYPE: Change Order(s)

AGENDA SECTION: Approval Items

SUBJECT:

- **Change Order #35 Mattawoman Flow Equalization Basin ITB 20-35**
  (Mr. Olin Straus, Senior Project Manager-Utilities, Mr. James Sizemore, Acting Deputy Director-Utilities, and Mr. Martin Harris, Director, Department of Public Works)

SUGGESTED ACTION:

ATTACHMENTS:
ITB 20-35 Change Order 35 Approval Request (004)_encrypted_.pdf
FY2025 Budget Amendment Increase #915 MWWTP Flow Equalization (Munis #7409000000)c.pdf

CHARLES COUNTY GOVERNMENT

INTEROFFICE MEMORANDUM

Equal Opportunity Employer

TO:	Board of County Commissioners *County Administration*
THRU:	Carol DeSoto, Clerk to the Commissioners *County Administration*
THRU:	Deborah Hall, Acting County Administrator *County Administration*
THRU:	Wes Adams, County Attorney *County's Attorney's Office*
THRU:	Jacob Dyer, Director *Fiscal and Administrative Services*
THRU:	Martin L. Harris, Director *Department of Public Works*
THRU:	James Sizemore, Acting Deputy Director *Department of Public Works, Utilities Division*
FROM:	Olin Straus, Senior Project Manager *Department of Public Works, Utilities Division*
SUBJECT:	Mattawoman WWTP Flow Equalization Basin, ITB 20-35 Change Order No. 35 Approval Request
DATE:	May 30, 2025

The Department of Public Works, Utilities Division presents Change Order No. 35 to the Mattawoman WWTP Flow Equalization Basin (MFEQ) Construction Contract, ITB 20-35 in the amount of $175,000. This Change Order executes Proposed Change Order No. 96, EQ Basin Wall Retrofit - Crack Injection T&M Phase 2. This project is included in the Corrective Action Plan submitted to MDE as part of the Consent Order for the Mattawoman Wastewater Treatment Plant. Approval of this Change Order will allow for timely completion of this project.

Both the Department of Public Works, Utilities Division, and our consultant, GHD Inc. have reviewed this Change Order and recommend approval by the County with the following justification:

- This Change Order will not be any additional cost to the County. The County will receive payment from the design engineer for 100% of this cost.
- **PCO-96, EQ Basin Wall Retrofit – Crack Injection T&M Phase 2**
    - This PCO is for labor and materials to perform concrete crack injections on basin no. 1 of the new MFEQ Basin.

The current contract amount for this project is $41,501,719.66. After approval of Change Order No. 35, the revised contract amount will be $41,676,719.66, which is an increase of 0.4%. The total of all Change Orders to date will be $16,078,719.66, which is a total increase of 61.3%.

Funding for this Change Order will be available in the Flow Equalization Basin Project, Fiscal Code No. 7409000000.50450, with concurrent approval of Budget Amendment No. 915.

In accordance with the Budget Policies and Delegated Authorities (March 11, 2014), the Board of County Commissioners has change order approval authority for construction change orders over $150,000.
If you have any questions or require additional information, please contact Olin Straus, Senior Project Manager, via email at strauso@charlescountymd.gov or by telephone 301-520-5552.

Attachments:

1. Change Order No. 35 (15 Pages)
    a. Change Order No. 35 (Page 3)
    b. Design Engineer letter of recommendation (Page 4)
    c. PCO-96, Crack Injection T&M Phase 2 (Pages 5-15)

CC: Erica Rizor, Program Support Specialist
Shanna Reese, Chief of Purchasing
Jesse Bungcayao, Executive Assistant
Project File

American Contracting & Environmental Services, Inc.
10330 Old Columbia Road, Suite 102
Columbia, MD 21046
(301) 490-9100
ATTN: Wendy Barry

CHANGE ORDER NO. 35

PW UTILITIES PROJECT NO.: **UN-1210**

DATE 5/29/2025

NAME OF PROJECT:
ITB 20-35 MWWTP Flow Equalization Basin

CONTRACTOR:
American Contracting and Environmental Services

THE FOLLOWING CHANGE(S) ARE HEREBY MADE TO THE CONTRACT:

Execution of the following proposed change orders (PCO's):

PCO 96 - EQ Basin T&M Crack Injections Phase 2, $175,000

THIS CHANGE ORDER:	$175,000.00
Approved CHANGE ORDERS:	
Change Order Nos. 1-20	$2,539,957.73
Change Order No. 21 - PCO 62	$1,779,502.18
Change Order No. 22 - PCO 50, 52, 59	$61,651.07
Change Order No. 23 - PCO 60	$163,119.68
Change Order No. 24 - PCO 46,48,74	$47,883.83
Change Order No. 25 - PCO 75	$1,987,976.90
Change Order No. 26 - PCO 27, 41, 54, 76, 77	$48,243.67
Change Order No. 27 - 49,79,80,81,84	$48,269.91
Change Order No 28 - Time Extension	$0.00
Change Order No. 29 - TIA1, PCO 44,51,53,57,63,65,67,73,85	$1,215,889.95
Change Order No. 30 - TIA-2	$7,432,520.92
Change Order No. 31 - PCO 86	$172,245.21
Change Order No. 32 - PCO 91	$175,000.00
Change Order No. 33 - PCO 64, 68, 71, 83	$185,000.00
Change Order No. 34 - PCO 45, 87, 89, 90, 92, 94, 95	$46,458.61
ORIGINAL CONTRACT:	$25,598,000.00
REVISED CONTRACT AMOUNT:	$41,676,719.66

CONTRACT START DATE:	2/25/2021
ORIGINAL COMPLETION DATE:	2/25/2023
ADDED TIME DUE TO PREVIOUS CHANGE ORDERS:	986 days
ADDED TIME DUE TO THIS CHANGE ORDER:	0 days
NEW COMPLETION DATE:	11/6/2025

EXECUTION OF THIS CHANGE ORDER SIGNIFIES FULL ACCEPTANCE AND SATISFACTION FOR ALL DIRECT COST ONLY. CONTRACTOR'S RIGHTS TO CLAIM FOR DELAY/IMPACT COSTS ASSOCIATED WITH THE WORK PERFORMED UNDER THIS MODIFICATION ARE EXPRESSLY RESERVED.

ACCEPTED BY:

ACE, Inc.

CONTRACTOR

Vice President

TITLE

5/29/25

DATE

APPROVED BY:

CHARLES COUNTY GOVERNMENT

SIGNATURE

Commissioner President

TITLE

DATE

Attachment 1.b

PROPOSED CHANGE ORDER REVIEW COMMENTS

Project Title	Mattawoman WWTP Flow Equalization Basin		
Owner	Charles County, MD		
Contract No.	ITB 20-35; RFP 19-09	**GHD Project No.**	11188086
PCO No.	096	**PCO Issue Date**	4/24/2025
PCO Subject	EQ Basin Wall Retrofit – Crack Injection T&M Phase 2		
Reference Doc.	Mattawoman WWTP Flow Equalization Basin ITB Number 20-35		
Issued By	T. Biagioli	**Issue Date**	4/29/2025
PCO Status:	☒ Recommended to Owner	☐ Revisions required	

Comments:

1. This work shall be undertaken in accordance with Section 1.4 of the General Provisions (Change Orders).
2. This work shall be undertaken on a time and materials basis to a not-to-exceed amount.
3. This will require weekly updates on the consumption of the not-to-exceed amount, indicating the total amount consumed to date. Notification shall be provided to the Owner / Owner's Representative when the consumption reaches 25%, 50%, and 75% of the not-to-exceed amount.
4. Subject to the not-to-exceed amount, the budgetary pricing provided by the Contractor for the change order is understood to be for informational purposes only and not binding. It is intended to serve as a basis for authorizing a budget amount. The budgetary pricing should not be construed as a final or fixed cost for the change order. Actual costs may vary based on project requirements and/ or unforeseen circumstances. The final cost of the change order will be determined through documentation as tracked with the Owner's Representative and the Contractor. Therefore, subject to the not-to-exceed amount, it is acknowledged that the budgetary pricing provided by the contractor does not constitute a binding commitment or obligation to perform the change order at a specified price.
5. Contractor is required to maintain clear and detailed documentation, including receipts and records of expenses, which must be made available to the Owner upon request. Time and material sheets as provided by the Contractor are required to be signed by Owner / Owner's Representative to be considered valid. This documentation shall be signed by all parties no later than 10am the following business day for the work that was performed. Invoicing should be detailed, indicating the hours worked, materials used and rates applied.

GHD Inc. 16701 Melford Boulevard Suite 330 Bowie Maryland 20715 USA
T 1 240 206 6810 **F** 1 240 206 6811 **E** BowMail@ghd.com **W** www.ghd.com

Building to Last | AMERICAN CONTRACTING & ENVIRONMENTAL SERVICES, INC.

Attachment 1.c

April 24, 2025

Olin Straus
Charles County Government
Department of Public Works
5310 Hawthorne Rd.
La Plata, MD 20646

Ref: Mattawoman WWTP Flow Equalization Basin
Subject: PCO-096 – FEQ Basin Wall Retrofit – Crack Injection T&M Phase 2

Dear Olin:

Please find enclosed the subcontractor proposals for the costs associated with PCO-096 to provide labor, material and equipment on a T&M basis to facilitate the crack injection of the EQ Basin per Field Order 11. This pricing is provided for budgetary purposes with the following clarifications and the actual cost will be as per the T&M tickets and provided invoices-

1- Fuel prices are subject to change. Documentation of fuel costs will be provided at time of billing.
2- All work will be tracked via T&M tickets, signed by the County RPR. Billing shall be detailed and include necessary back up.
3- The time associated with this work will be submitted under separate cover, provided this work impacts the critical path of the project.
4- This budgetary pricing shall not be construed as a fixed or final cost for this work. Actual costs may vary based on project requirements or unforeseen circumstances.

The estimated cost for this work is $175,000.00. Please issue a contract modification at your earliest convenience.

Please feel free to contact me if there are any questions.

Sincerely,

Wendy Barry
Senior Project Manager
American Contracting & Environmental Services, Inc.

5810 47th Ave. Riverdale, MD 20737
Phone: 301-322-7878 | Fax: 301-779-7110
www.sgs-pro.com

PROPOSAL NO. J18107-24-R2

December 6, 2024

Ace Services
11075 Stratfield Court
Marriottsville, MD 21104

Re: Mattawoman WWTP

Mr. Thames,

SGS, LLC proposes to furnish labor, material and equipment to perform the following items of work:

SCOPE OF WORK:

- Provide grout injection crews on a T&M basis to perform either Urethane grouting or Epoxy grouting to various cracks at areas identified and directed by client.

WORK TO BE PERFORMED BY OTHERS:
The following work is to be performed by contractors other than SGS and the cost of such work is not included in this proposal:

- Mark out leak areas for Urethane injections
- Mark out cracks for Epoxy injections

SCHEDULE:
Work will commence a minimum of seven (7) business days after written receipt of notice to proceed unless otherwise agreed to by both parties.

Services: *Concrete Restoration, FRP, Waterproofing, Grouting Structures (Urethane/Epoxy Injection), Grouting Soils (Void Filling/Slab Jacking), Control/Expansion Joint Systems (Caulking/Sealants), Exploratory Services/Demolition, GPR, Core Drilling, New Concrete (cast-in-place), Masonry*

WORKING CONDITIONS:
All work including portal to site is to be performed between the hours of 6:30 am and 3:00 pm, Monday through Friday.

SUPPORT BY OTHERS:
Customer shall provide SGS with the following facilities and services at no cost to SGS:

- 110-volt electric power.
- Toilet facilities
- Potable water source
- Access to work area
- Parking for SGS vehicles and equipment
- Permits, bonds or special insurance if required.

PRICE:
Current T&M Rates for Urethane and epoxy Injections

The following is our current labor prices and various equipment and material rates. Additional equipment and materials may be provided depending on specific repair needs.

Basic Labor Rates:

* Straight Time	$106.00/per man hour
* Off hours or Weekends	$159.00/per man hour

Equipment Rates: (If Applicable)

* Service Truck	$100.00/per shift
* Generator	$ 40.00/per shift
* Small Gas Air Compressor	$ 40.00/per shift
* Chemical Grout Pump	$ 40.00/per shift
* Power Washer	$ 40.00/per shift
* Confine Space Equipment	$500.00/per shift
* 19'x 30" wide scissor lift-	$940.00/day, $1,212.00/week, $1,897.00/month
* Road Plates-	$86.00/day, $233.00/week, $672.00/month
* 40' JLG Lift-	$1,878.00/day, $2,957.00/week, $5,973.00/month

Material Rates:

* Urethane grout	$220.00/per gallon-
* Pump flush-	$ 90.00/per gallon

Services: *Concrete Restoration, FRP, Waterproofing, Grouting Structures (Urethane/Epoxy Injection), Grouting Soils (Void Filling/Slab Jacking), Control/Expansion Joint Systems (Caulking/Sealants), Exploratory Services/Demolition, GPR, Core Drilling, New Concrete (cast-in-place), Masonry*

* Urethane Ports	$ 2.60/each
* Open cell backer rod	$ 2.00/per foot
* Hydraulic cement	$ 85.00/per 50 lb pail
* Non-shrink cement grout	$ 17.50/per bag
* 31 Epoxy gel Adhesive	$190.00/per gallon
* 35 Epoxy injection resin	$230.00/per gallon
* 52 Epoxy injection resin	$210.00/per gallon
* 55 SLV Epoxy Resin	$310.00/per gallon
* Epoxy ports	$ .50/each
* Solvent	$ 35.00/per gallon

Note: Client shall be billed a minimum of an 8 hour shift per man regardless of the length of time our employees are on site performing the repairs.

- During any mobilization if anyone other than SGS causes removal of our equipment prior to the start or completion of work for any period, the customer shall be charged $1,780.00 for the mobilization.
- Stand by time due to a temporary shutdown of the working operation not directly caused by SGS shall be billed out at $106.00 per man hour.
- This proposal does not include any provision for prevailing wage rates.
- This proposal does not include any costs associated for contractor/owners-controlled insurance program.

WARRANTY:
Due to unforeseen conditions, there is no written or implied warranty that this repair proposal will resolve all the waterproofing needs. If leaks are still evident after the above stated work is completed SGS will re-investigate for other leak source and supply client with an additional proposal.

PAYMENT TERMS:
SGS will submit and invoice upon completion of the work, which is due within thirty (30) days from the date on the invoice. If payment is late, you will be charged 1½% of the balance per month plus any court/collection costs, including reasonable attorneys' fees until the invoice is paid in full. No retainer shall be withheld from any payments.

- There will be an additional 3.5% charge for all credit card payments.
- Monthly billing will be incurred for completed work on larger projects.

Services: *Concrete Restoration, FRP, Waterproofing, Grouting Structures (Urethane/Epoxy Injection), Grouting Soils (Void Filling/Slab Jacking), Control/Expansion Joint Systems (Caulking/Sealants), Exploratory Services/Demolition, GPR, Core Drilling, New Concrete (cast-in-place), Masonry*

EXPIRATION:
This proposal may be withdrawn if not accepted in writing within fifteen (15) days from proposal date, and work commenced within 30 days from proposal date. If this proposal is not accepted within the period mentioned above, SGS has the right to review and adjust pricing.

Sincerely,

John Cook

Director of Operations
SGS, LLC.

ACCEPTANCE OF PROPOSAL:

All conditions of Attachment A, "General Conditions" apply. By signing this proposal, Customer acknowledges receipt of the General Conditions and agrees to the terms therein. SGS is authorized to proceed to do this work and payment will be as stated above.

ACCEPTED BY:

_____

Authorized Signature Printed Name

_____

Title Date

****Please provide your accounts payable phone number and e-mail address here:**

GENERAL CONDITIONS

Attachment A

The following General Conditions are included in and made a part of the accompanying Proposal submitted to Customer.

1. SGS, LLC will take reasonable precautions to minimize damage that might result from work done under this Proposal. Due to the nature of this work and the conditions under which it is performed, it is expressly understood that SGS shall not be liable for claims resulting from damage to subsurface structures, conduits, electric conduits, pipes, utility lines, drainage systems, ducts, or the structure and its contents.
2. Acceptance of this Proposal shall be acceptance of all terms and conditions recited herein or incorporated by reference.
3. Payment for work performed on a time and materials basis or unit price shall be made for work actually performed and materials actually used at the prices stated in the Proposal, regardless of any budget or estimate.
4. Minor repairs and adjustments of equipment operated on the project are considered normal and a part of the work under the Proposal. The cost of such minor delays, incident to such repairs or adjustments are chargeable under time and material contracts.
5. No back charges or other deductions shall be deemed accepted except by a written agreement signed on behalf of an authorized officer of SGS.
6. If payment is not made to SGS as herein provided, then SGS may stop work without prejudice to any other remedy it may have.
7. After acceptance of this proposal, and unless otherwise stated, SGS shall be given a reasonable time in which to make delivery of materials or labor to commence and complete its performance. SGS shall not be responsible for delays or defaults of any kind, including, but not limited to: delays caused by the customer, owner, general contractor, other contractors or subcontractors, architects, engineers, armed conflict or economic dislocation resulting therefrom; embargos, shortages of labor, raw materials, production facilities, or transportation; labor difficulties, civil disorders of any kind; action of civil or military authorities; vendor priorities and allocation, fires, floods, accidents, and acts of God.
8. The terms of SGS' warranty shall be stated solely in the Proposal, the terms, and conditions of which are herein incorporated by reference. THIS WARRANTY IS IN LIEU OF ALL OTHER WARRANTIES EXPRESSED OR IMPLIED INCLUDING ANY WARRANTIES OF MERCHANTABILITY OR FITNESS

FOR A PARTICULAR PURPOSE. SGS guarantees its work will be performed in a workmanlike manner and in conformation with the contract documents. Customer's exclusive remedy for defects under this warranty shall be limited to the remedying of defects in workmanship.

9. If a contract/subcontract is to be used, then such form shall be the current AIA standard form Contract Document A101 or Subcontract Document A401.
10. Notwithstanding any contract provision elsewhere contained, SGS shall have the right to file and enforce a mechanic's lien as permitted by the law of the jurisdiction where the work of SGS is to be performed.
11. Payment by Customer for SGS' performance is not, under any circumstances, subject to any contingencies or conditions precedent or subsequent other than SGS' performance of work described in this proposal.
12. This Proposal and any previous or subsequent agreement between SGS and Customer is not intended to inure to the benefit of any party other than the Customer; provided, however, that the obligations imposed upon Customer shall bind to its successors, assigns, sureties, insurers, officers, principals, and heirs.
13. The work to be performed involves specialty technical services and is to be performed by representatives of SGS. Pricing does not include personnel or wages which may be imposed by local trade agreements, standby time, nor government-imposed wages.
14. SGS agrees to accept responsibility, in accordance with generally accepted principles, for correction of defects in workmanship and direct damages to property (excluding damage caused by unforeseen or unknown conditions) as a result of SGS's failure to perform in accordance with the provisions of its Proposal. SGS's obligations and liabilities under its Proposal for alleged failures shall not extend to indirect, punitive, special, or consequential damages, or losses the client might suffer in connection therewith such as, but not limited to, loss of revenue or profits, damage or loss of Customer's ability to operate, shut down of plants or operations, loss of use of facilities or inability to fulfill contracts with third parties.
15. SGS hereby agrees to name Customer, and such other entities designated by Customer as having an ownership interest in the subject project, as an additional insured on its Commercial General Liability insurance policy so long as this Proposal remains in effect, but only with respect to liability for "bodily injury," "property damage," or "personal and advertising injury" as defined in that policy, caused in whole or in part by our acts or omissions:
    a. in the performance of our ongoing operations; or
    b. in connection with "our work" and included within the "products-completed operations hazard."

16. SGS and Customer expressly agree that SGS disclaims any obligation to indemnify Customer or any other person or entity in connection with the work performed pursuant to its Proposal.
17. SGS's Proposal shall be governed by the laws of the State of Maryland. Customer irrevocably consents to the exclusive jurisdiction of the Circuit and/or District Courts of Prince George's County, Maryland. Customer agrees that any suit, action, or proceeding arising under and/or relating to its Proposal, with the exception of filing an enforcement of a mechanic's lien, shall only be filed in the Circuit or District Courts in Prince George's County, Maryland. Customer irrevocably waives any right to trial by jury.

December 2, 2024

PROPOSAL 20240574

CRACK REPAIR
12,000,000-GALLON EQUALIZATION BASIN
LA PLATA, MARYLAND

CROM Coatings and Restorations (“CCR”), a Division of CROM, LLC, proposes to provide labor and material for the repair of the concrete structure in accordance with applicable portions of the plans dated 08/2020 and specifications dated 04/2020, for **Charles County at 5310 Hawthorne Rd, La Plata, MD 20646** ("Client"). The work will be completed in accordance with applicable codes and standards including OSHA, AWWA, AMPP, ICRI, ACI and standard prestressed concrete tank design. Any work not specifically detailed in Section 1 of this proposal shall be provided by others.

1. SERVICES TO BE FURNISHED BY CCR

CCR proposes to furnish supervision, labor, material, and equipment required to complete the work, except as noted in Section 2. The services to be furnished by CCR are specifically:

This scope of work is to be performed on the readily accessible portions of the following structure unless specified differently below:

- Mattawoman Wastewater Treatment Plant Flow Equalization Basin
  Interior and Exterior Walls of the FEQ Basin
  309’-0” L x 171’-8” W x 32’-0” H

2. MATERIALS AND SERVICES FURNISHED BY CLIENT OR OTHERS

It is understood that the following services shall be provided by others without expense to CCR:

a. Client will grant or obtain free and uninterrupted access to the structures for all equipment and personnel necessary for CCR to perform the work set forth in this Proposal. It is imperative that hatch covers are not installed prior to the completion of CCR's scope of work to allow for maximum hatch opening. The Client will notify any and all processors of the project site that the Client has granted CCR free and uninterrupted access to the site. CCR shall be responsible for site cleanup and repair of damages caused by CCR or its subcontractors.

b. The Client is responsible for the accuracy of locations for all subterranean structures and utilities. CCR will take responsible precautions to avoid known subterranean structures, and the Client waives any claim against CCR and agrees to defend, indemnify, and hold CCR harmless from any claim or liability for injury or loss, including costs to defend, arising from damage done to subterranean structures and utilities not identified or accurately located. In addition, Client agrees to compensate CCR for any time spent or expenses incurred by CCR in defense of any such claim, with compensation to be based upon CCR's prevailing fee schedule and expense reimbursement policy.

c. A continuous supply of potable water under 50-psi pressure at the rate of 60-gallons per minute for the use of the CCR crew within 100-feet of each structure site
d. A continuous supply of electricity during the period of work: one 100-AMP, 110/220-volt service for the operation of our power tools and accessories, located not more than 100-feet from each structure. Please

be sure that all circuit breakers are ground-fault protected. If it is necessary for CCR to supply its own electric power, add $500.00 per week to the contract amount.

e. Any permit or other fees from any AHJ, as may be required for the work including but not limited to all connect/disconnect, impact and building/construction fees.

f. A suitable container conveniently located on site for the use of the CCR crew to dispose of construction debris generated during the repairs/modifications.

g. Sanitary facilities for the CCR crew for the duration of the project.

h. Dewatering, drainage and disposal of the structure's contents including but not limited to removal of any sedimentation.

i. Refilling, disinfecting, bacteriological sampling, and testing of the tank's contents.

j. Cleaning the interior and exterior of the structure and accessories.

k. Complete lock-out and tag-out of the subject structure prior to personnel entering each structure. The Client will be required to provide all materials for this process. The Client will be responsible for demonstrating to CCR that the lock-out procedure is complete, and the structure is rendered "safe" before CCR performs air quality testing to enter each structure.

l. All professional engineering design services.

m. Method A "X-Cut Tape Test", per ASTM D3359, shall be completed by a qualified coatings inspector or coatings manufacturer representative prior to application of new coating system. Results of this test must be 4A or greater. If the results of this test are less than a 4A, CCR and the Client will have to re-evaluate the proposed scope of work and pricing.

n. Confined space compliance including hole watch, ventilation, retrieval system, and safe and clear access to the work area compliant to all local, state, and federal regulations for the duration of our work.

o. Proper environmental conditions including ambient temperature, moisture control and curing conditions.

p. Adhesion testing as required by the specifications.

q. Hazardous material removal and disposal as required by the specifications.

3. SCHEDULE, COMMENCEMENT, AND DELAYS

This quotation is valid for 30-days. Should this quotation expire, a new quotation will be required to reflect updated pricing due to market changes.

CCR will be prepared to start work on or before December 16, 2024, the Anticipated Construction Start Date, and will undertake to furnish sufficient labor, materials, and equipment to complete construction of our scope of work with the durations noted below:

FEQ Basins : Construction schedule based on scopes of work

4. QUOTATION

We are prepared to carry out this work in accordance with the foregoing for the time & material price of:

Per Mobilization	**$10,000.00**
Iron Worker Reinforcement	**$245/ Per MHR**
Iron Worker Structural	**$255/ Per MHR**
Laborer	**$225/ Per MHR**
Scaffold Builder	**$245/ Per MHR**
Loader Driver	**$238/ Per MHR**
Painter	**$235/ Per MHR**
Carpenter	**$245/ Per MHR**
Cement Mason	**$235/ Per MHR**
Materials, Equipment and Subcontractors	**+15% Markup**
Overtime Wages	**x1.5 Per MHR**

CROM's proposal is predicated on working four 10-hour workdays. If the site restrictions do not allow for a 10-hour workday, then our price will be renegotiated.

This proposal is based on the prevailing wage scale dated 05/08/2020 shared by the client.

If a bond is required for the Scope of Work included in this contract, CCR will furnish a one-year Performance and Payment Bond. The cost of this bond is not included in our price. Please add $9.00 per $1,000 of contract value.

5. ACCEPTANCE

This proposal is offered for your acceptance within **30-days**from the bid/proposal date. We reserve the right after that period to amend our proposal to reflect our changing construction schedules and materials and labor rate changes. The return to this company of a copy of this proposal, and incorporated terms and conditions, with your acceptance endorsed thereon within the time aforesaid will constitute a contract between us. This proposal and incorporated terms and conditions shall be made a part of any subcontract agreement or purchase order.

Sincerely,

CROM Coatings and Restorations, a Division of CROM, LLC

Daniel Austria
Business Development Manager

Josh Homes
Region Lead

/jh.dbt

ACCEPTED BY CLIENT

_____

PRINT: _____

TITLE: _____

DATE: _____

1. DRAWINGS, SPECIFICATIONS, AND OTHER REQUIRED DATA

   The Client or a duly authorized representative, is responsible for providing CCR with a clear understanding of the project nature and scope as is reasonably known to the Client. The Client shall supply CCR with sufficient and adequate information, including, but not limited to, maps, site plans, reports, surveys, and designs, to allow CCR to properly complete the specified services. The Client shall also communicate changes in the nature and scope of the project as soon as possible during the performance of the work so that the changes can be incorporated into the work product.

   Prior to starting work, CCR will request from Client data reasonably required for submittal purposes for the repair/modification/coating of the aforementioned structure(s), including any available computations, detailed drawings, and specifications. If, in the opinion of CCR, adequate data is not available or is incomplete, Client will be informed, and arrangements made for creation of needed data. CCR will not perform engineering studies or perform work requiring professional engineering duties but will assist Client in obtaining such services.

2. INSURANCE

   CCR represents and warrants that it and its agents, staff, and Consultants employed by it is and are protected by worker's compensation insurance and that CCR has such coverage under public liability and property damage insured policies, which CCR deems to be adequate. Certificates for all such policies of insurance shall be provided to the Client upon request in writing. Within the limits and conditions of such insurance, CCR agrees to indemnify and save Client harmless from and against loss, damage, or liability arising from negligent acts by CCR, its agents, staff, and consultants employed by it. CCR shall not be responsible for any loss, damage or liability beyond the amounts, limits, and conditions of such insurance or the limits described in Section 7, whichever is less. The Client agrees to defend, indemnify, and save CCR harmless for loss, damage, or liability arising from acts by Client, Client's agent, staff, and other consultants employed by Client. Any bond requirement(s) by Client will carry an additional cost unless the parties agree otherwise.

3. BACK CHARGES AND CLAIMS FOR EXTRAS

   No claim for extra services rendered or materials furnished will be valid by either party unless written notice thereof is given during the first ten days of the calendar month following that in which the claim originated. CCR's claims for extras shall carry 30% for overhead and 10% for profit. Any mutually agreed upon deductive change order will provide only a credit for 10% profit but will not provide a credit for 30% overhead.

4. LIMIT ON INDIVIDUAL LIABILITY OF DESIGN PROFESSIONAL

   LIMITATION ON INDIVIDUAL LIABILITY OF DESIGN PROFESSIONAL - TO THE EXTENT PERMITTED BY LAW, AN EMPLOYEE, AGENT, DESIGN PROFESSIONALS, OR ENGINEERS EMPLOYED BY CCR SHALL NOT BE INDIVIDUALLY LIABLE FOR NEGLIGENCE OCCURRING WITHIN THE COURSE AND SCOPE OF EMPLOYMENT WITH CCR UNDER THIS PROPOSAL TO AN OWNER, CONTRACTOR, SUBCONTRACTOR, OR TO ANY THIRD PARTY CLAIMING BY AND THROUGH THESE PARTIES.

5. ASSIGNMENT AND THIRD PARTIES

   Neither the Client nor CCR may delegate, assign, sublet or transfer their duties or any interest in this Proposal without the written consent of the other party. Both parties agree there are no intended third-party beneficiaries to this Proposal, including other contractors or parties working on the project, or, if necessary, a surety of CCR.

6. LABOR

   If CCR is required to employ persons of an affiliation desirable to the Client, or other contractor employed by him or the general contractor thereby resulting in increased costs to us, the contract price shall be adjusted accordingly. Such requirement shall not provide that CCR sign a contract with any labor organization. In the event of a labor stoppage, we shall not be in default or be deemed responsible for delay of the progress of this contract or damage to the Client or the contractor so long as CCR has sufficient qualified employees available to perform the scope of work.

   Our proposal is based on our crew performing our Scope of Work in accordance with our standard safety program. If any additional safety requirements are placed on us (not required by OSHA) such as: site training, additional safety equipment, or permit-required confined space, the cost for such additional requirements plus 30% for overhead shall be reimbursed to us.

   This proposal is predicated on open-shop labor conditions, using our own personnel.

7. SCHEDULE, COMMENCEMENT, AND DELAYS

   If the readiness of the project site or conditions do not allow efficient execution of our work on or before the Anticipated Construction Start Date our contract price will increase $200.00 per man hour of crew delay until other productive work can be scheduled for the assigned crew.

   Schedule changes not caused by CCR, including but not limited to delays to the Anticipated Construction Start Date, additional mobilizations and demobilizations not included in the original price, and other delays that impact CCR and cause actual additional costs shall be equitably compensated via change order procedures for time and price.

   It is agreed that we shall be permitted to execute our work without interruption. If delayed at any time for a period of 24 hours or more by an act or neglect of the owner, his representative, or other contractor employed by him, or by the general contractor, or by reason of any changes ordered in the work, we shall be reimbursed $200.00/manhour until the crew is able to resume work on the project. Any additional remobilizations will be reimbursed to CCR.

   In the event an agreement apart from this proposal is preferred, such agreement shall include this Proposal and all the conditions herein unless both parties agree in writing to specifically omit any condition.

8. PAYMENTS

   Periodic and final payment, including any retention, shall be made within net 30 days of sufficient invoice from the date our work is completed, or the billing is received, or in accordance with applicable state Prompt Payment law, whichever is earlier, and is to be received by us in our accounting office at 250 SW 36th Terrace, Gainesville, Florida 32607. All costs for third-party contracts and billing management services, or use of any software, as may be required by the Client or Owner, will be added to the Contract Price by change order. Final payment shall not be held due to delays in testing. Payment not received

by that date will be considered past due and will be subject to a late payment charge of 1½% per calendar month, or any fraction thereof until received in our office.

If CCR does not receive payment within 30 days after such payment is due as defined herein, CCR may give notice, without prejudice to and in addition to any other legal remedies and may stop work until payment of the full amount owing has been received. The Proposal Amount and Time shall be adjusted by the amount of CCR's reasonable and verified cost of shutdown, delay, and startup, which shall be effected by an appropriate change order.

Any reasonable legal or other expense necessary for the enforcement of this Proposal or for the collection of monies due shall be borne by the party at fault. If sales tax is excluded from our price, or on materials contained in our price, in accordance with project specifications, such exclusion is subject to receipt of adequate tax exemption documents from you or the project owner prior to commencement of Work to allow for our application of same. If proper tax exemption documentation is not received or is not adequate to provide exemption, we reserve the right to receive reimbursement of all sales tax CCR is obligated to pay due to the tardiness, lack of, or inadequate exemption documentation on behalf of you or the owner.

9. DISPUTE RESOLUTION
In the event of a controversy or claim related to this Proposal, then the Parties will engage in high-level management discussions within five (5) days of written notice to the other Party. If the issues remain unresolved, then the Parties will engage in Mediation per AAA Construction Industry Mediation Rules in the State of the place of the Project, unless an alternative location is agreed upon by the Parties in writing. The mediation shall be convened within thirty (30) days of a Party's mediation request. Each Party shall be responsible for their own attorneys' fees for the mediation; and the mediator costs shall be shared equally by the Parties. If the matter still remains unsettled after submission to mediation, the Parties may engage in litigation in the state or federal court having jurisdiction in the location of the Project, and the laws of State of the Place of the Project shall control jurisdiction, unless otherwise agreed to by the Parties in writing. The Prevailing Party shall be entitled to reasonable attorneys' fees and costs from the Non-Prevailing Party, upon an award of the Court.

10. CHANGES IN SCOPE AND LIMITATIONS
If the Client wishes to have CCR perform any additional repairs or remediation of the tank(s)/structure(s) or accessories, it shall authorize such work in writing and pay CCR its standard rates for such work.

It is agreed that CCR shall not be responsible for any consequential, special, or delay damages, or any force majeure events, including but not limited to acts of God and pandemic. CCR does not assume responsibility for differing, latent, or concealed conditions which differ materially from those indicated in the Subcontract/Contract documents or from those ordinarily found to exist and not inherent in the Work, including but not limited to weather or subsurface conditions, and not caused by CCR's fault or negligence.

11. TERMINATION
This agreement may be terminated by either party upon seven (7) days' written notice in the event of substantial failure by the other party to perform in accordance with the terms hereof. Such termination shall be effective if that substantial failure has been redeemed before the expiration of the period specified in the written notice. In the event of termination, CCR shall be paid for services performed to the termination notice date plus reasonable termination expenses.

In the event of termination, or suspension for more than three (3) months prior to completion of all work contemplated by the proposal, CCR may complete such analyses and records as necessary to complete their files and may also complete a report on the services performed to the date of notice of termination or suspension. The expense of termination or suspension shall include all direct costs of CCR in completing such analyses, records, and reports if necessary.

12. WARRANTY
CCR will warranty its workmanship and materials on its work covered in this Proposal for a period of one year after completion of its work. Prior to leaving the location, CCR personnel will perform a walk-through with the responsible party overseeing our work for the Client. In case any defects in CCR's workmanship or materials appear within the one-year period after completion and acceptance of CCR's work, CCR shall promptly make repairs at its own expense upon written notice by the Client that such defects have been found. CCR's warranty is limited to defects in CCR's workmanship and materials, excluding inspections, cleaning, and disinfection services ("Services"). CCR shall endeavor to perform these Services with that degree of care and skill ordinarily exercised under similar circumstances by contractors practicing in the same discipline at the same time and location. CCR shall not be responsible for, nor liable for, delamination of previous coatings application, any ordinary wear and tear, or for damage caused from negligent or inappropriate use or by any other entity beyond our control, including but not limited to modifications, work, or repairs by others.

Budget Transfer/Amendment Form

Please fill the form out **completely** and **attach** to your transfer/amendment request in MUNIS.

Date	05/30/2025
Submitted by	Adrienne Haskins
Department	Public Works - Utilities

Funding Request: $175,000 (Construction)

Fiscal Year:
FY2025

Category:
Capital Improvement Project - W&S

Fund:
Water & Sewer Fund (30)

Reason transfer/amendment is requested?

Funding is needed in the MWWWTP Flow equalization Project (MUNIS # 7409000000) for additional construction costs. The funding is being supplied by GHD and will be transmitted to the County as described in the attached agreement.

Reason for availability of funds?

Funding is available in Project (MUNIS # 7409000000- MWWWTP Flow Equalization Project.

Charles County Government

Budget Amendment/Transfer #915

DPW/Utilities is requesting funds to be transferred to MWWWTP Flow equalization Project (MUNIS # 7409000000). As part of an agreement, GHD will be providing a contribution to assist in the mitigation of design issues. We will need the funds moved from the deposit account to the project account.

Funding is needed in 7409000000: MWWTP Flow Equalization

GHD Contribution to go to 7409000000.50450	$ 175,000	Construction
Total Funding Requested	**$ 175,000**	

Funding will be available in 7409000000: MWWTP Flow Equalization

Available from 7409000000.40388	$ 175,000	Other
Total Funding Requested	**$ 175,000**	

Charles County County Commissioners

PROJECT BUDGET REPORT

FOR 07/01/2012 - 06/30/2025

	Original Budget	Net Budget Amendments	Revised Budget	Requisitions	Encumbrances	Actuals	Available Budget	Percent Used
Project: 7409000000 - MWWTP Flow Equalization								
F 7409000000.40346 WSSC 15%	-4,656,000.00	-937,000.00	-5,593,000.00	0.00	0.00	-4,869,019.89	-723,980.11	87.06%
F 7409000000.40388 Other	0.00	-9,801,250.00	-9,801,250.00	0.00	0.00	-9,940,799.21	139,549.21	101.42%
F 7409000000.40389 Bonds	-26,385,000.00	-5,882,000.00	-32,267,000.00	0.00	0.00	-26,770,284.63	-5,496,715.37	82.96%
E 7409000000.50437 Inspection	713,000.00	125,000.00	838,000.00	0.00	84,907.10	654,636.47	98,456.43	88.25%
E 7409000000.50441 Admin	168,000.00	170,000.00	338,000.00	0.00	0.00	270,390.88	67,609.12	80.00%
E 7409000000.50442 FAS Admin	14,000.00	5,000.00	19,000.00	0.00	0.00	15,615.44	3,384.56	82.19%
E 7409000000.50443 A&E	2,315,000.00	0.00	2,315,000.00	0.00	92,676.86	2,153,665.29	68,657.85	97.03%
E 7409000000.50450 Construct	25,300,000.00	18,851,250.00	44,151,250.00	0.00	4,352,490.60	39,443,121.80	355,637.60	99.19%
E 7409000000.50468 Cntngcy	2,531,000.00	-2,531,000.00	0.00	0.00	0.00	0.00	0.00	0.00%
FUNDING SOURCE TOTALS for Project: 7409000000 - MWWTP Flow Equalization	-31,041,000.00	-16,620,250.00	-47,661,250.00	0.00	0.00	-41,580,103.73	-6,081,146.27	87.24%
EXPENSE TOTALS for Project: 7409000000 - MWWTP Flow Equalization	31,041,000.00	16,620,250.00	47,661,250.00	0.00	4,530,074.56	42,537,429.88	593,745.56	98.75%
TOTALS for Project: 7409000000 - MWWTP Flow Equalization	0.00	0.00	0.00	0.00	4,530,074.56	957,326.15	-5,487,400.71	

TOTALS FOR FUNDING SOURCE STRINGS	-31,041,000.00	-16,620,250.00	-47,661,250.00	0.00	0.00	-41,580,103.73	-6,081,146.27	271.44
TOTALS FOR EXPENSE STRINGS	31,041,000.00	16,620,250.00	47,661,250.00	0.00	4,530,074.56	42,537,429.88	593,745.56	98.75

REPORT TOTAL

Original Budget	Net Budget Amendments	Revised Budget	Requisitions	Encumbrances	Actuals	Available Budget
0.00	0.00	0.00	0.00	4,530,074.56	957,326.15	-5,487,400.71

CHARLES COUNTY GOVERNMENT

INTEROFFICE MEMORANDUM

Equal Opportunity Employer

TO:	Board of County Commissioners *County Administration*
THRU:	Carol DeSoto, Clerk to the Commissioners *County Administration*
THRU:	Deborah Hall, Acting County Administrator *County Administration*
THRU:	Wes Adams, County Attorney *County's Attorney's Office*
THRU:	Jacob Dyer, Acting Director *Fiscal and Administrative Services*
THRU:	Martin L. Harris, Director *Department of Public Works*
THRU:	James Sizemore, Acting Deputy Director *Department of Public Works, Utilities Division*
FROM:	Olin Straus, Senior Project Manager *Department of Public Works, Utilities Division*
SUBJECT:	Mattawoman WWTP Flow Equalization Basin, ITB 20-35 GHD Offer Letter Approval Request
DATE:	May 30, 2025

The Department of Public Works, Utilities Division presents the GHD, Inc. Offer Letter in the amount of $175,000 to be applied to the Mattawoman WWTP Flow Equalization Basin (MFEQ) Construction Contract, ITB 20-25. This payment will allow for the County to continue to work on the MFEQ Tank Retrofit work. This follows six similar letters committing in total $10,303,554 to the County. By signing this letter, it will authorize GHD to send a payment to the County within 60 days of approval of the contractor's invoice for this work.

The Department of Public Works has reviewed this letter and recommends its approval by Commissioner Collins.

This payment will be applied to the Mattawoman WWTP Flow Equalization Basin Project, fiscal code no. 7409000000.50450.

If you have any questions or require additional information, please contact Olin Straus, Senior Project Manager, via email at strauso@charlescountymd.gov or by telephone 301-520-5552.

Attachments:

1. GHD, Inc. Offer Letter Dated 04.15.25 (2 Pages)

CC: Erica Rizor, Program Support Specialist
Carol DeSoto, Clerk to the Commissioners
Jesse Bungcayao, Executive Assistant
Project File

16701 Melford Boulevard, Suite 221
Bowie, Maryland 20715
United States
www.ghd.com

Our ref: 11188086

April 15, 2025

Mr. Reuben B. Collins
Commissioner President
Charles County
5310 Hawthorne Road
La Plata MD 20646

Project: RFP No. 19-09, MWWTP Flow Equalization Basin – Engineering Services

Dear Mr. Collins,

In furtherance of the ongoing discussions between GHD and Charles County in relation to the current Basin repairs and Basin No. 1 leak testing, GHD submits this letter.

As previously discussed, GHD has engaged substantively with Charles County, its consultant AECOM, and construction contractor American Contracting & Environmental Services Inc (ACE) to collectively work out design solutions to overcome the issues encountered on the Project. At this stage of the repairs to Basin No. 1, it is expected that upon conclusion of the tank filling stage, ACE will commence on crack injection and repair work to this Basin. Charles County asserts that issuance of a Change Order is warranted to provide a mechanism for ACE to invoice against for this crack injection and repair work but stated that GHD must commit to incurring the cost of this Change Order, which will be issued on a time and material basis with a "not to exceed" amount of $175,000. ACE will invoice against this Change Order based on actual costs incurred.

As set forth in GHD's November 17, 2023 letter, it is our position that Charles County must mitigate damages, regardless of GHD's current contribution. Nevertheless, to facilitate resolution of this Project, GHD accepts Charles County's demand for commitment to pay the amounts actually incurred and invoiced by ACE up to the not to exceed amount of $175,000 pursuant to the following:

1. Payment provided by GHD to Charles County at this juncture is on a "Without Prejudice" basis and without admission of any liability, and the facts, matters, and product of GHD's assistance will not be used against it in any proceedings of any nature.
2. Payment authorized by GHD at this juncture is for the purpose of allowing Charles County to take reasonable and necessary steps to mitigate further damages and delay while any remaining retrofit costs are being determined and negotiated between GHD, Charles County, and ACE.
3. The Parties agree to cooperate with the other in furtherance of this Agreement and in reaching any further agreements, which may be necessary in order to proceed with the Project. If the County determines that the details of this matter are not capable of resolution without resorting to legal

proceedings, the County agrees to provide the following to the GHD (i) Notice in writing stating its intention to terminate resolution discussions; and (ii) A minimum 30-day notice before it initiates any legal proceedings against the Company in relation to this Project.

Without Prejudice Offer – Subject to obligations under contract and applicable law

Subject to the above matters being agreeable to and accepted by Charles County, and without invalidating the terms of the GHD letters dated May 19, 2023, July 26, 2023, January 25, 2024, June 20, 2024, September 13, 2024, November 26, 2024, or January 30, 2025 GHD is willing to make an interim commitment to pay Charles County up to but not exceeding $175,000, based on ACE's actual costs as evidenced by invoices received and accepted by the County arising under the Change Order for crack injection and repair work to Basin No. 1, within 60 days of the County's approval of such invoices. Such payment will be made with a view to: (i) mitigate costs overall and (ii) allow GHD and Charles County to continue to engage in discussing final resolution with ACE.

This promise of payment should not be considered any admission of the validity of any costs claimed by or through Charles County and/or set any future precedent, and is made without admission of liability, but is intended to reflect the support that GHD is prepared to give at this juncture, given the ongoing relationships between the parties.

It is our expectation to engage in the coming days to work towards the global settlement under which GHD's total payment quantum will be agreed, and that GHD will pay what is owed pursuant to appropriate documentation of the resolution.

We look forward to hearing from you in relation to the above and discussing further.

Regards

Steven Davie
General Manager, US Southeast Region

678-280-2133
steven.davie@ghd.com

Jeff Sturdevant
Principal

240-206-6842
jeff.sturdevant@ghd.com

Accepted and Agreed:

Charles County

By: _____

Name: _____

Title: _____

cc: Wes Adams, Charles County Attorney
Martin Harris, DPW Director
Wilson Cochran, Deputy Director of DWP-Utilities
Ed Gorham, Chief of Technical Support

PROJECT: **MWWTP Flow Equalization (Parent)**

Design and construction of a flow equalization/storage system at MWWTP to buffer peak flows and prevent sanitary sewer overflows and unauthorized discharges. This project also includes construction of a primary effluent flow distribution structure to address hydraulic inefficiencies at the plant.

PROJECT STATUS AS OF 30-Jun-25

PROJECT NUMBER 7409000000

PROJECT TYPE: SEWER

STATUS: ACTIVE
PROJECT RESPONSIBILITY: DPW

REVENUE BUDGET	LIFE TO DATE STATUS ACTUAL LTD FUNDING	APPROVED LTD BUDGET	REMAINING BALANCE	% OF BUDGET	ACCOUNT NUMBER
FEDERAL	$0.00	$0.00	$0.00		
STATE	0.00	0.00	0.00		
REVOLVING LOAN	0.00	0.00	0.00		
WSSC @ 15%	4,869,019.89	5,593,000.00	723,980.11	87%	7409000000.40346
OTHER	10,091,773.16	9,801,250.00	(290,523.16)	103%	7409000000.40388
BOND PROCEEDS	26,770,284.63	32,267,000.00	5,496,715.37	83%	7409000000.40389
PAY-GO OPERATING	0.00	0.00	0.00		
TOTAL	$41,731,077.68	$47,661,250.00	$5,930,172.32	88%	

EXPENSE BUDGET	ACTUAL LTD EXPENSE	APPROVED LTD BUDGET	REMAINING BALANCE	% OF BUDGET	ACCOUNT NUMBER
INSPECTION	$654,636.47	$838,000.00	$183,363.53	78%	7409000000.50437
ADMINISTRATION	270,390.88	338,000.00	67,609.12	80%	7409000000.50441
FAS ADMINISTRATION	15,615.44	19,000.00	3,384.56	82%	7409000000.50442
A&E	2,153,665.29	2,315,000.00	161,334.71	93%	7409000000.50443
LAND & ROW	0.00	0.00	0.00		
CONSTRUCTION	39,443,121.80	44,151,250.00	4,708,128.20	89%	7409000000.50450
CONTINGENCY	0.00	0.00	0.00		
MISCELLANEOUS	0.00	0.00	0.00		
EQUIPMENT	0.00	0.00	0.00		
	$42,537,429.88	$47,661,250.00	$5,123,820.12	89%	

PROJECT BALANCE	($806,352.20)	$0.00

BUDGET HISTORY

369,000.00	FY13 Original Budget, $314k Bonds, $55k WSSC
135,000.00	FY14 Original Budget, $115k Bonds, $20k WSSC
711,000.00	FY15 Original Budget, $604k Bonds, $107k WSSC
4,013,000.00	FY16 Original Budget, $3,411 Bonds, $602 WSSC
349,000.00	FY17 Original Budget, $297k Bonds (30 yr) & $52k WSSC
9,299,000.00	FY18 Original Budget, $7,904k Bonds, $1,395k WSSC
490,000.00	FY21 Original Budget, $416k Bonds, $74k WSSC
15,675,000.00	FY22 Original Budget, $13,324k Bonds, $2,351k WSSC
6,245,000.00	FY23 Original Budget, $5,308K Bonds & $937K WSSC
2,000,000.00	FY24 MidYr Budget Amendment, $2,000,000, Other (GHD)
7,801,250.00	FY25 Budget Amendment, Other (GHD)
574,000.00	FY25 MidYr xfr from 7040007999, Sewer Contingency, Bonds
47,661,250.00	Total LTD Budget

BOND FUNDING HISTORY

99,218.30	2013 Bond Issue (30YR)
26,000.00	2014 Bond Issue (30YR)
49,066.33	2016 Bond Issue (30YR)
750,000.00	2019 Bond Issue
300,000.00	2020 Bond Issue
9,500,000.00	2021 Bond Issue
8,300,000.00	2022 Bond Issue (30YR)
7,746,000.00	2023 Bond Issue (30YR)
26,770,284.63	Total Funding to Date

	Bonded	Expended	%
13	99,218	99,218	100%
14	26,000	26,000	100%
16	49,066	49,066	100%
19	750,000	750,000	100%
20	300,000	300,000	100%
21	9,500,000	9,500,000	100%
22	8,300,000	8,300,000	100%
23	7,746,000	7,746,000	100%

COMMENTS:

PROJECT IS FULLY BUDGETED.

Water Funding	Funding Source	
0%	UF 60%	Other:
Sewer Funding	FF	
100%	CF 40%	

PROJECT BUDGET REPORT

FOR 07/01/2020 - 06/30/2025

	Original Budget	Net Budget Amendments	Revised Budget	Requisitions	Encumbrances	Actuals	Available Budget	Percent Used
Project: 7409000000 - MWWTP Flow Equalization								
F 7409000000.40346	.	.	MWWTPFlowEqu-WSSC 15%					
	-4,656,000.00	-937,000.00	-5,593,000.00	0.00	0.00	-4,869,019.89	-723,980.11	87.06%
F 7409000000.40388	.	.	MWWTPFlowEqu-Other					
	0.00	-9,801,250.00	-9,801,250.00	0.00	0.00	-10,091,773.16	290,523.16	102.96%
F 7409000000.40389	.	.	MWWTPFlowEqu-Bonds					
	-26,385,000.00	-5,882,000.00	-32,267,000.00	0.00	0.00	-26,770,284.63	-5,496,715.37	82.96%
E 7409000000.50437	.	.	MWWTP FlowEqulztnParent Inspec					
	713,000.00	125,000.00	838,000.00	1,498.94	84,907.10	654,636.47	96,957.49	88.25%
E 7409000000.50441	.	.	MWWTP Flow Equlztn Parent Admn					
	168,000.00	170,000.00	338,000.00	0.00	0.00	270,390.88	67,609.12	80.00%
E 7409000000.50442	.	.	MWWTP FlowEqulztnPrnt FASAdmin					
	14,000.00	5,000.00	19,000.00	0.00	0.00	15,615.44	3,384.56	82.19%
E 7409000000.50443	.	.	MWWTP Flow Equlztn Parent A&E					
	2,315,000.00	0.00	2,315,000.00	0.00	92,676.86	2,153,665.29	68,657.85	97.03%
E 7409000000.50450	.	.	MWWTP FlowEqulztn Parent Const					
	25,300,000.00	18,851,250.00	44,151,250.00	0.00	4,352,490.60	39,443,121.80	355,637.60	99.19%
E 7409000000.50468	.	.	MWWTP FlowEqulztn Parent Contg					
	2,531,000.00	-2,531,000.00	0.00	0.00	0.00	0.00	0.00	0.00%
FUNDING SOURCE TOTALS for Project: 7409000000 - MWWTP Flow Equalization								
	-31,041,000.00	-16,620,250.00	-47,661,250.00	0.00	0.00	-41,731,077.68	-5,930,172.32	87.56%
EXPENSE TOTALS for Project: 7409000000 - MWWTP Flow Equalization								
	31,041,000.00	16,620,250.00	47,661,250.00	1,498.94	4,530,074.56	42,537,429.88	592,246.62	98.75%
TOTALS for Project: 7409000000 - MWWTP Flow Equalization								
	0.00	0.00	0.00	1,498.94	4,530,074.56	806,352.20	-5,337,925.70	

TOTALS FOR FUNDING SOURCE STRINGS							
-31,041,000.00	-16,620,250.00	-47,661,250.00	0.00	0.00	-41,731,077.68	-5,930,172.32	272.98
TOTALS FOR EXPENSE STRINGS							
31,041,000.00	16,620,250.00	47,661,250.00	1,498.94	4,530,074.56	42,537,429.88	592,246.62	98.75

REPORT TOTAL						
Original Budget	Net Budget Amendments	Revised Budget	Requisitions	Encumbrances	Actuals	Available Budget
0.00	0.00	0.00	1,498.94	4,530,074.56	806,352.20	-5,337,925.70

** END OF REPORT - Generated by Marissa Russell **

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto, Department of Fiscal and Administrative Services

ITEM TYPE: Approval Item(s)

AGENDA SECTION: Approval Items

SUBJECT:

- **Board of Education FY2025 Inter-Category Budget Transfer Request**
  (Mr. Jacob Dyer, Director, and Ms. Samantha Chiriaco, Chief of Budget, Department of Fiscal and Administrative Services; Ms. Sherri Fischer-Davis, Budget Manager, and Ms. Karen Acton, Chief Financial Officer)

SUGGESTED ACTION:

ATTACHMENTS:
BOARD-ACTION-ITEM-Budget Q4 Expense Movement_6.24 (002).pdf

ACTION - OFS
June 10, 2025
Attachment

ACTION ITEM FOR THE BOARD OF EDUCATION

SUBJECT:

FY2025 Intercategory Budget Transfer Request

OVERVIEW:

The Superintendent requests an intercategory budget transfer of $5.7 Million in accordance with Education Article 5-105. The Budget Department meets monthly with staff from all areas to project spending throughout the fiscal year. Purchase orders are generated at the beginning of the fiscal year and are projections of an entire year of services. As the year progresses, meetings are held weekly to properly forecast for the fiscal year. Typically, during near the end of each fiscal year, Charles County Public Schools (CCPS) evaluates the outstanding purchase orders to determine if they should be closed and reallocated to other expenses. There is no elimination of actual expenses but is instead a reallocation of the budget to ensure there are no over budget categories. This request is necessary to support the following:

1. **Administration –** will reflect a decrease of $1,050,000 from contracted services and supplies in fiscal services and human resources. Specifically, savings from support with the new financial system and advertising costs for recruitment.

2. **Mid-Level Administration -** will reflect a decrease of $350,000 from year end savings in the contracted services budget due to a reduction in the cost for staff development this fiscal year.

3. **Instruction- Salaries & Wages -** will reflect an increase of $3,500,000 to reflect revised year end projections. This item is a reinstatement of the movement of budgets that was approved in May that transferred roughly $3.2M to other categories. Based in updated estimates for upcoming summer pay that CCPS is required to accrue back to this fiscal year, additional funds are needed in this category to ensure this line item is properly budgeted.

4. **Instruction- Supplies & Materials -** will reflect a decrease of $900,000 in supplies from various program areas. This is related to savings with math and reading subscriptions that will not be renewed until next fiscal year. These budget movements do not have a negative impact on students or supplies for instructional staff.

5. **Instruction- Other Instructional Costs -** will reflect a decrease of $150,000 in other costs (contracted services, other charges, and equipment) to offset budgets in other categories.

6. **Special Education –** will reflect a decrease of $200,000 from contracted services due to year end savings. The entire $6.25M amount previously reallocated in May was not needed to fund the remainder of the fiscal year. No student services have been affected by these budget adjustments. All services to students have already been provided.

7. **Student Personnel Services –** will reflect a decrease of $538,787 from supplies services to offset budgets in other categories. A portion of these funds reflect the movement of Community School supplies to Community School transportation services and nursing services. Community Schools are using the funds in a different way than was originally budgeted. The funding is still supporting Community Schools, however, under a different category.

8. **Student Health Services –** will reflect a decrease of $89,850 from contracted nursing services to offset budgets in other categories. A portion of these funds reflect the movement of Community School nursing funding to Community School supplies. Community Schools are using the funds in a different way than was originally budgeted. The funding is still supporting Community Schools, however, under a different category.

9. **Student Transportation –** will reflect a decrease of $946,363 from contracted services due to estimated year end savings to offset budgets in other categories. As stated above, a portion of these funds reflect the movement of Community School supplies to Community School transportation services. At the beginning of the fiscal year, CCPS generates purchase orders for the estimated amount they project on what is needed to pay contractors for bus services. As the fiscal year progressed, bus routes were adjusted, and bus contractor turnover did occur which created year end budget savings that can be used to support other cost increased in Maintenance of Plant and Fixed Charges.

10. **Operation of Plant -** will reflect a decrease of $1,300,000 from year end savings in the utilities budget to offset budgets in other categories.

11. **Maintenance of Plant -** will reflect an increase of $1,200,000. Funds are being used for inspections and various unexpected maintenance projects at schools that has occurred since May. The unexpected items that occurred include: Mattawoman Middle School sinkhole, Matthew Henson Middle School fire alarm issues, Annex-1 HVAC/water tank controller issues, Higdon Elementary School domestic water tank controller issues, and the Gwynn Center fire alarm system and duct detector issues.

12. **Fixed Charges -** will reflect the increase of $990,000. Funds are being used to offset health insurance charges. CCPS is self-insured. Year-end costs are higher than originally projected when FY2025 budget was adopted.

13. **Food Services -** will reflect the decrease of $140,000. The full amount previously forecasted of $750,000 for delinquent student meal accounts will not be needed and will be closer to $610,000 instead.

14. **Community Service -** will reflect a decrease of $25,000 from wages to offset budgets in other categories.

STAKEHOLDERS INVOLVEMENT:

Board of Education (BOE) and the Charles County Commissioners.

RECOMMENDATION/FUTURE DIRECTION:

The BOE will approve the request for an intercategory budget change and forward the request to the County Commissioners for their consideration and approval.

Attachment 1

FY2025 REQUEST FOR INTERCATEGORY BUDGET CHANGE

	Current Budget	Change Increase	Change (Decrease)	REVISED Budget
Category/ Description				
GENERAL FUND				
REVENUES				
40 - STATE REVENUES	(266,554,205)			(266,554,205)
41 - FEDERAL REVENUES	(970,000)			(970,000)
42 - LOCAL REVENUES	(36,131,167)			(36,131,167)
43 - LOCAL COUNTY APPROPRIATIONS	(232,015,716)			(232,015,716)
REVENUES Total	(535,671,088)	-	-	(535,671,088)
EXPENDITURES				
101 - ADMINISTRATION	22,425,320		(1,050,000)	21,375,320
102 - MID-LEVEL ADMINISTRATION	34,464,081		(350,000)	34,114,081
03 - INSTRUCTION				
301 - SALARIES & WAGES	179,541,251	3,500,000		183,041,251
303 - SUPPLIES & MATERIALS	8,096,100		(900,000)	7,196,100
OTHER INSTRUCTIONAL COSTS	4,495,355		(150,000)	4,345,355
03 - INSTRUCTION Total	192,132,706	3,500,000	(1,050,000)	194,582,706
104 - SPECIAL EDUCATION	57,044,623		(200,000)	56,844,623
105 - STUDENT PERSONNEL SERVICE	8,748,942		(538,787)	8,210,155
106 - STUDENT HEALTH SERVICES	6,085,613		(89,850)	5,995,763
107 - STUDENT TRANSPORTATION	49,133,539		(946,363)	48,187,176
108 - OPERATION OF PLANT	43,933,825		(1,300,000)	42,633,825
109 - MAINTENANCE OF PLANT	11,324,868	1,200,000		12,524,868
110 - FIXED CHARGES	97,221,935	990,000		98,211,935
111 - FOOD SERVICES	750,000		(140,000)	610,000
112 - COMMUNITY SERVICE	621,659		(25,000)	596,659
113 - CAPITAL OUTLAY	11,783,976			11,783,976
EXPENDITURES Total	535,671,088	5,690,000	(5,690,000)	535,671,088
GENERAL FUND Grand Total	0	5,690,000	(5,690,000)	0

The intercategory budget change request supports the following increased line items:

301 – Salaries & Wages:

Funds will reflect an increase of $3,500,000 to reflect revised year end projections. This item is a reinstatement of the movement of budgets that was approved in May that transferred roughly $3.2M to other categories. Based in updated estimates for upcoming summer pay that CCPS is required to accrue back to this fiscal year, additional funds are needed in this category.

109 – Maintenance of Plant:

Funds will reflect the reallocation of $1,200,000. Funds are being used for inspections and various unexpected maintenance projects at schools that has occurred since May. The unexpected items that occurred include: Mattawoman Middle School sinkhole, Matthew Henson Middle School fire alarm issues, Annex-1 HVAC/water tank controller issues, Higdon Elementary School domestic water tank controller issues, and the Gwynn Center fire alarm system and duct detector issues.

110 – Fixed Charges:

Funds are being used to offset health insurance charges. CCPS is self-insured. Year-end costs are higher than originally projected when FY2025 budget was adopted.

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto, Department of Fiscal and Administrative Services

ITEM TYPE: Approval Item(s)

AGENDA SECTION: Approval Items

SUBJECT:

- **FY2026 Board of Education Budget**
  (Mr. Jacob Dyer, Director, and Ms. Samantha Chiriaco, Chief of Budget, Department of Fiscal and Administrative Services; Ms. Sherri Fischer-Davis, Budget Manager, and Ms. Karen Acton, Chief Financial Officer)

SUGGESTED ACTION:

ATTACHMENTS:
FY2026 CCPS Approved Budget.pdf

FY 2026

July 1, 2025-June 30, 2026

Charles County Public Schools

Superintendent Approved Operating Budget

Maria V. Navarro, Ed.D.

Superintendent

Karen M. Acton

Chief Financial Officer

The Charles County public school system does not discriminate on the basis of race, color, religion, national origin, sex, sexual orientation, gender identity, age or disability in its programs, activities or employment practices. For inquiries, please contact Dr. Mike Blanchard, Title IX/ADA/Section 504 Coordinator (students) or Nikial M. Majors, Title IX/ADA/Section 504 coordinator (employees/adults), at: Charles County Public Schools, Jesse L. Starkey Administration Building, P.O. Box 2770, La Plata, Maryland 20646, or by phone: (301) 932-6610 or (301) 870-3814. For special accommodations, call (301) 934-7230 or TDD 1-800-735-2258 two weeks prior to the event.

Board of Education

Yonelle Moore Lee, Esq.
Chair

Nicole Kreamer
Vice-Chair

Dottery Butler-Washington

David W. Hancock, Jr.

Letonya Smalls, Ed.D.

Jamila Smith

Brenda Thomas

Samichie K. Thomas

Linda Warren

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Student Member

5980 Radio Station Road, PO Box 2770
La Plata, Maryland 20646

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PRESENTATION

GLOSSARY OF ACRONYMS

The following acronyms used in this document refer to definitions listed below.

A. ACHIEVE – Academics, Communication and Heightened Independence for Education, Vocation and Engagement
B. AFSCME – American Federation of State, County, and Municipal Employees
C. AP – Advanced Placement
D. ARP – American Rescue Plan
E. BOE – Board of Education
F. CCPS – Charles County Public Schools
G. CCR – College and Career Readiness
H. CIP – Capital Improvement Plan
I. COP – Concentration of Poverty
J. CPI – Consumer Price Index
K. CSM – College of Southern Maryland
L. CTE – Career and Technical Education
M. CWI – Comparable Wage Index
N. EACC – Education Association of Charles County
O. ELA – English Language Arts
P. ELL – English Language Learners
Q. ERP – Enterprise Resource Planning
R. ESOL – English for Speakers of Other Languages
S. ESSER – Elementary and Secondary School Emergency Relief
T. FARMS – Free and Reduced Meal Students
U. FNS – Food and Nutritional Service
V. FTE – Full-time equivalent
W. GASB – Governmental Accounting Standards Board
X. GCEI – Geographical Cost of Education Index
Y. IEP – Individualized Education Program
Z. IXL – I eXceL (academic math program)
AA. LEA – Local Education Agency
BB. MABE – Maryland Association of Boards of Education
CC. MOE – Maintenance of Effort
DD. MOI – Materials of Instruction
EE. MSDE – Maryland State Department of Education
FF. OPEB – Other Post-Employment Benefits
GG. PISOTA – Phoenix International School of the Arts
HH. PLTW – Project Lead the Way
II. PPW – Pupil Personnel Worker
JJ. SAIL – Secondary Academy of International Languages
KK. SOAR – Structured teaching, Opportunities for inclusion, Active learning, and Rigor
LL. TSI – Transitional Supplemental Instruction

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LINDA WARREN

SAMARJEET VIRK
STUDENT MEMBER

Board of Education of Charles County
P.O. Box 2770, La Plata, Maryland 20646-0170
(301) 932-6610 - (301) 870-3814
Fax: (301) 932-6651

MARIA V. NAVARRO, Ed.D.
SUPERINTENDENT OF SCHOOLS
SECRETARY-TREASURER

June 10, 2025

Board of Commissioners of Charles County
200 Baltimore Street
La Plata, Maryland 20646

Dear Commissioners:

The Board of Education's FY 2026 operating budget request of $529.5 million reflects an increase of $23.3 million or 4.6 percent more than our FY 2025 base operating budget. State funding, based on the Maryland State Department of Education preliminary draft estimates, is presumed to increase by $7.2 million or 2.7 percent. County funding requested is an increase of $11.2 million or 4.9 percent. The Food Nutrition Services meal prices for paying students will increase $.10 for breakfast and lunch in FY 2026.

The proposed operating budget-funding request includes mandatory cost increases of $8.0 million, and a reserve for collective bargaining for salary increases.

Our staff is devoted to focusing on academic success, college and career readiness, and providing a stimulating learning experience for all students. We appreciate your support as we continue to be the difference for our children by providing a world-class education.

We remain committed to working with the Charles County Commissioners to secure adequate funding for education.

Sincerely,

Yonelle Moore Lee, Esq.
Chairperson

Maria V. Navarro, Ed.D.
Superintendent of Schools

REPORT ITEM FOR THE BOARD OF EDUCATION

SUBJECT:

FY 2026 Superintendent's proposed school system Operating Budget

ABSTRACT:

Charles County Public Schools (CCPS) goal is to provide a stimulating learning experience to the highest levels of academic achievement by inspiring, empowering, and encouraging our students to reach and expand their potential. CCPS will strive to eliminate achievement gaps among all students and to help them thrive in their future college and career paths. This financial blueprint represents the three major components of a budget: the educational program of our school system, and the revenue and expenditures needed to effectively implement our education plan.

SUMMARY:

The documents reflect the Superintendent's priorities for our FY 2026 operating budget. The total of our recommended operating budget is $529,516,701 and represents an increase of $23.3 million, or 4.6 percent, over our FY 2025 base operating budget. CCPS depends primarily upon state and county resources to fund the total budget. At this time, state funding is presumed to increase by $7.2 million. Our request to the County Commissioner's is an increase of $11.2 million, or 4.9 percent. The FY 2026 base operating budget also includes the use of $ 10.2 million fund balance.

Expenditure increases include mandatory health care costs, negotiated school bus contractor wages and replacement of retiring buses, additional FY26 PISOTA allocation, along with budget line items not fully funded from the prior fiscal year. Other cost increase requests include a reserve for collective bargaining, funds to support the continual implementation of the Blueprint for Maryland's future policy areas, Oracle support positions, instructional increases, and non-instructional increases. This budget includes positions and operating costs associated with the opening of Margaret J. Thornton Elementary School. This budget also includes a request for the addition of 67.5 FTE positions to compensate for our continually expanding school system. These positions include human resources, finance, and IT staff, as well as school administration, and teachers.

Full time wages will be budgeted at 98 percent of actual cost, as has been done in prior fiscal years. This allows CCPS to fund necessary items or programs and still maintain a balanced budget.

The Food and Nutrition Services (FNS) program breakfast and lunch prices will comply with the Maryland Cares for Kids Act (House Bill 315). There will be a $.10 increase to meal prices for breakfast and lunch for paid students.

RECOMMENDATION:

We ask that the Board of Education (BOE) considers the Superintendent's proposed operating budget for FY 2026. The budget request recognizes education as a top priority and reflects the needs of the school system, as required by the Education Article § 4-205. Should additional funding become available, there are significant system-wide needs included in a supplemental budget. The successes of our school system significantly impact the quality of life of the entire community. This proposal is subject to change based on final funding from the state and county.

FY 2026 BUDGET DEVELOPMENT CALENDAR:

The budget development timeline is as follows:

Timeline	***Description of Activity***
February 28, 2025	BOE approved FY 2026 Operating Budget submission to the Charles County Commissioners
April 7, 2025	Maryland General Assembly legislative session ends
April 8, 2025	Charles County Government's presentation of FY 2026 Proposed Operating Budget to the Commissioners
April 30, 2025	Charles County Commissioners public hearing on Proposed FY 2026 Budgets
May 20, 2025	Charles County Commissioners FY 2026 Budget Adoption
June 10, 2025	BOE adopts final FY 2026 Operating Budget

CHARLES COUNTY PUBLIC SCHOOLS FACT SHEET

Charles County Public Schools (CCPS) offers a wide variety of academic programs and services focused on student achievement and ensuring that our students meet rigorous standards. Our goal is to devote our efforts to create a community committed to teaching, learning, and safety for all of our students.

39 Schools	
Elementary	23
Middle	9
High	7
7 Educational Centers	
Early Learning Center, La Plata	
Early Learning Center, Waldorf	
F.B. Gwynn Educational Center	
James E. Richmond Science Center	
Judy Center	
Nanjemoy Creek Environmental Center	
Robert D. Stethem Educational Center	
Enrollment SY 2023-2024*	**27,765**
African American	57.5%
Asian	3.0%
White	17.0%
Hispanic	13.8%
American Indian/Alaska	<1%
Native Hawaiian/Pacific Islander	<1%
Two or More Races	8.3%
Enrollment SY 2023-2024*	**By Grade**
Elementary	***12,238***
Pre-Kindergarten	1034
Kindergarten	1,726
1st Grade	1,860
2nd Grade	1,880
3rd Grade	1,841
4th Grade	1,912
5th Grade	1,985
Middle	***6,252***
6th Grade	2,109
7th Grade	2,002
8th Grade	2,141
High	***9,275***
9th Grade	2,512
10th Grade	2,373
11th Grade	2,287
12th Grade	2,103

Personnel	
Total Permanent Staff*	***3,853.5***
Superintendent	1
Teachers	1,839
Librarians	29
Paraprofessional/Instructional Assistants	650
Guidance Counselors	83
Pupil Personnel Workers (PPW)	27
Psychological Personnel	43
School Administrators (Principals, Assistant Principals, etc.)	111
Secretaries and Clerks	233.8
Non-instructional Support Staff (Technicians, Building Service, Trade Personnel and Laborers, CCPS Bus Drivers, etc.)	538.2
Other Professional Staff - Instructional and Non-instructional (Chiefs, Directors, Coordinators, Supervisors, Therapists, etc.)	298.9

Multi Language Learner (ELL Program)

CCPS is proud of its diverse student population. Approximately 1,412 students participated in our MLL program during the 2024-2025 school year. We are committed to meeting all our MLL students' needs at all grade levels.

Special Education Program

Our special education students experience varying levels of regular classroom inclusion in their daily schedules. CCPS provides speech, learning, physical, emotional, and life skills support for students and differing disabilities.

Early Childhood Program

CCPS' official full day Pre-K filled seats as of 11/09/2024 was 934. We also have 223 3-year-old slots filled.

Sources:

**MSDE - Maryland Public Schools Enrollment by Race/Ethnicity and Gender and Number of Schools - Table 1 - September 30, 2023*

***MSDE - Staff Employed at School and Central Office Levels - Table 2 - October 2023*

FY 2026 BUDGET PLANNING MODEL-REVENUE

	DESCRIPTION	FTE	FY 2026 Cost
BASE REVENUE BUDGET			**506,209,726.00**
	REVENUE INCREASES:		
	County Funding - Reduction To Base		
	County Funding - Additional Base		11,241,400
	One-time, Non-recurring Additional County Funding		(612,216)
4.9%	TOTAL ADDITIONAL COUNTY FUNDING		**10,629,184**
2.7%	**STATE FUNDING (Unofficial Estimate)**		**7,216,851**
	FEDERAL REVENUES		
	LOCAL REVENUES		
	FUND BALANCE TRANSFER		**5,460,940**
TOTAL REVENUE INCREASES:			**23,306,975**
TOTAL REVENUE BUDGET			**529,516,701**
	Percent Increase		**4.6%**

FY 2026 BUDGET PLANNING MODEL–MANDATORY AND COLLECTIVE BARGAINING EXPENSES

BASE EXPENDITURE BUDGET		**$ 506,209,726**
MANDATORY COST INCREASES:		
5% Health Care Costs (estimate)		2,391,550
3% Bus Contracts - Retiring Buses and Pay increase		1,358,466
21% Teachers' Pension (SB1301) - State Retirement Agency (estimate)		
Additional FY2026 PISOTA Allocation		400,000
FY2025 ITEMS NOT FULLY FUNDED:		
Non-Instructional Increases		
Extended Learning Opportunity Wages		2,118,005
Countdown to Kindergarten Orientation - 1756 Students		
Elementary Summer Boost - 1350 Students		
Extended School Year Elem - 300 Students		
Extended School Year Middle/High - 300 Students		
Sheriff's Camp SYAP - 100 Students		
Summer School - HS - 1300 Students		
Summer School - MS - 600 Students		
Extended Learning Opportunity Transportation		938,738
Non-Instructional Increases		
Insurance-Short Term Disability		300,000
TOTAL FY2025 ITEMS NOT FULLY FUNDED:		3,356,743
PISOTA Charter School		
Music Teacher	1.00	100,000
Art Teacher	0.50	50,000
Choir Teacher	0.50	50,000
Dance Teacher	0.50	50,000
Secretary	1.00	114,000
Administrative IA	1.00	47,250
Building Service Worker	1.00	59,875
TOTAL PISOTA Charter School		**471,125**
TOTAL MANDATORY COST INCREASES:	**5.50**	**7,977,884**
TOTAL COLLECTIVE BARGAINING ASSUMPTIONS:	**-**	**6,034,596**

FY 2026 BUDGET PLANNING MODEL–OTHER EXPENSES

OTHER BUDGET CHANGES:		
Blueprint Implementation Costs:		
Workforce Development Board - $63.89 per FTE		86,433
Concentration of Poverty Increases		
Jenifer Elementary School		155,848
Benjamin Stoddert		6,407
John Hanson		63,913
Thomas Stone		118,452
Smallwood		6,407
Eva Turner		174,173
Ryon		283,343
Mudd		152,363
Indian Head		174,482
Brown		203,616
Addition of Mt.Hope/Nanjemoy Elementary	1.00	280,212
Addition of William B. Wade Elementary	1.00	280,212
Addition of C. Paul Barnhart Elementary	1.00	280,212
Addition of JC Parks Elementary	1.00	280,212
TOTAL Blueprint Implementation Costs:		2,546,285
Oracle Support Positions		
HR Generalist	1.00	123,552
Benefits Manager	1.00	140,137
Director of Finance	1.00	197,100
Database Administrator	1.00	131,583
Instructional Increases		
Increase School Counselors (High School)		358,288
Staff Growth and Retention Specialists	2.00	240,000
Community Schools Secretary	1.00	60,750
International Baccalaureate Program Development		150,000
Special Education Non-Public Placements		750,000
Non-Instructional Increases		
Increase to HR overtime budget		8,000
Increase to HR hourly wages budget		120,000
Support Coordinator for the Board	1.00	130,000
Board Travel/Food		13,000
International Teachers Fee		170,000
School Signage Change		80,000
Food Service Debt		500,000
Technology Equipment		500,000
TOTAL OTHER BUDGET CHANGES:		**3,672,410**

FY 2026 BUDGET PLANNING MODEL-OTHER EXPENSES

Margaret J. Thornton ES:		
Staff Positions		
Principal		-
Secretary - Principal		57,000
Building Service Manager		73,000
Assistant Principal	2.00	221,956
Secretaries (Front Office & Registration)	2.00	89,648
Computer Analyst	1.00	94,774
Building Service Worker	4.00	195,496
Building Service Asst. Manager	1.00	66,424
Media Specialist	1.00	89,474
Counselor	1.50	134,211
Psychologist	1.00	99,474
PPW	0.50	49,737
SPED Service Providers (SLP,OT, PT etc)	1.00	99,474
PreK Teacher	2.00	174,862
Kindergarten Teacher	3.00	262,293
First Grade Teacher	3.00	262,293
Second Grade Teacher	2.00	174,862
Third Grade Teacher	2.00	174,862
Fourth Grade Teacher	1.00	87,431
Fifth Grade Teacher	1.00	87,431
Art Teacher	0.50	43,716
ESOL Teacher	1.00	87,431
Music Teacher - Instrumental	0.50	43,716
Music Teacher - Vocal	0.50	43,716
PE/Heath Teacher	0.50	43,716
SPED Teachers (4 inclusion, 1 ACHIEVE,1 Pre-K, 2 SOAR, 1 IEP Facilitator)	9.00	786,879
Science Teacher	1.00	87,431
Learning Resource Teacher	1.00	97,431
Reading Resource Teacher - 11 months	1.00	101,108
Math Resource Teacher - 11 months	1.00	101,108
Administrative IA	1.00	45,268
SPED IAs	10.00	452,680
Intervention IA (Math & Reading)	2.00	90,536
Technology Facilitator	1.00	57,368
Kindergarten IA	6.00	271,608
SPED PreK IA	1.00	45,268
PreK IA	2.00	90,536
Teacher Substitutes (Daily, LTS, Stipends)		129,600
Operating Cost:		
Copier/Lease		49,000
Repairs - Building		35,000
Software Maintenance		20,000
Refuse Disposal		17,000
Field Trips		8,200
Repairs - Equipment		2,200
Custodial Supplies		28,000
Repair Materials - Grounds		14,000
Utilities - Electric		160,000
Communications		16,500
Utilities - Water & Sewer		12,000
Utilities - Gas		10,000
Professional Development		2,300
TOTAL Margaret J. Thornton ES:		5,488,016
TOTAL OTHER BUDGET CHANGES:	**80.00**	**11,706,711**
BUDGET REDUCTIONS:		
One-time, Non-recurring Additional County Funding		(612,216)
Adjustment to Middle and High School Staffing Ratios	(8.00)	(800,000)
Adjustment to Fourth and Fifth Grade Staffing Ratios	(10.00)	(1,000,000)
TOTAL BUDGET REDUCTIONS:	**(18.00)**	**(2,412,216)**
TOTAL EXPENDITURE BUDGET	**67.50**	**529,516,701**
NET SURPLUS/(DEFICIT)		**(0)**

OPERATING REVENUE

			PROPOSED		
Description	**FY2024 Final**	**FY2025 Budget**	**FY2026 Budget**	**Variance**	**% Change**
40					
40030-State-Nonpublic Special Education	(1,818,748)	(1,194,373)	(1,444,373)	250,000	20.9%
40031-State-Foundation Program	(144,034,591)	(145,017,194)	(151,329,094)	6,311,900	4.4%
40032-State-Handicapped	(14,386,386)	(16,552,570)	(18,312,152)	1,759,582	10.6%
40033-State-Transportation	(14,364,412)	(14,691,509)	(15,273,582)	582,073	4.0%
40036-State-Compensatory Aid	(53,680,895)	(61,046,467)	(55,831,193)	(5,215,274)	-8.5%
40041-State-Out of County	(38,599)			(0)	0.0%
40044-State-Medicaid Revenues	(1,200,000)	(890,000)	(890,000)	(0)	0.0%
40045-State-Multilingual Learners	(6,322,904)	(7,071,163)	(7,889,145)	817,982	11.6%
40046-State-Guaranteed Tax Base	(8,524,080)	(5,830,020)	(2,602,342)	(3,227,678)	-55.4%
40062-Kirwan-Pre-Kindergarten	(4,567,731)	(4,898,523)	(7,705,003)	2,806,480	57.3%
40066-Kirwan Career Ladder	(190,334)	(119,388)	(389,464)	270,076	226.2%
40067-Kirwan Career College Readiness	(735,216)	(263,430)	(1,040,655)	777,225	295.0%
40068-Concentration of Poverty	(1,512,835)	(3,657,985)	(6,117,837)	2,459,852	67.2%
40069-TSI	(1,832,345)	(1,312,575)	(943,218)	(369,357)	-28.1%
40070-State Comparable Wage Index	(3,879,144)	(3,908,213)	(3,911,857)	3,644	0.1%
40071-State Blueprint Coordinators		(100,795)	(91,141)	(9,654)	-9.6%
40 Total	**(257,088,220)**	**(266,554,205)**	**(273,771,056)**	7,216,851	2.7%
41					
41053-Federal-Impact Aid	(635,970)	(476,000)	(476,000)	(0)	0.0%
41055-Federal-R.O.T.C.	(446,828)	(430,000)	(430,000)	(0)	0.0%
41061-Federal-Special Education Impact Aid	(135,703)	(64,000)	(64,000)	(0)	0.0%
41 Total	**1,218,501**	**970,000**	**970,000**	(0)	0.0%
42					
42001-Damaged Loaner Devices	(46,982)			(0)	0.0%
42004-Prior Year Fund Balance Transfer		(4,745,405)	(10,206,345)	5,460,940	115.1%
42006-Tuition-Summer Youth Camp	(30,241)	(25,000)	(25,000)	(0)	0.0%
42007-Tuition-Summer School		(92,296)	(92,296)	(0)	0.0%
42008-Tuition-Out of State	(264,311)	(185,400)	(185,400)	(0)	0.0%
42009-Tuition-Parent Payments	(139,289)	(89,100)	(89,100)	(0)	0.0%
42010-Interest Income	(3,630,211)	(1,000,000)	(1,000,000)	(0)	0.0%
42011-Rent-School Facilities	(161,421)	(191,200)	(191,200)	(0)	0.0%
42012-Payroll Transfers	(1,751)	(73,000)	(73,000)	(0)	0.0%
42015-Proceeds of Sale Gain/Loss	(24,288)	(6,000)	(6,000)	(0)	0.0%
42016-Tuition-Other Maryland Counties	(339,311)	(128,504)	(128,504)	(0)	0.0%
42021-Miscellaneous Revenue	(178,100)	(12,200)	(12,200)	(0)	0.0%
42022-Restitution		(10,000)	(10,000)	(0)	0.0%
42025-Rebates	(92,166)	(54,431)	(54,431)	(0)	0.0%
42026-Vending Commissions	(61,366)	(42,000)	(42,000)	(0)	0.0%
42027-Tuition-Novel		(15,269)	(15,269)	(0)	0.0%
42062-Net Insurance Recovery	(22,579)			(0)	0.0%
42064-Donations	(48)			(0)	0.0%
42 Total	**(4,992,064)**	**(6,669,805)**	**(12,130,745)**	5,460,940	81.9%
43					
43000-County-Supplement		(612,216)	0	(612,216)	-100.0%
43001-County-Appropriation	(218,767,000)	(231,403,500)	(242,644,900)	11,241,400	4.9%
43 Total	**(218,767,000)**	**(232,015,716)**	**(242,644,900)**	10,629,184	4.6%
General Fund Total	(482,065,785)	(506,209,726)	(529,516,701)	23,306,975	4.6%
Food Service	(18,112,488)	(24,719,867)	(26,500,000)	1,780,133	7.2%
Restricted	(40,421,618)	(15,000,000)	(16,118,748)	1,118,748	7.5%
Grand Total	**(540,599,891)**	**(545,929,593)**	**(572,135,449)**	**26,205,856**	**4.8%**

OPERATING BUDGET BY CATEGORY AND OBJECT CODE

Category			**PROPOSED**		
Description	**FY2024 Final**	**FY 2025 Budget**	**FY 2026 Budget**	**Variance**	**% Change**
101-Administration	18,470,061	16,379,366	17,757,807	1,378,441	8.4%
102-Mid-Level Administration	31,293,769	32,870,303	34,494,742	1,624,439	4.9%
104-Special Education	47,088,717	49,504,335	54,139,250	4,634,915	9.4%
105-Student Personnel Service	6,024,871	8,126,314	10,323,732	2,197,418	27.0%
106-Student Health Services	5,365,771	7,982,359	8,428,207	445,848	5.6%
107-Student Transportation	44,079,440	47,142,490	49,764,832	2,622,342	5.6%
108-Operation of Plant	37,070,949	37,756,917	39,764,383	2,007,465	5.3%
109-Maintenance of Plant	9,966,514	10,419,075	10,708,926	289,851	2.8%
110-Fixed Charges	91,997,420	95,359,454	98,618,338	3,258,884	3.4%
111-Food Services	353,264		500,000	500,000	100.0%
112-Community Service	465,840	663,314	734,751	71,437	10.8%
113-Capital Outlay	5,687,244	2,473,448	2,603,538	130,090	5.3%
301-Instruction Salaries	159,526,116	182,511,551	186,557,620	4,046,069	2.2%
303-Instruction Supplies	6,652,978	7,049,857	7,680,790	630,933	8.9%
304-Instruction Other	4,965,131	7,970,942	7,439,784	(531,158)	-6.7%
General Fund Total	**469,008,084**	**506,209,726**	**529,516,701**	23,306,975	4.6%
Food Service		24,719,867	26,500,000	1,780,133	7.2%
Restricted		15,000,000	16,118,748	1,118,748	7.5%
Grand Total	**469,008,084**	**545,929,593**	**572,135,449**	**26,205,856**	**4.8%**

Object			**PROPOSED**		
Description	**FY2024 Final**	**FY 2025 Budget**	**FY 2026 Budget**	**Variance**	**% Change**
71-Salaries & Wages	271,568,259	302,319,910	316,194,915	13,875,004	4.6%
72-Contracted Services	65,349,980	75,312,597	77,533,055	2,220,458	2.9%
73-Supplies & Materials	15,793,450	14,007,749	16,508,405	2,500,656	17.9%
74-Other Charges	11,429,383	14,204,856	14,416,863	212,007	1.5%
75-Equipment	8,398,286	1,444,566	1,434,532	(10,034)	-0.7%
78-Fixed Charges	91,997,420	95,359,454	98,618,338	3,258,884	3.4%
79-Transfers	4,471,306	3,560,594	4,810,594	1,250,000	35.1%
General Fund Total	**469,008,083**	**506,209,726**	**529,516,701**	23,306,975	4.6%
Food Service		24,719,867	26,500,000	1,780,133	7.2%
Restricted		15,000,000	16,118,748	1,118,748	7.5%
Grand Total	**469,008,083**	**545,929,593**	**572,135,449**	**26,205,856**	**4.8%**

Full-time Equivalent Staff

DESCRIPTION	26 Budget
GENERAL FUND	
01 - ADMINISTRATION	107.0
02 - MID-LEVEL ADMINISTRATION	324.5
03 - INSTRUCTION	2,383.8
04 - SPECIAL EDUCATION	771.7
05 - STUDENT PERSONNEL SERVICE	78.5
06 - STUDENT HEALTH SERVICES	0.0
07 - STUDENT TRANSPORTATION	78.0
08 - OPERATION OF PLANT	326.0
09 - MAINTENANCE OF PLANT	67.0
11 - FOOD SERVICES	0.0
12 - COMMUNITY SERVICE	1.0
13 - CAPITAL OUTLAY	6.0
GENERAL FUND Total	**4,143.5**
FOOD SERVICE	147.4
RESTRICTED	115.0
Grand Total	4,405.9

DESCRIPTION OF REVENUES

LOCAL (County) Funding Request

Local funding revenue is the County's general fund appropriations to the school system's operating budget. The county's sources derive primarily from property tax revenues. There is also a required match of certain programs based on the Blueprint for Maryland's Future.

Adequate local funding is essential to the current and continued success of CCPS. The Commissioners of Charles County determine funding based on tax revenues, and formula-based calculations in accordance with a statutory Maintenance of Effort (MOE) provision. The provision requires that a county government provide, on a per pupil basis, at least as much funding for the local school system as was provided in the prior fiscal year.

STATE Revenue

Local school systems are fiscally dependent on state appropriations. Revenue from the state of Maryland is provided primarily through statutory formulas on a per pupil basis. Funding is determined by a factor of formulas based on changes in student enrollment, county wealth, and free-and-reduced meal enrollments. The following is a summary of major state revenue categories:

- ✓ Special Education – Non-Public Placements –

  This State funding is provided to support special education and related services to students placed in non-public special education schools. These students cannot be provided the education needed in public county, regional or state programs, so they are placed in appropriate non-public educational programs that offer the required services. This is mandated by Education Articles 8-401 and 8-406.

- ✓ Foundation Program –

  Funding based on school enrollment and county wealth based on Education Article 5-201.

- ✓ Special Education Formula –

  This funding to support students requiring special education services as defined in the Federal Individuals with Disabilities Education Act (IDEA) and is required by Education Article 5-225.

- ✓ Transportation –

  This aid is to support the transportation of students to and from school, per Education Article 5-218.

- ✓ Compensatory Education –

  This funding is directed to the education of students who are economically disadvantaged. They are defined by the number of students eligible for free or reduced prices meals in the prior fiscal year. This funding source is mandated by Education Article 5-222.

- ✓ Out-of-County Tuition –

  This revenue is local reimbursement for out-of-county students enrolled in Charles County Public Schools.

- ✓ Medicaid –

  School districts enrolled with Maryland Medicaid, will receive funding through the Department of Mental Health and Mental Hygiene for services rendered.

- ✓ English Learner/Multilanguage Learner –

  The state funding is based upon the school system's number of students with limited English proficiency in the prior fiscal year. Limited English proficiency means non-English or limited English competency under the reporting requirements established by the Department for the Maryland School Performance program. This is mandated by Education Article 5-224.

- ✓ Guaranteed Tax Base –

  The Guaranteed Tax Base program encourages low-wealth jurisdictions to maintain and increase local education tax effort. These funds are available to jurisdictions with wealth per pupil below 80 percent of statewide wealth per pupil.

- ✓ Blueprint Prekindergarten –

  Funding provided through The Blueprint for Maryland's Future Fund, Education Article 5-229, for the expansion of available full-day slots for prekindergarten students through local school programs and private providers in the community.

- ✓ Blueprint Career Ladder –

  Funding provided through The Blueprint for Maryland's Future Fund, Education Article 6-1009, to issue salary increases to certain instructional personnel who are National Board Certified (NBC).

- ✓ Blueprint College and Career Readiness (CCR) –

  Funding provided through The Blueprint for Maryland's Future Fund, Education Article 5-217, to support post College and Career Readiness. The curriculum and resources enable students to achieve CCR status by the end of tenth grade which allows them to pursue Advanced Placement, CTE, and early college pathway programs in eleventh and twelfth grade.

- ✓ Blueprint Concentration of Poverty (COP) –

  Funding provided through The Blueprint for Maryland's Future Fund, Education Article 5-223, to create Community Schools in areas where at least 60% of students qualified for the FARMS program during the prior school year. This funding provides for personnel and or per pupil allotment based on how many years the school was qualified.

  Blueprint Concentration of Poverty (COP) Per Pupil–
  It is the second type of concentration of Poverty Grant, the per-pupil grant, provides an additional layer of funding based on the percentage of students living in poverty. This grant is awarded on a sliding scale.

- ✓ Blueprint Transitional Supplemental Instruction (TSI) –

  Funding provided through The Blueprint for Maryland's Future Fund, Education article 5-226, to enable resources to address the needs of struggling learners in grades K-3.

- ✓ Comparable Wage Index (CWI) –

  This funding is an adjustment used to reflect regional differences in the cost of providing educational services that are outside the control of local jurisdictions. This program is based upon Education Article 5-216 and replaced the Geographical Cost of Education Index (GCEI).

Food and Nutrition Services

The Food and Nutrition Services (FNS) department manages all aspects of the Food Service Fund. FNS revenue depends primarily on revenue from federal, state, and local (children's payments) resources.

- ✓ Sale of Food -

  The sale of food revenue represents cash receipts collected for the price of breakfast, lunch, and a` la carte items purchased by students and school staff in the school cafeteria.

- ✓ Federal -

  This revenue is the per meal reimbursement under the National School Breakfast and Lunch Programs.

- ✓ State -

  This revenue is the state revenue match for food service, based on the percentage of federal reimbursement earned.

- ✓ Local -

  This revenue is interest earned on investments and miscellaneous income.

Meal services for the FY 2026 school year will follow the National School Breakfast and National School Lunch program. School breakfast and lunch prices will increase $.10 for paying students.

Elementary	**Secondary**
Breakfast - $1.45	Breakfast - $1.60
Lunch - $2.90	Lunch - $3.15

Restricted Funds

Restricted funds are received from federal and state agencies, as well as private grants. Federal revenue includes Title I, Title II, Title III, Title IV, Medicaid, Special Education, and other grant programs. State grants are passed through Maryland State Department of Education (MSDE).

Grants are used primarily to supplement existing or implement new instructional programs or projects. All budgeted amounts are based on original proposals. In most cases, changes between fiscal years are due to final allocations from authorizing agencies. Final grant allocations are usually official in the month of September.

DESCRIPTION OF EXPENDITURES

Mandatory Costs

Mandatory Costs reflect expenditures that are required by law, such as retirement and employee benefits, and support contractual commitments like bus and nurses' contracts. The increase in Mandatory Costs for FY 2026 totals $7,927,884.

- ✓ Health Insurance – $2,391,550

  Annual health care cost increases are due to claims and additional enrollments. This budget provides funding for anticipated industry trend cost increases. The CCPS insurance committee meets on a regular basis to review and discuss health care costs. Changes to benefits or employee contribution levels (75/25) must be negotiated with collective bargaining units.

- ✓ Bus Contracts - $1,358,466

  Under Maryland Annotated Code § 7-804(b) (2) (i), CCPS may not transport school children on a school bus that is older than 15 years. The school system's current operational bus fleet consists of 384 total buses: 315 contractual buses and 69 buses owned by CCPS (33 regular, 17 special needs, 19 spare). The 17 CCPS special needs buses transport students daily to out-of-county placements and in-county regional programs.

  The request reflects recent contract modifications based on the Consumer Price Index (CPI).

- ✓ Additional FY2026 PISOTA Allocation - $400,000

  Additional funding for the needs CCPS' Charter School – Phoenix International School of the Arts (PISOTA).

✓ FY 2025 Items not fully funded –

Extended Learning Opportunity Wages - $2,118,005

Countdown to Kindergarten Orientation - 1756 Students
Elementary Summer Boost - 1350 Students
Extended School Year Elem - 300 Students
Extended School Year Middle/High - 300 Students
Sheriff's Camp SYAP - 100 Students
Summer School - HS - 1300 Students

Extended Learning Opportunity Transportation - $938,738
Insurance-Short Term Disability - $300,000

- PISOTA – $471,125

1 Music Teacher	1 Secretary
.5 Art Teacher	1 Administrative IA
.5 Choir Teacher	1 Building Service Worker
.5 Dance Teacher	

Reserve for Collective Bargaining $6,034,596

In an effort to attract, retain, and invest in high quality teachers and staff, this request is to establish a reserve for collective bargaining with the Education Association of Charles County (EACC) and the American Federation of State, County and Municipal Employees (AFSCME). The estimated reserve amount supports FY 2026 funding needs.

OTHER COST INCREASES

The Blueprint for Maryland's Future – Policy Implementation Costs

Pursuant to the Blueprint for Maryland's Future Legislation (HB1372), several policy areas must be implemented with FY 2026

✓ Creating a World-Class Instructional System/College and Career Readiness (CCR) Pathway –

Requires all local school systems to provide students who have met college and career readiness standards with access to a set of program pathways.

- Workforce Development Board - $86,433 –

  Each local school board will receive funding, based on student enrollment, to distribute to the local workforce development board. The funding is to support collaborative planning and development of the Career Counseling Program for middle and high school students.

✓ Concentration of Poverty

- Concentration of Poverty Increases – $2,459,852
  Daniel of St. Thomas Jenifer E.S. - $155,848
  Benjamin Stoddert M.S. - $6,407
  John Hanson M.S – $63,913
  Thomas Stone H.S. – $118,452

General Smallwood M.S. – $ 6,407
Eva Turner E.S. - $174,173
J. P Ryon E.S. - $283,343
Dr. Mudd E.S. - $152,363
Indian Head E.S. - $174,482
Dr. Brown E.S - $203,616
Addition of Mt Hope/Nanjemoy E.S $280,212
Addition of William B. Wade E.S $280,212
Addition of Paul Barnhart E.S $280,212
Addition of J.C. Parks E.S. $280,212

CCPS has four (4) new schools, Mt. Hope/Nanjemoy E.S, William B, Wade E.S, Paul Barnhart E.S, JC Parks E.S, which meet the state's 3-year average concentration of poverty level of at least 55 percent. These schools are eligible to receive program funding for personnel (Community School Coordinator and Health Services Practitioner).

CCPS will have a total of fourteen (14) community schools in FY2026.

Oracle Support Positions

- ✓ HR Generalist – $123,552

  Additional FTE will recruit, process and service a growing workforce, creating an efficient structure to service the hiring needs of the school system.

- ✓ Benefits Manager – $140,137

  The individual will be responsible for managing State and Classified pensions, retiree health and life care, and TSA's including enrollments and disbursements. Tracking and monitoring employer cost for these items. Also responsible for financial reporting, actuarial validations, and the census. Project lead for all audits relating to duties.

- ✓ Director of Finance – $197,100

  The Director of Financial Services is responsible for overseeing the Division of Financial Services, ensuring the implementation of financial policies, procedures, controls, and reporting systems. This role ensures compliance with federal, state, local, and Board mandates for all accounting and financial reporting functions. The Director collaborates with staff to support schools with accounting and fiduciary responsibilities and provides financial data and periodic reports to the Board of Education, the superintendent, and relevant agencies as require.

- ✓ Database Administrator – $131,583

  The implementation of a new Oracle ERP system presents a critical need for a dedicated ERP Database Administrator (DBA). This role is essential to ensure the optimal performance, security, and integrity of the system's database, which serves as the foundation for all operations.

Instructional Budget Increase Requests

- ✓ Increase in School Counselors (High School) – $358,288

  The goal is to address the significant workflow around summer scheduling, master scheduling, and addressing student needs for high school counselors as there are only 1 12-month counselor at each high school currently.

- ✓ Staff Growth and Retention Specialists – $240,000

  Provides coaching and training to lead teachers in compliance with Blueprint for Maryland's Future requirements. Examines data and works with staff to support the planning and implementation of countywide in-service, summer professional development, professional learning teams, and on-going professional development opportunities.

- ✓ Community Schools Secretary – $60,750

  With the increase in the number of community schools, this position will support the Community School Coordinators (CSC) and the Manager with monitoring and tracking program expenditures. Processes invoices, submits requisitions, request transfer of funds, purchases orders, conference request forms, and other activities related to the program. Supports Community Schools food bank and events.

- ✓ International Baccalaureate Program Development – $150,000

  The International Baccalaureate (IB) Diploma Program provides a strong foundation in various subjects while fostering critical thinking, research skills, and a global perspective, making it a valuable choice for students seeking a challenging academic path and potential college credit upon graduation. The program demands deep critical thinking and analytical skills through a comprehensive curriculum covering diverse subjects. Beyond subject knowledge, the IB program emphasizes research, writing, time management, and independent learning abilities. IB uses an interdisciplinary approach: which encourages students to connect concepts across different subjects, fostering a holistic understanding. The IB program promotes global citizenship by encouraging students to consider diverse perspectives and engage with global issues.

- ✓ Special Education Non-Public Placements – $750,000

  This is a State aid program for students placed in nonpublic special education schools through the Individualized Education Program (IEP) process. The State share of the cost of nonpublic special education is calculated in accordance with Education Article §8-415, Annotated Code of Maryland.

Non-Instructional Budget Increase Requests

- ✓ Increase to the Office Human Resources (OHR) overtime budget - $8,000

  Cost increases result in OHR budget still underfunded in this category. If not funded, this will adversely impact hiring and cause OHR to go over budget.

- ✓ Increase to OHR hourly wages budget - $120,000
  OHR lacks permanent FTEs or an outsourced vendor to process HB486 which is a mandatory Maryland law.

- ✓ Support Administrator for the Board – $130,000

  In January of 2023, the BOE increased from a 7-member board to a 10-member board. The Board has increased its community engagement activities. The increase demands of a growing school system with more appeals, meetings, community engagement and board activities give rise to the need for additional administrative support to this office. This cost covers salary and benefits.

- ✓ Board Travel/Food - $13,000

  This requested increase in funds aligns with properly accounting for the additional increase in Board membership (no increases were done in the FY24 or FY25 budget). There has been an increase in board members who participate in more professional learning opportunities (travel and food) along with increases in meetings and activities in the community (food).

- ✓ International Teachers Fee – $170,000

  Fee associated with contracting high-quality teachers through the International Alliance Group in hard to place subject areas.

- ✓ School Signage Change – $80,000

  Under Board Policy 7230 the Board may initiate or consider requests to rename an existing school facility at its discretion. The Board may consider renaming a school or facility at any time if the current name of the school or facility conflicts with current Board policies, core values, or curricular objectives. The Board may also consider renaming a school or facility if the Board determines through petition, through public demonstration, or in some other manner that there is significant community interest to do so. The decision to rename a school shall be made independently of and prior to the decision on what the new name may be.

- ✓ Food Service Debt – $500,000

  While bad debt must be written off as an operating loss, this particular operating loss may not be absorbed by the National School Lunch Program, but must be restored using non-federal funds. These funds may come from the *school district's general fund, special funding from state or local governments, school or community organizations, or any other non-federal sources*. Once delinquent meal charges are converted to bad debt, records relating to those charges must be maintained in accordance with the record retention requirements in 7 CFR 210.9(b)(17) and 7 CFR 210.15(b).

- ✓ Technology Equipment – $500,000

  Increase budget to accommodate the needs of our technology department by providing reliable technology infrastructure.

✓ Margaret J. Thornton ES – $5,488,016

- Staff Positions - $5,113,816 (Remaining positions needed after 13 reallocated from other schools)

Secretary - Principal	PreK Teacher	Science Teacher
Administrative IA	Kindergarten Teacher	Learning Resource Teacher
Building Service Manager	First Grade Teacher	Reading Resource Teacher (11- months)
Assistant Principal	Second Grade Teacher	Math Resource Teacher (11- months)
Secretaries (Front office and Registration)	Third Grade Teacher	SPED IAs
Computer Analyst	Fourth Grade Teacher	Intervention IA (Math & Reading)
Building Service Worker	Fifth Grade Teacher	Technology Facilitator
Building Service Asst. Manager	Art Teacher	Kindergarten IA
Media Specialist	ESOL Teacher	SPED PreK IA
Counselor	Music Teacher – Instrumental	PreK IA
Psychologist	Music Teacher – Vocal	Teacher Substitutes (Daily, LTS, Stipends)
PPW	PE/Health Teacher	SPED Service Providers (SPL, OT, PT, etc.)
SPED Teachers (4 Inclusion, 1 PreK, 2 SOAR, 1 IEP Facilitator)		

- Operation Cost - $374,200

Copier/Lease	Field Trips	Utilities – Electric
Repairs – Building	Repairs -Equipment	Communication
Software Maintenance	Custodial Supplies	Utilities – Water & Sewer
Refuse disposal	Repair Materials - Grounds	Utilities - Gas
Professional Development		

BUDGET REDUCTIONS

$250,000 - Early Learning Center, Waldorf (start-up costs) (one-time nonrecurring costs)

$362,216 – TV Production Equipment (upgrade to aging equipment) (one-time nonrecurring costs)

$800,000 – Adjustment to Middle and High School Ratios

$1,000,000 – Adjustment to Fourth and Fifth Grade Staffing Ratios

Full-Time Wages

Full-time wages will be budgeted at 98 percent of actual costs as done in the previous fiscal year. This allows CCPS to continue to fund necessary items while maintaining a balanced budget.

SUPPLEMENTAL BUDGET REQUESTS

If additional funds are available, and depending on the amounts, selected initiatives will be accommodated.

School Requests

School budget requests would provide funds for classroom instruction, technology enhancements and special renovation projects.

Below is a summary of School Budget Requests:

CATEGORY/DESCRIPTION	Cost
FACILITY MAINTENANCE (Parking lot repair and expansion; school entry way concrete and walkway repairs; outdoor classrooms; electronic school marquee signs; carpet; classroom/school renovations; indoor and outdoor security cameras; emergency door panic bars; outdoor improvements; playground equipment; gym bleachers; lockers; electricity to sports fields; updated sound systems and acoustics; auditorium curtains; water bottle filling stations)	$1,466,887
TECHNOLOGY (Smartboards; laptops, carts and bags; iPads/tablets and carts; Apple TV; LCD projectors; printers; audio visual system; digital monitors and/or message boards; outdoor theater learning system; laminators; poster makers)	$1,242,452
INSTRUCTIONAL (Student classroom chairs; classroom tables; headphones; choral risers; physical education and recess equipment; graphing calculators)	$207,526
OTHER (Office/conference room furniture; walkie-talkies; emergency medical equipment; additional professional development; teacher chairs; school banners; CTE vehicle)	$59,095
GRAND TOTAL	**$4,291,046**

Office Requests

Office budget requests provide enhancements for current programs.

Below is a summary of office budget requests (sorted in descending order by monetary amounts):

GRAND TOTAL	$15,354,376

INITIATIVE NAME	Initiative Description	PRIORITY #	Total Cost
Core network upgrades	This will replace the equipment that runs our critical infrastructure systems that include the management of our phone system, switches and wireless infrastructure.	01 - PRIORITY	$ 5,000,000
LMS	This is the ongoing maintenance for the Canvas LMS and Learn software that grant funds were used to purchase the initial implementation and first three years of service	01 - PRIORITY	$ 300,000
Microsoft	This is to cover the expense of having all users covered under the Microsoft licensing to access Oracle using MFA as required by the audit and state security requirements	01 - PRIORITY	$ 200,000
Destiny Library Manager	Need additional funding for new sites - ELC La Plata, ELC Waldorf, and Thornton ES.	01 - PRIORITY	$4,500
CAPA Program at McDonough High School, Industry Standard Workshops	As part of the dance and theatre programs, specialized clinicians are brought in to help provide high-level workshops/training. This money has been coming out of grants and needs to now come from CCPS and be earmarked for MHS in either the school budget or mine.	01 - PRIORITY	$6,400
PebbleGo Next	Provides an engaging research database specifically designed for students in grades 3-5.	01 - PRIORITY	$45,537
PebbleGo Spanish	Provide Middleton's dual language program with an engaging Spanish language research database specifically designed for students in grades K-3.	01 - PRIORITY	$200

Junior Great Book, Series 3, 4, 5, Book Two Teacher Editions & Student Editions	Provides high-quality literature and student-centered discussion that encourages students to develop the habits of effective readers and thinkers.	01 - PRIORITY	$50,000
DeltaMath Plus	Skill building program used for practice, remediation, and assessment in high school math.	01 - PRIORITY	$12,000
IXL	Program used for diagnostic assessment in Foundations of Algebra and used to build prerequisite skills supporting Algebra 1. Program is used for individual, small-group, and large group instruction. Also used to support Math Lab 3 in middle school.	01 - PRIORITY	$34,000
Illustrative Math Professional Development Secondary	Illustrative Math PD session for new teachers teaching IM in grades 6-Algebra 2.	01 - PRIORITY	$40,000
Algebra 1 Illustrative Math Teacher Kits	Illustrative Math Kits provide teachers with all instructional materials to go through all activities in the curriculum resource. Kits will be for Algebra 1 for every teacher in each middle and high school.	01 - PRIORITY	$5,280
Geometry Illustrative Math Teacher Kits	Illustrative Math Kits provide teachers with all instructional materials to go through all activities in the curriculum resource. Kits will be for Geometry for every teacher in each middle and high school.	01 - PRIORITY	$15,200
Algebra 2 Illustrative Math Teacher Kits	Illustrative Math Kits provide teachers with all instructional materials to go through all activities in the curriculum resource. Kits will be for Algebra 2 for every teacher in each high school.	01 - PRIORITY	$7,310
Digital Renewal - SPARK PE Early Childhood	Provides high-quality early childhood physical education programming. This primary resource is currently embedded within the PK content area curriculum.	01 - PRIORITY	$5,913.75
Physical Education MOI	PE MOI to replace worn/damaged equipment items from regular use and/or items to supplement instructional programs.	01 - PRIORITY	$42,000.00

CommonLit 360	Curriculum for Language Arts, Honors, and Self-Contained	01 - PRIORITY	$56,000.00
Wilson Reading Materials	Curriculum for the intervention course Literacy Lab 1	01 - PRIORITY	$28,000.00
Language! Live (Literacy Lab 2)	Curriculum for the intervention course Literacy Lab 2	01 - PRIORITY	$70,060.00
Instrument Repair	CCPS pays for the repairs for all CCPS instruments, kilns, and other instructional equipment. This budget has not increased in 20 years. We no longer have the funds to keep all equipment in working order.	01 - PRIORITY	$10,000
FARMS Instruments	CCPS purchases instruments for FARMS students and to replace instruments that are no longer salvageable/worth repairing. This is an eight-year cycle. Students use the instrument from 5-12 grade.	01 - PRIORITY	$15,000
MusicFirst	This software is used as the Middle school general music "textbook". This is a suite of programs that allows for a well-rounded hands-on experience for the students.	01 - PRIORITY	$8,400
Music Play Online	This software is used in Elementary General Music as a valuable resource that helps engage students and provides a safe environment for students to express themselves through music.	01 - PRIORITY	$5,750
CAPA Program at McDonough High School, Industry Standard Fieldtrip Workshops	As part of the dance and theatre programs, field trips to attend specialized workshops and events to help provide high-level workshops/training. This money has been coming out of grants and needs to now come from CCPS and be earmarked for MHS in either the school budget or mine.	01 - PRIORITY	$15,000
Legends of Learning	Provides an engaging and interactive platform that helps students grasp complex science concepts.	01 - PRIORITY	$40,000

Gizmos	Provides interactive, visual simulations that help students grasp complex science concepts.	01 - PRIORITY	$70,000
Mystery Science	Provides an engaging, hands-on approach to meeting the science standards. It is aligned to our county science curriculum and is the core for curriculum covered at the elementary level.	01 - PRIORITY	$32,200
Generation Genius	Provides engaging standards-aligned videos that simplify complex science concepts.	01 - PRIORITY	$10,500
Discovery Techbook	It is an interactive, digital textbook designed to engage students with dynamic multimedia content, real-time data, and hands-on activities through a comprehensive, standards-aligned curriculum.	01 - PRIORITY	$290,000
Edge materials for HS Literacy Courses	These courses are designed to help students reading below grade level move closer to grade level so they can be successful in all courses. These materials include teacher and student editions of the books, interactive and grammar & writing workbooks, student libraries, and online opportunities for students.	01 - PRIORITY	$30,000.00
CommonLit 360	Curriculum for Language Arts, Honors, and Self-Contained	01 - PRIORITY	$56,000.00
Just Words	Tier 3 Intervention	01 - PRIORITY	$25,000.00
i-Ready Teacher Toolbox	Tier 2 intervention materials for middle school math Lab 2 classes.	01 - PRIORITY	30,455
Turnitin/Revision Assistant	These programs are included in the English curriculums. They provide writing assistance that helps ensure original work and prevent plagiarism in student writing samples.	01 - PRIORITY	$5,906
Nearpod/Flocabulary	These programs provide an interactive learning environment for teachers and students. There are options for elementary and secondary	01 - PRIORITY	27,241.04

	teachers to create engaging lessons in all content areas.		
i-Ready Personalized Instruction	This computer program supports math instruction by providing students will a differentiated path based on their diagnostic results to meet or exceed grade level. It used in all elementary and middle schools	01 - PRIORITY	228,000
Illustrative Mathematics Student Workbooks Grades 1-2	Supports core mathematics instruction for students in grades 1-2 to make teaching and learning more effective and efficient	01 - PRIORITY	$142,912.00
Illustrative Mathematics 360 Teacher Guides for Grades K-5	Illustrative Mathematics has revised the core curriculum to become IM360. New teacher guides will need to be ordered to ensure that all CCPS educators are using the most current and relevant materials.	01 - PRIORITY	$93,960.00
Illustrative Mathematics 360 Spanish Workbooks and Teacher Guides for Dual Language K and 1	IM resources that align with core purchases for all students, in Spanish, to support the dual language curriculum at Middleton ES- student workbooks for G1 and teacher guides for K and 1	01 - PRIORITY	$4,779.20
IM360 Professional Learning for Teachers, Coaches, and Administrators	Contracted Services to support the professional learning needs of educators as we implement a revised core curriculum for elementary mathematics	01 - PRIORITY	$71,000.00
Bridges Intervention for Mathematics, Intervention Set 1	Bridges Intervention provides targeted instruction and assessment for essential K–5 mathematics skills and concepts. A strengths-based approach builds on each student's abilities—starting with manipulatives, then moving to two-dimensional representations and mental images.	01 - PRIORITY	$136,725.00
Edmentum/Apex	Apex Learning provides online coursework for special and alternative programs (Home and Hospital, Evening High School, Virtual Academy, and recovery programs) for secondary.	01 - PRIORITY	$11,351.25

EdOptions Academy	Online program that offers core, AP, and CTE courses, taught by certified educators who specialize in virtual instruction.	01 - PRIORITY	$70,000
Textbook Replacement - World Language texts	Replacement of 10 books per school for Que Chevere, T'es Branche, En Voz Alta texts	01 - PRIORITY	$111,600
Supplementary training for Heritage and Native Spanish teachers, 2 days in the summer	HNS teachers need continuing training to implement the literaacy-based HNS classes	01 - PRIORITY	$28,560
Supplementary AP work texts for AP Spanish and AP French	Support of AP French and Spanish with appropriate resources is integral to preparing students for success on AP examinations. These texts align with the Temas and Themes texts already used from Vista Higher Learning.	01 - PRIORITY	$2,283.75
Supplementary French and Spanish readers	Supplementary readers provide diverse and engaging contexts for language acquisition, helping students enhance their vocabulary and comprehension skills while fostering a deeper cultural understanding.	01 - PRIORITY	$22, 560
Polyglot Games	Funds for supplies to support the Polyglot Games. (Onlyif not already included in HITS expo budget)	01 - PRIORITY	$5,000
Ellevation	ELD Case Management System	01 - PRIORITY	$55,000
Imagine Learning Language and Literacy Subscriptions	Supplemental language development and literacy intervention for Newcomer ELs	01 - PRIORITY	$72,100
Off2Class licenses and PD	A supplemental online resource for teachers and students to access grammar, listening, reading, writing and speaking exercises.	01 - PRIORITY	$10,000.00
ELD Curriculum K-12: English 3D/Language Launch TEXTS	Curricular materials for ESOL classes/pull out sessions- physical texts/materials	01 - PRIORITY	$196,670.00
ELD Curriculum K-12: English 3D/Language Launch 3 YEAR SUBSCRIPTION	Curricular materials for ESOL classes/pull out sessions- digital licenses- 3 years	01 - PRIORITY	$216,810.00
Dual Arriba la lectura for 3 first grade classrooms 3 year	licenses for 3 first grade classrooms and physical materials needed	01 - PRIORITY	$23,481.00

Dual Arriba la lectura PD for 1st grade teachers	Getting started session for 1st grade teaches	01 - PRIORITY	$6,300.00
Dual Arriba la lectura teachers manual grade 3	1 grade 3 TE for curriculum writing	01 - PRIORITY	$210.00
Dual Heggerty primary	Intervention sets	01 - PRIORITY	$267.00
Dual Supplemental materials for literacy instruction when Spanish version is unavailable	Supplemental Books in SPA	01 - PRIORITY	$1,500.00
Dual 1st grade Classroom libraries	1st grade Spanish teacher classroom libraries	01 - PRIORITY	$9,000.00
Dual MOI for teachers	Spanish manipulatives, anchor chart materials, color coded items, etc...	01 - PRIORITY	$12,000.00
Dual classroom Rugs	floor rugs with Spa words or no words	01 - PRIORITY	$2,700.00
Dual Carts	Carts for moving student belongings between classrooms	01 - PRIORITY	$600.00
Dual Media Center	add Spanish books for 1st grade	01 - PRIORITY	$5,000.00
Dual Orientation events for parents	staff, materials, and food	01 - PRIORITY	$2,000.00
Connect 4 Learning Online Portal	Continue to provide access to the curriculum and resources through the Connect 4 Learning online portal	01 - PRIORITY	$28,698.90
Into Reading	Into reading program	01 - PRIORITY	$3,000.00
Into Reading - Structured Literacy guides	Into reading Science of Reading program	01 - PRIORITY	$9,570.00
STEM Resource Teacher Materials of Instruction	Office supplies, mileage, and materials to support the position.	01 - PRIORITY	$3,000.00
CTE Coordinator, McDonough High School-Materials of Instruction	Office supplies, mileage, and materials to support the position.	01 - PRIORITY	$3,000.00

OSHA-30 Certification	Students in the following programs attain OSHA-30 safety certification: Construction Design and Management, Electrical Construction, HVAC, Welding	01 - PRIORITY	$9,900.00
Educational Assessment	Woodcock-Johnson V is being released in Febrary 2025 and needs to be fully implemented by February 2026.	01 - PRIORITY	$25,000.00
One Roster for Canvas Integration	One Roster for Canvas Integration with Synergy	01 - PRIORITY	$32,114.00
Ipads for KIOSKVUE and Registration	iPads for KIOSKVUE and Registration	01 - PRIORITY	$61,295.00
Alphabet strips for classrooms K - 2	In order to have a consistant alphabet and key words across the county that goes along with Science of Reading	02 - PRIORITY	$5,940.00
Novels study	Novels used in grades 3 -5	02 - PRIORITY	$1,500.00
Alphabet strips for Pre-K classrooms	In order to have a consistant alphabet and key words across the county that goes along with Science of Reading	02 - PRIORITY	$1,260.00
Acadience Benchmark Online Management System	Online Management System to hold benchmark and progress monitoring assessment data for students in MS reading interventions.	02 - PRIORITY	$7,700.00
Social Studies Textbook	New textbook for Grades 4 and 5 Social Studies	02 - PRIORITY	$500,000.00
Advertising	Strategic recruitment initiative to enhance advertising through social media, etc. to source for teachers and support staff. The teacher shortage throughout the country makes this a top priority for HR.	02 - PRIORITY	$25,000.00
EAP Services	Employee Assistance Services (EAP) is offered to all CCPS employees through a contract with ComPsych.	02 - PRIORITY	$11,600.00
Replacement Laptop/Desktops	This initiative would replace desktops and laptops that are over 5 years old for staff use and computer labs. (excluding 1-1 student devices)	02 - PRIORITY	$2,300,000.00

Classroom Monitoring System	The initiative would be to provide software that would enable teachers to monitor the devices students use and enable our system to block websites at a classroom level.	03 - PRIORITY	$190,000.00
Athletic Trainers	High school athletic trainers (ATs) are healthcare professionals who specialize in the prevention, treatment, and rehabilitation of injuries for athletes. They play a key role in keeping high school athletes safe and healthy. Per email and phone call the current budget is $248K the ask should be reduced	03 - PRIORITY	$348,281.00
Assisted fleet manager (TRANSPORTATION)	The assistant fleet manager will provide support to the fleet manager, supervise the drivers on duty, and now that we have expanded to a second location, they will also be responsible for overseeing that group of drivers. This individual will be in charge of monitoring the daily activities and operations of all drivers under the guidance of the fleet manager.	01-Priority	$65,000.00
Elementary PE Itinerant Teachers	Addition of itinerant PE teachers (3) Matula/Mitchell, Middleton/Mudd, Barnhart/Ryon.	01-Priority	$384,750.00
ELD Teachers	Additional ESOL/ELD teachers to support ongoing enrollment and high caseloads.	01-Priority	$400,000.00
Pre-K4 Teacher	Expansion of Pre-K programs	01-Priority	$100,000.00
Pre-K4 Instructional Assistant	Expansion of Pre-K programs	01-Priority	$50,000.00
Prekindergarten Enrollment Secretary	Secretary to assist in the Pre-K enrollment process, answer parent questions, verify income for tiers	01-Priority	$60,000.00
Elementary Instrumental Music Teacher	This full-time position will be needed to meet COMAR regulations to provide music instruction to all elementary students	01-Priority	$100,000.00

Elementary Art Teacher	This full-time position will be needed to meet COMAR regulations to provide art instruction to all elementary students	01-Priority	$100,000.00
CTE Coordinator, McDonough High School	Coordinator over regional CTE programs at McDonough High School to include Graphic Communications, Interactive Media, Dance, and Theatre	01-Priority	$54,912.00
Behavior Supports	One additional BCBA to support SOAR program of services at the elementary level.	01-Priority	$90,000.00
OHR Staffing	Additional FTEs will recruit, process and service a growing workforce; four (4) additional FTEs requested including two (2) two HR Generalist and two (2) HR Assistant/Coordinator. Creating an efficient structure to service the hiring needs of the school system.	01-Priority	$285,521.00
Stormwater Management Specialist (MAINTENANCE)	This position would be responsible for the maintenance and inspections of stormwater management devices. These devices require compliance inspections through MDE.	02 - PRIORITY	$77,947.00
(New Position) Technology Trainer	The implementation of new technology systems in our school system has created a pressing need for dedicated Technology Trainer to ensure that staff members are equipped with the skills and knowledge to effectively utilize technology systems such as Oracle Cloud and business systems.	02 - PRIORITY	$103,041.00
Middle School Sports	Participating on a team can help students make friends and discover new strengths. School sports provide middle schoolers with a way to get involved and develop healthy habits, teamwork, discipline, leadership, confidence, time management, and a sense of belonging. School and community comradery and academic benefits have also	02 - PRIORITY	$69,700.00

	proven to increase as a result of organized sports.		
Increasing School Counselor contracts for High School and Elementary School Counselors	The goal is to address the significant workflow around summer scheduling, master scheduling, and addressing student needs for high school counselors as there are only 1 12-month counselor at each high school currently. All elementary school counselors are only 10 months, significantly hampering their ability to meet deadlines at the end of the year and to match recruitment efforts of other systems.	02 - PRIORITY	$536,734.00
Increased population compliance support	IEP Facilitator County-Wide Support	02 - PRIORITY	$200,000.00
Additional Project Manager (P & C)	Planning and Construction is actively working more than 15 projects in construction, 6 projects in close out and 14 projects in various stages of design.	03 - PRIORITY	$105,112.00
Athletic Trainers	High school athletic trainers (ATs) are healthcare professionals who specialize in the prevention, treatment, and rehabilitation of injuries for athletes. They play a key role in keeping high school athletes safe and healthy.	03 - PRIORITY	$596,491.00
Infants and Toddlers	One additional ITP educator	03 - PRIORITY	$80,000.00
(Position Reclassification) Network Operations Manager	Due to the increasing complexity and scope of the responsibilities that fall on the Lead WAN Network Engineer position, the incumbent is consistently operating beyond the capacity of their current role. o more accurately reflects the nature and extent of their duties; it is proposed that the Lead WAN Network Engineer position be reclassified to Network Operations Manager. This position reclassification	03 - PRIORITY	$125,580.00

	also aligns with a re-org in the Office of Technology.		
(Position Reclassification) Executive Assistant to the Chief of IT	Currently, my Secretary to Director of Technology's position has never been reclassified, even after my position was added back in 2014 to support two executives and new scopes of work. Given the position's scope of work and responsibilities and to align to her EA counterparts, it is being requested this position be reclassed as her colleagues, to Executive Assistant to the Chief of IT.This position reclassification also aligns with a re-org in the Office of Technology.	03 - PRIORITY	$89,067.00

CHARLES COUNTY PUBLIC SCHOOLS
FISCAL YEAR 2026
APPROVED OPERATING BUDGET

Presented to the Board of Education

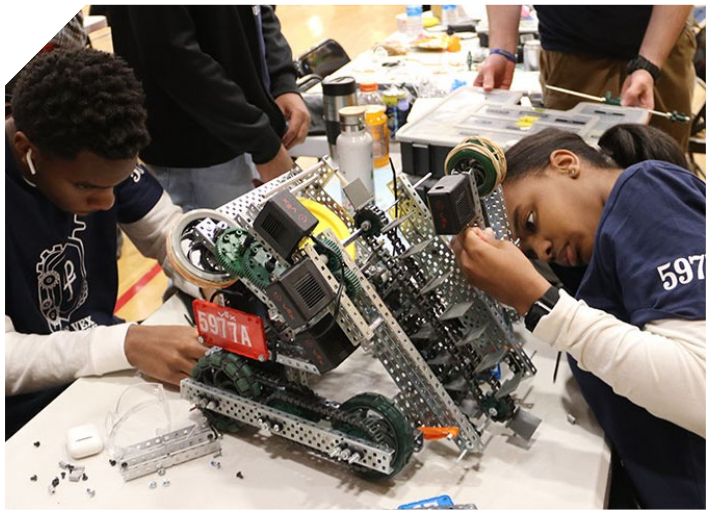
June 10, 2025

Maria V. Navarro, Ed.D.

Superintendent of Schools

Karen M. Acton

Chief Financial Officer





Our Budget Supports CCPS Strategic Priorities…

▸Priority 1: Student Learning and Achievement

Our focus is on the learning, improvement and achievement of every student.

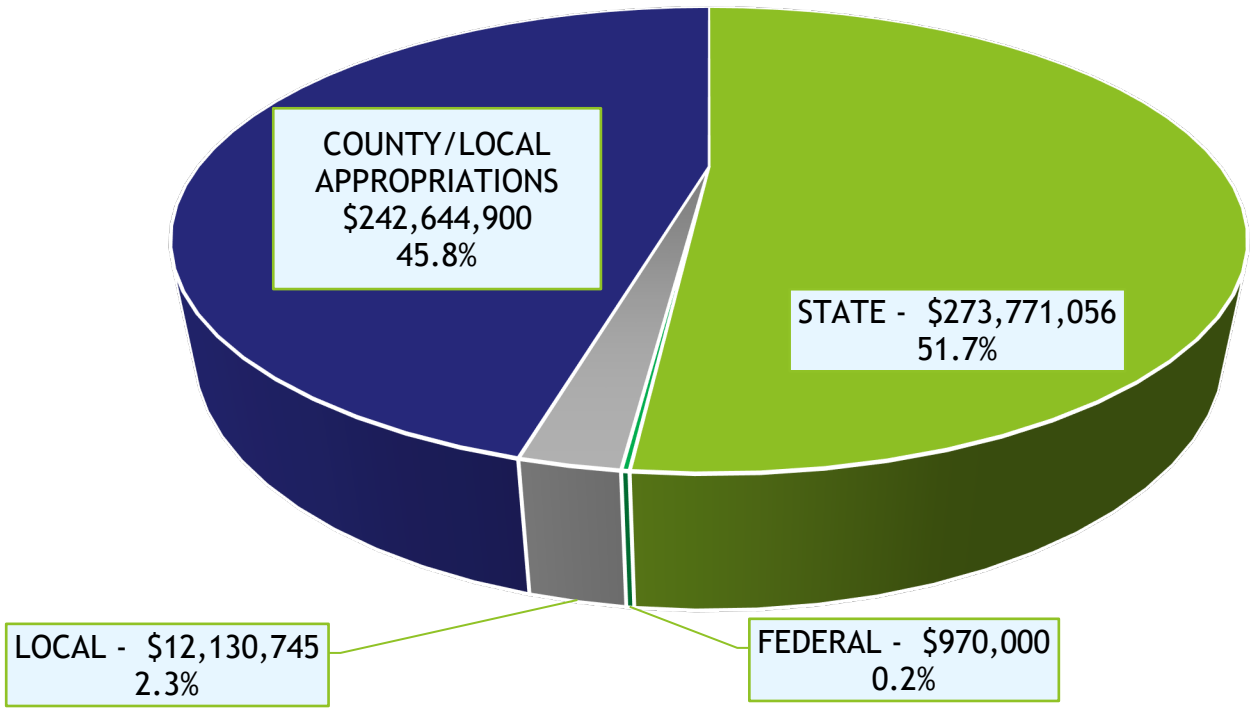
▸Priority 2: Access and Opportunities

No measure of progress can be made if we don't address the barriers that impact students' learning and achievement.

▸Priority 3: Culture and Climate

The culture and climate of the school system should reflect our values. We value students, staff and our community feeling a sense of belonging in our schools while being safe and engaged in supporting student learning and achievement.

FY 2026 OPERATING BUDGET
WHERE THE MONEY COMES FROM
TOTAL REQUESTED REVENUE= $529,516,701



Per Pupil Cost and How Every Dollar is Spent



Student Transportation

$0.10



School Administration

$0.08



Maintenance, Operations & Capital Outlay

$0.12



Student & Community Services

$0.02



Instruction (Classroom)

$0.64

FY 2026 Cost Per Pupil = $18,450

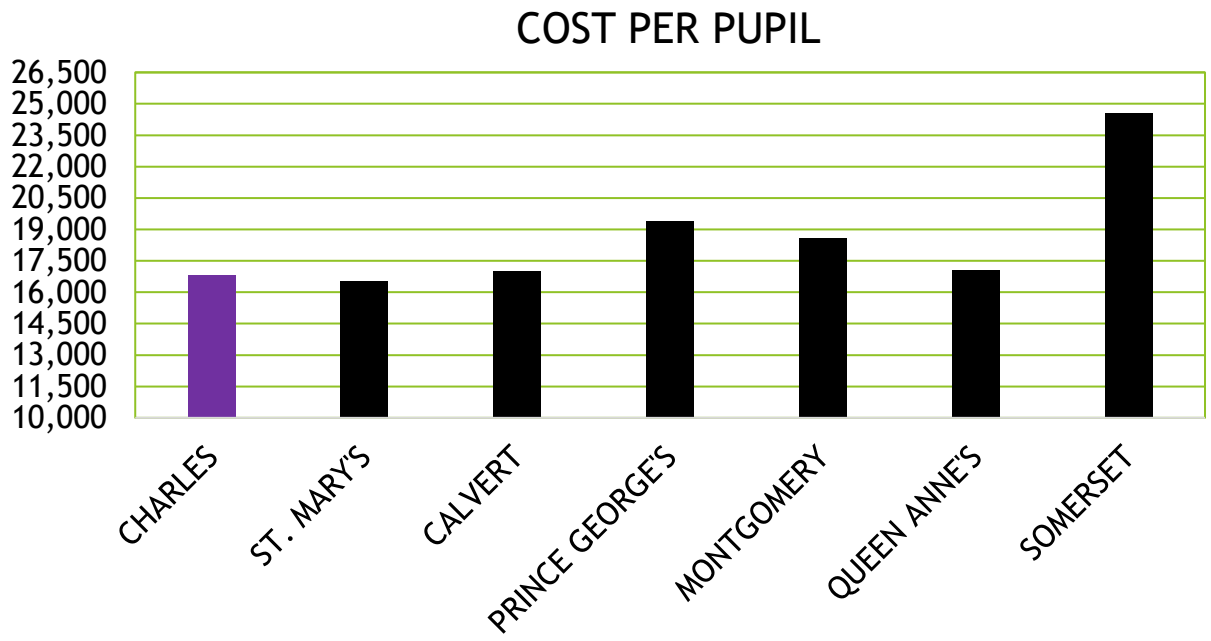
$0.04



Central Administration

Based on projected enrollment of 28,700 (inclusive of PreK)

Maryland County Comparison – Cost Per Pupil FY 2023



- ✓ Data based on actual expenditures and FTE enrollment
- ✓ Maryland state average cost per pupil is $18,551
- ✓ Charles County ranks 20th out of 24 Maryland LEAs at $16,786
- ✓ St. Mary's County ranks 21st at $16,541
- ✓ Somerset County ranks 1st at $24,560
- ✓ Frederick ranks 24th at $15,849

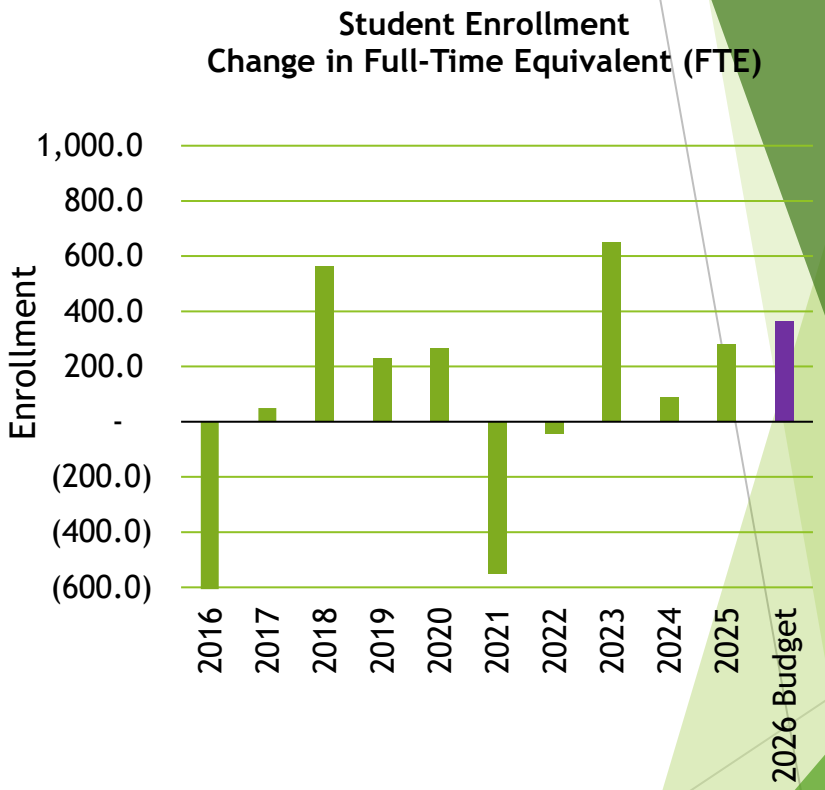
* Source: MSDE Selected Financial Data, Part 3 – 2022-2023

Full-time Equivalent (FTE) Student Enrollment Statistics

- CCPS' FY 2026 estimate for student enrollment is expected to reach 27,370, an increase of 1.35 percent (365 students) more than the current years official enrollment, excluding pre-k enrollment

FISCAL YEAR	FULL-TIME EQUIVALENT	CHANGE	%
2016	25,470.8	57.8	0.2%
2017	25,520.3	49.5	0.2%
2018	26,085.0	564.8	2.2%
2019	26,314.5	229.5	0.9%
2020	26,579.0	264.5	1.0%
2021	26,029.25	(549.8)	-2.1%
2022	25,985.75	(43.5)	-0.2%
2023	26,634.75	649.00	2.50%
2024	26,722.50	137.75	0.33%
2025	27,005.00	282.50	1.06%
2026 Budget	27,370.00	365.00	1.35%

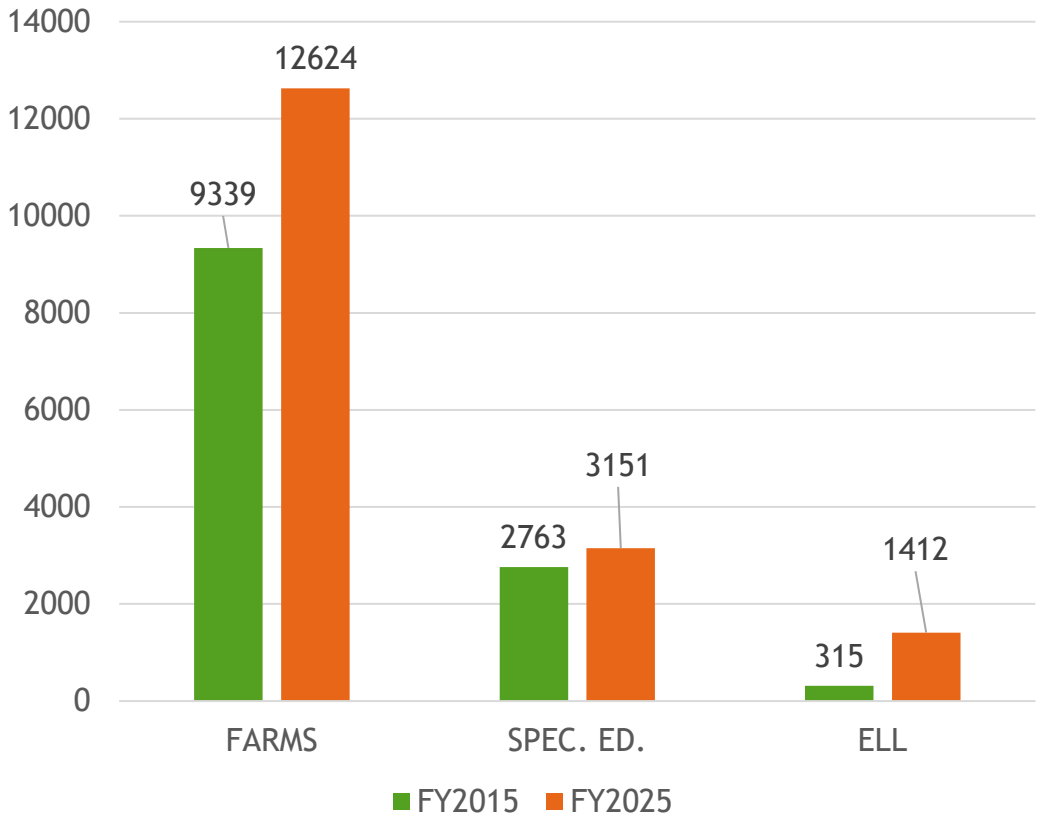
Note: Based on projected enrollment of 28,700 – (PreK - 12)
Projected PreK = 1,330
Projected K-12 = 27,370



Student Enrollment for Special Populations

This slide demonstrates a 10-year comparison of our student population, diversity, and ever-changing educational needs to achieve student success.

Source: CCPS



FARMS – Free and Reduced Meal Students

SPEC. ED. – Special Education & Special Needs Students

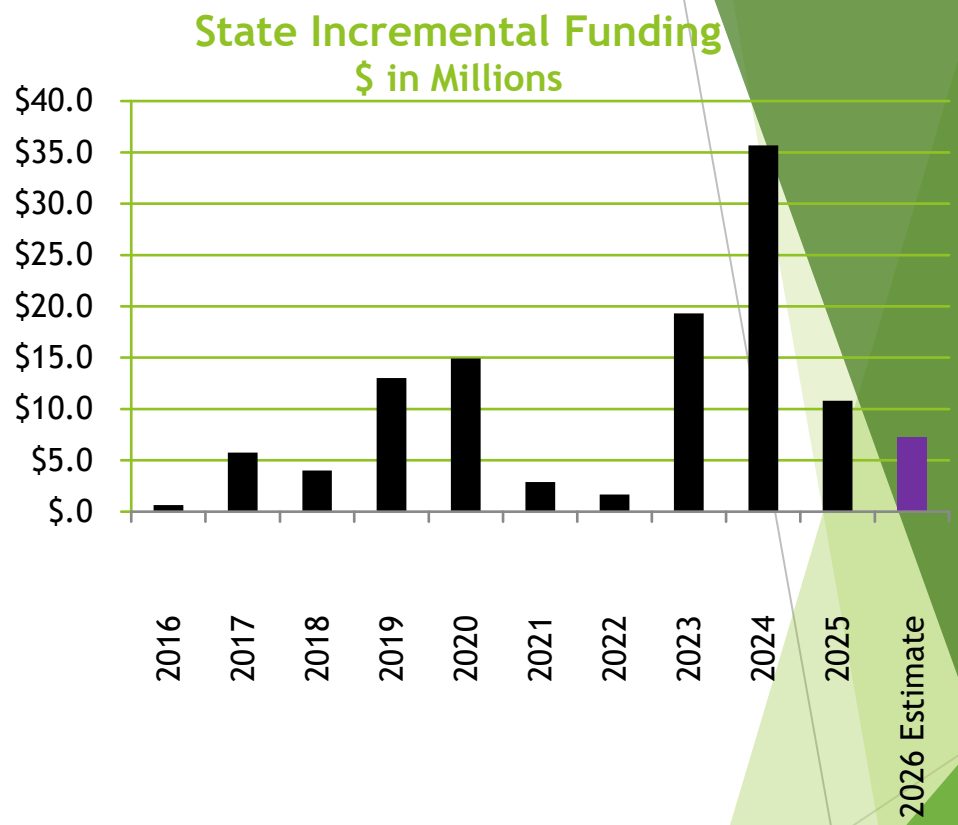
ELL – English Language Learner Students

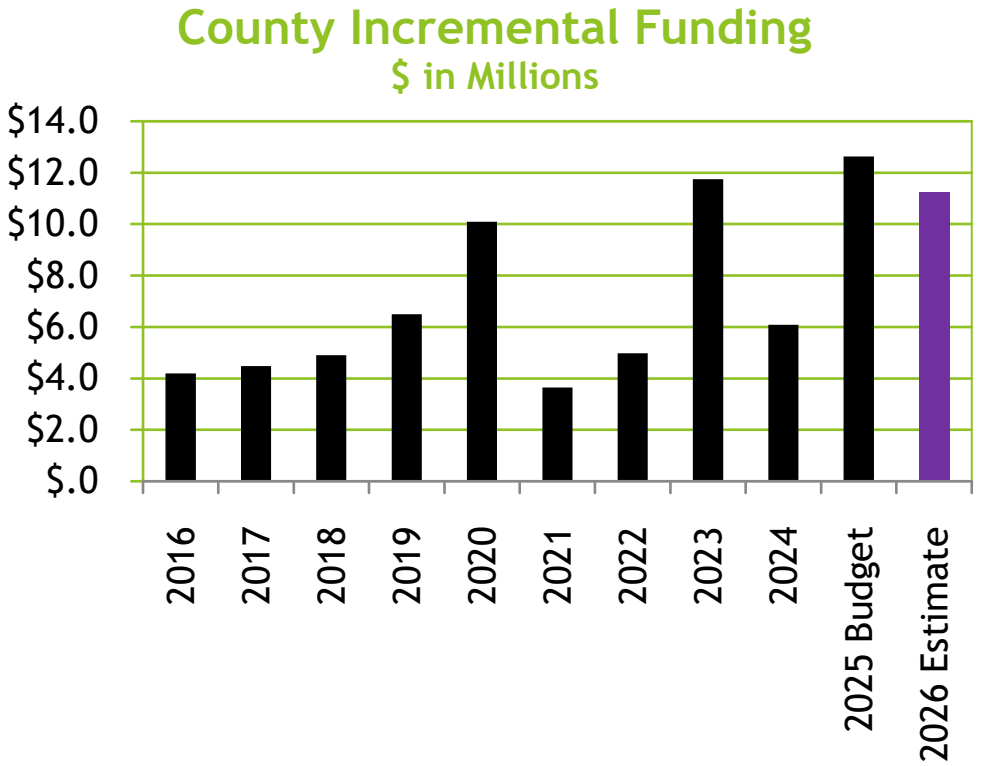
Revenue Planning Model

	DESCRIPTION	FTE	FY 2026 Cost
BASE REVENUE BUDGET			**506,209,726.00**
	REVENUE INCREASES:		
	County Funding - Reduction To Base		
	County Funding - Additional Base		11,241,400
	One-time, Non-recurring Additional County Funding		(612,216)
4.9%	TOTAL ADDITIONAL COUNTY FUNDING		**10,629,184**
2.7%	**STATE FUNDING (Unofficial Estimate)**		**7,216,851**
	FEDERAL REVENUES		
	LOCAL REVENUES		
	FUND BALANCE TRANSFER		**5,460,940**
TOTAL REVENUE INCREASES:			**23,306,975**
TOTAL REVENUE BUDGET			**529,516,701**
	Percent Increase		**4.6%**

State Funding - $7.2 Million Increase (unofficial estimate)

- The State of Maryland allocates funding Local Education Agencies (LEA) based on student enrollment, an assessment of the county's wealth, and free-and-reduced meals program eligibility relative to all other counties.
- FTE enrollments increased from the previous fiscal year by 365 students, or 1.35 percent.
- State Compensatory Aid is based on eligible free-and-reduced-price meal students (FARMS). FARMS enrollment for FY 2025 is 12,624 students. A decrease of 1,404, or 10.0 percent, from FY 2024.
- Compensatory Aid and Guaranteed Tax Base are projected to decline by $5.3M, and $3.2M respectively.





- FY 2020 reflects additional revenue for opening year operating costs for Billingsley Elementary School

County Funding - $11.2 Million Increase Request

- County revenue sources are based primarily on property and income taxes, recordation and various user fees.
- County funding is a formula established calculation based on Maryland Maintenance of Effort (MOE) requirements and student enrollment growth. The MOE law states that each county must appropriate an amount equal to or greater than its prior year per pupil appropriation. This calculation does not address the cost of negotiated agreements, benefits, Pre-Kindergarten students, Non-Public placements students, inflation, and funding for quality improvement initiatives.
- Charles County Commissioners funded CCPS $231.4 million in FY 2025. The total county funding request for FY 2026 is $11.2 million more than the current fiscal year or a 4.9 percent increase.

County Funding - Five-Year Comparison

Fiscal Year	Charles County Government Operating Budget	CCPS Proposed Budget Request	Percentage of Local Funding CCPS Requested	Approved CCPS Local Allocated Funding	Variance – Funding Request vs Approved	Percentage of Approved Local Funding to CCPS
2026	$594,293,300	$256,131,664	43.1%	$242,644,900	($13,486,764)	40.8%
2025	$561,338,600	$248,374,171	44.2%	$231,403,500	($16,970,671)	41.2%
2024	$527,362,100	$218,767,000	41.5%	$218,767,000	$0	41.5%
2023	$494,446,200	$214,155,774	43.3%	$212,686,400	($1,469,374)	43.0%
2022	$450,350,300	$206,705,477	45.9%	$200,686,400	($6,019,077)	44.6%

Expenditure Schedule

BASE EXPENDITURE BUDGET		**$ 506,209,726**
MANDATORY COST INCREASES:		
5% Health Care Costs (estimate)		2,391,550
3% Bus Contracts - Retiring Buses and Pay increase		1,358,466
21% Teachers' Pension (SB1301) - State Retirement Agency (estimate)		
Additional FY2026 PISOTA Allocation		400,000
FY2025 ITEMS NOT FULLY FUNDED:		
Non-Instructional Increases		
Extended Learning Opportunity Wages		2,118,005
Countdown to Kindergarten Orientation - 1756 Students		
Elementary Summer Boost - 1350 Students		
Extended School Year Elem - 300 Students		
Extended School Year Middle/High - 300 Students		
Sheriff's Camp SYAP - 100 Students		
Summer School - HS - 1300 Students		
Summer School - MS - 600 Students		
Extended Learning Opportunity Transportation		938,738
Non-Instructional Increases		
Insurance-Short Term Disability		300,000
TOTAL FY2025 ITEMS NOT FULLY FUNDED:		3,356,743
PISOTA Charter School		
Music Teacher	1.00	100,000
Art Teacher	0.50	50,000
Choir Teacher	0.50	50,000
Dance Teacher	0.50	50,000
Secretary	1.00	114,000
Administrative IA	1.00	47,250
Building Service Worker	1.00	59,875
TOTAL PISOTA Charter School		**471,125**
TOTAL MANDATORY COST INCREASES:	**5.50**	**7,977,884**
TOTAL COLLECTIVE BARGAINING ASSUMPTIONS:	**-**	**6,034,596**

Expenditure Schedule Cont.

OTHER BUDGET CHANGES:		
Blueprint Implementation Costs:		
Workforce Development Board - $63.89 per FTE		86,433
Concentration of Poverty Increases		
Jenifer Elementary School		155,848
Benjamin Stoddert		6,407
John Hanson		63,913
Thomas Stone		118,452
Smallwood		6,407
Eva Turner		174,173
Ryon		283,343
Mudd		152,363
Indian Head		174,482
Brown		203,616
Addition of Mt.Hope/Nanjemoy Elementary	1.00	280,212
Addition of William B. Wade Elementary	1.00	280,212
Addition of C. Paul Barnhart Elementary	1.00	280,212
Addition of JC Parks Elementary	1.00	280,212
TOTAL Blueprint Implementation Costs:		2,546,285
Oracle Support Positions		
HR Generalist	1.00	123,552
Benefits Manager	1.00	140,137
Director of Finance	1.00	197,100
Database Administrator	1.00	131,583
Instructional Increases		
Increase School Counselors (High School)		358,288
Staff Growth and Retention Specialists	2.00	240,000
Community Schools Secretary	1.00	60,750
International Baccalaureate Program Development		150,000
Special Education Non-Public Placements		750,000
Non-Instructional Increases		
Increase to HR overtime budget		8,000
Increase to HR hourly wages budget		120,000
Support Coordinator for the Board	1.00	130,000
Board Travel/Food		13,000
International Teachers Fee		170,000
School Signage Change		80,000
Food Service Debt		500,000
Technology Equipment		500,000
TOTAL OTHER BUDGET CHANGES:		**3,672,410**

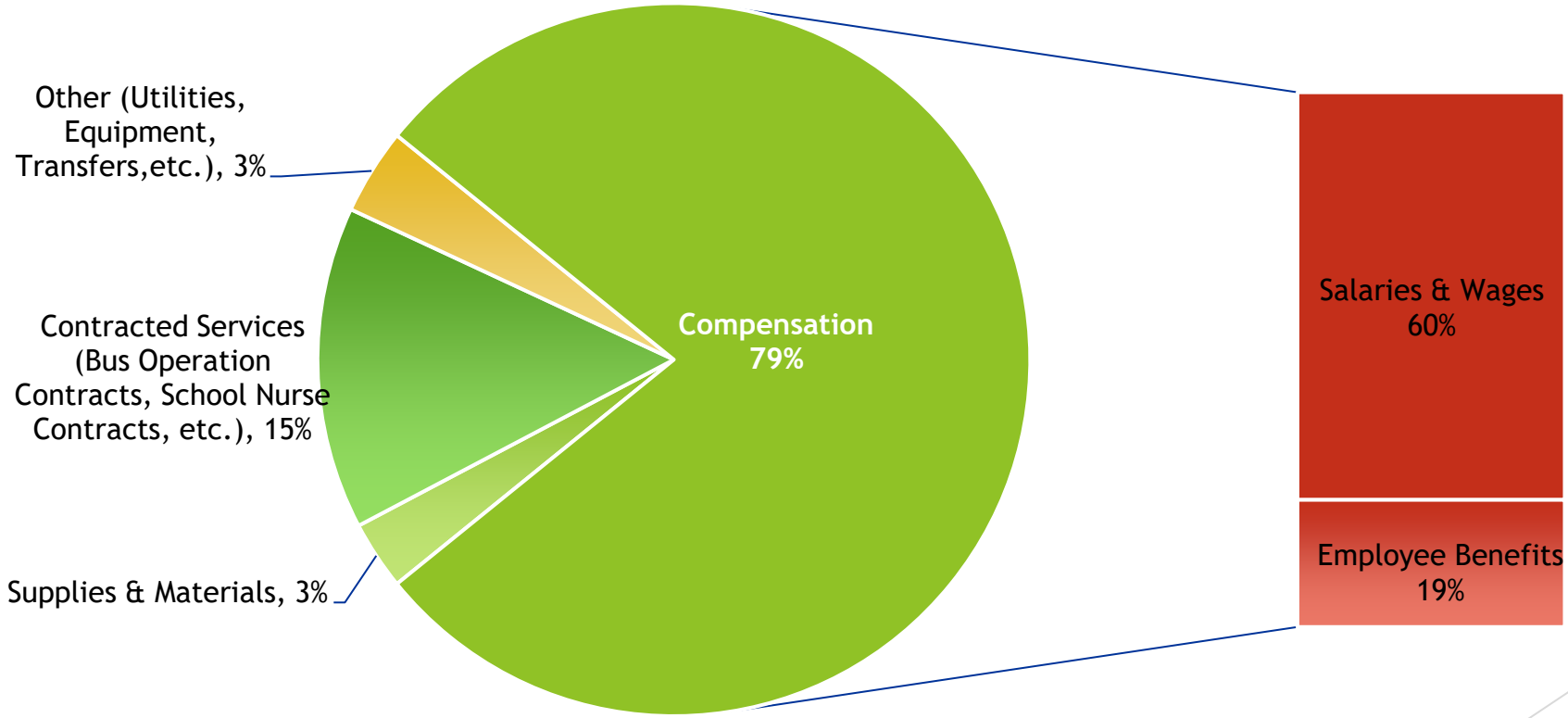
Expenditure Schedule Cont.

Margaret J. Thornton ES:		
Staff Positions		
Principal		-
Secretary - Principal		57,000
Building Service Manager		73,000
Assistant Principal	2.00	221,956
Secretaries (Front Office & Registration)	2.00	89,648
Computer Analyst	1.00	94,774
Building Service Worker	4.00	195,496
Building Service Asst. Manager	1.00	66,424
Media Specialist	1.00	89,474
Counselor	1.50	134,211
Psychologist	1.00	99,474
PPW	0.50	49,737
SPED Service Providers (SLP,OT, PT etc)	1.00	99,474
PreK Teacher	2.00	174,862
Kindergarten Teacher	3.00	262,293
First Grade Teacher	3.00	262,293
Second Grade Teacher	2.00	174,862
Third Grade Teacher	2.00	174,862
Fourth Grade Teacher	1.00	87,431
Fifth Grade Teacher	1.00	87,431
Art Teacher	0.50	43,716
ESOL Teacher	1.00	87,431
Music Teacher - Instrumental	0.50	43,716
Music Teacher - Vocal	0.50	43,716
PE/Heath Teacher	0.50	43,716
SPED Teachers (4 inclusion, 1 ACHIEVE,1 Pre-K, 2 SOAR, 1 IEP Facilitator)	9.00	786,879
Science Teacher	1.00	87,431
Learning Resource Teacher	1.00	97,431
Reading Resource Teacher - 11 months	1.00	101,108
Math Resource Teacher - 11 months	1.00	101,108
Administrative IA	1.00	45,268
SPED IAs	10.00	452,680
Intervention IA (Math & Reading)	2.00	90,536
Technology Facilitator	1.00	57,368
Kindergarten IA	6.00	271,608
SPED PreK IA	1.00	45,268
PreK IA	2.00	90,536
Teacher Substitutes (Daily, LTS, Stipends)		129,600
Operating Cost:		
Copier/Lease		49,000
Repairs - Building		35,000
Software Maintenance		20,000
Refuse Disposal		17,000
Field Trips		8,200
Repairs - Equipment		2,200
Custodial Supplies		28,000
Repair Materials - Grounds		14,000
Utilities - Electric		160,000
Communications		16,500
Utilities - Water & Sewer		12,000
Utilities - Gas		10,000
Professional Development		2,300
TOTAL Margaret J. Thornton ES:		5,488,016
TOTAL OTHER BUDGET CHANGES:	**80.00**	**11,706,711**

Expenditure Schedule Cont.

BUDGET REDUCTIONS:		
One-time, Non-recurring Additional County Funding		(612,216)
Adjustment to Middle and High School Staffing Ratios	(8.00)	(800,000)
Adjustment to Fourth and Fifth Grade Staffing Ratios	(10.00)	(1,000,000)
TOTAL BUDGET REDUCTIONS:	**(18.00)**	**(2,412,216)**
TOTAL EXPENDITURE BUDGET	**67.50**	**529,516,701**
NET SURPLUS/(DEFICIT)		**(0)**

FY 2026 Operating Budget
Where the Money Goes
Budget Planning Expenditures = $529,516,701



Collective Bargaining Assumptions

Description	Estimate $
Reserve approximation for Collective Bargaining	$6,034,596

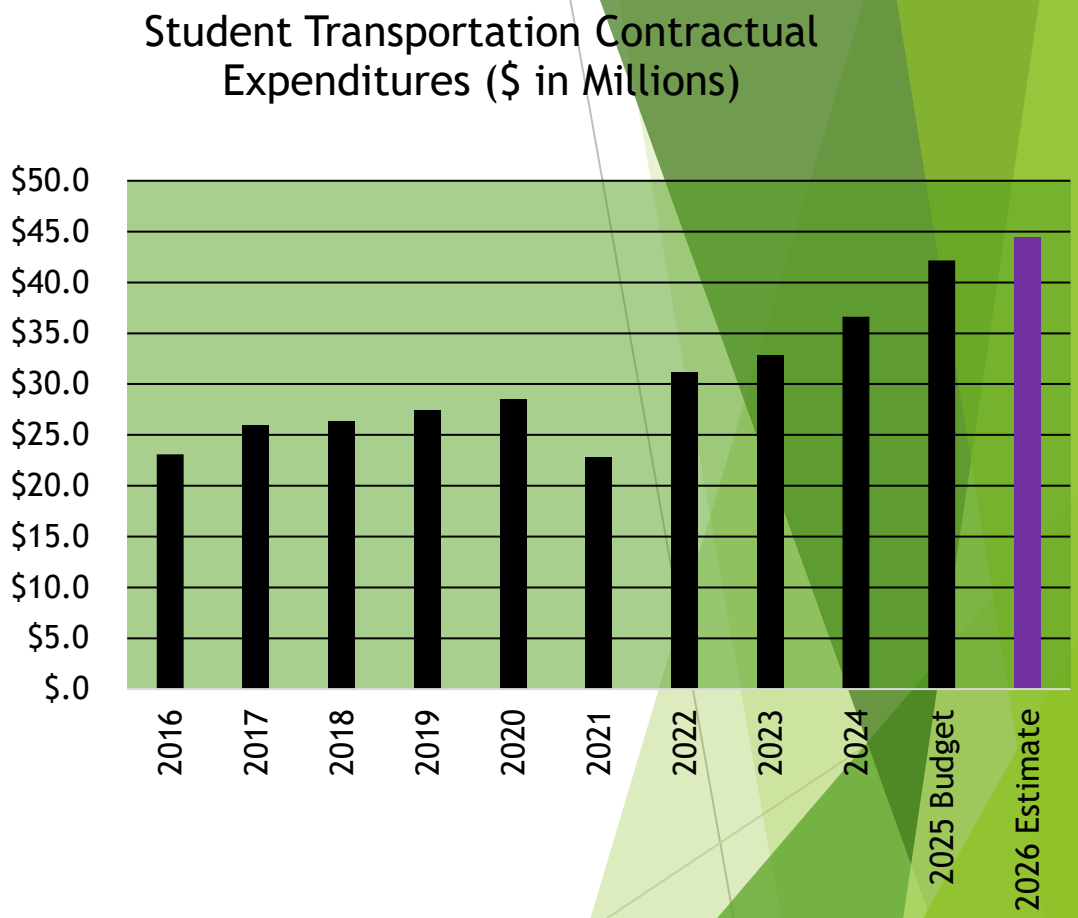
- This request is to set aside funding for potential FY 2026 collective bargaining increases for the Education Association of Charles County (EACC) and the American Federation of State, County and Municipal Employees (AFSCME).

Mandatory Student Transportation Increase - $1,358,466

- Bus Contracts – Retiring Buses and Pay Increases - $1,358,466

  The school system's operational bus fleet total is 384 (315 contractual and 69 owned by CCPS).

  The increase includes purchasing new buses to replace retired buses greater than 15 years in service and estimated pay increases for contracted student bus drivers.



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Mandatory Cost Increases

- **Health Care Costs (estimate) - $2,391,550**
  Annual health care cost increases are due to claims and additional enrollments. Our FY2026 budget provides funding for anticipated industry trend cost increases.

- **Bus Contracts (estimate) - $1,358,466**
  Under Maryland Annotated Code § 7-804(b) (2) (i), CCPS may not transport school children on a school bus that is older than 15 years. This increase reflects the retirement of buses and wage increased to bus contractors.

- **Additional FY2026 PISOTA Allocation - $400,000**

  Additional funding for the needs CCPS' Charter School – Phoenix International School of the Arts (PISOTA).



Mandatory Cost Increases

- **Items Funded through Budget Cuts in FY 2025 Budget that need to be restored:**
  - **Extended Learning Opportunity Wages- $2,118,005**
  - **Extended Learning Opportunity Transportation - $938,738**
  - **Short Term Disability Insurance- $300,000**
  - **PISOTA - $471,125**
    - 1 Music Teacher, .5 Art, .5 Choir and .5 Dance Teachers, 1 Secretary, 1 Administrative IA, 1 Building Service Worker

<u>The Blueprint for Maryland's Future – Policy Implementation Costs</u>

- **Creating a World-Class Instructional System/College and Career Readiness (CCR) Pathway –**
  - **Workforce Development Board - $86,433**

As part of the College and Career Readiness policy, each local school board will receive funding, based on student enrollment, to distribute to the local workforce development board. The funding is to support collaborative planning and development of a Career Readiness Program for Middle and High School Students.

The Blueprint for Maryland's Future - Policy Implementation Costs



- ✓ **Concentration of Poverty**
  - **Concentration of Poverty Increases - $2,459,852**

Daniel of St. Thomas Jenifer E.S. -	$155,848
Benjamin Stoddert M.S. -	$ 6,407
John Hanson M.S –	$ 63,913
Thomas Stone H.S. –	$118,452
General Smallwood M.S. –	$ 6,407
Eva Turner E.S. -	$174,173
J. P Ryon E.S. -	$283,343
Dr. Mudd E.S. -	$152,363
Indian Head E.S. -	$174,482
Dr. Brown E.S -	$203,616
Addition of Mt Hope/Nanjemoy E.S	$280,212
Addition of William B. Wade E.S	$280,212
Addition of Paul Barnhart E.S	$280,212
Addition of J.C. Parks E.S.	$280,212

CCPS has four (4) new schools, Mt. Hope/Nanjemoy E.S, William B, Wade E.S, Paul Barnhart E.S, JC Parks E.S, that meet the state's 3-year average concentration of poverty level of at least 55 percent. These schools are eligible to receive program funding for personnel (Community School Coordinator and Health Services Practitioner).

CCPS will have a total of fourteen (14) community schools in FY2026

Other Cost Requests/Increases

Oracle Support Positions

- ✓ HR Generalist – $123,552
  Additional FTE will recruit, process and service a growing workforce. Creating an efficient structure to service the hiring needs of the school system.

- ✓ Benefits Manager – $140,137
  The individual will be responsible for managing State and Classified pensions, retiree health and life care, and TSA's including enrollments and disbursements. Tracking and monitoring employer cost for these items. Also responsible for financial reporting, actuarial validations, and the census. Project lead for all audits relating to duties.

- ✓ Director of Finance – $197,100
  The Director of Financial Services is responsible for overseeing the Division of Financial Services, ensuring the implementation of financial policies, procedures, controls, and reporting systems. This role ensures compliance with federal, state, local, and Board mandates for all accounting and financial reporting functions. The Director collaborates with staff to support schools with accounting and fiduciary responsibilities and provides financial data and periodic reports to the Board of Education, the superintendent, and relevant agencies as require.

- ✓ Database Administrator - $131,583
  The implementation of a new Oracle ERP system presents a critical need for a dedicated ERP Database Administrator (DBA). This role is essential to ensure the optimal performance, security, and integrity of the system's database, which serves as the foundation for all operations.

Instructional Budget Increase Request

✓ Increase in School Counselors (High School) – $358,288

The goal is to address the significant workflow around summer scheduling, master scheduling, and addressing student needs for high school counselors as there are only 1 12-month counselor at each high school currently. All elementary school counselors are only 10 months, significantly hampering their ability to meet deadlines at the end of the year and to match recruitment efforts of other systems.

✓ Staff Growth and Retention Specialists – $240,000

Provides coaching and training to lead teachers in compliance with Blueprint for Maryland's Future requirements. Examines data and works with staff to support the planning and implementation of countywide in-service, summer professional development, professional learning teams, and on-going professional development opportunities.

✓ Community Schools Secretary – $60,750

With the increase of the number of community schools, this position will support CSC and the grant manager with monitoring and tracking program expenditures.
Processes Community School Program invoices, submits requisitions, request transfer of funds, purchases orders, conference request forms, and other activities related to the program.
Supports Community Schools food bank and events.

✓ International Baccalaureate Program Development – $150,000

The International Baccalaureate (IB) Diploma Program provides a strong foundation in various subjects while fostering critical thinking, research skills, and a global perspective, making it a valuable choice for students seeking a challenging academic path and potential college credit upon graduation. The program demands deep critical thinking and analytical skills through a comprehensive curriculum covering diverse subjects. Beyond subject knowledge, the IB program emphasizes research, writing, time management, and independent learning abilities. IB uses an interdisciplinary approach: which encourages students to connect concepts across different subjects, fostering a holistic understanding. The IB program promotes global citizenship by encouraging students to consider diverse perspectives and engage with global issues.

✓ Special Education Non-Public Placements – $750,000

This is a State aid program for students placed in nonpublic special education schools through the Individualized Education Program (IEP) process. The State share of the cost of nonpublic special education is calculated in accordance with Education Article §8-415, Annotated Code of Maryland.

Non-Instructional Budget Increase Requests

- ✓ Increase to HR overtime budget - $8,000

  Cost increases result in OHR budget still underfunded in this category. If not funded, adversely impacts hiring and causes OHR to go over budget.

- ✓ Increase to HR hourly wages budget - $120,000

  OHR lacks permanent FTEs or outsourced vendor to process HB486 which is a mandatory Maryland law.

- ✓ Support Administrator for the Board – $130,000

  In January of 2023, the BOE increased from a 7-member board to a 10-member board. The Board has increased its community engagement activities. The increase demands of a growing school system with more appeals, meetings, community engagement and board activities give rise to the need for additional administrative support to this office. This cost covers salary and benefits.

- ✓ Board Travel/Food - $13,000

  This requested increase in funds aligns with properly accounting for the additional increase in Board membership (no increases were done in the FY24 or FY25 budget). There has been an increase in board members who participate in more professional learning opportunities (travel and food) along with increases in meetings and activities in the community (food).

- ✓ International Teachers Fee - $170,000

  Increase high quality teachers through International Teacher Pilot in hard to teach subject area(s).

Non-Instructional Budget Increase Requests

- ✓ School Signage Change- $80,000

  Under Board Policy 7230 the Board may initiate or consider requests to rename an existing school facility at its discretion. The Board may consider renaming a school or facility at any time if the current name of the school or facility conflicts with current Board policies, core values, or curricular objectives. The Board may also consider renaming a school or facility if the Board determines through petition, through public demonstration, or in some other manner that there is significant community interest to do so. The decision to rename a school shall be made independently of and prior to the decision on what the new name may be.

- ✓ Food Service Debt - $500,000

  While bad debt must be written off as an operating loss, this particular operating loss may not be absorbed by the National School Lunch Program, but must be restored using non-federal funds. These funds may come from the school district's general fund, special funding from state or local governments, school or community organizations, or any other non-federal sources. Once delinquent meal charges are converted to bad debt, records relating to those charges must be maintained in accordance with the record retention requirements in 7 CFR 210.9(b)(17) and 7 CFR 210.15(b).

- ✓ Technology Equipment – $500,000

  In January of 2023, the BOE increased from a 7-member board to a 10-member board. The Board has increased its community engagement activities. The increase demands of a growing school system with more appeals, meetings, community engagement and board activities give rise to the need for additional administrative support to this office. This cost covers salary and benefits.

✓ Margaret J. Thornton ES – $5,488,016

- Staff Positions - $5,113,816 (Remaining positions needed after 13 reallocated from other schools)

Secretary - Principal	PreK Teacher	Science Teacher
Administrative IA	Kindergarten Teacher	Learning Resource Teacher
Building Service Manager	First Grade Teacher	Reading Resource Teacher (11- months)
Assistant Principal	Second Grade Teacher	Math Resource Teacher (11- months)
Secretaries (Front office and Registration)	Third Grade Teacher	SPED IAs
Computer Analyst	Fourth Grade Teacher	Intervention IA (Math & Reading)
Building Service Worker	Fifth Grade Teacher	Technology Facilitator
Building Service Asst. Manager	Art Teacher	Kindergarten IA
Media Specialist	ESOL Teacher	SPED PreK IA
Counselor	Music Teacher – Instrumental	PreK IA
Psychologist	Music Teacher – Vocal	Teacher Substitutes (Daily, LTS, Stipends)
PPW	PE/Health Teacher	SPED Service Providers (SPL, OT, PT, etc.)
SPED Teachers (4 Inclusion, 1 PreK, 2 SOAR, 1 IEP Facilitator)		

- Operation Cost - $374,200

Copier/Lease	Field Trips	Utilities – Electric
Repairs – Building	Repairs -Equipment	Communication
Software Maintenance	Custodial Supplies	Utilities – Water & Sewer
Refuse disposal	Repair Materials - Grounds	Utilities - Gas
Professional Development		

Budget Reductions

$ 250,000 - Early Learning Center, Waldorf (start-up costs)

$ 362,216 – TV Production Equipment (upgrade to aging equipment)

$ 800,000 – Adjustment to Middle and High School Ratios

$1,000,000 – Adjustment to Fourth and Fifth Grade Staffing Ratios

Questions?

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto, Department of Fiscal and Administrative Services

ITEM TYPE: Approval Item(s)

AGENDA SECTION: Approval Items

SUBJECT:

- **Letter of Intent: College of Southern Maryland for FY2027 Renovation of Campus Center and Bookstore Project and Petition for Grant**
  (Dr. Bill Comey, Vice President Division of Operations and Planning, Dr. Yolanda Wilson, President, Ms. Judith Mills, Vice President Financial Services, College of Southern Maryland (CSM))

SUGGESTED ACTION:

ATTACHMENTS:
CIP Form O BK & CC Renovation2.pdf
CIP Forms M for BK and CC Renovation2.pdf

PETITION
MARYLAND COMMUNITY COLLEGES

RE: Petition for Grant of $13,758,179
Board of Trustees of the College of Southern Maryland, La Plata, Maryland

WHEREAS, The General Assembly of Maryland has enacted various community college construction loan acts that provide State funds to assist the counties in the financing of the cost of the acquisition of land and in the construction of public junior, community, or regional community college buildings and facilities, the cost of which were incurred after the effective dates of the acts; and

WHEREAS, A petition to participate in the financial assistance provided in the acts must be filed by the County Commissioners with the Maryland Higher Education Commission; and calls for a budget of $13,758,179 and the State portion of 75% is $10,318,634 and the matching funds of 25% is $3,439,545.

WHEREAS, The Board of Trustees of the College of Southern Maryland proposes the design, construction and equipping of the "Renovation of the Bookstore and Campus Center" project at the La Plata, Maryland campus; and upon resolution duly adopted by it, a copy of said Resolution being appended hereto, request the County Commissioners of Charles County, Maryland to petition the Maryland Higher Education Commission for the sum of thirteen million, seven hundred fifty-eight thousand, one hundred and seventy-nine dollars ($13,758,179) needed for the purpose of assisting the financing of the public community project which is described in the application for financial assistance;

NOW, THEREFORE, BE IT RESOLVED, By the County Commissioners of Charles County, Maryland that petition is hereby made to the Maryland Higher Education Commission for a grant of thirteen million, seven hundred fifty-eight thousand, one hundred and seventy-nine dollars ($13,758,179) from the available funds of the various community college construction loan acts in order to participate in said financial assistance; and

BE IT FURTHER RESOLVED, That the County Commissioners of Charles County, Maryland shall provide all the remaining funds necessary to complete the described project, even if the Board of Public Works approves a grant which is less than the amount requested by this Petition.

Signatures of Charles County Commissioners:

_____
Reuben B. Collins, II, Esq.
President

_____
Ralph E. Patterson, II, M.A.
Vice President, District 4

_____
Gilbert "BJ" O. Bowling, III
District 1

_____
Thomasina O. Coates, M.S.
District 2

_____
Amanda M. Stewart, Ed.D.
District 3

Date: _____

Project: Bookstore & Campus Center Renovation
MHEC FORM - O

LETTER OF INTENT
MARYLAND COMMUNITY COLLEGES

TO: Maryland Higher Education Commission
217 East Redwood Street, Suite 2100
Baltimore, MD 21202

RE: Request for Design and Construction Funds
College of Southern Maryland Renovation of the Bookstore and Campus Center

This Letter of Intent is to assure the Maryland Higher Education Commission that the county intends to provide the local share of funds to design, construct, and equip the above referenced project.

A Resolution and Petition for the State's share of funds to design and construct this facility will be submitted with the CC-Form A, Annual Capital Budget Request, on or before June 30, 2025.

Signatures of the Board of Charles County Commissioners:

_____
Reuben B. Collins, II, Esq.
President

_____
Ralph E. Patterson, II, M.A.
Vice President, District 4

_____
Gilbert "BJ" O. Bowling, III
District 1

_____
Thomasina O. Coates, M.S.
District 2

_____
Amanda M. Stewart, Ed.D.
District 3

Date: _____

MHEC FORM - M

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto

ITEM TYPE: Approval Item(s)

AGENDA SECTION: Approval Items

SUBJECT:

- **Approval of Collective Bargaining Agreements for Fraternal Order of Police (FOP)and the Charles County Correctional Officers Association (CCCOA)**
  (Ms. Jenifer Ellin, Acting Deputy County Administrator, Office of the County Administrator; Ms. Alexis Blackwell, Director, and Ms. Megan Donnick, Deputy Director, Department of Human Resources; Mr. Jacob Dyer, Director, Department of Fiscal and Administrative Services; and Mr. Eric Paltell, Outside Counsel)

SUGGESTED ACTION:

ATTACHMENTS:

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto

ITEM TYPE: Discussion

AGENDA SECTION: Briefings-Morning

SUBJECT:

- **Quarterly Update: Impact of Federal Executive Orders on Charles County**
  (Ms. Michelle Frye, Acting Director, Department of Economic Development, and Mr. Jeffrey Barnett, Chief of Transit, Department of Planning and Growth Management ; Mr. George Clark, Acting Transportation Director, and Ms. Ruthy Davis, Workforce Director, Tri-County Council for Southern Maryland (TCCSMD); and Mr. Everett Kelley, National President, American Federation of Government Employees)

SUGGESTED ACTION:

ATTACHMENTS:
Federal Workforce Transition Impact_EDD_06242025.pdf
CCEDD Federal Gov Transition Flyer.pdf
Chas Co Presentation Federal Separations 06-24-25.pdf

Charles
CHARLES COUNTY, MARYLAND
ECONOMIC DEVELOPMENT DEPARTMENT



Federal Workforce Transition Impact

Economic Development Response

June 23, 2025

Resources for Local Individuals and Businesses Impacted by Federal Government Transition

Charles
CHARLES COUNTY, MARYLAND
ECONOMIC DEVELOPMENT DEPARTMENT

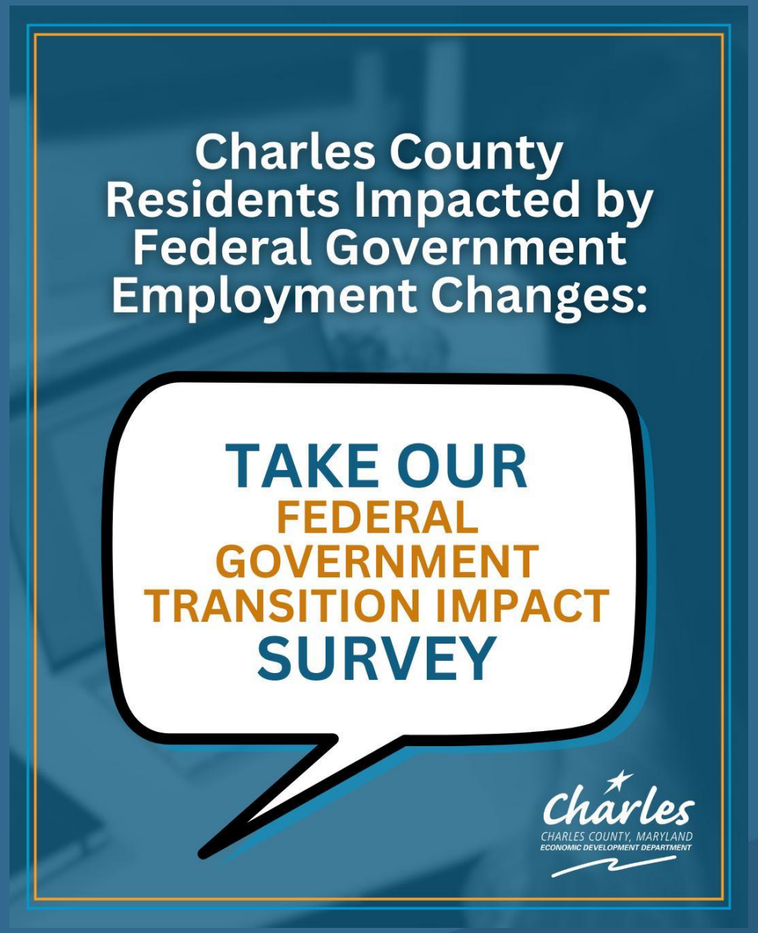


https://www.meetcharlescounty.com/government-transition-resources

NEW WEBPAGE

- Job Search Assistance
- Unemployment Resources
- Benefits Programs
- Business Support
- Impact Survey

Federal Government Transition
Impacted Survey for Charles County



- Charles County Economic Development Department is gathering insights on how recent federal government transition changes are impacting businesses, residents, and federal employees who live in Charles County. Our new impact survey aims to identify the most helpful resources for those affected.

- Community input is essential in shaping support efforts, so we encourage you to complete the survey: **https://www.surveymonkey.com/r/JP5N9RC**

PRESENTED BY:

Michelle, Acting Director of Economic Development

Economic Development Department
Charles County Government

10665 Stanhaven Place, Ste. 206 | White Plains, MD 20695
301-885-1340 | info@MeetCharlesCounty.com

Equal Opportunity Employer

It is the policy of Charles County to provide equal employment opportunity to all persons regardless of race, color, sex, age, national origin, religious or political affiliation or opinion, disability, marital status, sexual orientation, genetic information, gender identity or expression, or any other status protected by law.

www.MeetCharlesCounty.com
www.CharlesCountyMD.gov

Charles
CHARLES COUNTY, MARYLAND
CLOSE TO THE CAPITAL. FAR FROM ORDINARY

Resources for Local Individuals and Businesses Impacted by Federal Government Transition

Government Transition Resources Webpage

- Job Search Assistance
- Benefits Programs
- Unemployment Resources
- Business Support

Federal Government Transition Impact Survey

Survey responses will provide valuable insights, helping us to better tailor our resources, services, and support to meet the needs of Charles County.

CHARLES COUNTY ECONOMIC DEVELOPMENT DEPARTMENT

WWW.MEETCHARLESCOUNTY.COM

Charles
CHARLES COUNTY, MARYLAND
ECONOMIC DEVELOPMENT DEPARTMENT



SOUTHERN MARYLAND
JOBSOURCE
WHERE PEOPLE MEET JOBS



State and Local Response to the Separation of Federal Workers and Contractors

Tuesday, June 24, 2025

CALVERT • CHARLES • ST. MARY'S

TRI-COUNTY COUNCIL
for SOUTHERN MARYLAND



SOUTHERN MARYLAND JOBSOURCE
WHERE PEOPLE MEET JOBS



MD Department of Labor Overview

January 14, 2025

	Federal Jobs (2023)	% of State Total
Calvert County	392	0.2%
Charles County	3,711	2.3%
St. Mary's County	10,297	6.5%
Maryland	158,475	100%

- We know that 89,831 Charles County residents are in the workforce
- We know that 49,472 (55%) of those residents commute out of the county for work
- We do not know how many of those commuters commute to federal jobs







MD Department of Labor Overview

January 14, 2025

- Federal Contracting in Maryland – data not directly available on the contracting workforce but can be estimated based on contract spending.

	Contract Dollars (2023)	% of State Total
Calvert County	$52.5M	0.1%
Charles County	$336.1M	0.72%
St. Mary's County	$3.7B	8.0%
Maryland	$46.5B	100%



SOUTHERN MARYLAND
JOBSOURCE
WHERE PEOPLE MEET JOBS



MD Department of Labor Resources for Separated Employees

Professional Outplacement Assistance Center (POAC)

Professional Outplacement Assistance Center



SOUTHERN MARYLAND JOBSOURCE WHERE PEOPLE MEET JOBS



MD Department of Labor Resources for Separated Employees

POAC Specialized Workshop: Transitioning from Federal Employment

- 3-hour virtual workshop every Wednesday – up to 500 participants
- Focus - Regroup and redefine career path, including transitions into private sector or State public service. Highlights:
  - Understanding the Private Sector Landscape
  - Guidance on Applying for State Jobs
  - Career and Skills Assessment
  - Resume Reinvention
  - Effective Job Search Strategies
  - Interview Preparation
  - Networking for Success
  - Emotional and Practical Support







MD Department of Labor Resources for Separated Employees

POAC Specialized Workshop: Transitioning from Federal Employment

To register, email FedWorker.Transition@maryland.gov



SOUTHERN MARYLAND
JOBSOURCE
WHERE PEOPLE MEET JOBS



MD Department of Labor Resources for Separated Employees

Other POAC Services/Workshops:

- Agilities Workshops – Virtual
  - Aid individuals in exploring their skills and workplace strengths to successfully transition to new employment opportunities
  - The Agilities are a group of 10 work activities that are used in every job in the economy
  - Take the assessment – The Agile Work Profiler
  - Access Career Exploration tools
- Managing stress
- Salary negotiation
- Job fair strategies and networking opportunities
- Using social media
- Career transitions



SOUTHERN MARYLAND
JOBSOURCE
WHERE PEOPLE MEET JOBS



MD Department of Labor Resources for Separated Employees

Professional Outplacement Assistance Center (POAC)

POAC is open to the public.

Come visit us at our new location:
1306 Concourse Drive, Suite 340
Linthicum, MD 21090

Main number: 410-609-7129







MD Department of Labor Resources for Separated Employees

For information about more resources, please visit:

Resources for Federal Employees







Local Resources for Separated Employees

Southern Maryland American Job Centers (AJCs)

Comprehensive AJC:

Southern Maryland JobSource – Waldorf
175 Post Office Road
Waldorf, Maryland 20602
Telephone: 301-645-8712
dlwdalcharlescountyjs-LABOR@maryland.gov

Satellite AJC:

Southern Maryland JobSource - St Mary's
22934 Three Notch Road, Suite B
California, Maryland 20619
Telephone: 301-844-6404
stmarysajc@tccsmd.org



SOUTHERN MARYLAND
JOBSOURCE
WHERE PEOPLE MEET JOBS



Southern Maryland AJC Services

AJCs provide a full range of assistance to job seekers and businesses free of charge.

Staffed with qualified professionals who can assist with numerous employment-related services, the Centers stand ready to serve Marylanders with high-quality services and programs.

- **Job search assistance**: Help with job listings, job banks, and resume writing
- **Career counseling**: Guidance on career planning and job searching
- **Training**: Job training, skills testing, and practice interviewing
- **Employment workshops**: Workshops to help with employment and career development
- **Supportive services**: Information about benefits such as SNAP, Medicaid, and unemployment insurance
- **Networking**: Opportunities to meet with employers and attend hiring events
- **Community resources**: Referrals to community resources and other agencies
- **Accessibility**: Special accommodations for people with disabilities
- **Labor market information**: Information about the labor market and employers







Southern Maryland AJC Services

And . . .

Access job search and self-service options utilizing the Maryland Workforce Exchange (MWE). Instantly view any job posted to the web directly on your pc, tablet, or mobile phone

Maryland Workforce Exchange







Southern Maryland AJC Services

And . . .

Check out the Southern Maryland JobSource website for a wealth of jobseeker and business services:

Southern Maryland Job Source



SOUTHERN MARYLAND
JOBSOURCE
WHERE PEOPLE MEET JOBS



Note . . .

Workers should apply for UI benefits in the jurisdiction of their "duty station." This means, for example, that if you are a Marylander who is laid off from a federal job based in Virginia, you should apply for benefits in Virginia. Here are direct links to apply for UI benefits in Maryland; Washington, DC; and Virginia.



SOUTHERN MARYLAND
JOBSOURCE
WHERE PEOPLE MEET JOBS



What Data Exists?

This calendar year to date:

- 237 federally impacted workers have registered in the MWE through the Charles County AJC
- 96 indicated they were an employee of a federal contractor seeking services
- 141 indicated they were a federal employee seeking reemployment services



SOUTHERN MARYLAND JOBSOURCE WHERE PEOPLE MEET JOBS



What's Next?

OPM OMB Memo

Guidance on Agency RIF and Reorganization Plans

- Agency RIF and Reorganization Plans ("ARRP") Phase 1
  Due June 30, 2025
  MD Labor received one RIF notice to date
  HHS – 2,755 separations – none from Charles County

- Agency RIF and Reorganization Plans ("ARRP") Phase 2
  Due September 30, 2025



SOUTHERN MARYLAND
JOBSOURCE
WHERE PEOPLE MEET JOBS



For Questions and Further Information

Ruthy Davis
Director of Regional Workforce & Business Development
rdavis@tccsmd.org
301-274-1922, x315

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TRI-COUNTY COUNCIL
for SOUTHERN MARYLAND

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto, Department of Planning and Growth Management

ITEM TYPE: Discussion

AGENDA SECTION: Briefings-Morning

SUBJECT:

- **Discussion: Virginia Department of Transportation Toll on the Woodrow Wilson Bridge**
  (Mr. George Clark, Transportation Director, Southern Maryland Tri-County Council (SMDTCC); and Mr. Jason Groth, Director, Department of Planning and Growth Management, Mr. Jeffry Barnett, Chief of Transit; and Mr. Robert Romero, Transit System Administrator, Department of Planning and Growth Management)

SUGGESTED ACTION:

ATTACHMENTS:
Charles Co VDOT Presentation 6.24.2025.pdf
VDOT Letter of Support.pdf

Charles County Commissioners Meeting

June 24th , 2025

495 SOUTHSIDE EXPRESS LANES STUDY

CALVERT CHARLES ST. MARY'S

TRI-COUNTY COUNCIL FOR SOUTHERN MARYLAND

Transportation Division



Northern Virginia Regional Express Lanes Network







- **94-Mile Network of Connected Express Lanes**
  - I-95, I-395 (reversible lanes)
  - I-495 (2 lanes each direction)
  - I-66 Outside the Beltway (2 lanes each direction)
  - I-66 Inside the Beltway (2 lanes, weekdays peak travel time, peak commute direction)
  - I-95 Express Lanes/Opitz Boulevard Ramp
- **3 Miles Under Construction**
  - I-495 Northern Extension (2 lanes each direction opening late 2025)
- **Under Study**
  - I-495 Southside Express Lanes
  - I-95 Bi-Directional Express Lanes

Study Overview and Area

- Environmental study to potentially extend express lanes system on 11 miles of southern section of I-495 (Capital Beltway)
- Last section of I-495 in Virginia without express lanes
- Aligned with region's approved Visualize 2045 Plan "Aspirational Initiatives" to expand express highway network



Current Conditions in I-495 Southside Corridor

Recurring traffic congestion and unreliable travel times

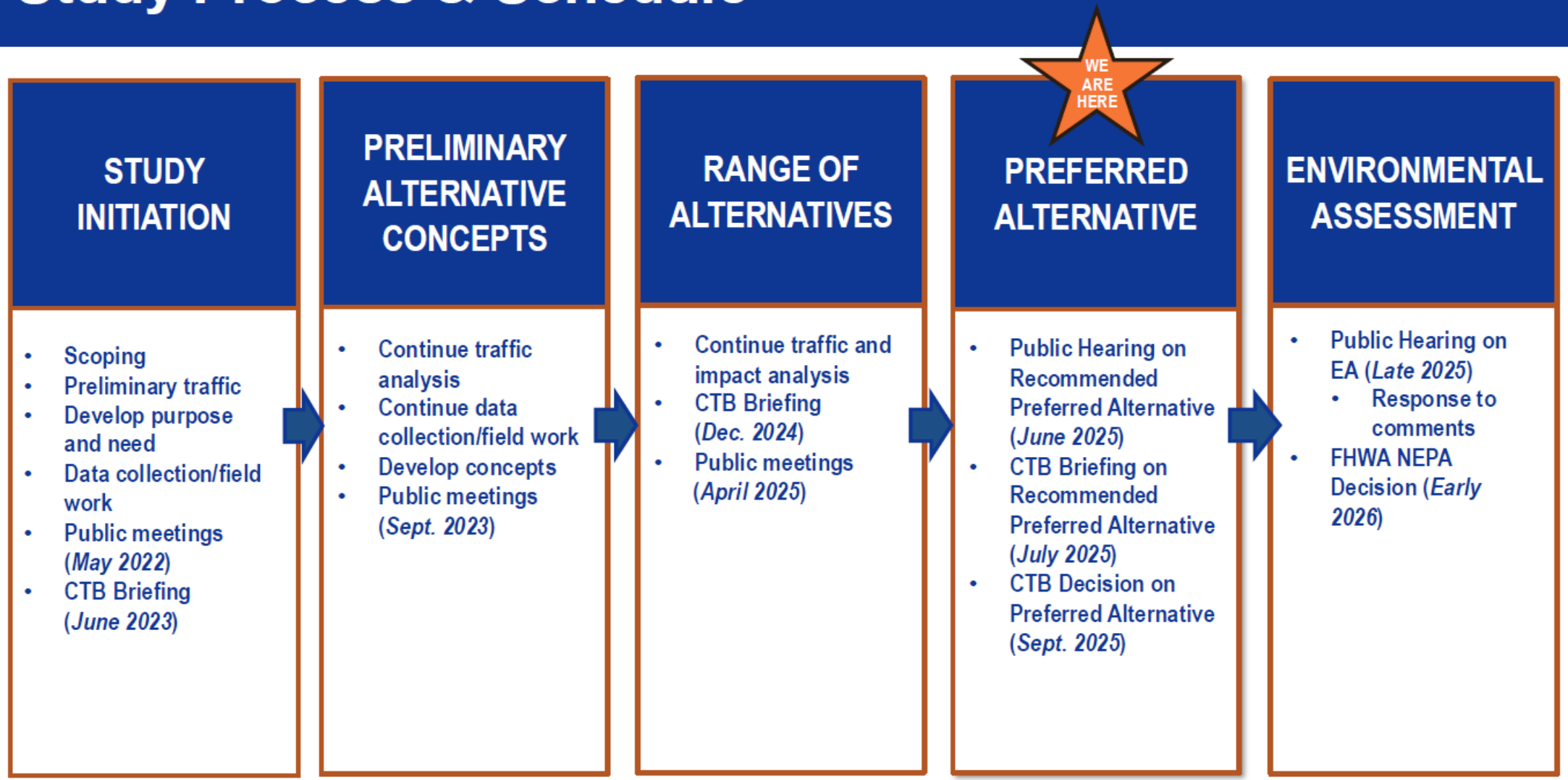
- Mornings: Westbound I-495 peak travel times could double by 2050 (26→52 minutes)
- Evenings: Eastbound I-495 peak travel times could more than double by 2050 (21→54 minutes)

Limited travel choices

- No fast, reliable mass transit in the corridor for east-west trips to support current needs or future growth
- Limited bicycle and pedestrian connections in surrounding communities



Study Process & Schedule



Alternatives Retained for Detailed Study

- **No Build Alternative**
- **Add 1 Express Lane in each direction**

  Features:

  - Fund new bus service between Central-West Prince George's County and Tysons
  - Add bike/pedestrian facilities and improvements
  - Preserve space on Woodrow Wilson Memorial Bridge for future rail transit
  - Provide potential funding source for new/expanded transit services and other improvements benefitting the corridor
- **Add 2 Express Lanes in each direction**

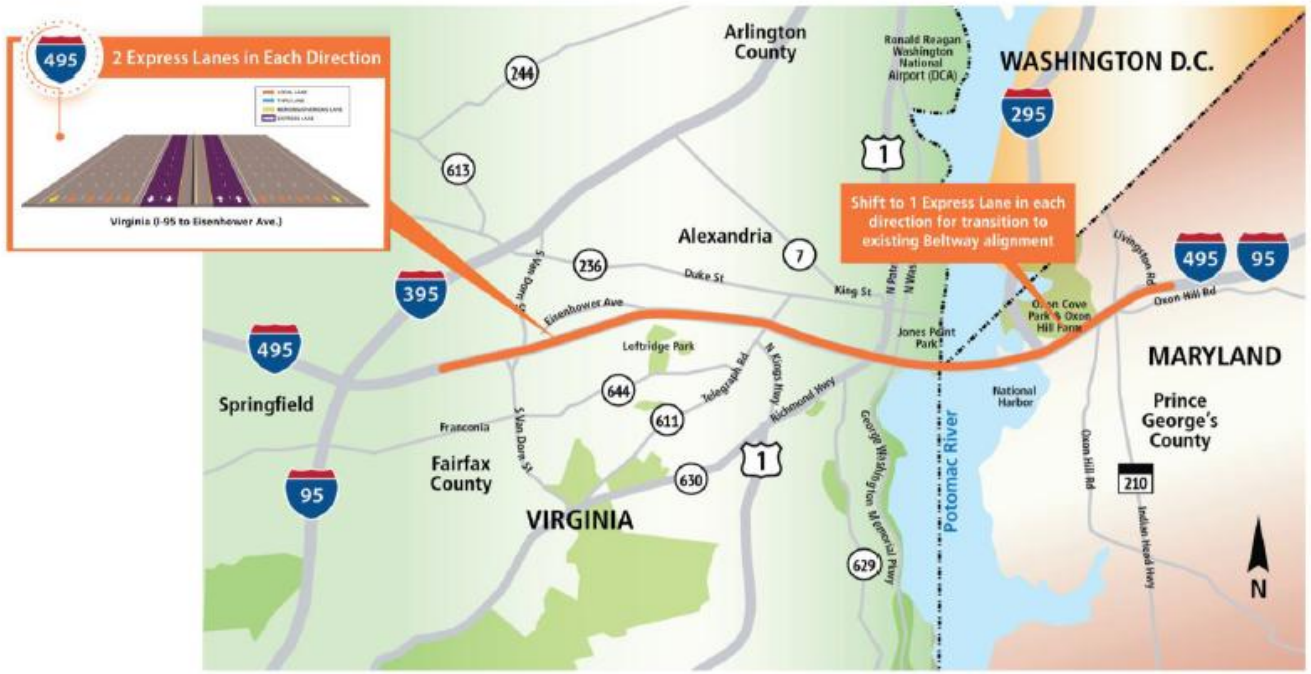
  Features:

  - Fund new bus service between Central-West Prince George's County and Tysons
  - Add bike/pedestrian facilities and improvements
  - Preserve space on Woodrow Wilson Memorial Bridge for future rail transit
  - Provide potential funding source for new/expanded transit services and other improvements benefitting the corridor

Recommended Preferred Alternative: 2 Express Lanes

Add 2 Express Lanes in each direction

- 2 buffer-separated express lanes in each direction on I-495
- Fund new bus transit service
- Bike/pedestrian improvements
- Preserve space on Woodrow Wilson Memorial Bridge for future rail transit
- Provide potential funding source for new/expanded transit services and other improvements benefitting the corridor



Rationale for Recommended Preferred Alternative: 2 Express Lanes

No-Build will result in worse traffic

Mornings: Westbound I-495 peak travel times could double by 2050 (26→52 minutes)

Evenings: Eastbound I-495 peak travel times could more than double by 2050 (21→54 minutes)

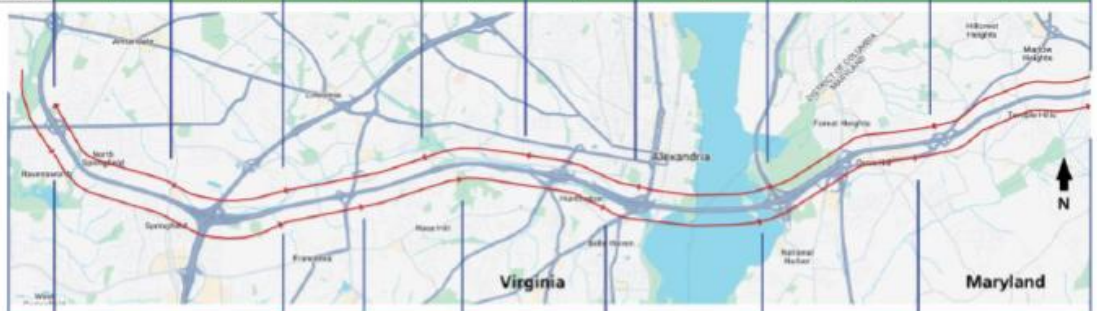
Compared to 1 Express Lane, the 2 Express Lanes alternative:

- Moves 600 more people per hour
- General-purpose lanes average speeds are faster:
  - 90% faster WB in AM peak in Maryland
  - 25% faster EB in PM peak in Virginia
- General-purpose lanes travel times are 16 min. faster in local lanes, 5 min. faster in thru lanes

2 Express Lanes alternative provides more capacity to relieve congestion, manage demand, and keep traffic moving

AM	2050 NO-BUILD	16	24	55	55	56	31	5	6
	2050 2 EXPRESS LANES	17	14	54	56	56	37	20	36
	2050 1 EXPRESS LANE	15	19	56	56	56	33	7	9
PM	2050 NO-BUILD	55	53	24	18	54	54	56	56
	2050 2 EXPRESS LANES	55	50	56	56	56	55	56	56
	2050 1 EXPRESS LANE	55	48	56	56	56	55	56	54

WESTBOUND



EASTBOUND

AM	2050 NO-BUILD	56	54	20	21	49	56	56	55
	2050 2 EXPRESS LANES	56	53	57	52	53	56	56	55
	2050 1 EXPRESS LANE	56	53	57	52	53	56	56	55
PM	2050 NO-BUILD	17	12	35	37	7	19	55	55
	2050 2 EXPRESS LANES	28	20	42	54	16	18	55	55
	2050 1 EXPRESS LANE	29	18	41	34	6	18	55	55

Preserving Space For Future Metrorail

Key Feature of Recommended Preferred Alternative: 2 Express Lanes

- **Woodrow Wilson Bridge contains unused space dedicated for future HOV, transit, or rail, as part of Record of Decision in 2000**
- **495 Southside Study recommended preferred alternative incorporates rail preservation across the bridge through a commitment to convert necessary space to rail transit in the future**
  - Commitment will be included in the Environmental Assessment as a legally-enforceable requirement if/when the region is positioned to implement rail
  - Terms within any potential contract or concessionaire agreement would incorporate a requirement for conversion to rail transit in the future



I-495 Woodrow Wilson Memorial Bridge

**Should future transit (i.e., rail) be provided by others*

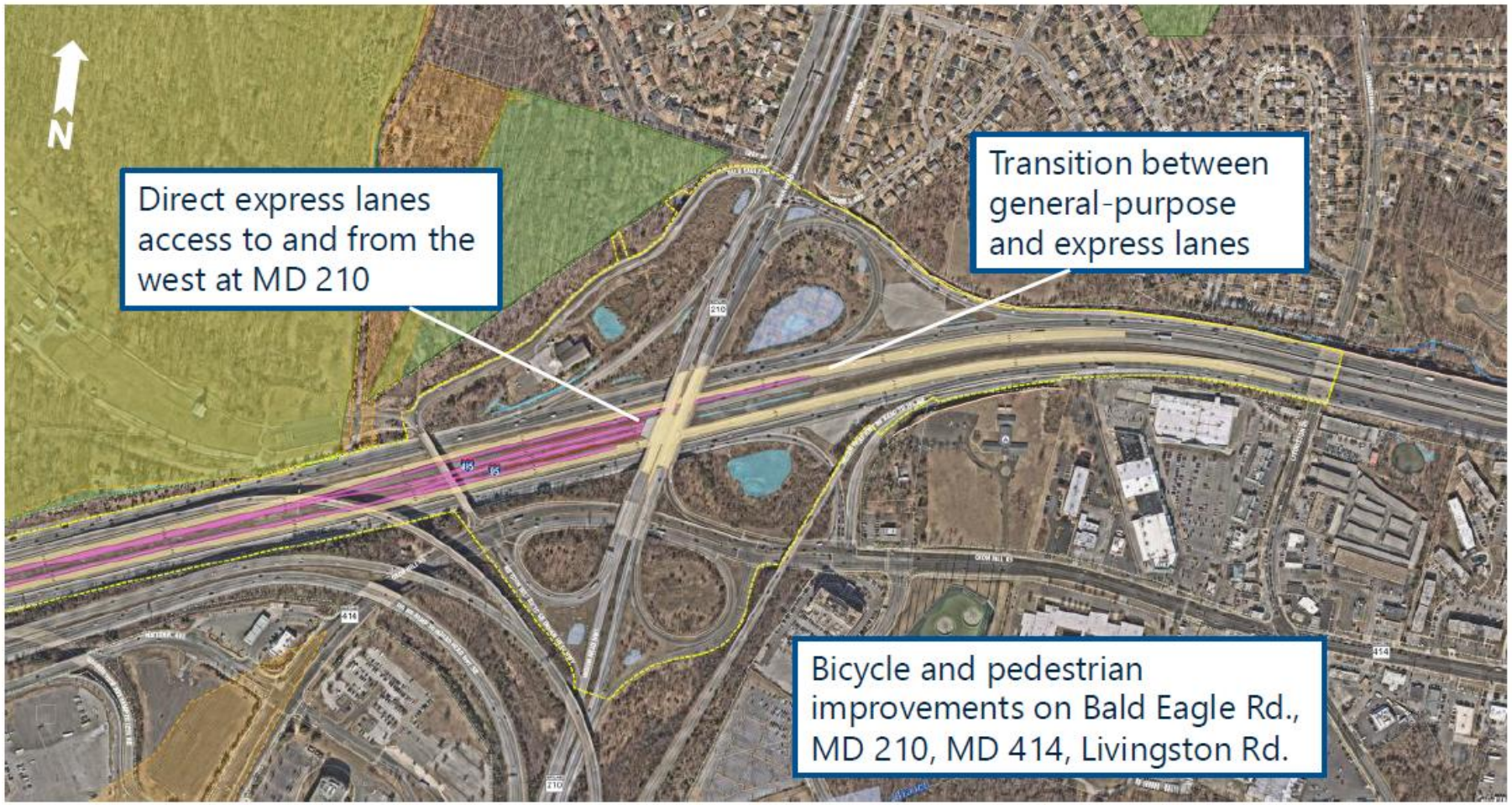
East End Between MD 210 and MD 414

Recommended Preferred Alternative: 2 Express Lanes

Legend

- Limits of Disturbance
- New Retaining Walls
- New or Reconstructed Bridges
- Express Lanes
- General Purpose Lanes
- Property Displacements
- Existing Noise Barriers
- Impacted Existing Noise Barriers
- Potential Noise Mitigation Areas
- Historic Properties
- Park/Recreation Area Boundary
- Parcel Boundaries (Obtained by GIS)
- Proposed Stormwater Management Facilities
- Waters of the US
- Streams
- 100-Year Floodplains

These concepts are based on planning level design and subject to change. They should not be used for any type of construction or acquisition of property.



Stakeholder Coordination

Coordination with Federal, State, Regional, and Local Agencies

- Agency meetings on environmental assessment (NEPA)
- Interagency review meetings with Maryland
- Regular coordination meetings with Maryland staff (MDOT SHA)
- Coordination meetings with Metro, Fairfax County, Prince George's County, City of Alexandria
- Stakeholder Technical Advisory Group meetings including regional and local agencies

Stakeholder Coordination and Public Outreach

- Public information **meetings and public hearings**
  - April 2025: 4 in-person meetings, 250+ attendees, 837 comments
  - Sept. 2023: 3 in-person meetings + 1 virtual meeting, 180+ attendees, 330 comments
  - May 2022: 3 in-person meetings + 1 virtual meeting, 160+ attendees, 484 comments
- April 2025 public meeting **online social media campaign** reached 127,871 people with 6,346 website clicks

June 2025 Public Hearings

Location Public Hearings to Present Recommended Preferred Alternative

- June 2: Edison HS (Fairfax County-Franconia/Springfield)
- June 4: Oxon Hill HS (Prince George's County)
- June 9: West Potomac HS (Fairfax County-South Route 1 Area)
- June 11: Nannie J. Lee Rec Center (City of Alexandria)



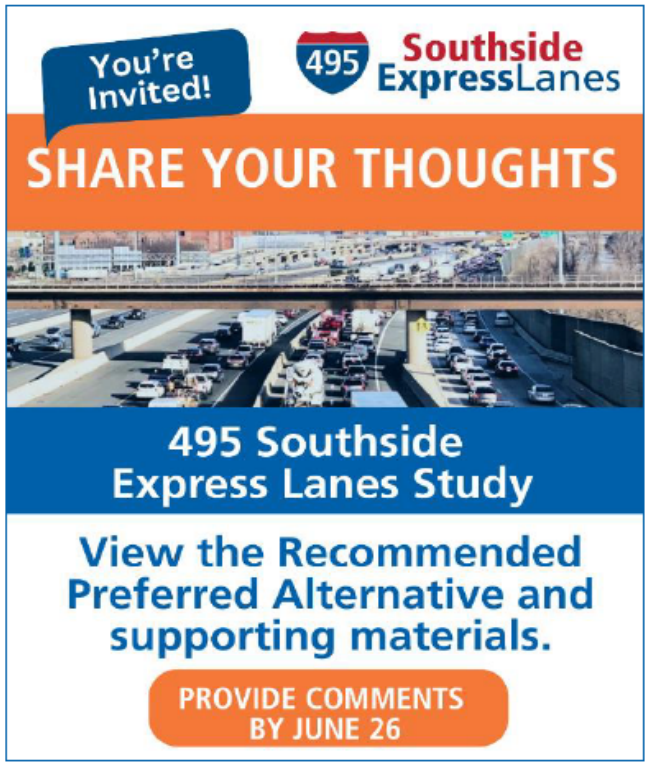
Virtual Public Information Room

- Available May 19 at www.vdot.virginia.gov/495southside

Other Ways to Provide Comments

- Visit the virtual public information room and complete the online comment form at www.vdot.virginia.gov/495southside
- Email: 495southsideexpresslanes@VDOT.Virginia.gov
- Submit comments by mail to:

  Michelle Shropshire, P.E.
  VDOT Northern Virginia Megaprojects Director
  4975 Alliance Drive
  Fairfax, VA 22030
- Call VDOT at: 703-691-6044 or TTY/TDD 711



All comments must be received by
June 26, 2025, to be included in public hearing report


Public Hearing
I495 Southside
Express Lanes Expansion
Public Comment To Make Your Voice Heard!
Why Voice Your Opinion?
The recommended preferred alternative is to add two (2) buffer-separated express lanes in each direction on I-495. The two express lanes would extend from approximately the railroad bridge west of Van Dorn Street to I-295.
CALVERT • CHARLES • ST. MARY'S •
TRI-COUNTY COUNCIL for SOUTHERN MARYLAND
Public Hearings:
• Complete Online Comment Form
• Email Comments
• Mailing comments to:
Michelle Shropshire, P.E., VDOT
Northern Virginia Megaprojects Director,
4975 Alliance Drive, Fairfax, VA 22030
Let's make our roads safer and more accessible!
16 June, 2025
AT 6:00 pm.
https://tccsmd.org
St. Charles High School
5305 Piney Church Rd
Waldorf, MD 20602
301-274-1922

Questions needed from VDOT/MDOT I-495 Southside Express lanes Study

1) How long has this been in the process
2) What role does MDOT play in this and understanding the decision-making process
3) What steps have MDOT taken to gather input from Marylanders that will be impacted.
4) What's the Governor and MDOT's official position.
5) What role does the MWCOG's TBP have in it.
6) Toll rates cost and who shares the received fees
7) How has VDOT response been to MDOT's questions
8) How far is VDOT in their studies

TRI-COUNTY COUNCIL FOR SOUTHERN MARYLAND

Transportation Division

Driven to Serve

Questions ?

George Clark

Transportation Director

gclark@tccsmd.org

TRI-COUNTY COUNCIL FOR SOUTHERN MARYLAND
P.O. BOX 745 HUGHESVILLE, MARYLAND 20637
WWW.FACEBOOK.COM/TCCSMD
WWW.TCCSMD.ORG
(301) 274-1922
(301) 870-2520
FAX (301) 274-1924

May 28, 2025

Office of the Secretary of Transportation
W. Sheppard Miller III
Patrick Henry Building
1111 East Broad Street
Richmond, VA 23219

Dear Secretary Miller:

The proposed toll/express lane changes to the Woodrow Wilson Bridge have the potential to significantly impact the daily lives of residents in Charles County and Southern Maryland, many of whom rely on the bridge for their daily commutes to and from work in Virginia.

Given the magnitude of these changes, the citizens of Southern Maryland should have the opportunity to hear the proposed plans directly and provide feedback. Decisions of this scale must reflect the voices of those most affected, and any final determination regarding the usage of the bridge's lanes should be made with input from across the entire region.

To that end, we respectfully request that VDOT and its project partners host ***one*** additional public outreach session in the Waldorf area. The Southern Maryland Delegation, in partnership with the Tri-County Council for Southern Maryland, will help facilitate a town hall meeting that is accessible and convenient for constituents throughout Southern Maryland and Southern Prince George's County.

We propose the evening of either Monday, June 16, 2025, or Wednesday, June 18, 2025, from 6:00–8:00 PM as potential options. This additional session will ensure that residents who face the most direct impacts from these proposed changes are included.

Thank you for your attention to this request. We look forward to your partnership in providing a transparent, inclusive process that considers the full needs of our commuting public.

Sincerely,

Delegate Edith Patterson
Chair, Southern Maryland Delegation
Maryland House of Delegates

John F. Hartline
Tri-County Council for Southern Maryland
Executive Director

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto, Department of Human Resources

ITEM TYPE: Briefing

AGENDA SECTION: Briefings-Morning

SUBJECT:

- **Briefing: Review the Equity Assessment Findings**
  (Ms. Renesha Miles, Chief Equity Officer, and Ms. Elaine Pollard, DEI/HR Coordinator, Department of Human Resources; Zunilda Rodriquez, Director, MGT; and Ms. Janice Banks, President/CEO, Small Planet Works, Inc.)

SUGGESTED ACTION:

ATTACHMENTS:
Charles County Board of Commissioners Presentation_DEI Assessment FINAL_6.24.25.pdf
Charles County DEI Assessment Report_FINAL.pdf

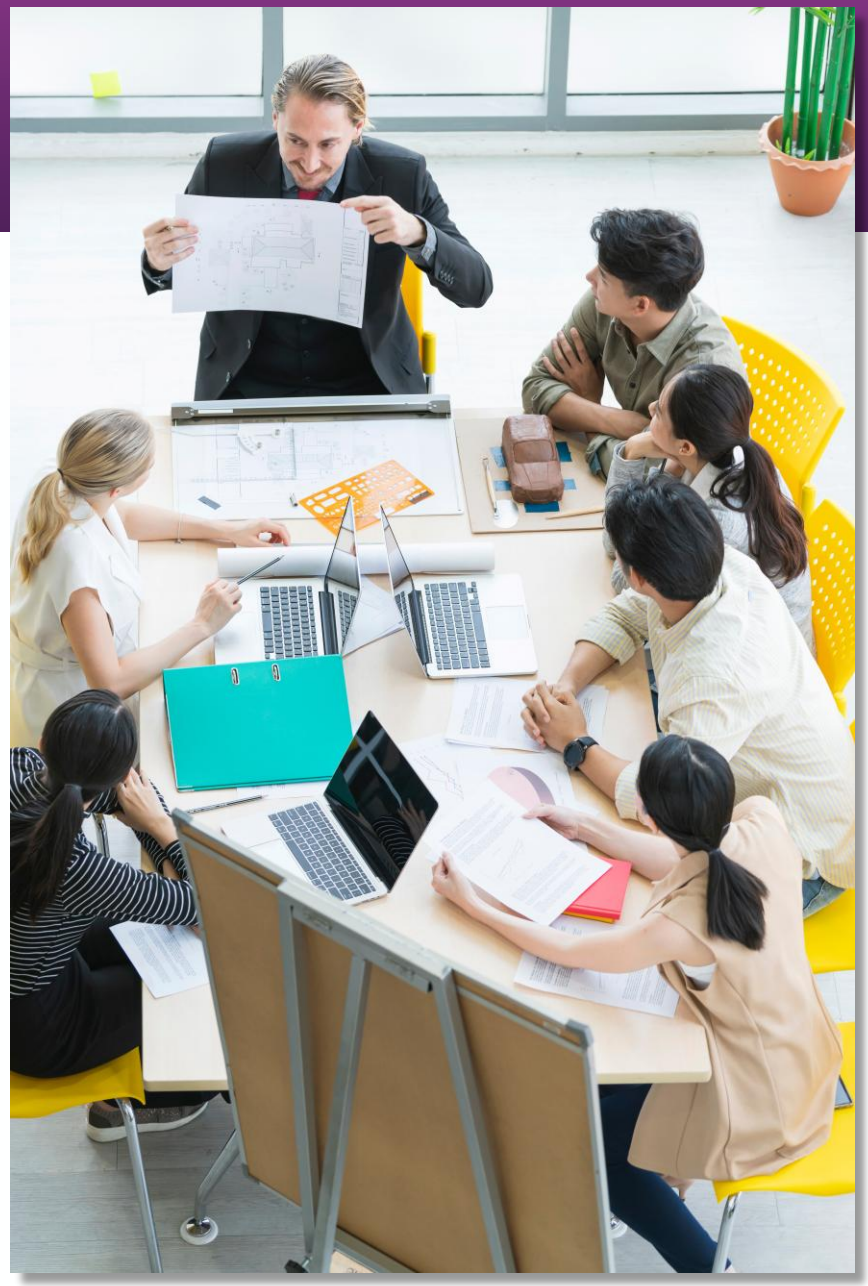


Charles County, MD

Diversity, Equity and Inclusion Assessment Project

All-Staff Presentation

May 15, 2025



Agenda

- Welcome
- Definitions
- Project Methodology
- Strengths & Opportunities
- High-level Survey Findings (Survey/Focus Groups)
- High-level Recommendations
- Next Steps

Definitions

- **DIVERSITY** — Encouraging representation of many dimensions of difference or a variety of characteristics. Some characteristics include age, ethnicity, gender, language, physical ability, race, religion, sexual orientation, national origin, etc.

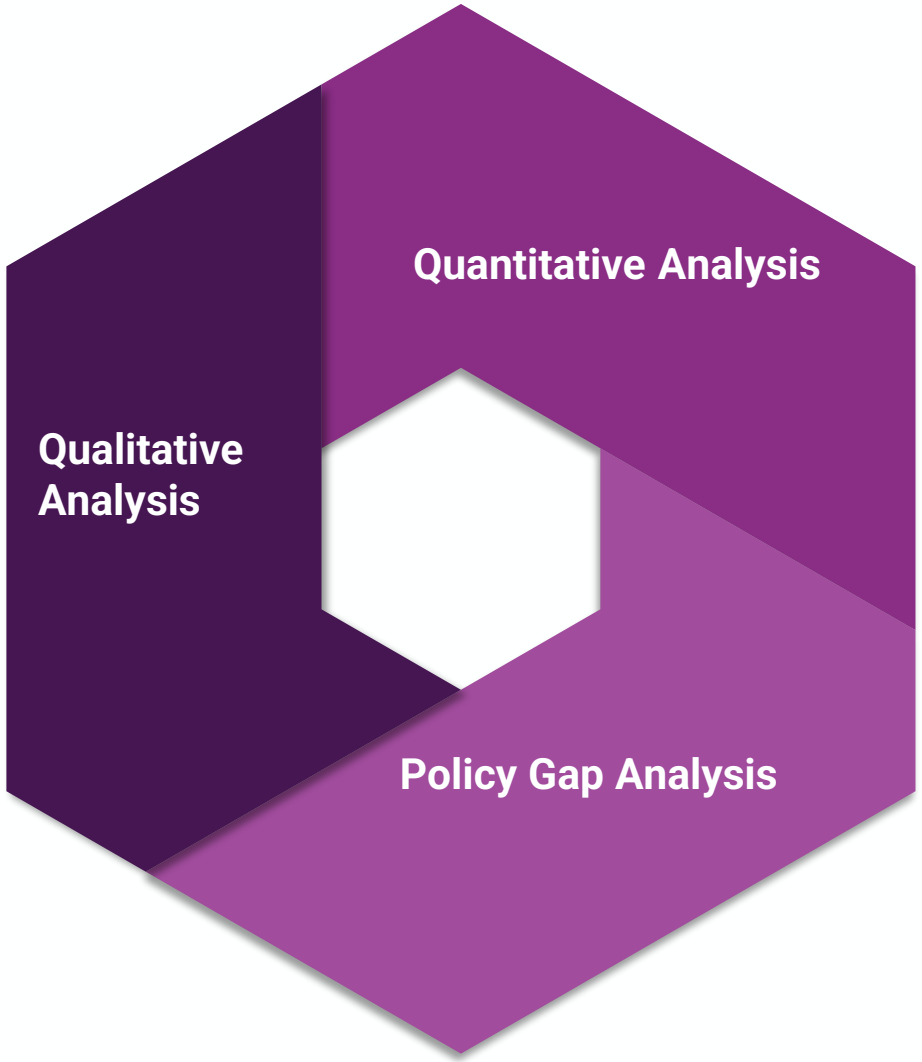
- **EQUITY** — Ensuring that everyone has the resources -- according to their need -- and the opportunity to be successful.

- **INCLUSION** — Facilitating acceptance, ensuring that everyone feels valued and connected.

- **CULTURE** — An integrated pattern of indigenous knowledge, beliefs and behaviors that are successfully transmitted from one generation [of current employees] to the next [new hires].

Project Methodology

- Employee Experience Survey (Open-Ended Questions)
- Focus Groups



- Employee Experience Survey (Likert Questions)

- Programmatic Data
- Policy Documents

Strengths & Opportunities

STRENGTHS

- Survey respondents noted they have accessible supports (74% favorable), and the necessary resources to interact with the public and do their jobs (82% favorable).
- Focus group discussions further supported that staff generally feel they have access to resources and support needed to succeed.
- Staff have comfortability with raising concerns to direct supervisor. In fact, an overwhelming majority of survey respondents, 82%, are comfortable raising concerns to their direct supervisor.
- 72% of survey respondents noted that employees' have respect for differences in identity.
- 80% of survey respondents felt supported by their supervisor when negative interactions with the public do occur.
- Focus group participants shared DEI staff is trusted; under-funded; and gradually making a difference.
- Organizational communications are present for the County workforce (email communications, centralized breakroom notices, SharePoint, *Dialogue and Donut* events, all-staff meetings, etc.).

Strengths & Opportunities

OPPORTUNITIES

- Desire for more responsive and accountable leadership.
- Survey respondents and focus group participants shared the need for better selection and promotion processes that are deemed unfair.
- Survey respondents noted a lack of pay equity and transparency.
- Focus group participants shared that silos prevents creating a culture of DEI within departments, talent band levels and at various locations.
- Lack of confidence in the County's ability to take appropriate action in response to incidents of bias.
- Psychological safety gaps – staff feels afraid or unsafe to speak out.
- Focus group participants shared that there is a disconnect between full-time and part-time staff in how they experience DEI.
- Desire for staff to connect better with the community they serve.
- Inconsistencies in the County's commitment to DEI as an organizational initiative.
- Embedding DEI into the County internal workforce culture – moving from words into action.

Policy Gap Analysis

Policy Gap Analysis Summary

Documents Reviewed			
1	Equal Opportunity Utilization Report 2023	13	Supervisor Sample Evaluation
2	Leadership Philosophy Video	14	Personnel Policy & Procedures Manual, Chapter 8
3	(REAC) Guidelines and Expectations	15	Reasonable Accommodations Agreement
4	Leadership Academy instructions	16	FY24 Exit interviews (reviewed form only, not content)
5	Justice, Equity, Diversity and Inclusion (JEDI) Bylaws_2022 Update Final	17	Employee Sample Evaluation
6	Holiday Schedule	18	Common Acronyms
7	NHO Schedule	19	2023 Budget Equity Focus Update
8	Onboarding Instructions	20	Tuition Reimbursement Policy
9	Americans with Disability Act (ADA) Memo	21	2023 Budget Equity Focus Update DEC
10	Personnel Policy & Procedures Manual, Chapter 7	22	Style Guide
11	Americans with Disability Act (ADA) Medical Certification Form	23	Benefits
12	Sample Interview Questions for Current Recruitment of: RPT Specialist IQ/SQ (2 documents)		

High-Level Findings: Quantitative Analysis (Survey)

The Employee Experience Survey Measured

7 Core Areas:

- Leadership Readiness
- Diversity / Representation
- Inclusion and Belonging
- Equity and Access
- Conflict Resolution
- Hiring and Recruitment
- Professional Development



Improved Compensation and Benefits



Career Advancement and Training



Equitable and Inclusive Work Environment



Enhanced Communication and Management Practices



Public and Community Engagement

High-Level Findings: Qualitative Analysis (Focus Groups)

8 Key Themes

- DEI Commitment
- Leadership
- Equity in Access to Resources
- Culture First
- Policy & Procedure
- Training
- Selection & Promotion Process
- Communication

Shaded by number of mentions

- 1-9 mentions
- 10-19 mentions
- 20-30 mentions
- 31-50+ mentions

High-Level Recommendations



Organizational Communications



Change Management



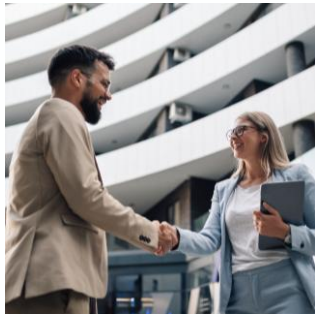
DEI Awareness



Developing Inclusive Organizational Leaders



Breaking Down Organizational Silos



Building Trust and Psychological Safety



Performance Management



Career Advancement

Action Planning Session Overview

GOALS

1. Visualize strategic objectives on Diversity, Equity and Inclusion using assessment.
2. Gather additional leadership buy-in.
3. Build connection, transparency and accountability for departmental ambassadors.
4. Identify and prioritize activities, tactics and outcomes for implementation.
5. Develop foundational elements to draft updated Diversity, Equity and Inclusion Strategic Plan.

Session Objectives
May 22, 2025

Morning

Envision DEI Success

- ✓ Envision what success looks like, and how to measure progress
- ✓ Review key priorities & recommendations
- ✓ Focus on leadership readiness and systems

Afternoon

Build DEI Framework

- ✓ Focus on staff development and support
- ✓ Identify key implementation steps (including prioritization)

Post Session

Path Forward

- ✓ Update DEI Strategic Plan for County
- ✓ Develop Strategic Communication Plan
- ✓ Identify quick wins
- ✓ Identify steps for implementation
- ✓ Continue building momentum

Action Planning Session Focus Priority Areas

- Leadership Readiness
- Equity and Access
- Professional Development
- Conflict Resolution



Source: Small Planet Works, LLC

Next Steps



July 2025

Update Diversity, Equity and Inclusion Strategic Plan for Charles County Government


THANK YOU



Charles County

Diversity, Equity, and Inclusion Assessment Report

May 2025

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Executive Summary

Overview

In February 2023, Charles County (the County) released a Request For Qualifications (RFQ) that sought proposals from qualified service providers that could help design a comprehensive Diversity, Equity and Inclusion (DEI) Assessment to help the County become more equity-centered in its strategic priorities and application. Beginning in September 2024 an external consulting firm was procured by the County and began the project using a mixed-methods approach of both quantitative and qualitative data processes to determine DEI assessment findings and recommendations to the County.

In fact, an in-depth review and analysis of selected policies, programs and practice documents provided by the County to help identify areas of strength and replication as well as gap opportunity areas was conducted. Recommendations and strategies within the DEI Assessment Report were offered to support future County workforce efforts as it reexamines, updates and applies various policies, programs and practices for greater efficiency and to deploy more diverse, inclusive and equitable outcomes.

As part of this DEI assessment process, an external consulting firm worked with the County to engage staff and leadership throughout the process. A comprehensive stakeholder engagement plan was designed at the beginning of the project to help guide the County and consulting firm through steps to ensure front line staff, people managers, leadership and the Board of Commission was kept abreast about the project, including how to participate and what the outcomes were of the assessment. There were four main vehicles that were used to engage County staff and leadership in the DEI assessment project: 1) All-staff meeting presentations; 2) Online and hardcopy Employee Engagement Survey; 3) In-person focus groups were conducted; and 4) Regular staff email communication updates. The Board of Commissioners was engaged via updates from the County leadership staff as well as through a public presentation on the outcomes of the assessment report findings and recommendations.

Findings shared in this report were the result of the policy gap review and analysis, Employee Engagement Survey, and qualitative focus groups. These findings form the foundation for the development of key recommendations in the DEI Assessment Report to the County. The ultimate purpose was to identify key recommendations for consideration as the County seeks to update its DEI Strategic Plan, which will steer future actions to support the County staff workforce.

Executive Summary

Charles County undertook the development of a diversity, equity, and inclusion (DEI) assessment to address the following areas of interest:

- Asses its DEI journey from initiation to current state
- Identify challenges
- Seek greater internal alignment and shared understanding around DEI
- Elevate opportunities to hold collective action across the assessment findings and recommendations
- Update the County DEI Strategic Plan

The County selected a consulting firm to lead a comprehensive diversity, equity, and inclusion (DEI) assessment of the current state of the organization's workforce and culture from September 2024 to July 2025. Based on the findings, a draft report summarizing the areas of strength and barriers for advancing diversity, equity and inclusion for the County's internal workforce. It also offer recommendations to advance its DEI efforts holistically for staff and administrative leadership at the County.

A mixed-methods approach was applied in the County's DEI Assessment, which included the launch of an all-staff Employee Experience Survey and analyzing selected policies, programs and practices of the County. To gather a better understanding of how the County's workplace culture impacts staff, a team of consultants facilitated five focus groups that included staff from various talent levels and departments. The focus groups were designed to gather candid insights and feedback The in-person focus group settings offered "brave spaces" to have difficult conversations are guided by vulnerability, authenticity, and good faith.

Our recommendations are guided by the themes, insights, and innovative suggestions that emerged using multiple avenues of research and staff engagements. The following DEI assessment report is a testament to the County's continued and growing commitment to creating a diverse, inclusive and equitable workplace that includes areas of strength and unique opportunity. This is work that requires the courage to listen, to learn, and to grow. This report offers a robust look the County's DEI Assessment as a reflection of where the organization is, and a pathway toward where and how it can grow.

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Prioritized Findings

Utilizing quantitative data from the Employee Experience Survey, qualitative data from the Employee Experience Survey and focus groups, and review of the County's internal workforce-related policies, programs and practices, we identified key findings of strength below for this DEI assessment study.

Strengths
Establishment of a Chief Equity Officer and DEI Strategic Plan are strong foundations for DEI work that the County can continue to build from
Focus group participants shared DEI staff is trusted; under-funded; and gradually making a difference
Organizational communications are present for the County workforce (email communications, centralized breakroom notices, SharePoint, *Dialogue and Donut* events, all-staff meetings, etc.)
Policy gap analyses of several County documents found gender-inclusive language
Detailed policies on supporting hiring practices and policies explicitly ensuring anti-discrimination
County employs a budget equity tool to guide annual budgeting processes for various departments
County recognizes a wide variety of holidays including celebrations like the "Juneteenth" federal holiday to support employees
Robust and comprehensive benefits available for staff provide include tuition reimbursement
Welcoming environment is present for most staff while feeling valued by their supervisors and direct teams
Survey respondents noted they have accessible supports (74% favorable), and the necessary resources to interact with the public and do their jobs (82% favorable). Focus group discussions further supported that staff generally feel they have access to resources and support needed to succeed
Staff have comfortability with raising concerns to direct supervisor. In fact, an overwhelming majority of survey respondents, 82%, are comfortable raising concerns to their direct supervisor
72% of survey respondents noted that employees' have respect for differences in identity
65% of survey respondents believe the County is increasing diversity in management roles and above
79% of survey respondents indicated they understand the process for reporting incidents of bias when it comes to conflict resolution
80% of survey respondents felt supported by their supervisor when negative interactions with the public do occur

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Prioritized Findings

Utilizing quantitative data from the Employee Experience Survey, qualitative data from the survey and focus groups, and review of the County's internal workforce-related policies, programs and practices, we identified key areas of opportunity below in this DEI assessment study.

Areas of Opportunity
Inconsistencies in the County's commitment to DEI as an organizational initiative
Embedding DEI into the County internal workforce culture – moving from words into action
Desire for better communication across all levels of the organization
Focus group participants shared that though supervisors are viewed as generally supportive, they often have no ability – on their own – to make changes
Desire for more responsive and accountable leadership
Need for training and education opportunities to increase cultural competency and DEI understanding
Equitable career advancement encompasses the entire employee lifecycle
Survey respondents and focus group participants shared the need for better selection and promotion processes that are deemed unfair
Survey respondents and focus group participants noted a lack of career advancement opportunities
Survey respondents noted a lack of pay equity and transparency
Focus group participants shared that silos prevents creating a culture of DEI within departments, talent band levels and at various locations
Focus group participants shared social dynamics and workplace culture includes favoritism/cliques
Lack of accountability with supervisors and leaders
Lack of confidence in the County's ability to take appropriate action in response to incidents of bias
Psychological safety gaps – staff feels afraid or unsafe to speak out
Lack of empowerment to speak about issues or differences of opinion within the broader organization
Focus group participants shared that there is a disconnect between full-time and part-time staff in how they experience DEI
Part-time and employees in the field believe they don't have adequate access to resources
Desire for staff to connect better with the community they serve

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High-Level Recommendations

Seven areas of focus emerged during this study in the analysis of policies, programs and practices of the County, as it relates to its internal workforce, Employee Experience Survey results, and a thematic analysis of the focus groups. Each area of focus includes recommendations for the County and suggested tactics to assist in implementing of each of the suggestions. **For the full list of suggested solutions per recommendation, please refer to page 56 of this report.**

FOCUS AREA	RECOMMENDATIONS
Organizational Communications	Strengthen trust and communications through internal and external communication channels, talent band levels, locations, and strategic equity efforts.
DEI Awareness	Improve communications and provide specific and responsive training for County staff and managers to continue building diversity, equity, and inclusion muscles around cultural competency, implicit bias, and racial equity.
Developing Inclusive Organizational Leaders	Identify values and behaviors to measure and evaluate leaders against goal-setting, achievement, and consistent employee experiences.
Breaking Down Organizational Silos	Mitigate and reduce the number of silos between departments, staff talent band levels, and locations to enhance the culture of the County and DEI within the organization.
Building Trust and Psychological Safety	Enhance psychological safety, trust and support across all bands of talent in the organization.
Performance Management	Expand the County's efforts to embed staff and leadership competencies with inclusive behaviors and systematize the performance management processes.
Career Advancement	Enhance career advancement pathways and expand professional development opportunities across talent bands to provide more equitable and transparent hiring, promotional and succession planning processes for County staff and leadership.
Change Management	Implement change management across the organization to address the human side of change; identify necessary support resources; reinforce new behaviors; and provide strategies to influence behavior.

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Project Methodology

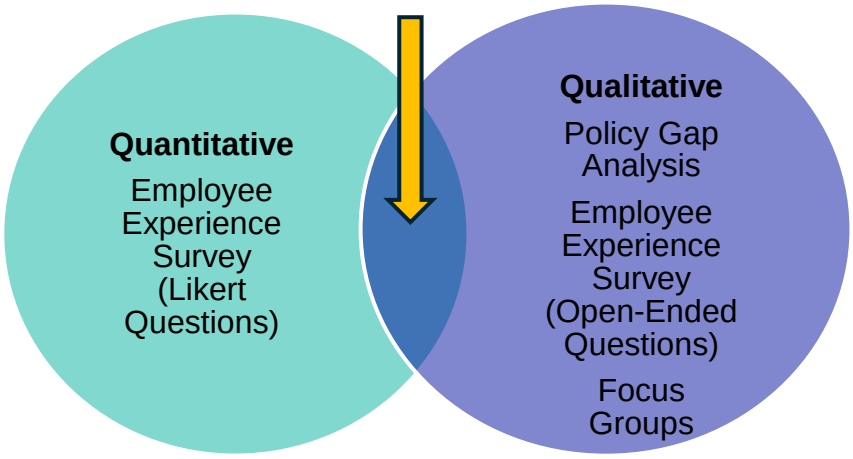
This chapter includes information on the project methodology and process used to gather data and information to help inform findings and recommendations in this DEI assessment for the County.

Project Methodology

The process for arriving at prioritized findings is included below. Through the collection and interpretation of qualitative and quantitative data, the procured consulting firm triangulated findings leveraging a mixed-methods approach.

Data Collection Analysis	Data Interpretation	Synthesis of Findings	Triangulate Prioritized Findings
• Internal policies and practices • External policies and practices • Employee Experience Survey • Focus Groups	• Survey data analysis • Selected Documents Review	• Identify Key Results • Sense-making with the Project team	• Areas of Strength • Identified Barriers

Triangulation of Prioritized Findings



Employee Engagement Survey

- **Total of 368 respondents**
- **32 multiple-choice** questions (including demographic information).
- **3 open-ended feedback questions** where respondents could write in comments.
- **67% of survey respondents provided comments.**
- **Electronic and hardcopy distributed.**
- At a **95% confidence level**, the survey has a **margin of error of 5%.** The survey sample is strong, and the views are representative of the intended audience.

Policy Gap Analysis

- **23** selected internal-facing documents reviewed
- An equity-lens was used by the consultant team to review existing and selected documented policies, processes, and procedures to identify areas of strength and DEI gap opportunities

Focus Groups

- **(5)** focus groups
  - (1) Manager only
  - (4) Staff Groups
- #40 participants
- Focus group discussions held in in-person at two locations within the County

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Policy Gap Analysis

This DEI Assessment identifies areas of strength and opportunity and recommends key actions by which the County can support its internal staff workforce using a lens of diversity, equity, and inclusion.

General Highlights from Policy Review

1. Charles County language and policy decisions demonstrate its willingness to embrace DEI, craft a welcoming internal community, and lead by example for other counties.

2. Documents have gender-inclusive language and are free of gender binary language (example: he/she, him/her).

3. Policies/documents are very well designed. This makes them much more engaging to read.

General Recommendations for Consideration

1. Promote a culture of respect and empathy, where all voices are valued.

2. Regularly gather feedback and review policies to ensure they're working as intended and are serving the County's needs.

3. Build partnerships with external organizations to enhance diversity and inclusion efforts.

Policy Gap Analysis Summary

Documents Reviewed			
1	Equal Opportunity Utilization Report 2023	**13**	Supervisor Sample Evaluation
2	Leadership Philosophy Video	**14**	Personnel Policy & Procedures Manual, Chapter 8
3	(REAC) Guidelines and Expectations	**15**	Reasonable Accommodations Agreement
4	Leadership Academy instructions	**16**	FY24 Exit interviews (reviewed form only, not content)
5	Justice, Equity, Diversity and Inclusion (JEDI) Bylaws_2022 Update Final	**17**	Employee Sample Evaluation
6	Holiday Schedule	**18**	Common Acronyms
7	NHO Schedule	**19**	2023 Budget Equity Focus Update
8	Onboarding Instructions	**20**	Tuition Reimbursement Policy
9	Americans with Disability Act (ADA) Memo	**21**	2023 Budget Equity Focus Update DEC
10	Personnel Policy & Procedures Manual, Chapter 7	**22**	Style Guide
11	Americans with Disability Act (ADA) Medical Certification Form	**23**	Benefits
12	Sample Interview Questions for Current Recruitment of: RPT Specialist IQ/SQ (2 documents)		

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

In addition to the review of written policies at Charles County, a consulting firm reviewed specific documented processes and procedures. Although these practices are not formally codified in policy, they have a direct impact on how staff operate within departments and across the organization.

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Equal Opportunity Utilization Report 2023	• Charles County Government has a clear policy statement supporting EEO and diversity. • County uses an Applicant Tracking System (ATS) to analyze applicant demographics and target recruitment efforts. • There is a focus on underrepresented groups through targeted recruitment in specific fields. • Partnerships with local high schools, colleges, and minority organizations to diversify the candidate pool. • Leadership Academy and ongoing training programs to prepare employees for leadership roles. • Tuition Reimbursement Program available to support further education and career advancement.	• Opportunities to address underutilization of certain demographic groups in various job categories. • Opportunity to develop specific strategies to address these gaps in demographics. • Enhance recruitment strategies by expanding online recruitment activities and advertising on websites for underrepresented groups. • Enhance focus on succession planning for current employees to transition to leadership roles.	• Ensure that interview panels are diverse to minimize biases and promote fair hiring practices. • Utilize the Applicant Tracking System (ATS) to analyze applicant demographics and target recruitment efforts more effectively. • Provide ongoing training on equal employment opportunity, diversity, and inclusion for all employees. • Enforce a zero-tolerance policy on discrimination and harassment. Presently, only training is mentioned in relation to this policy. • Conduct regular reviews of recruitment practices and policies to ensure compliance with equal employment opportunity laws.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Leadership Philosophy Video	• The philosophy message is concise. It does not demand a lot of time, which is important when videos hosted online compete with other distractions. • The video has closed captions which assist with accessibility.	N/A	• The County should provide a transcript of its values in the description of the video. This would allow viewers to revisit sections of the philosophy statement without having to manage the playback feature.
REAC Guidelines and Expectations	• REAC's mission is clearly defined and seeks to drive engagement with the community.	• The "Department Leadership Engagement" and "Department Update" sections are incomplete. • The REAC Roles section would benefit from expansion.	• The County is recommended to revisit and update the "Department Leadership Engagement" and "Department Update" sections. • Define the qualifications and frequency of the REAC roles appointments. • Decide if the volunteer program would benefit from other roles beyond those of a facilitator and a secretary.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration

Leadership Academy Instructions	• Step-by-step instructions are clear and helpful.	• The use of four (4) different font colors different sizes, different boldness is challenging to follow as a reader.
		• Screengrabs are very small in terms of the font the reader is being directed to.
		• The QR code takes the reader to a County website with an error page. There is an opportunity to rectify the page.
			• Create uniform use of font size, color, and boldness in the document.
			• Clearly label the QR code (where it takes readers, their call to action, provision of actual URL).
			  ○ As reader, it sems like this QR code might take me to Kelci's contact information for assistance
			  ○ Ex. 'Scan this QR code to get started today', 'Visit the website to create your account.'
			• Consider offering technical assistance when applying to the academy.
			• Consider the need for instructions to be printed or offered in additional languages.
			• Consider how this instructions could be adapted for people with disabilities.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Justice, Equity, Diversity and Inclusion (JEDI) Bylaws_2022 Update Final	• Bylaws demonstrate a strong commitment to justice, equity, diversity, and inclusion (JEDI) as core values with an emphasis on fostering a culture where everyone is welcome and historically marginalized voices are heard. • Regular meetings and clear communication channels are established. • Membership includes representatives from various divisions, ensuring diverse perspectives. • Voting members are elected every two years, promoting democratic participation. • Council is accountable to Emergency Services Leadership Team and provides quarterly briefings. • Includes specific responsibilities for members to develop objectives, tactics, and benchmarks.	• Increase engagement with all staff members to ensure widespread understanding and support of JEDI values. • Utilize subcommittees to focus on specific issues and drive targeted initiatives. • Consider expanding membership to include more diverse voices, particularly from underrepresented groups. • Encourage participation from all levels of the organization, not just leadership. • Implement feedback mechanisms to gather input from staff and stakeholders. • Develop mentorship programs to support the growth and development of diverse talent.	• Enhance internal communication strategies to ensure all staff are aware of JEDI initiatives and progress. • Use multiple platforms (e.g., newsletters, intranet, meetings) to disseminate information. • Develop and implement performance measures to track the impact of JEDI initiatives. • Encourage open dialogue and create safe spaces for staff to share their experiences and perspectives. • Engage with the community to understand their needs and incorporate their feedback into DES policies. • Provide ongoing training for council members and staff on JEDI principles and practices.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Holiday Schedule	• The County recognizes a wide variety of holidays including celebrations like the "Super Bowl" and "Juneteenth" federal holiday. • The County Board of Commissioners recently added Eid al Fitr, Eid al Adha, and additional days around Easter, Thanksgiving, Christmas, and New Year's as observed holidays and office closures. • The more flexible leave program contributes to a more scheduling-friendly use of time. It is commendable that the County offers pro-rated (Paid time off) PTO to employees who join mid-year. • Overall, the terms of the PTO policy and its applications are clear and easy to understand.	• The County could consider adding other holidays to its observance schedule such as Diwali, Holi, or the Lunar New Year. Even if staff do not receive a day off for these holidays, recognizing them would contribute to cultural competency and raise morale. • Consider allocating a couple of days specifically for mental health. This can help reduce burnout and promote overall well-being among employees.	• Consider introducing a few floating holidays that employees can use for personal or cultural observances not covered by the standard holiday schedule. This provides flexibility and respects individual preferences. • Offer paid time off for employees to volunteer in their communities. This encourages civic engagement and can enhance the company's community presence. • Consider extending holiday breaks around major holidays like Christmas and Thanksgiving to allow employees more time with their families.
New Hire Orientation (NHO) Schedule	• Clear schedule.	• Inconsistent branding. • The pdf is blurry and difficult to read.	• Update to include consistent branding • Update document for clarity when viewing.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Onboarding Instructions	• Step-by-step instructions are a helpful guide for employees responsible for onboarding others.	• This pdf is blurry and difficult to read • The screen grabs are too small, blurry, and illegible.	• Update this document to consistent branding with the County and update blurry screengrabs. • Consider whether to print or offered onboarding instructions in additional languages. • Consider how this could be adapted for people with disabilities. • Add an option to include someone's preferred name is there is a field for that available.
Americans with Disabilities Act (ADA) Memo	• Americans with Disabilities Act policy is in place with the County.	• Printed version only version provided.	• Clarify if there is another mode to delivery of this communication for people with disabilities (translation services, provisions in other languages, options for people with visual disabilities).

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Personnel Policy & Procedures Manual, Chapter 7	• Position announcement includes minimum pay, which promotes pay equity/transparency. • Nepotism stance clear.	• Clearly state what 'qualification requirements' entails (lived experience, academics, professional experience). • Employment tests: Clear accommodations for people with disabilities. • Review the list of individuals considered 'immediate family' – is there a need to add other 'shared relationships / conflicts of interest'?	• Clearly identify where open position announcements are posted to ensure reach and equity in advertising. • Clearly identify if interview panel will be using anonymous screening in applicant review. • Revise on a regular schedule, last review was 2018.
Americans with Disabilities Act (ADA) Medical Certification Form	• Offers clear paths to support.	• If possible, remove the language of "impairment." • Share in additional languages and formats.	• Provide clear process of how to receive accommodations and support. • Offer an in-person meeting where someone can get help fill this form out.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Sample Interview Questions for Current Recruitment of: RPT Specialist IQ/SQ (2 documents)	SQ role • Based in experience.	SQ role • Is there a way that number of years of experience can be qualified in a different way? Is there a specific number of years that the County is seeking for the SQ position? • Shift SQ question 3 from yes/no → Tell us a little more about your experiences with the following… This creates more illustrative and narrative responses verses just yes/no.	SQ role • Determine number of years qualify or disqualify someone from candidacy of this role. • Consider the need related to the Driver's License question. Is it 'does this individual have reliable transportation?' or 'does this individual need to be able to drive themselves?' – would a state ID suffice?
Supervisor Sample Evaluation	• Rating scales help give nuance to the experience. • Helpful examples of what each item means.	• Using a numbered score can be limiting for employees. • Clarify item weights used and how that is determined and justified.	• Implement detailed and annual training for supervisors to ensure adequate and thorough understanding of the performance rating system. • Include personal goals for supervisors around Diversity, Equity and Inclusion.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Sample interview Questions for Current Recruitment of: RPT Specialist IQ/SQ (2 documents) **(Continued)**	IQ role • Questions are open-ended and offer opportunity for applicants to provide in-depth information	IQ role • Refine what you are asking in 'tell us about yourself'. What is the County hoping to learn from this question? • Refine question about 'supervisory experience' to include specific tasks or activities included like assigning work to others, managing a team, providing mentorship, etc. • Refine conflict resolution question to seek a specific example/process from applicant • Salary question: Shift from yes/no → 'The salary for this position is listed at $54,403.45 per year. How does this compensation align or not align with your expectations. What questions do you have?'	IQ role • Remove yes/no questions from list and shift into open-ended questions • Specifically, around salary, instead of asking 'is this acceptable', ask 'What are your thoughts on this?' 'How does this align with your expectations?"

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Personnel Policy & Procedures Manual, Chapter 8	• Based in positive reinforcement. • Rooted in respect and relationships. • Expectations are set at the beginning of the review period, so employees know exactly what they are being evaluated on. • Employee-specific training needs are identified.	• Include core competencies being reviewed. • Define values and skills to provide objective standards.	• Create a training plan and supports for each employee to achieve training opportunities. • Consider what value the County places on a number rating and using the performance level as the metric to remove the assignment of numbers as value.
Reasonable Accommodations Agreement	• Clearly provided support and expectations.	• Inconsistent use o f periods at the end of lists and not aligned with County branding guide.	• Include of purpose statement of this agreement.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration

FY24 Exit Interviews (reviewed form only, not content)	• Form seeks to understand:
	  ○ Cause for separation.
	  ○ Factors that led to accepting the job.
	  ○ What they liked most about the County/job.
	  ○ What they liked least.
	  ○ Support and resources.
	  ○ 1-10 rating of job components.
	  ○ Net Promotor Score (NPS) question.
	  ○ Supervisor.
	  ○ Improvements.
		• Opportunity to use Microsoft/Google form for document, so that data can easily be analyzed
		• Principal reason for leaving options aren't consistently used (ex. Retirement is an option, yet someone checked the box for 'other' and wrote in the word retirement
		• Create questions in an open-ended format to encourage more usable and actionable data
		• Clarify what the 1-10 scale means, and if they rated below a 9 or 10, ask the question 'what would help make it a 9 or 10?'
		• Rewrite Q7 to a traditional eNPS (employee NPS) with a 1-10 rating
			• Review listed opportunities and rewrite exit interview questions accordingly.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Employee Sample Evaluation	• Goal-based oriented for easy use by staff and managers.	• Offer definitions of 'long-range' in years. • Offer example objectives that are rooted in soft skills like conflict resolution, managing a team, interpersonal communication, facilitation techniques, etc. • Change language of 'factors **can** include' to 'examples of factors' so that it does not seem like factors are required to include or not include.	• Reconfigure question about job satisfaction – consider employee net promotor score (eNPS). • Focus job satisfaction on what they like about their jobs and areas of improvement including providing detailed and annual training on the performance review process. • Include personal goals employees around Diversity, Equity and Inclusion.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Common Acronyms	• List of acronyms appears thorough and accounts for commonly used department names. • List is straightforward and easy to navigate, allowing employees to quickly find the information they need without having to sift through unnecessary details. • By providing a standardized list of acronyms, the document helps ensure consistency in communication across the organization, which is particularly important in a large and diverse workforce.	• Include a brief description or definition of each department or program to provide more context. For example, instead of just "DPW," add "Department of Public Works - Responsible for maintaining county infrastructure, including roads, bridges, and public buildings."	• a consulting firm recommends elevating this Excel document into a branded Word or PDF file complete with last-updated labels. This will make it easier to attach the sheet to other policies that use these acronyms frequently and assist with version control. • The County could organize acronyms into categories such as departments, processes, systems, and programs. This can make the list easier to navigate. • Alternatively, ensure that acronyms are listed in alphabetical order within each category for quick reference.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
2023 Budget Equity Focus Update	• The document outlines Charles County Government's commitment to diversity, equity, and inclusion (DEI), emphasizing the importance of these values in all operations and decision-making processes. • Use of a Budget Equity Tool provides a structured approach to evaluating budget requests, ensuring that equity considerations are systematically integrated into budget decisions. • Includes a four-point scale to rate the equity impact of budget items, which helps objectively assess and prioritize budget requests. • Suggested focus areas cover a wide range of community needs, from children and youth to workforce development, ensuring a holistic approach to equity. • Includes a glossary of terms and contact information for the Office of Diversity, Equity, and Inclusion (ODEI).	• Opportunity to engage with the community to gather input and feedback on budget priorities, ensuring that the voices of underserved populations are heard and considered. • Leveraging both quantitative and qualitative data to identify and address inequities can enhance the effectiveness of budget decisions and ensure that resources are allocated where they are most needed. • Providing additional training for staff on using the Budget Equity Tool. Understanding of equity concepts can improve the quality of budget requests and their alignment with DEI goals. • Establishing robust monitoring and reporting mechanisms for tracking.	• Increase efforts to communicate the importance of the Budget Equity Tool and DEI initiatives to all departments and broader community. (i.e. include workshops, informational sessions, and regular updates. • Invest in tools and systems to collect and analyze data on the impact of budget decisions on different demographic groups. • Encourage collaboration between departments and external partners, such as community organizations and advocacy groups. • Periodically review and update the Budget Equity Tool and related processes to ensure they remain relevant and effective. • Share success stories and case studies on tool positive impacts on the community.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Tuition Reimbursement Policy	• Offers 100% tuition reimbursement opportunities for staff. • Offers reimbursement for textbooks as a benefit.	• Gendered language of his/her is limiting. • Gendered language of 'grandfathered' can be seen as oppressive. • No citation of financial amount to be covered, but does list 12 credit hours – is there a financial limit? • Program does not state how often an employee may use this benefit. • Program does not state if the coursework/education must be relevant to the employee's role/position/field.	• Offer language like 'their' or 'the employee's' instead of gendered his/her. • Change 'grandfathered' language to something that represents the case-by-case nature of 'FT reduced-hour) employees. • Clarify the financial limit (if any) of this program. • Clarify how often/frequently an employee may use this benefit. • Consider if there is an option to pay upfront the costs of tuition vs reimbursement model to support equity in access to education/learning. • Expand the tuition program to include other types of education/professional development to include things like licensing fees, certification fees, trainings, etc.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
DEI Strategic Plan 2021	• Highlights the importances of change in demographics. • 3-year plan includes awareness of creating baseline data and understanding. • Plan includes mention of metrics.	• Pg. 3 and 4 lists of percentages is not a helpful visual in understanding the change. • Pg. 3 and 4 use a descriptor then noun approach vs. person-first language. • Pg. 5 offers demographics in numbers, which is confusing for a reader as pages 3 and 4 are percentages. • Charts are difficult to read, and titles do not tell a reader what they should be looking for. • There is no mention of a dedicated budget in the plan. • Many of the activities may appear performative from an external lens (i.e., work with media to tell our DEI story, create internal award and recognition.) • No identification of specific inputs, outputs, outcomes, or owners/responsible parties.	• Update pg. 5 data to protect confidentiality when reporting out on demographics which represent small numbers of individuals such as '1 Hispanic Female.' • Change pg. 5 to be represented to percentages. • Provide a total number of individuals from which this data is based (n=X). • Update all charts to include clear axis labels, titles with clear takeaways. • Change representation of race from 100% stacked chart to another format. 100% stacked implies that all the races are represented here and devalues what lies in 'other'. Recommendation to use bar chart. • Create a clear *Call to Action* for staff to actively participate in changing the narrative around DEI at the County.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
2023 Budget Equity Focus Update DEC	• Clear instructions on how to use equity budgeting tool.	• Community outcomes does not include feedback from community to understand impact (County-centered vs community-centered approach). • Focus areas include both areas and populations (ex. children and youth AND housing). • Highlighted sections are very difficult to read on a screen • County Commissioners Resolution No 2021-24 is blurry. • Equity emphasis map is difficult to read and there is no legend.	• Research community-centered evaluation and participatory approaches to collecting feedback. • Develop priority populations and priority areas, distinguish between the two. • Include BIPOC population. • Remove highlights from instructions and reformat so it is clearer and easier to read. • Re-upload the Resolution for clarity. • Re-upload the map with a legend, title, axis, etc.
Style Guide	• Promotes gender inclusivity. • Fonts are easy to read. • Very clear grammar guidelines.	• Define 'easy to understand' by offering a grade level to support what that means, example, 5th grade reading level. • Bulleted list instructions for periods at the end of lists is not consistent in this document.	• Standardize the style guide to reflect a fifth-grade reading level. • Review the style guide for consistency on a regular basis to account for changes such as acronyms, etc.

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Policy Gap Analysis Summary

Gap Analysis of Additional Programs and Policies

Document Reviewed	Strengths	Opportunities	Questions and Recommendations for Consideration
Personnel Policy & Procedures Manual, Chapter 21 - Benefits	• Array of benefits including FSA, supplemental benefits, health medical, dental, vision and prescription, and long-term disability, workers compensation, deferred compensation benefits. • Tuition reimbursement is available for continued professional development for staff. • House Keys for Employees available for downpayment assistance for County employees. • County offers pension plan and sheriff office retirement plan for eligible employees. • Retiree health insurance is available for both County and Sheriff office former employees.	• Provide regular reminders to employees for usage of various benefits (i.e., tuition reimbursement, *House Keys for Employees program*, retiree health benefits, etc.) outside of open enrollment each year. • Provide benefit information in languages other than English (i.e., Spanish, French, etc.) for easier access by non-English speaking employees who may prefer to read information in their native language.	• The County could consider a similar supplemental grant program that can be used alongside the Maryland *House Keys 4 Employees* program as the County's annual budget permits. • Provide opportunities for additional flexibility for courses that may require daytime or nighttime attendance during work shift hours for those seeking tuition reimbursement.

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Employee Experience Survey

Overview

A consulting firm procured by the County designed and administered an Employee Experience Survey, which was distributed to the County's staff workforce to better understand employees' perceptions of diversity, equity, and inclusion. Respondents provided a wealth of information on their insights around seven core areas within the survey to gauge the current state of DEI within the organization. This chapter of the report includes quantitative and qualitative findings and analysis of the Employee Experience survey.



Source: Charles County Government Photo Gallery

Employee Engagement Survey Analysis

The Employee Experience Survey consisted of nine topics via Likert statements with four open-ended questions. a consulting firm collected general demographic information to identify patterns within race, ethnicity, gender, or other employee groups.

All survey respondents volunteered to participate and likely may have stronger opinions on DEI within the County. Still, it is essential to note that this activity, coupled with the five focus groups, provides a robust and valid sense of employee opinions on the current state of DEI within the County. When reading the breakouts by demographic groups, it is also critical that readers understand that anyone can identify as many different and varying identities. For example, an employee could be Black, male, gay, and disabled. To maintain the anonymity of the respondents, a consulting firm did not collect intersectional demographics. For this report, the survey response options “Strongly Agree” and “Agree” were grouped into the “Favorable” category, the “Strongly Disagree” and “Disagree” were grouped into the “Unfavorable” category, and the “I don’t have a strong position” were grouped into the “Neutral” category.



When?	The survey was administered across two weeks during this timeframe: December 9 - 23, 2024.
How?	The survey was administered online using the **Qualtrics** survey application. Hardcopy paper format of the surveys were also distributed to 10 locations throughout the County to reach staff who did not have access to computers.
Who?	The survey was administered to **all Charles County employees (part-time and full-time).**
What?	• **32 multiple-choice** questions • **6** demographic information questions • **3 open-ended questions** where respondents could write in comments • **297 employees provided at least one comment**
Response Rate?	**368 employees participated in the survey**. At a 95% confidence level, the survey has a **margin of error of 5%**

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Employee Experience Survey Context

To maintain the anonymity of the respondents, a consulting firm did not collect intersectional demographics. Additionally, when respondents of a particular demographic were too few (Less than ten individuals per group), they were grouped at the next highest level of organization when bifurcating results on a specific identity marker to protect confidentiality further.

Once the survey closed, the consulting firm procured by the County aggregated all the results and cross-tabulated the data across seven core assessment areas of interest: Leadership; Diversity/Representation; Inclusion and Belonging; Equity and Access; Conflict Resolution; Hiring and Recruiting and Professional Development. The following sections show critical findings for each aggregate survey sections including a summary of respondent's demographic makeup. The quantitative analysis found key findings and insights within each core area of the survey as well as qualitative responses provided within general questions posed to respondents.

The Employee Experience Survey Measured 7 Core Areas:

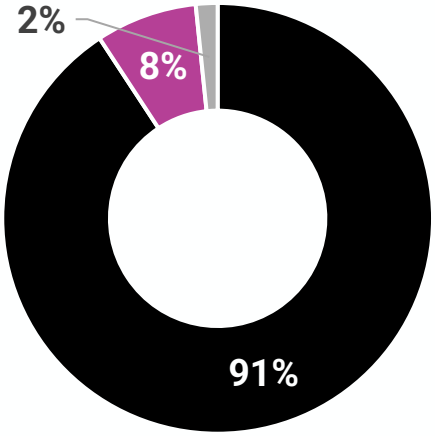
- Leadership Readiness
- Diversity / Representation
- Inclusion and Belonging
- Equity and Access
- Conflict Resolution
- Hiring and Recruitment
- Professional Development

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Employee Experience Survey Quantitative Analysis

Overview

In December 2024, a consulting firm released an Employee Experience Survey to all County staff to gather insights and feedback on diversity, equity and inclusion operations, and practices within the organization. The largest shares of respondents work full-time for Charles County (91%), have worked for the County for seven or more years (47%), and are not managers of supervisors (54%).

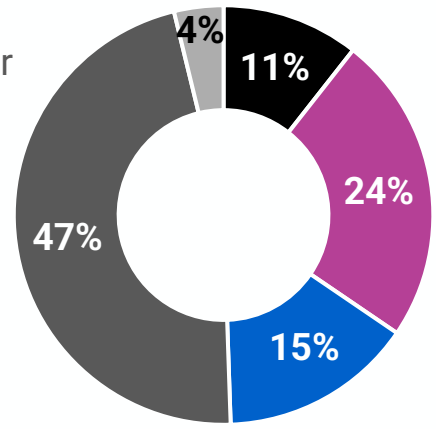


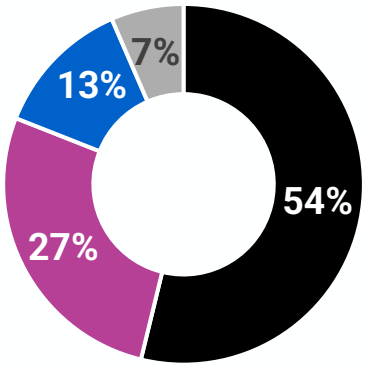
- Full-time
- Part-time
- Prefer not to disclose

Are you a full-time employee or part-time?

How long have you worked for Charles County Government?

- Less than one year
- 1 - 3 years
- 4 - 6 years
- 7 or more years



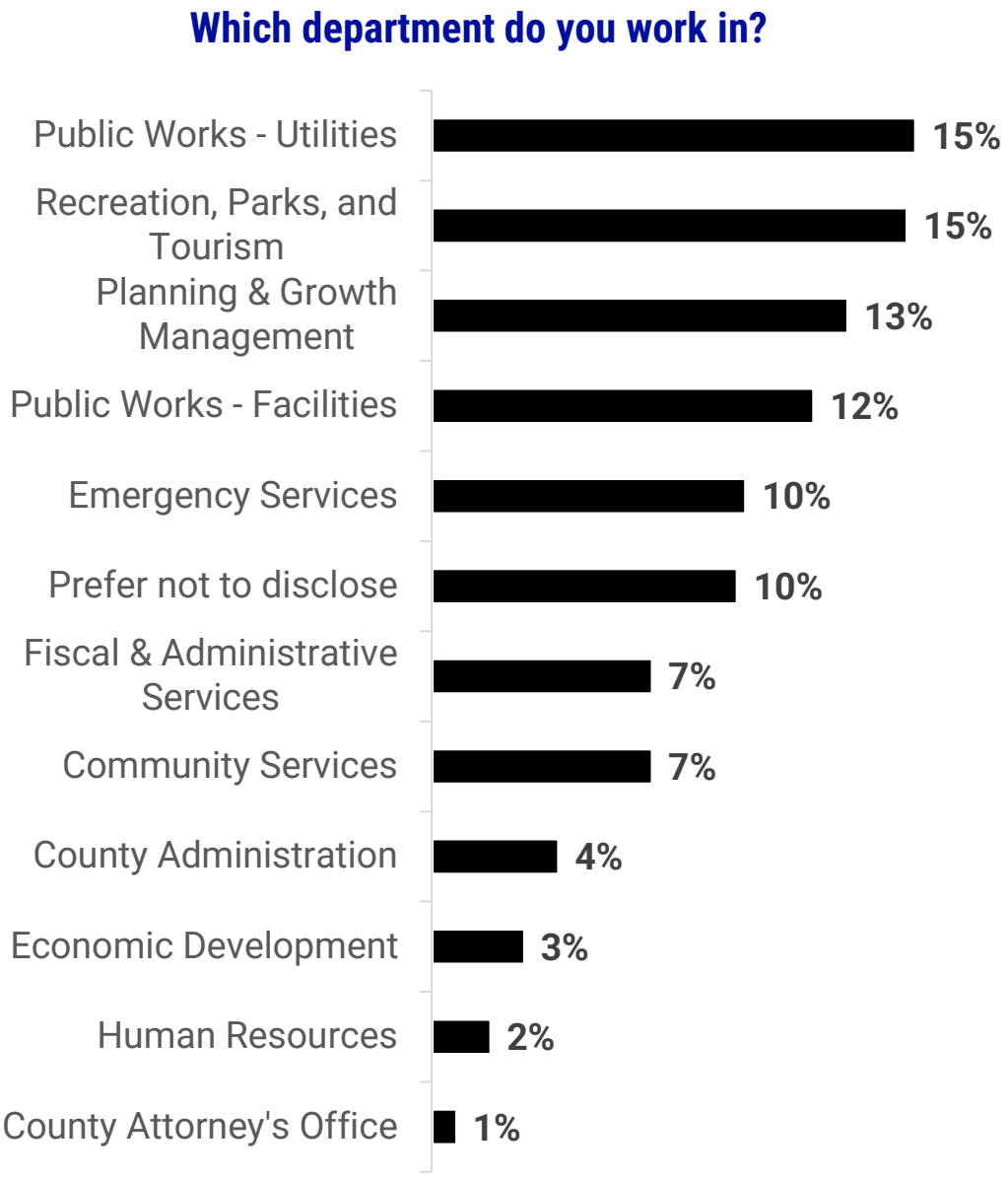


- Not a Manager or Supervisor
- First-level Supervisor
- Manager / Supervisor
- Prefer not to Disclose

Which of the following best describes your role at Charles County Government?

Employee Experience Survey Quantitative Analysis

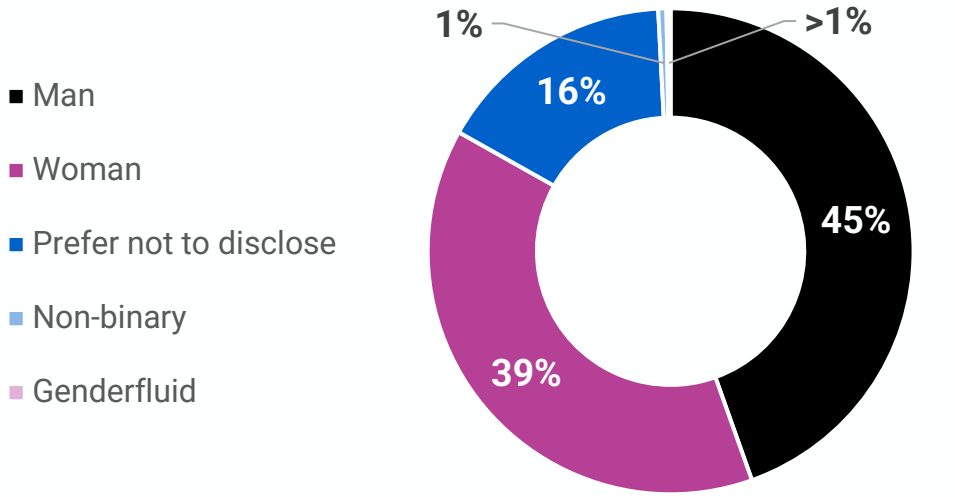
Survey respondents work in departments across Charels County, with the largest shares in Public Works – Utilities (15%), Recreation, Parks, and Tourism (15%), Planning and Growth Management (13%), Public Works – Facilities (12%), and Emergency Services (10%). Ten percent of respondents chose not to disclose the department where they work.



Employee Experience Survey Analysis

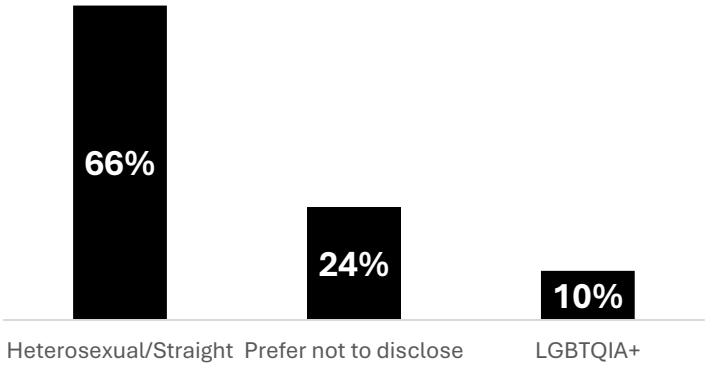
Survey Respondent Demographics

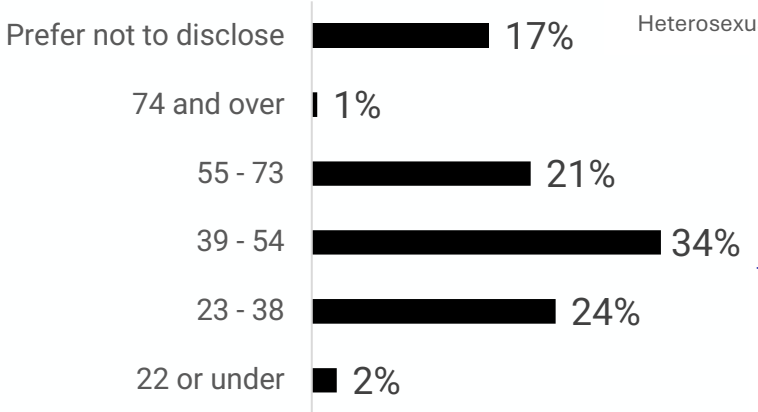
The largest shares of respondents identify as men (45%), heterosexual/straight (66%) and are between 39 and 54 years old.



Please select the gender with which you most identify.

Please select the sexual orientation with which you most identify.



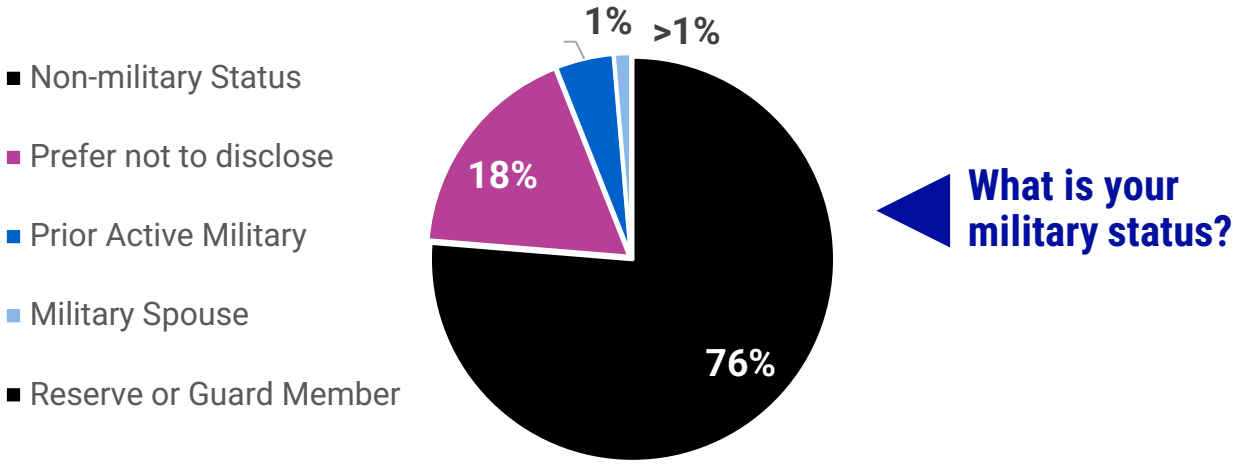


What is your age group?

Employee Experience Survey Quantitative Analysis

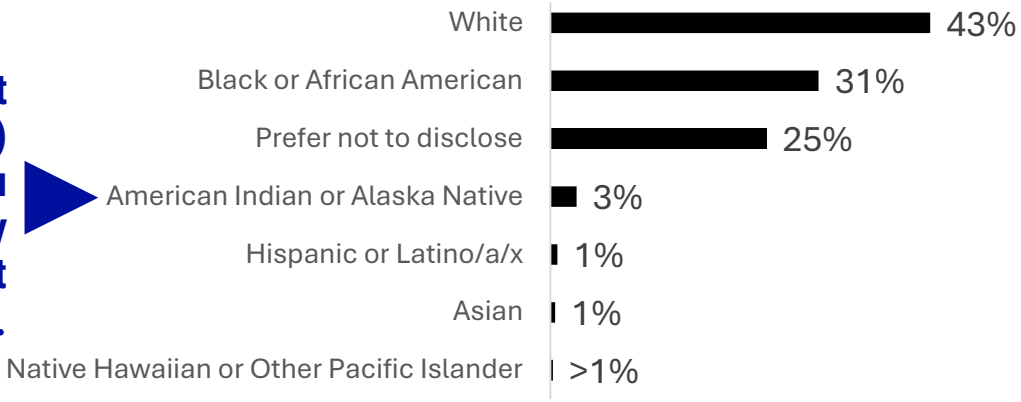
Survey Respondent Demographics

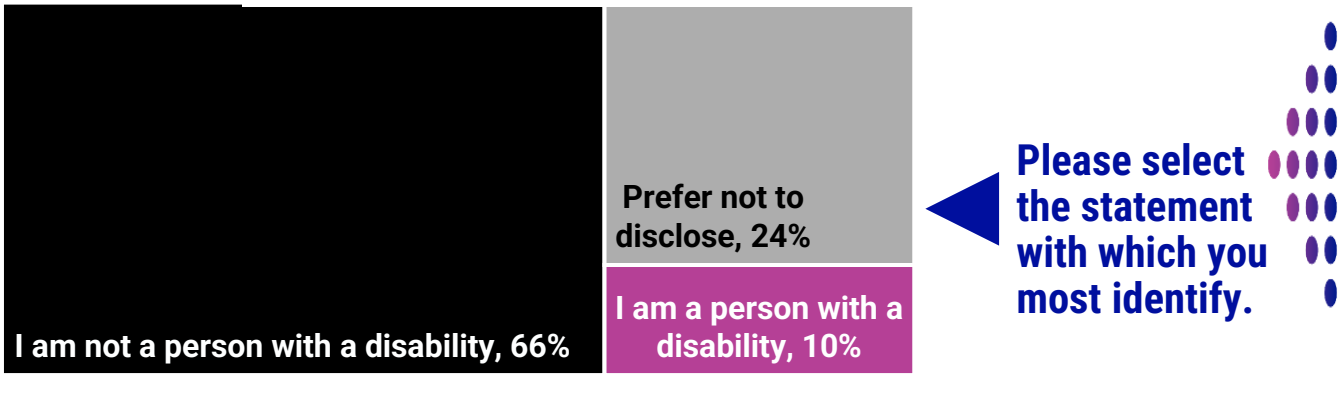
The largest shares of respondents have never served in the military (76%), identify as White (43%), and indicate that they do not have a disability (66%).



What is your military status?

Please select the race(s) with which you most identify (Check all that apply).





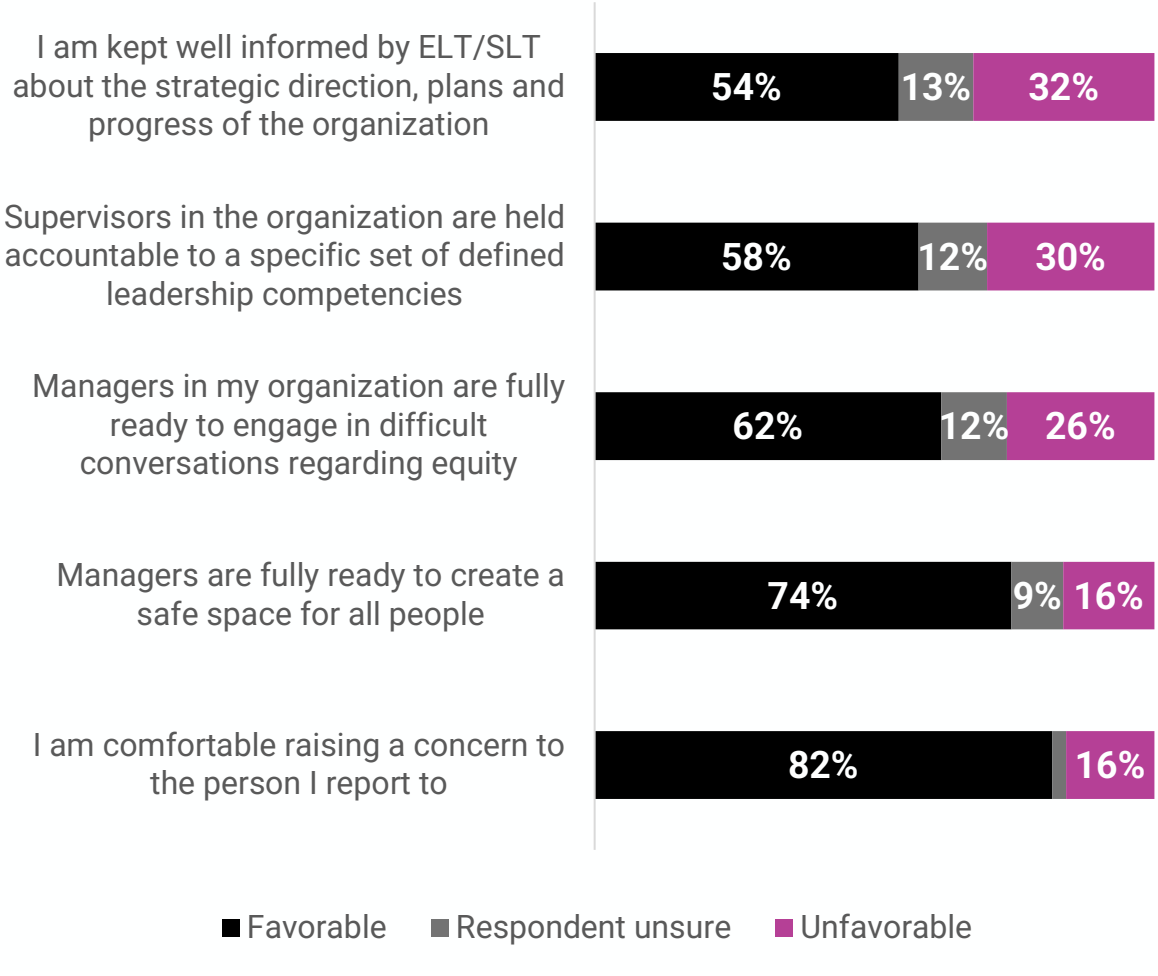
Please select the statement with which you most identify.

Employee Experience Survey Quantitative Analysis

Aggregated Survey Responses

Nearly one-third of survey respondents do not believe they are kept well informed by ELT/SLT about the strategic direction, plans and progress of the organization (32% unfavorable) and don't believe supervisors at Charles County are held accountable (30% unfavorable). The overwhelming majority of respondents are comfortable raising concerns to their direct supervisor (82% favorable).

Leadership Readiness



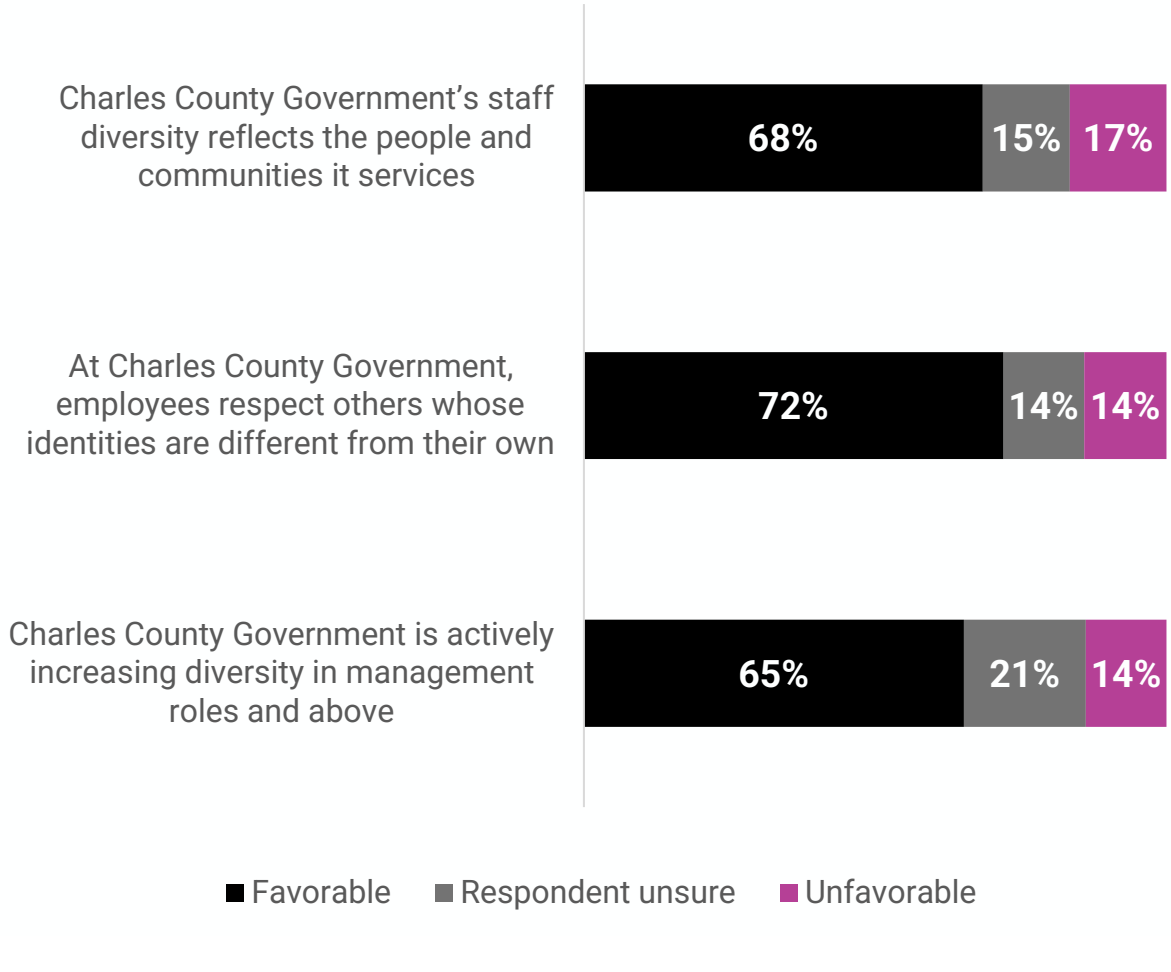
Note: Labels have been removed for percentages of 5% or below in the exhibit for better readability.

Employee Experience Survey Quantitative Analysis

Aggregated Survey Responses

More than two-thirds of respondents gave favorable answers to items related to the diversity of the Charles County Government staff (68% favorable), employees' respect for differences in identity (72% favorable), and active increase of diversity in management roles and above (65% favorable). Unfavorable responses to these questions were below 20%.

Diversity and Representation



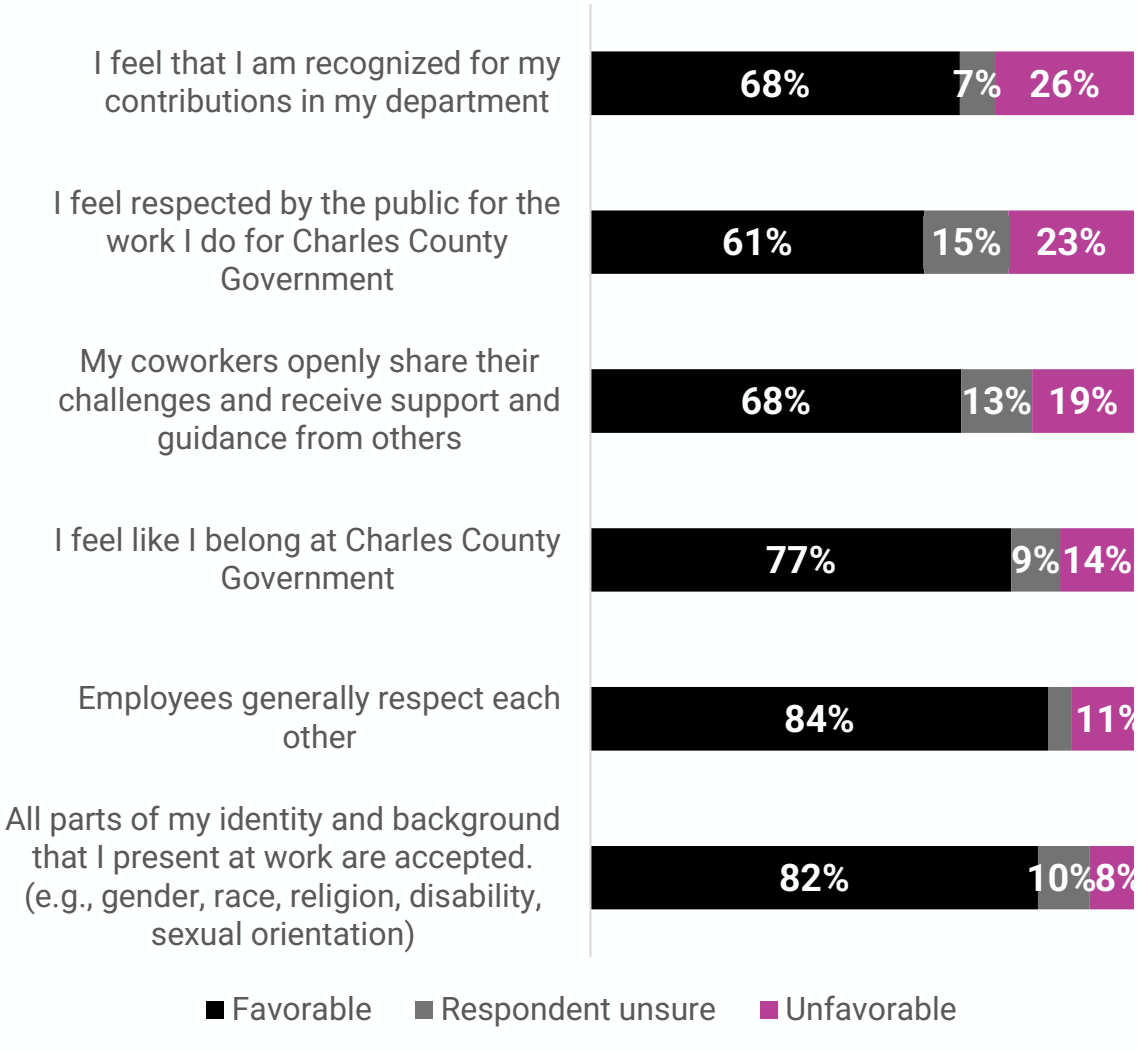
Note: Labels have been removed for percentages of 5% or below in the exhibit for better readability.

Employee Experience Survey Quantitative Analysis

Aggregated Survey Responses

Approximately one in four respondents (26% unfavorable) do not believe they are recognized for their contributions, while nearly as many (23% unfavorable) do not feel respected by the public for their work. Most employees (84% unfavorable) feel that employees of Charles County respect one another.

Inclusion and Belonging



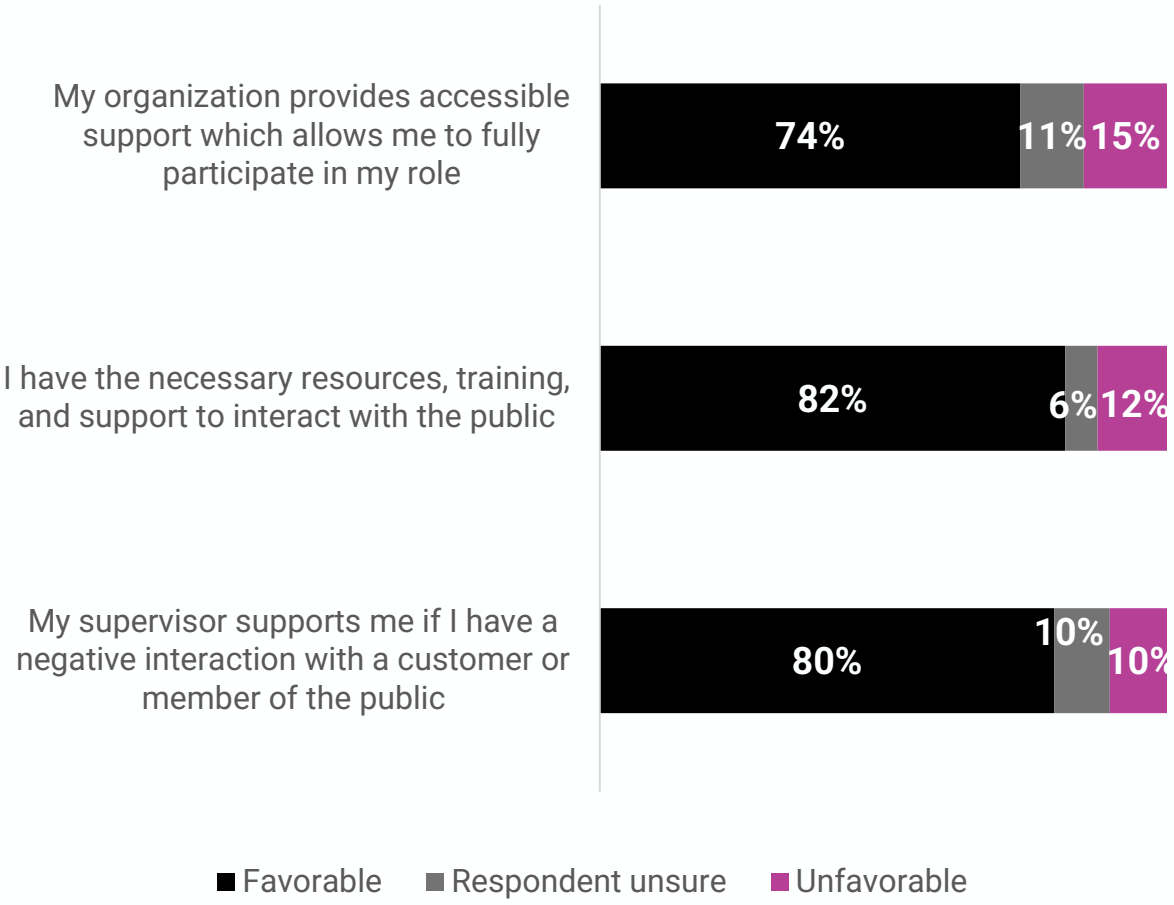
Note: Labels have been removed for percentages of 5% or below in the exhibit for better readability.

Employee Experience Survey Quantitative Analysis

Aggregated Survey Responses

Most employees report that they have accessible supports (74% favorable), and the necessary resources to interact with the public and do their jobs (82% favorable). Most also feel supported by their supervisor when negative interactions with the public do occur (80% favorable).

Equity and Access

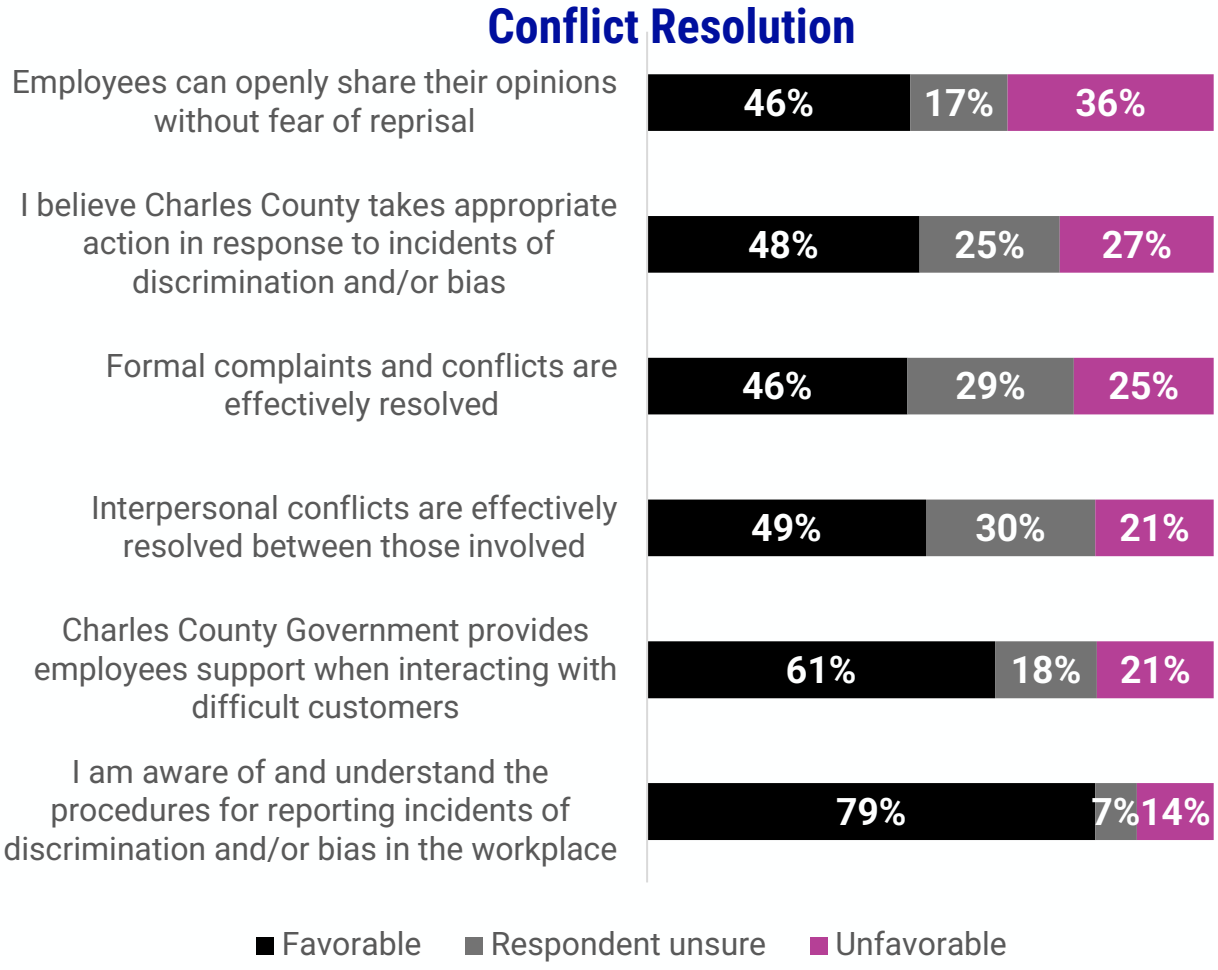


Note: Labels have been removed for percentages of 5% or below in the exhibit for better readability.

Employee Experience Survey Quantitative Analysis

Aggregated Survey Responses

More than one-third of respondents indicate that they cannot share their opinions without fear of reprisal (36% unfavorable) and more than one-quarter do not believe that Charles County takes appropriate action in response to incidents of bias (27% unfavorable). One-quarter do not believe formal complaints are effectively resolved (25% unfavorable), although most indicate that they understand the process for reporting these incidents (79% favorable).



Note: Labels have been removed for percentages of 5% or below in the exhibit for better readability.

Employee Experience Survey Quantitative Analysis

Aggregated Survey Responses

Just over half of respondents indicated that the reality of the culture at Charles County is consistent with the way it was portrayed at the employee's point of hire (54% favorable and 29% unfavorable).



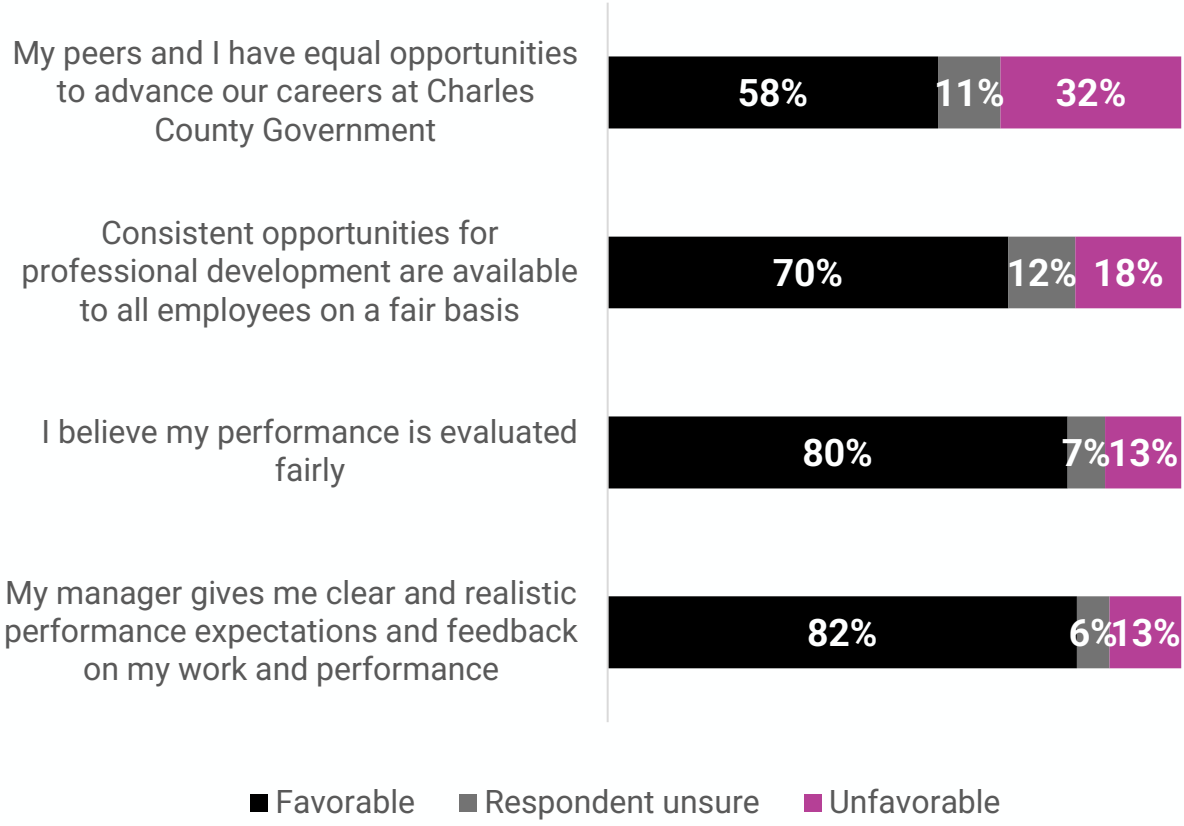
Note: Labels have been removed for percentages of 5% or below in the exhibit for better readability.

Employee Experience Survey Quantitative Analysis

Aggregated Survey Responses

Nearly one-third of respondents (32% unfavorable) indicate that opportunities to advance one's career at Charles County are not equally available to all. Respondents feel generally more positive about opportunities for professional development (70% favorable), evaluation of their own performance (80% favorable), and expectations and feedback on their own work performance (82% favorable).

Professional Development



Employee Experience Survey Qualitative Analysis

Themes from Open-Ended Responses

In three to five years, what do you want to see changed about the organization?

245 respondents provided an answer to this question. Verbatim responses reflective of each theme are shown in blue.

- **Improved Compensation and Benefits**: Many responses highlight the need for better pay, reflecting local living costs, and including hazard pay. Others mention the need for benefits like take-home vehicles and phone reimbursements.

  "Pay increase, due to astonishingly high cost of living and relative low pay, for example I am a supervisor and cannot afford my monthly bills (rent, utilities, transportation) without my significant other working a fulltime job."

- **Career Advancement and Training**: Respondents desire clear career paths, better leadership training for managers, and a formalized training structure, especially for new hires.

  "I would like to see a mentorship program developed for not just new, but all employees that are interested in growing within the organization. I would also like to see more supervisor positions made available so that staff at the top level of their positions have the opportunity for advancement."

- **Equitable and Inclusive Work Environment**: Respondents called for ending favoritism, creating non-biased promotion processes, and establishing a workplace that respects diversity and provides equal opportunities for all were shared.

  "Better understanding of what focusing on diversity in the workplace actually looks, sounds, and feels like."

- **Enhanced Communication and Management Practices**: There is a strong desire for better communication across all levels of the organization and more responsive and accountable leadership.

  "I want to see all levels of management live up to the agency leadership philosophy. I want to see leadership that is willing to make adjustments to change and select the most qualified candidates for positions instead of selecting persons based on the number of years they have been with the county."

- **Public and Community Engagement**: Suggestions include more outreach and community-oriented events, which could help staff connect better with the community they serve.

  "Public outreach, opportunities to assist the public and get to know the community better. Maybe more county sponsored events such as soup kitchen during cold seasons. Or something simple such trunk or treat with the Police department."

Employee Experience Survey Qualitative Analysis

Themes from Open-Ended Responses

Have you ever been made to feel uncomfortable at work in Charles County Government?

279 respondents provided an answer to this question. Verbatim responses reflective of each theme are shown in blue.

- **Positive Responses**: A significant number of respondents (143, or 51%) provided responses indicating they have not felt uncomfortable in their tenure at County government.

  "No, I have always felt comfortable working here."

- **Negative Responses**: Around 126 respondents replied that they felt uncomfortable at work on at least one occasion, and many shared experiences of discrimination, poor management, workplace politics, gossip, or inappropriate behavior.
  - **Management Issues**: Ineffective handling of complaints and power abuse by supervisors were common issues.

    "Yes "leaders" share everybody's business and every issue that they face. There's no trustworthiness; how do you expect me to trust leadership if they talk about everything that goes on in the office?"

  - **Discrimination and Harassment**: Instances of age discrimination, racial comments, and feeling marginalized based on ethnicity or background were mentioned.

    "There are people in leadership positions that constantly harass employees, and they are not held accountable."

  - **Political and Administrative Discomfort**: The actions of elected officials and the political environment were cited as sources of discomfort.

    "Yes, when politics is discussed at the office."

  - **Social Dynamics and Workplace Culture**: Some employees mentioned discomfort due to the prevailing workplace culture, including favoritism and cliquish behavior.

    "Yes, microaggressions occur daily."

Employee Experience Survey Qualitative Analysis

Themes from Open-Ended Responses

What else feels important to share regarding your experience at Charles County Government?

162 respondents provided an answer to this question. Verbatim responses reflective of each theme are shown in blue.

- **Management and Leadership Concerns**: There is a notable dissatisfaction regarding how upper management and leadership handle issues and engage with employees. Many feel their opinions aren't taken seriously, and there's a desire for more accountable, transparent, and supportive leadership.

  "Upper management does not seem to take your opinion seriously. Then when goes wrong they don't own up to it."

  "I wish that all managers felt empowered to do their jobs like I get to do mine. I also wish that managers were held accountable for their management. Even if it's only a few managers, they can infect entire departments."

- **Work Environment and Culture**: There are mixed feelings about the workplace culture, with some expressing a positive experience and others feeling underappreciated or experiencing favoritism and bias. The need for a more inclusive and supportive environment is highlighted.

  "Charles County Government can be an amazing place to work as the agency provides competitive benefits; however, the agency seems to be suffering from growing pains and the residues of the do as I say mentality and not as I do."

  "Charles County Government overall is a great place to work, and I feel comfortable working here. I feel as though I am adequately compensated for my position and intend to work my whole career here for Charles County Government. I just want to see accountability for County employees in supervisory roles of all levels, stronger leadership from folks who genuinely care about living and or working in Charles County, and more focus being placed on hiring the best possible candidates for the position regardless of race, gender, etc."

- **Compensation and Benefits**: Compensation remains a concern, particularly in relation to the cost of living and compared to other organizations. Benefits are appreciated, but many feel the pay does not adequately reflect their job demands or living expenses.

  "Benefits are great but feel most are under paid for what it costs to live these days. I feel it is not right that the school board and sworn sheriff's officers always get a higher COLA than us, and they get it in July, not January."

  "It is not fair to expect employees that are 2-3 pay grades lower than someone to fill that role consistently with no compensation."

Employee Experience Survey Qualitative Analysis

Themes from Open-Ended Responses

(Continued)

What else feels important to share regarding your experience at Charles County Government?

162 respondents provided an answer to this question. Verbatim responses reflective of each theme are shown in blue.

- **Training and Career Development**: Positive notes on training opportunities contrast with concerns about career advancement limitations and the need for better pathways for personal and professional growth within the government.

  "There are a lot of employees that could use more training on how to interact with their coworkers and their direct reports. There are a lot of people who don't understand the concept of DEI and there should be accountability for those who refuse to adapt to the changing culture and expectations of just being a good person."

  "I came from 30 years in the private sector so may have a somewhat different view than career long county employees. I'm seeing in Charles County, an organization that is constantly making improvements to make the work experience better, to recognize employees for their achievements, to give employees more tools to serve the public in their areas either through training or technology and to recognize differences in culture, race, religion, etc."

- **Employee Value and Retention**: High turnover is a significant concern, with many noting that after receiving training, employees often leave for better-paying opportunities elsewhere. There's a call for better strategies to retain skilled workers.

  "I have heard this many times in my experience. But Charles County is known as a training center for DC water/Blue Plains. This is due to the astonishingly low pay as the main factor. I know it cannot be changed overnight and there are a lot of factors at play."

  "I have been here for a few months now and am pleasantly surprised by the positive atmosphere of my office and friendly reception I received by my team members and coworkers in my department. So far, I have only really had positive interactions with others here and am grateful that everyone is willing to answer questions, share their knowledge, and welcome me into the community. I feel valued and respected by my team, and based on these first impressions feel even more excited to start my career here."

Qualitative Analysis – Focus Groups

5 Focus Groups, **90** minutes each

Focus Group Types: **1** Managers and Supervisors, **4** Individual Staff

10 questions resulting in the following key themes: DEI Commitment; Leadership; Equity in Access to Resources; Culture First; Policy & Procedure; Training; Selection & Promotion Process; and Communication.

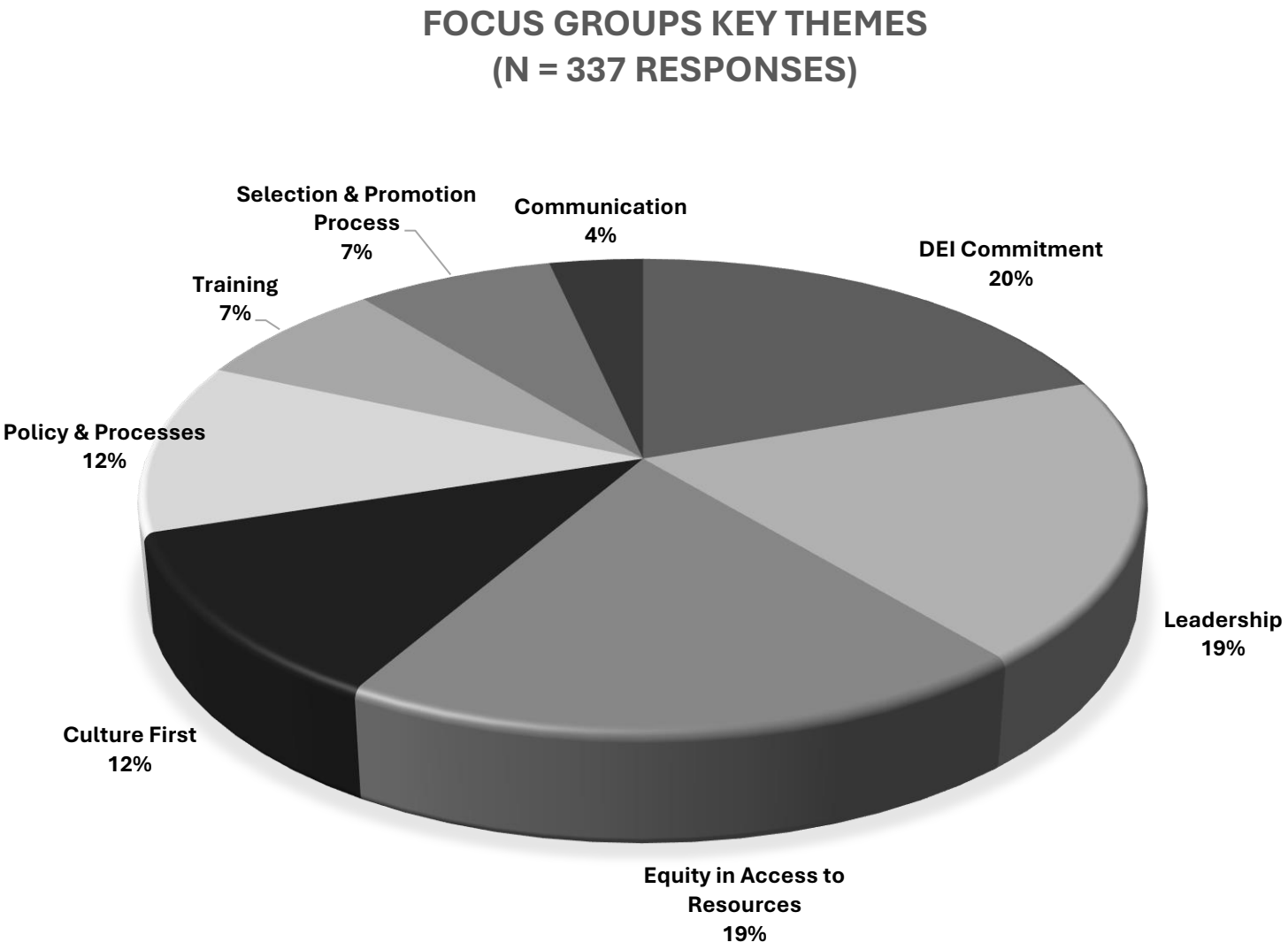
Methodology

Focus groups were engaged through open-ended questions and conversational dialogue. The process focused on meaning and context; continued refinement, and removal of direct and indirect identifiers of those providing input. Responses were then grouped for patterns and overarching themes. The following are Key Themes and Major Insights:

Key Themes | Quick View



Key Themes Overview



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Major Insights

Questions	Major Insights
1. How would you describe your initial impression of the organization's DEI efforts?	DEI staff is trusted; under-funded; gradually making a difference.
2. What situations make you feel included or excluded at work? How does Charles County respond to the situation?	Inclusion or exclusion is highly dependent on departmental leadership. Employees in the field and part-timer staff feel least included.
3. What barriers do you see to creating an inclusive environment?	Departmental silos are viewed as inhibiting change.
4. What do you need to be comfortable expressing your authentic self at work?	A safe space that respects differences and values everyone's contribution creates an environment for authenticity.
5. What characteristics, traits, contributions, and behaviors are most valued and rewarded in your organization?	Personal relationships and status quo are most valued. Hard work is rewarded with more hard work.
6. Do you feel like you have access to the resources and support needed to succeed in your role? Why or why not?	People generally feel supported. However, some lack training opportunities, budget and staff to be more successful.
7. Do you feel the promotion process is fair and equitable for everyone? Why or why not?	Perception is that external hires have advantage over internal candidates in the hiring, selection and promotion process.
8. How well does leadership actively promote and champion DEI initiatives? To what extent do you feel leadership is prepared and willing to play this role?	Senior leadership should advocate more. Some middle management is resistant to change. Direct supervisors are viewed as most supportive; however, lack the ability to change things.
9. To communicate and engage employees around an important initiative or priority, what kinds of communications or strategies work best? Who should communicate these things? What methods – email, face-to-face, or something else – work.	Multiple mediums and different people should communicate, depending on the audience. All employees should have access, at least, to a general email account or message board.
10. What specific actions could Charles County take to improve diversity, equity, inclusion and your experience at work?	Make DEI an integral part of policy and procedure.

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Qualitative Analysis - Focus Groups

Below are the key findings and impact themes from staff focus groups. Small Planet Works, a consulting firm, is sharing the top eight (8) themes that emerged. To ensure our commitment to confidentiality and anonymity of focus group participants, all personal information was removed from quotes shown.

DEI Commitment

Commitment to DEI makes up 42% of themes expressed by participants. This theme is a compilation of responses to Questions 1, 3, and 8. They reflect impressions of initial DEI efforts; commitment of senior leadership; and general supportiveness of direct supervisors and managers. Though supervisors are viewed as generally supportive, they often have no ability – on their own – to make changes.

"Excited for the existence of the DEI program and the availability of officers. It's improving; but it takes time."

"DEI team is approachable; I go to them for personnel issues, as well."

"DEI has been dismissed by some office superiors; it is an after-thought."

"Some teams' supervisors have a willingness to hear, but I don't think they have much power to respond. They can't offer solutions."

"Staff has DEI fatigue. DEI should not be part of appointments and the selection process."

Leadership

Leadership makes up 41% of themes expressed by participants. Views on leadership were reflected in responses to questions about DEI efforts; advocacy, valuing employees; inclusion/exclusion; communication; and whether the promotion process is fair and equitable for everyone.

Participants expressed that inclusion, or exclusion is dependent upon departmental leadership. The issue was also raised in discussions of the impact of long-standing relationships and whether those relationships impacted the selection and promotion process.

"There is a top-down structure, but they want bottom-up leadership."

"Lots of siloing in departments."

"They talk the talk, but don't walk the walk."

"A survey was conducted in 2023, called How Are We Measuring Up, but nothing became of it."

"Sometimes supervisors have their favorites. The separation that needs to happen between them and the person he or she supervises gets very blurred and they become friends. That just makes everything they do questionable, in terms of favoritism."

"I'm part-time and excluded from decisions, even regarding my job. Everybody else knows but me."

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Primary Impact Themes

Equity in Access to Resources

EQUITY *is defined as ensuring that everyone has the resources -- according to their need -- and the opportunity to be successful.*
(source: Government Alliance on Race Equity (GARE) & Charles County Government)

Access to resources **represents 25%** of the themes expressed by participants. Participants generally felt they have access to resources and support needed to succeed. The need for more staff and budget was universal. However, part-time and employees in the field believe they don't have adequate access to resources.

"Supervisor is approachable, open and wants people to succeed."

"Need support from above. Too much time is required to get support."

"I know who to talk to in order to get resources."

"Charles County Government doesn't provide knowledge and resources, but teammates do."

"Need access to better resources."

"There is an open door."

Culture First

CULTURE *is defined as an integrated pattern of indigenous knowledge, beliefs and behaviors that are successfully transmitted from one generation to the next.*
(source: Merriam Webster Dictionary)

Culture **makes up 25%** of themes expressed by participants. The culture was discussed in terms of DEI commitment; inclusion/ exclusion; communication; and what traits, characteristics and behaviors are valued in the organization.

In an organizational culture of DEI, knowledge, beliefs and behaviors occur naturally; and are successfully transmitted to succeeding groups of new hires.

"Charles County makes me feel good about valuing our input and protecting our feedback."

"I like weekly and monthly access to leaders to express concerns."

"The harder you work; the penalty is more work or responsibilities."

"Have a focus group on the organization's culture, not just DEI."

"How we develop policies should be spread throughout the culture."

"People are afraid to say anything for fear of 'who's coming to get me'."

"Connect Core Values to commissioners and policies. Connect Core Values to Charles County Government and the organization."

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Primary Impact Themes

Policy & Procedure

This theme **makes up 16%** expressed views of focus group participants and reflects references to policies, procedures and processes. Participants noted that departmental silos impact the ability to communicate DEI initiatives organization-wide. They believe this allows for inconsistent messaging.

Comments suggest revision of onboarding and professional development policies is required, as well as implementing a consistent performance management system for all departments with a regular review schedule.

"People are not held accountable for not complying with DEI. It should be part of everyone's job description."

"DEI should be a regular part of management's annual review, their contribution; and how they have engaged."

"P&P [Policy and Procedure] should be changed and people's needs addressed."

"Bake DEI into all processes, not just what's already done."

"County must buy-in all the way. Make it part of everybody's job. Establish goals. Provide evidence-based data. Develop plan and implementation strategy. Benchmark. Transparency."

"We need to rely on policies more, not people, to embed DEI."

"Executive leadership needs more commitment. It's not connected to their annual performance evaluation."

"There are no standards in the assessment process; and you get nothing out of a good assessment."

"Staff has DEI fatigue: DEI should not be part of appointments and the selection process."

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Primary Impact Themes

Training

This category **represents 13%** of themes expressed by participants. Part-time employees and employees in the field appeared most affected by the absence of and inconvenience of receiving training.

Participants noted that there needs to be a greater effort to build "buy-in," more learning opportunities, as well as recognition of different learning styles.

In addition to expanded DEI training, participants expressed the need for more career development; training to perform their jobs better; and monetary support to help pay for training.

"Need more support from upper management and leadership. Mandatory training for everyone."

Training should be more frequent; publicized; quiz at the end.

"Broaden focus of training outside of Implicit/Explicit Bias."

"Tailor training that meets people where they are."

"Some openly complain about training and GARE."

"I can't find training to do my job."

"No career development training, direction or mentoring program."

"Limited training opportunities. The schedule [of training] is open and convenient to people primarily in the main building, not for folks in the field."

"I can't afford to pay for training that Charles County does not pay for."

Selection and Promotion Process

This theme **represents 11%** of themes expressed by participants. The nature of the feedback was consistent that the hiring, selection and promotion process is unfair. Those who would comment, overwhelmingly felt the process is unfair.

Disagreement with the process ranged from the inability of internal candidates to negotiate salary; the impact of long-time relationships; the presence of a "good ole boy network;" to the absence of a career ladder or career path in some positions.

"Promotion-in-place (step promotion) should be made available across the board, so as not to lose good people."

"Not necessarily streamlined; no clearly defined steps."

"Job descriptions are bent. Based on personality and relationship, not skills."

"No negotiations for inside hire. You get your 6%, your 9%, 12% or whatever it is. You can be paid less than someone coming from the outside."

"Internal candidates are always provided feedback on why they were not selected."

"The [selection] process is subjective; not based on requirements."

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Primary Impact Themes

Communication

This category **represents 6%** of themes expressed by participants and reflects responses Question 2 and 9. They reflect feelings of inclusion, exclusion; and how and when they get information.

Participant responses point toward departmental silos that impact the ability to communicate DEI initiatives staff-wide.

<u>County Response to Inclusion/Exclusion Situations</u>:

- ❖ Often the County doesn't respond.
- ❖ Hard to voice concerns without being dismissed or labeled.
- ❖ No response to the *2023 How Are We Measuring Up* survey.
- ❖ Dialogue & Donuts and Straight Scoop are much appreciated.

In response to the best or preferred method to communicate important initiatives, suggestions included:

- ❖ Face-to-face in smaller settings, more often.
- ❖ Potlucks to get to know others.
- ❖ People in leadership should be more visible.
- ❖ A variety of communications, depending on the audience.
- ❖ All-Hands meetings.

"Upper management keeps everything secret, without reaching out to get input from others."

"I don't know anything until the last minute."

"Concerns are heard, but answers are not always what we want or expected. Though there is a genuine effort to get the concerns up the channel. And that makes you feel good."

"Some supervisors don't inform part-time employees of things or post them."

"If I could receive notice in advance, I could make additional arrangements in order to participate in activities."

"A link for feedback provides an option for anonymity."

"I like Dialogue and Donuts."

"Straight Scoop with Deb Hall provides access to representatives from each department."

"I was here for 1½ years without any knowledge of the Core Values."

"Have DEI Ambassadors."

"Communication mechanisms for everyone."

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Recommendations for Improvements

This chapter includes key recommendations to help support further integration of DEI within its internal policies, programs, practices and workplace culture to the County. This assessment identified seven areas of focus based on the analysis of the County's internal workforce policies, practices and programs, results from the Employee Experience Survey, and thematic analysis of the focus group findings with staff and managers.

Recommendations

Each area of focus includes recommendations for the County to consider and suggested solution tactics to assist in implementing each of the recommendations.

Focus Area	Recommendation	Suggested Solution
Organizational Communications	• Strengthen trust and communications through internal and external communication channels, talent band levels, locations, and strategic equity efforts.	1. Develop an internal and external communication strategy plan to enhance transparency in communication practices and build trust with constituents. 2. Identify County staff and leaders who can champion the County's DEI work and support socialization. 3. Enhance communication methods between leadership and staff on DEI issues. 4. Socialize findings and feedback received with staff when appropriate. 5. Share the high-level findings and recommendations from this DEI Assessment with staff across the organization to build trust and transparency. 6. Leverage new communication methods and vehicles to support active communications across locations. 7. Enhance policies, programs and practices to better integrate DEI best practices and then communicate these policies, programs and practices on a regular basis with staff and leaders for integration and implementation purposes.

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Recommendations

Focus Area	Recommendation	Suggested Solution
Change Management	• Managing change within change requires new approaches in language, behaviors and systems to achieve inclusion and buy-in. Leaders must continue to do the work of change, but not in a performative manner. Consider leveraging external consultant such as Small Planet Works to: address the human side of change; identify necessary support resources; reinforce new behaviors; and provide strategies to influence behavior.	1. Conduct *Change Management Leadership* by Small Planet Works, which is rooted in anti-discrimination principles and compliant with the recent presidential executive order on discrimination. This process is grounded in leadership skills that recognize the human side of change; lead to stronger decision-making; and improve teamwork. 2. SPW works with leaders to: address the human side of change; identify necessary support resources; reinforce new behaviors; and provide strategies to influence behavior. SPW's approach utilizes a GARE-influenced framework (Government Alliance on Race & Equity) that helps organizations adhere to the 5 Cs of Change Management and avoid the 7 Ways that Change Management Strategies Fail. 3. Build supplementary communications to support change management efforts within the organization.

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Recommendations

Focus Area	Recommendation	Suggested Solution
DEI Awareness	• Dovetail communication efforts and provide specific and responsive training for County staff to continue building diversity, equity, and inclusion muscles around cultural competency, implicit bias, and racial equity.	1. Implement baseline (pre) test survey to determine learning needs and goals for staff. 2. Develop and implement an education and training plan to shepherd and guide equity and cultural competency training across all bands of talent within the organization. 3. Consistently and continuously pulse out equity learning curriculum linked to the County's DEI strategic objectives. 4. Launch training and education opportunities within the organization to provide both foundational, advanced, and informal opportunities for continuous learning. 5. Foster regular informally and formally designed equity-related discussions in which staff can engage, for example, *Dialogue and Donuts*, Lunch and Learn opportunities, departmental or team focus group conversations. 6. Administer post-training evaluation surveys using the Kirkpatrick (or equivalent) evaluation model that evaluates four levels of learning (reaction, knowledge, behavior change, business impact) to measure employee understanding of equity curriculum and application. 7. Track and measure the efficacy of equity-related training and education opportunities to support refinement and engagement.

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Recommendations

Focus Area	Recommendation	Suggested Solution
Developing Inclusive Organizational Leaders	• Identify values and behaviors to measure and evaluate leaders against goal-setting, achievement, and consistent employee experiences.	1. Expand leadership competencies at the County by including behaviors that engender trust and empathy in leadership and within department and project teams (i.e., vulnerability, empathy, etc.). 2. Once inclusive leadership behaviors have been defined per leader competency, link these key behaviors to organizational objectives and integrate them into related programs and processes. 3. Rebuild trust in the workplace by creating opportunities for leaders and managers to model authenticity and empathy while explaining the roadmap the County is taking to address pain points. 4. Embed values, behaviors, and leadership competencies into performance management, so leaders understand expectations and are held accountable. Involve subordinates in the evaluation process. 5. Conduct 360-degree reviews for County department leaders.

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Recommendations

Focus Area	Recommendation	Suggested Solution
Breaking Down Organizational Silos	• Mitigate and reduce the number of silos between departments, staff talent band levels, and locations to enhance the culture of the County and DEI within the organization.	1. Develop cross-functional initiatives or special programs to bridge and cross-pollinate siloed departments and programs to build cohesion and achieve a centralized experience – through collaborative, problem-solving efforts. (i.e., Innovation fairs, organization-wide keynote addresses, staff appreciation days, etc.). 2. Invest in coaching, or additional development, for leaders who need support in demonstrating new inclusive leadership behaviors and habits to help support the reduction of silos. 3. Have department and people managers model inclusive behaviors and champion equity within their teams and departments. 4. Evaluate internal workforce programs with DEI metrics and make any adjustments as needed. Develop and strengthen key partnerships where metrics are reached and build new partnerships in gap areas. Share lessons learned with other departments in the County. 5. Launch leadership stories campaigns where they share their own equity journey or insights in their units to broaden access and connection to the workforce. 6. Set up formal team mechanisms to encourage the sharing of ideas (e.g., have a standing "mischievous spirit advocate meeting" to pressure-test plans and ideas.

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Recommendations

Focus Area	Recommendation	Suggested Solution
Building Trust and Psychological Safety	• Enhance psychological safety, trust and support across all bands of talent in the organization.	1. Rebuild trust in the workplace by providing opportunities for staff to connect authentically – especially across project teams, departments, levels, locations, and identity markers – and practice empathy. 2. Develop team norms that promote psychological safety, such as "no blame" policies, where the focus is on finding solutions, not pointing fingers. 3. Establish a “speak up” initiative that encourages staff to have open conversations about difficult topics with their leader and one another. The conversations can be facilitated by a third-party consultant, or the County could partner with a third party to develop internal capability through a train-the-trainer model. 4. Build cultural competency skills among staff and leaders through active training and regular engagement. 5. Explore asset-based and trust-based frameworks for culture like StrengthsFinders, Predictive Index, RELI, etc.

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Recommendations

Focus Area	Recommendation	Suggested Solution
Performance Management	• Expand the County's efforts to embed staff and leadership competencies with inclusive behaviors and systematize the performance management processes.	1. Refresh performance management processes and practices for employees and people managers. 2. Develop a clear standard operating procedure (SOP) around implementing annual performance management throughout the department. 3. Supplement established core competencies by identifying value-based behaviors to measure and evaluate staff against. 4. Ensure goal setting, achievement, and consistent evaluation experiences across all employees. 5. Create mentorship opportunities between leadership, management, and staff. 6. Ensure performance management review processes include DEI accountability and performance metrics.
Career Advancement	• Enhance career advancement pathways and expand professional development opportunities across talent bands to provide more equitable and transparent hiring, promotional and succession planning processes for County staff and leadership.	1. Create mentorship opportunities between leadership, management, and staff. 2. Create clear pathways with opportunities for career advancement (i.e., Progression models). 3. Determine what jobs and job descriptions do not require a college degree with the purpose of expanding the potential applicant pool to those with different educational backgrounds. 4. Expand recruitment strategies to include individuals outside of the traditional college track. 5. Support professional development opportunities for part-time staff.

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Conclusion

What We Learned

This DEI Assessment for Charles County is a testament to the County's commitment to create a workplace culture that serves all staff in service to the community. Through this study, the County has made progress in its DEI journey; this is evident from some of the positive responses from staff through the survey and focus group discussions.

Areas of growth discovered through this DEI Assessment include creating a shared understanding of DEI principles across county government departments. The County should elevate communications and foster collaboration across departments to develop a shared understanding. Through the Employee Experience Survey and focus groups, staff expressed that they would like to predominately see targeted strategies to increase DEI awareness and proficiency within the organization in these core areas:

1. Establish a firm, visible and comprehensive DEI organizational commitment supported by initiatives for staff and leaders.
2. Dovetail communication efforts and provide specific and responsive training for County staff to continue building diversity, equity, and inclusion muscles around cultural competency, implicit bias, and racial equity.
3. Developing inclusive organizational leaders that embody clear values and behaviors consistent with furthering DEI in the organization to support employee experiences.
4. Mitigate and reduce the number of departmental silos and silos between talent band levels and locations to enhance the County employee culture and DEI within the organization.
5. Build and enhance psychological safety and support across all bands of talent in the organization.
6. Expand the County's efforts to embed staff and leadership competencies with inclusive behaviors and systematize the performance management processes.
7. Establish clear protocols and initiatives to garner greater career advancement and professional development support to meet the needs of the County's internal workforce and promotion and succession planning efforts.
8. Undergo change management leadership efforts within the organization.

Conclusion

What We Learned (Continued)

The findings and recommendations from this study will inform the development of an updated DEI Strategic Plan to help guide all DEI actions the County takes. A cross-section of department leaders and other key staff will work collaboratively to develop the updated strategic plan. Lastly, we would like to thank the County's DEI Assessment project team, and all staff and leaders in the County who lent their time and insights to inform this study.

Appendix:
Peer Review and Emerging Practices

Overview

The following appendices is a compilation of selected peer research. a consulting firm chose the peers for their similarity to Charles County regarding proximity, population size, and services offered to residents. This section provides information, models, and insights into three similar communities related to how they embed diversity, equity and inclusion into their organizational culture. As expected, there is no one-size-fits-all solution. Community priorities, dynamics, resources, and other factors drive efforts undertaken in other communities. a consulting firm's research focused on communities in Washington, Virginia and Minnesota for this review. Ultimately, the results of the peer research are meant to guide areas of inquiry and engagement and help to inform recommendations, practices, and policies for consideration by Charles County.

City of Seattle

Minneapolis
City of Lakes

ARLINGTON
VIRGINIA

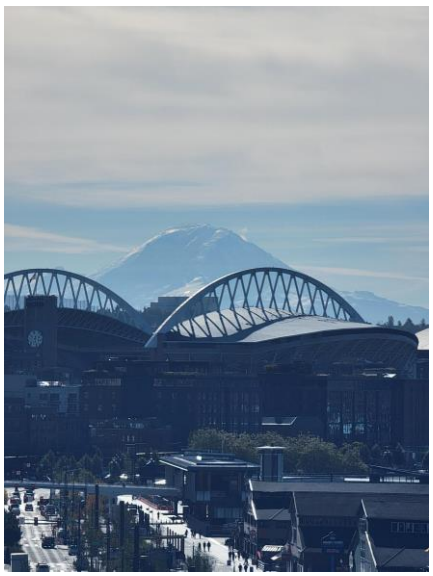
Peer Review

City of Seattle

Population: 755,078

Race Demographics:
- 63.60% White
- 6.70% Black/African American
- 16.80% Asian
- 7.50% Hispanic/Latino





Diversity
The City of Seattle celebrates diversity by hosting and promoting cultural events, supporting its historic districts – like its Chinatown, and working with community liaisons[1] to ensure that everyone's voices are heard. The City hosts a myriad of different festivals and special events throughout the year. Information about each one can be found on its official calendar[2]. The City's International District and Chinatown[3] benefits from ongoing partnership with the City in the form of community engagement, a neighborhood advisory committee, and a tailored action plan.

Equity
This City of Seattle embraces equity with a multifaceted approach. The City's SOUND Transit ensures equitable access to services through its Link Rail, a low-cost rail system connecting the metropolitan area with suburban outskirts and providing direct access to Seattle-Tacoma airport. The rail line accommodates people with disabilities by designating priority seating areas, installing multiple assistance buttons in train cars for extra exit time, and including elevators at all stops for street access. In terms of digital equity[4], Seattle works to ensure all residents and neighborhoods have the necessary information technology capacity for civic and cultural participation, employment, lifelong learning, and access to essential services. The city collaborates to create opportunities and eliminate historical barriers to technology access and use, having started its digital inclusion work in 1996. Additionally, the One Seattle Homelessness Action Plan[5] addresses homelessness by building affordable housing, promoting access to healthcare, referring unhoused individuals to shelters, and supporting regional initiatives.

Inclusion
The City of Seattle embodies inclusion by actively including its residents in decision-making. The Your Voice Your Choice Project[6] is a participatory initiative where City of Seattle residents democratically decide how a portion of the City's budget is spent on small-scale park and street improvements. Residents can track approved projects by using the interactive map on the City's website. The page also provides five additional languages translation options.

General DEI Initiatives
Seattle's Race and Social Justice Initiative (RSJI)[7] aims to eliminate racial disparities and achieve racial equity. It includes training for city employees, community engagement, and policy changes.

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Peer Review

Minneapolis
City of Lakes

Population: 425,115

Race Demographics:
- 62.70% White
- 18.50% Black/African American
- 5.20% Asian
- 9.90% Hispanic/Latino

Diversity

The City of Minneapolis celebrates diversity by hosting a variety of City events, festivals and fairs[8]. As stated on the City's website, "these aren't just events, it's just how we live." In addition, the City boasts a vast collection of public art installations, with additional projects being planned and added each year. Many of these projects honor minority groups and people, such as Hussein Samatar[9], John Biggers[10], and multiple tribal affiliations[11]. These public projects turn regular spaces into dynamic and engaging public places that drive engagement from residents and tourists.

Equity

The City of Minneapolis promotes equity with its public services and quality improvement projects. The City's public transit[12] services include buses, light rail, and commuter trains. These services are cost-effective and contribute to positive climate action by reducing the need to commute via car.

Inclusion

The City of Minneapolis promotes inclusion by providing Workforce Development[13] resources. The City has programs for youths and adults which include training, internships, and job placement assistance.

General DEI Initiatives

The City of Minneapolis's department of Racial Equity, Inclusion and Belonging[14] provides a variety of equity resources[15] online and hosts in-person events to raise awareness and support of various issues like the Trans Equity Summit.

In response to the murder of George Floyd, the City is working to renovate 38th & Chicago, turning a site of tragedy into a renewed community space. George Perry Floyd Square[16] is currently being redeveloped with input from the local community.





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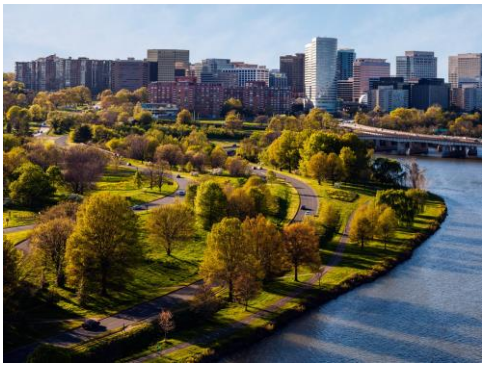
Peer Review

ARLINGTON
VIRGINIA

Population: 234,162

Race Demographics:
- 73.20% White
- 10.70% Black/African American
- 11.30% Asian
- 16% Hispanic/Latino







Diversity

Adopted in 2019, Arlington County's Racial Equity Action Plan (RACE[17]) is informed documented racial history timelines and uses a lens of equity to reduce and prevent disparities in the County. Education and adoption are key focuses of the equity plan's framework. It aims to normalize racial equity by establishing a shared understanding and terminology, making it a priority within the organization and the community. To organize these efforts, they are creating a sustainable structure with dedicated personnel and resources, building capacity, and committing resources to identified areas of need. The County operationalizes racial equity by integrating its principles into policies and decisions, using tools and data to identify and dismantle systemic racism. Finally, the County assess their progress by ensuring everyone sees themselves in the work, evaluating their efforts, and making necessary adjustments to respond to changes in the workforce, culture, and community.

Equity

The County's Digital Equity Initiative's[18] goal is to close the technology gap, so its residents have "the necessary devices and technology skills to fully participate in the community and economy." This initiative uses data-driven insights to target the most vulnerable communities and provide digital literacy training, internet services and physical technology as-needed. In the future, a fully-fledged Digital Equity Coalition will join this initiative.

Inclusion

As an arm of the County, Arlington Public Schools (APS) leads multiple DEI initiatives[19] that support students and people of color. APS also has multiple partnerships that work to support students and their education. This includes the No Place for Hate[20] program, which is an anti-bias and anti-bullying framework that is used to support inclusion efforts and create a sense of belonging for students.

General DEI Initiatives

The County's Library[21] frequently hosts events that celebrate books written by minority-authors and cultural history events. It also provides resources and training covering a wide-range of topics, including financial literacy, retirement planning, yoga, tech support and real-time language practice. (i.e., practice speaking Italian) Thanks to these initiatives, the Library cements itself as a touchstone for belonging and cultural literacy in the community.

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Emerging Practices

Emerging Practices

Each organization is unique regarding its current place in its DEI journey. It takes time and intentionality to embed DEI into the organization's DNA. In contrast, other organizations have implemented programs, designated staff to lead DEI efforts, or created support systems to ensure DEI is present in every aspect of their organization. Across organizations, there are apparent differences shaped by the challenges facing leadership, staff, and the community at large; however, several practices have emerged as critical for DEI. After reviewing numerous DEI assessments and programs from various public and private sector organizations, a consulting firm has compiled the following list of common emerging practices across many of these organizations.

Staff Engagement | **Technological Support** | **Accessibility** | **DEI Implementation**

Staff Engagement:

Leadership from the top is integral to successful DEI strategies, but continued buy-in from staff will ensure that initiatives flourish.





Technological Support:

By leveraging technology to bypass language barriers in making both internal and external communication more accessible with AI-driven translation technology. Leveraged virtual and hybrid work environments support the ability to recruit more staff diversity.

Accessibility:

Accessibility can be considered for both physical and systemic applications. Physical spaces and public transportation can be configured to accommodate people living with disabilities.





DEI Implementation:

To implement a DEI strategic plan effectively, the county must assess its internal cultural baseline using quantitative and qualitative data. Understanding where strengths and knowledge gaps exist will help measure progress in the future.

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Emerging Practices

Staff Engagement

Each organization must engage its staff and lead by example for its DEI initiatives to be successful. Leadership from the top is integral to successful DEI strategies, but continued buy-in from staff will ensure that initiatives flourish. The County can engage its staff by hosting DEI training programs and immersive cultural events throughout the year.

Staff Training

Step 1: Define the learning outcomes of the training. Each municipality has its own unique needs internally and externally. This could include cultural awareness training, promoting an inclusive work environment, and a discussion about equity & equality.

Step 2: Identify an engaging trainer who has experience with government and the public sector that understands the function and needs of the County which will achieve sustainable results.

Step 3: Determine which training environment is best for your staff. DEI training can be performed with varying group sizes, virtually, in-person or in a hybrid environment.

After training is completed, gather feedback from your staff to understand what worked best and what could be changed to improve future training sessions.

Examples – Unexpected Virtual Tours & Training + Culture of Belonging

The Government Diversity Training program by Unexpected Virtual Tours[1] offers engaging and immersive virtual DEI training specifically designed for local, state, and federal agencies. This program aims to enhance workplace culture, employee satisfaction, and community representation through interactive and educational sessions. It features unique DEI events, interactive elements like trivia, and live sessions led by knowledgeable guides. This training is ideal for government organizations seeking to foster a more inclusive and equitable workplace, improve service delivery, and better serve diverse communities.

Curtis Hill's Culture of Belonging[2] workshops focus on creating inclusive environments that enhance people, profits, and productivity. These educational, engaging, and interactive workshops provide participants with hands-on learning experiences that make DEI concepts tangible and actionable. Key components include emphasizing diversity as differentiation, ensuring equity through individualized support, and fostering inclusion by creating the least restrictive environments. Participants gain a deeper understanding of DEI principles, engage in active dialogue, and develop practical strategies to confront implicit biases and cultivate a culture of belonging within their organizations. These workshops are ideal for organizations aiming to improve employee well-being, engagement, and productivity through a more inclusive and equitable workplace.

1. https://unexpectedvirtualtours.com/government-diversity-training/
2. https://cultureofbelonging.org/

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Technological Support

Technology has great potential to create a more equitable work and living environment. By leveraging technology to bypass language barriers, the County can ensure that all members of its staff and community have access to valuable resources. Both internal and external communication can be made more accessible with AI-driven translation technology. Leveraging virtual and hybrid work environments enables the County to hire employees from a more-diverse pool of candidates and allows existing employees to better balance their lives and commitments without worrying about time lost commuting to work.

Example – Montgomery County and City of Phoenix AI Implementation

In July 2024, Montgomery County Maryland released its Artificial Intelligence Action Plan[1] (AIAP). The AIAP is a "full strategy designed to use artificial intelligence (AI) to deliver new and enhanced services to County residents." The AIAP is divided between strategy, structure and staffing, governance, and partnerships. The new strategy is led by the Artificial Intelligence Center of Excellence (AICOE). The AICOE is a safeguard against abuse and works to ensure that AI-implementation is successful and ethical. One of AICOE's first steps was to upgrade the County's website with Monty 2.0, a generative AI chatbot. Monty can reason through hundreds of curated topics and return answers in up to 140 languages in a matter of seconds, making it an asset for residents with questions and ease the burden on County employees. Residents can ask Monty questions related to County services like voting, waste collection, and voting locations. Monty is available to answer questions 24 hours a day, 7 days a week for non-emergency uses. Thanks to its model, it will be able to recognize patterns and improve its responses over time. In the future, the AICOE in planning to use the AIAP to improve transparency with residents, improve its approved vendor lists, develop an ethics review board, advertise and staff for AI positions, and more.

The City of Phoenix introduced myPHX311[2], a robust AI-powered web portal that that allows residents to perform tasks such as requesting waste removal and pull public records, report violations and debris to the city, and browse through City services. This service creates a more streamlined user-experience compared to that of searching through City Department webpages manually. Since all available services are in one place, a resident will be able to resolve multiple tasks all in one place. The portal is also equipped with a virtual assistant that can answer simple questions about myPHX311 services.

1. https://www.montgomerycountymd.gov/OPI/ai-action-plan.html
2. https://phxatyourservice.dynamics365portals.us/#iwantto

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Emerging Practices

Accessibility

Accessibility can be considered for both physical and systemic applications. Physical spaces and public transportation can be configured to accommodate people living with disabilities. County planning should consider its resident's access to resources like groceries and which areas have clean air. At a systemic level, lack of access to healthcare, education, public transportation routes and job opportunities all create barriers to participate within society.

Example – Montgomery County, MA Voting Assistance
To make voting more accessible for residents in Montgomery County, the County implemented several measures to ensure that every resident could participate in the voting process regardless of disability status or language barriers. The County introduced voting machines that were equipped with multiple technological-assistance features including audio ballots, large print, and touch screens. Additionally, physical alternations were made to poling locations – such as installing ramps – to increase accessibility for people with disabilities. Poll workers also receive training about how to assist residents with disabilities. Residents can also request a vote-by-mail ballot to exercise their vote. Additional guidance for state and local governments can be found online: State and Local Governments | ADA.gov

Example – King County, WA Community Health Assistance Program
Access to healthcare can be hindered by cost and lack of knowledge. In King County, residents can contact the Community Health Assistance Program (CHAP)[1] for education, advocacy, and healthcare access. CHAP assists King County residents by enrolling them in health insurance, ORCA LIFT, Subsidized Annual Pass, Basic Food, and other public benefit programs. It educates residents on navigating the health care system in Washington State and provide training and technical assistance to community partners on health insurance and access. Additionally, CHAP collaborate with community partners to identify and eliminate barriers, achieving system-wide improvements in health care access. CHAP is a telephone assistance program so it does not require an internet connection or computer to use, so residents living in rural areas with limited connection can still access the program.

1. https://kingcounty.gov/en/dept/dph/health-safety/health-centers-programs-services/access-outreach-program/community-health-access-program

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DEI Implementation

Each county has its own unique DEI needs, informed by its history and current events. To implement a DEI Strategic Plan effectively, the County must assess its internal cultural baseline using quantitative and qualitative data. Understanding where strengths and knowledge gaps exist will help measure progress in the future. Next, the County should set clear and measurable objectives and determine the best strategy and timeline to achieve them. The County's goals will fail without commitment and accountability. The leadership of the municipality must demonstrate their commitment to the plan and be responsible for its success. Using the data gathered before, implement comprehensive training programs that address the knowledge gaps from the DEI assessment. Verify that none of the County's existing policies hinder its implementation goals. Next, identify external candidates in your community to partner with. Engaging your staff will promote ownership of the work. Maintain transparency internally and externally regarding DEI implementation and progress monitoring. Adjust DEI strategies to ensure continuous improvement. Soon, DEI practices will become a part of everyone's day to day work life.

Example – City of Seattle Race and Social Justice Initiative (cont.)

The City of Seattle launched its Race and Social Justice Initiative[1] (RSJI) in 2004, with the goal to eliminate racial disparities and achieve racial equity within the community. This initiative has served as a model for other cities. The RSJI includes comprehensive DEI training for all city employees, designed to build a common understanding of racial equity and social justice principles across the organization. The training program features foundational workshops that introduce concepts such as institutional racism and implicit bias, department-specific training to address unique challenges, leadership development to equip city leaders with skills to manage diverse teams, and ongoing learning opportunities through seminars and discussion groups.

The outcomes of this initiative have been significant. Employees reported a greater understanding of racial equity issues and felt more equipped to address these issues in their work. The training led to the development and implementation of policies promoting equity and inclusion, such as equitable hiring practices and inclusive community engagement strategies. Additionally, the initiative has contributed to more equitable service delivery and improved relationships between the city government and diverse community groups.

For other municipalities looking to implement similar programs, it is crucial to ensure commitment from city leaders, customize training sessions to meet departmental needs, provide continuous learning opportunities, and regularly assess the impact of the training on employee attitudes, policies, and community outcomes. The program's homepage includes a timeline of the project's lifespan which demonstrated how it has changed over time. These lessons could be adopted by other municipalities that want to introduce their own program.

1. https://www.seattle.gov/cityarchives/exhibits-and-education/online-exhibits/race-and-social-justice-initiative

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Charles County, MD

Diversity, Equity, and Inclusion Assessment Report

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto

ITEM TYPE: Boards and Commissions Updates

AGENDA SECTION: Charles County Boards and Commissions Annual Update

SUBJECT:

- **Briefing: Annual Update from the Ethics Commission**

SUGGESTED ACTION:

ATTACHMENTS:
2024 Annual Report.pdf

CHARLES COUNTY GOVERNMENT

INTEROFFICE MEMORANDUM

Equal Opportunity Employer

TO: John Adelodun
Assistant Clerk to the Commissioners

FROM: Linda Price, Clerk to the Ethics Commission

SUBJECT: Annual Report – Ethics Commission for 2024

DATE: June 16, 2025

The Ethics Commission met nine times during 2024. During these meetings the Commission completed the following:

Ethics Inquires/Advisory Opinions 15
Reviewed Financial Disclosure Forms for 2023
74 current employees
3 former employees
54 board/commissions members
Discussions to revise Ethics Rules of Procedure and Ethics Code

Ethics Commission

January 2024- December 2024

MEMBER NAME	1/10/2024	1/30/2024	4/16/2024	5/8/2024	6/3/2024	7/24/2024	8/5/2024	9/23/2024	12/9/2024			
Cecelia Miller, Chairperson	P	P	-	-	-	-	-	-	-			
Shara Hendler, Chairperson	P	P	P	P	P	P	P	P	P			
Christopher Nickerson, Vice Chair	P	P	P	P	P	E	P	E	P			
Sarah Hazeltine	P	P	P	P	P	P	E	P	P			
Angel Riley	-	-	P	P	P	P	P	P	P			
Maxine Somerville	-	-	P	E	P	E	P	P	P			
Tanika Whittington	-	-	P	P	E	P	P	E	E			
C = Meeting Cancelled												
E = Excused Absence												
L = Late Arrival to meeting												
P = Present												
N = No Meeting												
NQ = No Quorum												
Sub = sent representative												
U = Unexcused Absence												

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE:	June 24, 2025
SUBMITTED BY:	Carol DeSoto
ITEM TYPE:	Boards and Commissions Updates
AGENDA SECTION:	Charles County Boards and Commissions Annual Update
SUBJECT:	• ***TO BE RESCHEDULED* Briefing: Annual Update from Charles County Commission for Women**
SUGGESTED ACTION:	
ATTACHMENTS:	

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto

ITEM TYPE: Boards and Commissions Updates

AGENDA SECTION: Charles County Boards and Commissions Annual Update

SUBJECT:

- **Briefing: Annual Update from Charles County Commission for Veterans Affairs**

SUGGESTED ACTION:

ATTACHMENTS:
CVA Annual Report 2024.pdf

2024 ANNUAL REPORT

Charles County Commission for Veteran Affairs

Charles County Commission for Veteran Affairs Annual Report

Background

To better serve the more than 17,000 veterans in Charles County, the Board of County Commissioners (BoCC) signed Resolution 2018-02 on May 1, 2018, establishing the Commission for Veterans Affairs (CVA).

Mission

The Veterans Affairs Commission of Charles County is steadfastly dedicated to serving as the paramount advocate and ally for the diverse and unique needs of veterans and their families residing within Charles County. Our unwavering mission is to provide essential services through partnering with various organizations within Charles County. The Commission will provide leadership that creates opportunities for all Charles County veterans and their families, and exists to evaluate, develop, and promote new and existing programs within Charles County.

Vision Statement

The Commission will offer our veterans valuable information to ensure enrichment and enhancement of life for veterans and their families.



Officers and commissioners

The Commission is served by thirteen (13) members that are appointed by and serve at the pleasure of the Board of County Commissioners. The Commission members elect the chairperson, the vice-chair, and secretary. The Veteran Commission Liaison is Pearl Zimmerman. The 2024 officers were as follows:

- Chairman: Renaldo Walston
- Vice-Chairman: Julie Bryson (January through June)
  Omyni Harrell (June through December)
- Secretary: Laurie Cangelosi (January through June)
  Jenine Melton (June through December)

The CVA has established a consistent avenue of communication for our Veteran community so Charles County veterans can better understand, communicate, and have their needs addressed.

2024 Meetings

February 7, 2024 – A new Chair and Vice-Chair were elected (Renaldo Walston and Julie Bryson). Review of the approved and submitted Red Line bylaws were discussed. A vote for the NAMI walk was approved for support. The Tri-County Veteran Resource Day in Laplata, MD was approved to be supported by the commission. Veteran Treatment court letters of support were delivered to the Board of Commissioners for signature. The 2023 Annual report is being developed for submittal in April 2024.

April 3, 2024 – The commissioned welcomed two members – Omyni Harrell and James Wade. Charter Board member of District 4, Greg Waring was the guest speaker. He spoke on the impact of a Charter government and the importance to vote towards the Charter on November 5, 2024. The second guest speaker was Charles County government Human Resources recruiting team, Ms. Shandy Destin-Williams and Ms. Melissa Ferguson. They spoke to the commission about creating a solid recruiting plan for the Veterans and requested the solicitation of the CVA to assist. CVA received a letter of support towards the implementation of a Veteran Treatment court. The budget for the CVA was discussed in which $1,500 is allotted annually. The Taste of Southern Maryland 2024 was voted upon to support in which the CVA will provide information. Additionally, the subcommittee of "Fundraisers and Special Events" was changed to "Outreach and Special Events" due to inability to fundraise.

June 5, 2024 – CVA members Ebony Cullens, Julie Bryson and Laurie Cangelosie resigned. Joseph Barnette and Dr. Rhonda Bello were welcomed as new members to the CVA. Guest speaker, Mr. William Johnson from Animal matters was introduced. He spoke about the animal adoption process and timeline. Our second guest speaker was Donnie Williams, regional manager for Serving Together. He spoke on the monthly meeting, "Four corners of collaboration" in which representatives from Charles, Montgomery, Prince George and Anne Arundel counties discuss veteran resources, upcoming events, etc. The Veterans Corners Facebook page was discussed to identify content manager. Purchase request was voted for approval to submit to Board of Commissioners.

July 12, 2024 **(Special Meeting) –** Meeting was conducted to discuss outcome of CVA marketing tools and community fund request. An addition to the bylaws were implemented. A new subcommittee report was initiated and approved for usage in conjunction to decreasing subcommittees (removal of Final Salute Memorialization, Transportation, and combine Transition troops with Resource for Veterans.

August 2, 2024 – No guest speakers this month. CVA member Rebecca Collins agreed to join the Outreach and Special Events. CVA member Joseph Barnette coordinated with Dr. Tiffany Daniels of the VFW Woman's committee to promote Veterans events via Facebook. subcommittee. With Legislation currently in study hall, there were various bills that were not

passed. CVA listening tours were conducted for this month in which representative from VFW, AMVET and NAVVET were in attendance. The listening tour is tailored towards advocating and providing services to Veterans of Charles County. A request for a government space to provide services was mentioned in this month's meeting. Additionally, the Woman's Memorial package was place on the Governor's desk in Annapolis for bidding and design. Thee CVA attended the Hidden Heroes proclamation ceremony led by Maryland Governor Wes Moore.

October 2, 2024 – No guest speakers this month. CVA member Dr. Rhonda Bello replaced Jenine Melton as chair for Women Veteran Initiatives. Expressed appreciation were displayed for CVA personnel that attended the Prisoner of War Observance event. Collaborating with Department of Veterans Affairs hospital in scheduling the "Walk-In Their Footsteps" donation drive. Motion was approved to conduct the upcoming "Trunk or Treat" and Veteran's Day parade. Additionally, CVA members approved to take photos in December 2024.

December 6, 2024 – Brief meeting. Conducted holiday veteran event, open to the community. Approximately 75 personnel were in attendance. Numerous VIPs in attendance to include:

- Three members of the Maryland Gold Star Mothers Chapter Inc, Janice Chance, Stephanie White and Basmattie Bishunday
- Dr. Tiffany Daniels, Chair for VFW Women Veterans Committee,
- Dyotha Sweat, Charles County NAACP President
- Pam Frank, Military Alliance Council
- Marguerite Stubbs, Commander, DAV PFC John C. Demarr Jr. Chapter 36
- Delegate Edith Patterson
- Larry Abel, President of the Maryland Veterans Museum

Subcommittees

Resources for Veterans
Chairperson: Joan Sabree
Mission: Provide information and assistance to Veterans and their families regarding available resources and benefits.

Housing
Chairperson: Joseph Barnette
Mission: Assisting Veterans with housing needs and providing resources for stable living conditions

Communications
Chairperson: Jonathan Lee
Members: James Wade, Mike Moses
Mission: Advertising and marketing the Commission for Veterans Affairs, its existence, projects, and events.

Outreach and Special Events
Chairperson: Ramona Jones
Members: Rebecca Collins, Joseph Barnette
Mission: Creation, coordination, and setup of veteran events that will support our veteran community.

Legislative
Chairperson: Mike Moses
Mission: Advocating for policies and legislation that benefit Veterans and their families.
Advocates and provides legislative information directing effecting the Veterans of Charles County.

Strategic Planning
Chairperson: James Wade
Members: Jonathan Lee
Mission: Development and implementation of long-term strategies for supporting Veterans of Charles County and their families.

Women Veteran Initiatives
Chairperson: Jenine Melton (January through November)
Members: Dr. Rhonda Bello (November through December)
Mission: Assist women veterans in receiving the Veterans Affairs benefits they earned, review programs to assist, support legislature that ensures the needs of women veterans in Charles County are addressed.

2024 Veteran Activities

- Conducted listening tours in collaboration with local Veteran Service Organizations (VSOs), such as the Disabled American Veterans (DAV) and the National Association for Black Veterans (NABVETS), these tours gathered crucial feedback to shape our initiatives

- CVA members (Omyni Harrell, Mike Moses and Ramona Jones) attended the Hidden Heroes Proclamation ceremony; led by Maryland Governor Wes Moore. Governor Moore joined U.S. Senator Elizabeth Dole to announce Maryland will work with her foundation Hidden Heroes campaign to support military and veteran caregivers.

- CVA member Sabre performed Secretarial Duties for the Joint Veterans Committee Meeting in Bowie, Maryland, and promoted the Charles County Veterans Commission to the State Commanders and representatives of the six Veterans Service Organizations in attendance.

- Advocated for the establishment of a Drug Treatment Court in Charles County by presenting necessity of supporting facts to the Charles County Criminal Justice Coordinating Council. Additionally, collaborated with state attorney and judges of Southern Maryland to streamline the process for our Veterans.

- Spear-headed CVA Winter clothing drive in partnership with New Life Church, Hooks & Hangers and the Charles County government building.

- Held the annual Trunk R Treat at New Life Church, promoting Veteran resources provided by the CVA

- CVA acknowledged two individuals via letter of support who have gone above and beyond to assist with veteran-related events and initiatives. These letters highlight the invaluable contributions made to improve the lives of veterans in Charles County
- CVA attended Taste of Southern Maryland event, interacting and promoting information and services for Charles County Veterans.

- Partnered with local media outlets such as Southern Maryland News and Maryland Independent, we shared compelling stories of veterans and promoted the Commission’s events and resources.

- Collaborated with local businesses to include, the DAV, and NABVETS to facilitate job placements for over 25 veterans. Workshops on business development and financial literacy were supported by Wealth Builders Kingdom LLC.

- Partnered with Project Veteran House and The Oasis Resource Center to provide companionship and care packages Charlotte Hall Veteran residents, honoring their service with a special ceremony.

- Partnered with Project Veterans Houses to provide permanent housing for 10 homeless veterans and transitional support for 15 others.

- Through collaboration, provided over 50 women veterans with tailored resources and mentorship opportunities, highlighting their unique contributions and challenges.

- Mental Health Support: Hosted mental health workshops focused on PTSD, depression, and anxiety, providing individualized care follow-ups in collaboration with DAV counselors.
- With the expertise of our certified and accredited VSOs, we assisted veterans in filing disability claims, achieving over $1.2 million in approved benefits for 35 veterans.

- CVA member Joan Sabree was selected to deliver the opening remarks at “Operation Annapolis” an annual event sponsored by the Joint Committee of the Maryland Committee

- Veterans Career Fair: CVA Co-hosted with NABVETS and DAV, the fair featured over 50 employers and provided direct job offers to 12 veterans.

- Participated in the annual Salute to Veterans Parade in Laplata, MD; interacting with Veterans and their families in the community.

- Coordinated shelter arrangements for Charles County homeless veteran utilizing partnership services of Lifestyle of Maryland.
- Participated in “Capitol Region Honor Flight Operation Welcome Home”, acknowledging Veterans from WWII, Korea and Vietnam.



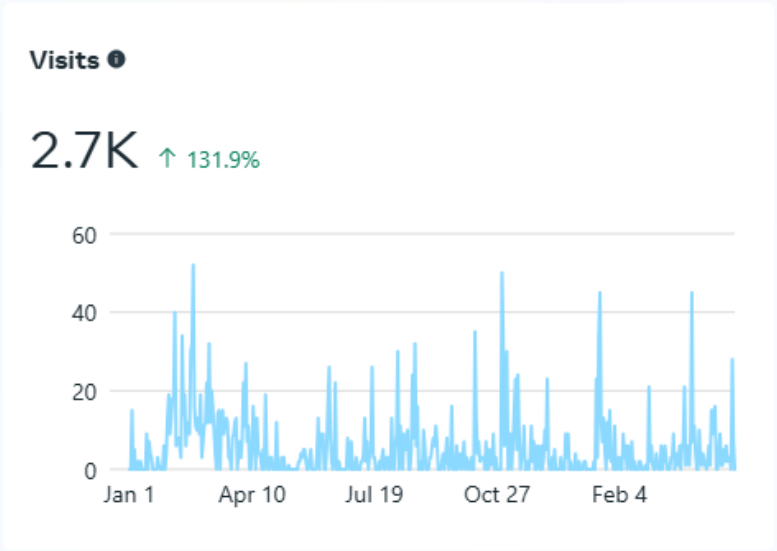
2024 Charles County Commission for Veteran Affairs Goals

- Advocate for the extension of Charles County Veteran Property Tax Credit to veterans with a disability rating of less than 100%.
- Prioritize centralizing services and create a hub for veterans seeking assistance; to streamline claims assistance, enhance career development, and address critical health and housing needs.
- Support Charles County and/or Southern Maryland Veterans Court.
- Continuance support of Charles County Veterans.
- Consolidating Subcommittees
- Finalize CVA Bylaws/Strategic Plan

2025 Charles County Commission for Veteran Affairs Goals

- Maintain current Veteran Resource Center (VRC) being utilized while advocating for a stand-alone VRC in Charles County.
- Continuance of advocating for a Southern Maryland drug treatment court.
- Establishment of 501(c) via partnership with existing Veteran organization
- Extensive legislative action that focuses on Veterans
- Streamline claim assistance for Veterans of Charles County
- Continuance of community engagement and outreach

2024 Facebook Veterans' Corner Visits



2024 Facebook Veterans Corner Reach








VETERAN
NAVY




NAVY
ARMY


for Veterans Affairs
Holiday Celebration
FRIDAY
DEC
6
6 PM
Charles County Veterans and their families are
cordially invited to celebrate the upcoming

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE:	June 24, 2025
SUBMITTED BY:	Carol DeSoto, Department of Emergency Services
ITEM TYPE:	Discussion
AGENDA SECTION:	Briefings-Afternoon
SUBJECT:	• **Update: Fire Suppression Task Force** (Ms. Michelle Lilly, Director, Department of Emergency Services, and Mr. Wes Adams, County Attorney, Office of the County Attorney for Charles County)
SUGGESTED ACTION:	
ATTACHMENTS:	

Item Cover Page

***CHARLES COUNTY BOARD OF COUNTY COMMISSIONERS AGENDA ITEM REPORT**

DATE: June 24, 2025

SUBMITTED BY: Carol DeSoto, Office of the County Attorney

ITEM TYPE: Public Hearing

AGENDA SECTION: Briefings-Afternoon

SUBJECT:

- **Work Session: 2025 Local Legislative Proposals**
  (Ms. Danielle Mitchell, Assistant Deputy County Attorney, Office of the County Attorney for Charles County)

SUGGESTED ACTION:

ATTACHMENTS:
2025 Local Proposals.pdf

LOCAL LEGISLATIVE PROPOSALS 2025

1. TOPIC: Ballot Initiative **PG.1**

Submitted by Carlos Childs

2. TOPIC: Special Elections **PG.4**

Submitted by Carlos Childs

3. TOPIC: Term Limits **PG.7**

Submitted by Durrell Gray

4. TOPIC: Nuisance Abatement **PG. 11**

Submitted by Terrah Dews on behalf of the
Nuisance Abatement Hearing Board

5. TOPIC: Volunteer Emergency Responders Tax Credit **PG.15**

Submitted by Bill Smith on behalf of Charles County
Volunteer Firemen's Association

****

Outlook

NEW SUBMISSION Legislation Proposal - County Attorney

From DO NOT REPLY - UNMONITORED ACCOUNT <no-reply@charlescountymd.gov>
Date Tue 4/1/2025 12:23 PM
To Danielle E. Mitchell <MitchelD@charlescountymd.gov>; County Attorney <coattorney@charlescountymd.gov>

[External Content Warning] **This message is from an external sender. Please exercise caution when opening attachments and hover over any links before clicking.**

Legislation Proposal - County Attorney

Submission #: 3896853
IP Address: 96.231.123.38
Submission Date: 04/01/2025 12:23
Survey Time: 28 minutes, 29 seconds

You have a new online form submission.
Note: all answers displaying "*****" are marked as sensitive and must be viewed after your login.

Legislative Proposals

Questions or More Information 301-645-0555

This form should be used to submit legislative proposals for amendments, additions, or deletions to the Charles County Code or State of Maryland Code. Please submit the completed form online, or print and mail to: County Attorney's Office, 200 Baltimore Street, La Plata, Maryland 20646. Please attach responses to questions that require additional space to answer and indicate the question number on the attachment.

Contact Person Name

Carlos Childs

Contact Person Email

[redacted]

Contact Person Phone

[redacted]

Contact Person Address

[redacted]

Proposal Summary (Describe proposal in 1 sentence)

This legislative proposal would allow Charles County residents to petition voters to put forward local legislation on a general election ballot in the form of a ballot initiative.

Code References (List any sections/chapters of the Charles County or State Code that you believe would be impacted by the proposal, if known)

N/A

Problem (Describe the problem the proposal addresses)

Many residents put forward great policy ideas and local legislative proposals, however they do not move forward. We have seen legislation die, with or without reason, even though a large number of residents supported the legislation. This makes people

feel as if they have no power when it comes to their local democratic process.

Solution (Explain how the proposal addresses the problem).

This proposal would solve the problem by giving residents the ability to petition Charles County voters to put a local law on a general election ballot. Which would not only increase voter participation, but also empower residents to taken an active role in their local government and allow residents to directly decide on what legislation they want to see put in place.

Organizational Support (List any organizations that would likely be in support of the proposal, even if not confirmed).

N/A

Proposed Draft Language (Provide draft language for the legislation if you have it).

This legislative proposal would allow residents to petition 5% of Charles County registered voters to put a ballot initiative on a general election ballot. A petition shall include a proposed law pursuant to Charles County, with the following exemptions; - A law imposing a tax; - A law appropriating government funds; - A law redistricting commissioner districts; - A law affecting Commissioner salaries or benefits; - A law affecting County government staff positions or hiring. All petitions shall be compliant with the manner prescribed by the Maryland constitution. Once the 5% threshold has been reached and approved by the Charles County Board of Elections. The Commissioner may vote to pass the legislation, without adding amendments, or vote in the affirmative, without adding amendments, to put the proposed law on the next regularly scheduled general election ballot for a full vote by all Charles County voters. If the ballot initiative fails no action is taken. If the ballot initiative is approved by voters, the law shall take effect 30 days after the certification of the general election results. A downloadable copy of blank petition forms shall be posted on the Charles County government website. If this legislative proposal is approved by the Board of Commissioners it shall be put on the 2026 general election ballot for a vote by Charles County voters.

Other Information To Note

Attachment(s)

Ballot Initiative legislative proposal .pdf

Thank you,
Charles County, MD

This is an automated message generated by Granicus. Please do not reply directly to this email.

Ballot Initiative legislative proposal summary:

- Allow residents to petition 5% of Charles County registered voters to put a ballot initiative on a general election ballot.
    - A petition shall include a proposed law pursuant to Charles County, with the following exemptions;
        - A law imposing a tax;
        - A law appropriating government funds;
        - A law redistricting commissioner districts;
        - A law affecting Commissioner salaries or benefits;
        - A law affecting County government staff positions or hiring.
    - All petitions shall be compliant with the manner prescribed by the Maryland constitution.
    - Once the 5% threshold has been reached and approved by the Charles County Board of Elections. The Commissioner may vote to pass the legislation or vote in the affirmative to put the proposed law on the next regularly scheduled general election ballot for a full vote by all Charles County voters.
- If the ballot initiative fails no action is taken
- If the ballot initiative is approved by voters, the law shall take effect 30 days after the certification of the general election results.
- A downloadable copy of blank petition forms shall be posted on the Charles County government website.

If this legislative proposal is approved by the Board of Commissioners it shall be put on the 2026 general election ballot for a vote by Charles County voters.

Outlook

NEW SUBMISSION Legislation Proposal - County Attorney

From DO NOT REPLY - UNMONITORED ACCOUNT <no-reply@charlescountymd.gov>
Date Wed 4/2/2025 6:38 PM
To Danielle E. Mitchell <MitchelD@charlescountymd.gov>; County Attorney <coattorney@charlescountymd.gov>

[External Content Warning] **This message is from an external sender. Please exercise caution when opening attachments and hover over any links before clicking.**

Legislation Proposal - County Attorney

Submission #: 3901172
IP Address: 96.231.123.38
Submission Date: 04/02/2025 6:38
Survey Time: 56 minutes, 26 seconds

You have a new online form submission.
Note: all answers displaying "*****" are marked as sensitive and must be viewed after your login.

Legislative Proposals

Questions or More Information 301-645-0555

This form should be used to submit legislative proposals for amendments, additions, or deletions to the Charles County Code or State of Maryland Code. Please submit the completed form online, or print and mail to: County Attorney's Office, 200 Baltimore Street, La Plata, Maryland 20646. Please attach responses to questions that require additional space to answer and indicate the question number on the attachment.

Contact Person Name

Carlos Childs

Contact Person Email

[redacted]

Contact Person Phone

[redacted]

Contact Person Address

[redacted]

Proposal Summary (Describe proposal in 1 sentence)

In the instance of a vacancy within the Board of Commissioners, there will be a special election for their replacement.

Code References (List any sections/chapters of the Charles County or State Code that you believe would be impacted by the proposal, if known)

N/A

Problem (Describe the problem the proposal addresses)

Currently if a Commissioner seat is vacated during a term the Central Committee, associated with the party of the Commissioner who represented the seat before the vacancy, holds an appointment process. This process does not have to include public input,

forums, or voting by residents. It allows a small group of 16 people to decide who represents a district or county at-large in the Commissioner seat.

Solution (Explain how the proposal addresses the problem).

The legislative proposal would establish a special election process that would allow residents of the respective district or county at-large to vote for someone to fill the vacancy for the remainder of the term.

Organizational Support (List any organizations that would likely be in support of the proposal, even if not confirmed).

N/A

Proposed Draft Language (Provide draft language for the legislation if you have it).

If a Commissioner vacates their office during a term a special election shall be held to fill the vacancy. - A special election for Commissioner shall be held within 180 days after a vacancy. - If a vacancy occurs within 180 days of a presidential general election, the election to fill the vacancy shall be added to the general election ballot. - If a vacancy occurs within 180 days of a gubernatorial primary election, the Central Committee representing the political party of the vacated Commissioner shall appoint someone, within 60 days, to serve the remainder of the term. - For the purpose of term limits, the appointed Commissioner, shall be seen as serving one term. - Any person who has filed as a candidate for the district representing the vacated Commissioner shall be prohibited from being appointed.

Other Information To Note

Attachment(s)

Special Elections legislative proposal.pdf

Thank you,
Charles County, MD

This is an automated message generated by Granicus. Please do not reply directly to this email.

Special Election legislative proposal summary:

- If a Commissioner vacates their office during a term a special election shall be held to fill the vacancy.
    - A special election for Commissioner shall be held within 180 days after a vacancy.
    - If a vacancy occurs within 180 days of a presidential general election, the election to fill the vacancy shall be added to the general election ballot.
    - If a vacancy occurs within 180 days of a gubernatorial primary election, the Central Committee representing the political party of the vacated Commissioner shall appoint someone, within 60 days, to serve the remainder of the term.
        - For the purpose of term limits, the appointed Commissioner, shall be seen as serving one term
        - Any person who has filed as a candidate for the district representing the vacated Commissioner shall be prohibited from being appointed.

Outlook

NEW SUBMISSION Legislation Proposal - County Attorney

From DO NOT REPLY - UNMONITORED ACCOUNT <no-reply@charlescountymd.gov>
Date Tue 4/15/2025 6:32 PM
To Danielle E. Mitchell <MitchelD@charlescountymd.gov>; County Attorney <coattorney@charlescountymd.gov>

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Legislation Proposal - County Attorney

Submission #: 3932057
IP Address: 100.15.27.202
Submission Date: 04/15/2025 6:32
Survey Time: 12 minutes, 28 seconds

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Legislative Proposals

Questions or More Information 301-645-0555

This form should be used to submit legislative proposals for amendments, additions, or deletions to the Charles County Code or State of Maryland Code. Please submit the completed form online, or print and mail to: County Attorney's Office, 200 Baltimore Street, La Plata, Maryland 20646. Please attach responses to questions that require additional space to answer and indicate the question number on the attachment.

Contact Person Name

Durrell Gray

Contact Person Email

[redacted]

Contact Person Phone

[redacted]

Contact Person Address

[redacted]

Proposal Summary (Describe proposal in 1 sentence)

This proposal aims to establish term limits for County Commissioners in Charles County, Maryland.

Code References (List any sections/chapters of the Charles County or State Code that you believe would be impacted by the proposal, if known)

Chapter 27 Commissioners, County

Problem (Describe the problem the proposal addresses)

Term limits address the problem of entrenched political power by ensuring regular turnover in elected office. Without limits, long-term incumbents can become disconnected from voters, resistant to change, and vulnerable to corruption and cronyism. This discourages new voices from entering public service and can lead to voter apathy and stagnation in government. Term limits

promote accountability, reduce special interest influence, and create space for fresh ideas and leadership that better reflect the evolving needs of the community.

Solution (Explain how the proposal addresses the problem).

This proposal addresses the problem of entrenched political power and lack of accountability by establishing clear term limits for Charles County Commissioners. By capping the number of terms any one person can serve, it ensures regular turnover and prevents the concentration of power in the hands of a few officials. This creates opportunities for new leaders with fresh perspectives, innovative ideas, and stronger ties to the community to step forward and serve. The proposal promotes government transparency and responsiveness by eliminating the "career politician" dynamic that often leads to complacency, political favoritism, and resistance to change. With term limits in place, commissioners are more likely to focus on effective governance and the public good rather than political survival or catering to entrenched interests. Additionally, term limits level the playing field for elections. They reduce the built-in advantages of incumbency, such as name recognition, donor networks, and political influencemaking it easier for grassroots candidates and everyday residents to run viable campaigns. This enhances citizen engagement and helps restore public confidence in local government by showing that leadership positions are accessible and accountable. Ultimately, this proposal ensures that Charles County government stays dynamic, representative, and community-focused, while reinforcing the principle that no one should hold power indefinitely.

Organizational Support (List any organizations that would likely be in support of the proposal, even if not confirmed).

I believe the democratic Central committee, the Charles County NAACP, The League of Women Voters and several other local organizations would support this proposal

Proposed Draft Language (Provide draft language for the legislation if you have it).

COUNTY COMMISSIONERS – TERM LIMITS FOR the purpose of establishing term limits for County Commissioners in Charles County, Maryland, to promote accountability, transparency, and fresh leadership by limiting any individual to two total terms as a Commissioner, regardless of whether such terms were served consecutively or non-consecutively, and applying the limitation retroactively to include terms already served. SECTION 1. BE IT PROPOSED THAT the Laws of Charles County, Maryland be amended to add a new section to read as follows: §27-1B. TERM LIMITS AND ELIGIBILITY FOR COUNTY COMMISSIONERS A. TERM LIMITS 1. No person may serve more than two (2) terms as a County Commissioner, regardless of whether the terms are served consecutively or non-consecutively. 2. Any person who has already served two (2) or more terms as a County Commissioner prior to the adoption of this section shall be ineligible to run for or be appointed to the office of County Commissioner in any future election or appointment. B. RETROACTIVE APPLICATION 1. For the purpose of this section, all prior terms served — whether elected, appointed, partial, or full — shall be counted toward the two-term limit. 2. This section shall apply retroactively to all individuals who have served in the capacity of County Commissioner prior to the effective date of this proposal. C. ENFORCEMENT 1. The Charles County Board of Elections shall enforce this provision by verifying the eligibility of all candidates filing to run for County Commissioner. 2. If a person is determined to be ineligible under this section, they shall not be certified as a candidate or be permitted to appear on any ballot for County Commissioner. SECTION 2. SEVERABILITY If any provision of this Proposal is held invalid for any reason, the invalidity shall not affect the other provisions, which shall remain in full force and effect. SECTION 3. EFFECTIVE DATE This proposal shall take effect forty-five (45) calendar days after adoption into law.

Other Information To Note

Attachment(s)

Charles_County_Term_Limits_Proposal.docx

Thank you,
Charles County, MD

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COUNTY COMMISSIONERS OF CHARLES COUNTY, MARYLAND
2025 Legislative Session

Proposal No. 2025-__

Chapter No. 27-1B

Introduced by Durrell Gray

Date of Introduction _____

PROPOSAL

COUNTY COMMISSIONERS – TERM LIMITS

FOR the purpose of establishing term limits for County Commissioners in Charles County, Maryland, to promote accountability, transparency, and fresh leadership by limiting any individual to two total terms as a Commissioner, regardless of whether such terms were served consecutively or non-consecutively, and applying the limitation retroactively to include terms already served.

SECTION 1. BE IT PROPOSED THAT the Laws of Charles County, Maryland be amended to add a new section to read as follows:

§27-1B. TERM LIMITS AND ELIGIBILITY FOR COUNTY COMMISSIONERS

A. TERM LIMITS

1. No person may serve more than two (2) terms as a County Commissioner, regardless of whether the terms are served consecutively or non-consecutively.

2. Any person who has already served two (2) or more terms as a County Commissioner prior to the adoption of this section shall be ineligible to run for or be appointed to the office of County Commissioner in any future election or appointment.

B. RETROACTIVE APPLICATION

1. For the purpose of this section, all prior terms served — whether elected, appointed, partial, or full — shall be counted toward the two-term limit.

2. This section shall apply retroactively to all individuals who have served in the capacity of County Commissioner prior to the effective date of this proposal.

C. ENFORCEMENT

1. The Charles County Board of Elections shall enforce this provision by verifying the eligibility of all candidates filing to run for County Commissioner.

2. If a person is determined to be ineligible under this section, they shall not be certified as a candidate or be permitted to appear on any ballot for County Commissioner.

SECTION 2. SEVERABILITY

If any provision of this Proposal is held invalid for any reason, the invalidity shall not affect the other provisions, which shall remain in full force and effect.

SECTION 3. EFFECTIVE DATE

This proposal shall take effect forty-five (45) calendar days after adoption into law.

Outlook

NEW SUBMISSION Legislation Proposal - County Attorney

From DO NOT REPLY - UNMONITORED ACCOUNT <no-reply@charlescountymd.gov>
Date Mon 4/21/2025 3:35 PM
To Danielle E. Mitchell <MitchelD@charlescountymd.gov>; County Attorney <coattorney@charlescountymd.gov>

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Legislation Proposal - County Attorney

Submission #: 3943491
IP Address: 167.102.160.10
Submission Date: 04/21/2025 3:35
Survey Time: 22 minutes, 23 seconds

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Legislative Proposals

Questions or More Information 301-645-0555

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Contact Person Name

Terrah Dews

Contact Person Email

Dewst@CharlesCountyMD.gov

Contact Person Phone

(301) 645-0555 ext. 0541

Contact Person Address

200 Baltimore Street
LaPlata, Maryland 20646

Proposal Summary (Describe proposal in 1 sentence)

Revise Chapter 85 of the Charles County Code to expand the scope of nuisance enforcement to include commercial properties and abandoned/bank owned properties. Incorporate civil penalties for daily violations of the Nuisance Code.

Code References (List any sections/chapters of the Charles County or State Code that you believe would be impacted by the proposal, if known)

Chapter 85 - Nuisances; Public Health

Problem (Describe the problem the proposal addresses)

The current Code Section 85 is limited to enforcement of nuisance conditions on residential property.

Solution (Explain how the proposal addresses the problem).

Revising Section 85 would permit the County to address nuisance conditions on commercial and abandoned properties. The incorporation of civil penalties would incentivize property owners to abate nuisances on their properties in a timely manner.

Organizational Support (List any organizations that would likely be in support of the proposal, even if not confirmed).

County Department of Planning and Growth Management

Proposed Draft Language (Provide draft language for the legislation if you have it).

Draft language will be subsequently provided.

Other Information To Note

Attachment(s)

Thank you,
Charles County, MD

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Revise Chapter 85 - Nuisance of the Charles County Code

Submission #: 3943491

IP Address: 167.102.160.10

Submission Date: 04/21/2025 3:35 PM

Contact Person Name: Terrah Dews

Contact Person Email: Dewst@CharlesCountyMD.gov

Contact Person Phone: (301) 645-0555 ext. 0541

Contact Person Address: 200 Baltimore Street, LaPlata, Maryland 20646

Proposed Revision

- Revise Chapter 85 of the Charles County Code to expand the scope of nuisance enforcement to include commercial properties and abandoned/bank owned properties.
- Incorporate inspection fees per each inspection and assess the nuisance penalty if the nuisance has not been abated on the scheduled compliance date. However, all fees will be held in abeyance for the first 30 days and only assessed if nuisance conditions have not been abated.
- Remove Section 85-1 (C)
  "Landowners' association" means:
  (1) A nonprofit association, corporation, or other organization that is:
    (I) Comprised of at least two landowners or homeowners in an election district within which a nuisance is located;
    (II) Operated exclusively for the promotion of social welfare and general neighborhood improvement and enhancement; and
    (III) Exempt from taxation under § 501(c)(3) or (4) of the Internal Revenue Code; or

  (2) A nonprofit association, corporation, or other organization that is:
    (I) Comprised of at least two landowners or homeowners in a contiguous community that is defined by specific geographic boundaries and a substantial portion of which is within an election district within which a nuisance is located; and
    (II) Operated for the promotion of the welfare, improvement and enhancement of that community.

- Revise Section 85-3(A) as follows:

Any person, firm or corporation, either as owner, lessee, occupant or otherwise who sends a written complaint to the County Commissioners or their designee charging that any of the conditions under § **85-2** of this chapter exist on commercial, residential, or improved commercial or residential property, and become a nuisance or affect the public health and

comfort of residents of the County, the County Commissioners or their designee shall issue a complaint to the owner of the commercial residential property or improved commercial residential property. The complaint shall include the following:

(1) Stating the charges alleged;
(2) Setting a thirty-day deadline for abatement of alleged charges; and
(3) Containing a notice that a hearing will be held before the Nuisance Abatement Board not less than four days nor more than thirty days after the expiration of the abatement deadline.

- Revise Section 85-4(A)(2) to remove the requirement to send notice by certified return receipt requested postal mail

- Revise Section 85-4(B) to remove the requirement to send notice by certified return receipt requested postal mail

- Revise Section 85-9(A) as follows:

If an owner of a property affected by an order under § **85-3** of this chapter fails to implement said order and the County incurs costs associated with the implementation of the order, then the property owner shall pay a nuisance enforcement fee in addition to any costs associated under § **85-6** of this chapter. This nuisance enforcement fee shall be set by the Charles County Commissioners as it appears in the Charles County Approved Fees and Charges Schedule.

Submission #	3946175
IP Address	73.86.175.250
Submission Recorded On	04/22/2025 2:13 PM
Time to Take Survey	23 minutes, 6 seconds

Page 1

Legislative Proposals

Questions or More Information
301-645-0555

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Please attach responses to questions that require additional space to answer and indicate the question number on the attachment.

*** Contact Person Name**

William Smith

Contact Person Email

smithb@ccvfireems.org

Contact Person Phone

[redacted]

*** Contact Person Address**

109 LA GRANGE AVE
103
LA PLATA MD 20646-9503

*** Proposal Summary (Describe proposal in 1 sentence)**

A salary cap was inserted by the Charles County Delegation at the last minute in 2023.

*

Code References (List any sections/chapters of the Charles County or State Code that you believe would be impacted by the proposal, if known)

not certain of any impacts

*** Problem (Describe the problem the proposal addresses)**

We would appreciate removing the salary cap and provide a $500.00 increase capped at $2,500.00 in the year 2028

*** Solution (Explain how the proposal addresses the problem).**

We would appreciate removing the salary cap and provide a $500.00 increase capped at $2,500.00 in the year 2028

*** Organizational Support (List any organizations that would likely be in support of the proposal, even if not confirmed).**

We have the support of you 1200 volunteer Fire/EMS members

*** Proposed Draft Language (Provide draft language for the legislation if you have it).**

Simply removing salary cap or keeping it at $250,000

Other Information To Note

The property tax incentive is to maintain our senior volunteers that for numerous situations have become less active and is designed to give these "property owners" a means to offset the current economic situation we all endure at this present time. And yes, we do have younger volunteer families here in Charles County that do have "starter homes" and this incentive would assist these members as well. , this legislation has been endorsed for two years by our county commissioners, it costs the state nothing, we would ask the Charles County Delegation to endorse this small benefit for our volunteer Fire/EMS members, send it back to our county and allow our county officials to enact this legislation. And finally, under the leadership of State Senator Michael Jackson our volunteer friends in Calvert County along with other counties across the state have enjoyed this same legislation and with much success, we would ask the delegation; "what's so different about the Charles County Volunteers"? These same volunteers have saved millions upon millions of dollars providing very good service to the residence and guest of our county.

Attachment(s)

hb0947.pdf

HOUSE BILL 947

Q2 3lr1969
CF SB 521

By: **Charles County Delegation**
Introduced and read first time: February 10, 2023
Assigned to: Ways and Means

Committee Report: Favorable with amendments
House action: Adopted
Read second time: March 9, 2023

CHAPTER _____

AN ACT concerning

Charles County – Property Tax – Credit for Volunteer Emergency Responders

FOR the purpose of authorizing the governing body of Charles County to grant, by law, a tax credit against the property tax imposed on the owner–occupied residence of certain emergency responders and their surviving spouses; and generally relating to a property tax credit in Charles County for emergency responders and their surviving spouses.

BY adding to
Article – Tax – Property
Section 9–310(l)
Annotated Code of Maryland
(2019 Replacement Volume and 2022 Supplement)

SECTION 1. BE IT ENACTED BY THE GENERAL ASSEMBLY OF MARYLAND, That the Laws of Maryland read as follows:

Article – Tax – Property

9–310.

(L) (1) IN THIS SUBSECTION, "EMERGENCY RESPONDER" MEANS AN INDIVIDUAL WHO IS AN ACTIVE OR RETIRED VOLUNTEER MEMBER OF A FIRE, RESCUE, OR EMERGENCY MEDICAL SERVICES COMPANY IN CHARLES COUNTY.

EXPLANATION: **CAPITALS INDICATE MATTER ADDED TO EXISTING LAW.**
[Brackets] indicate matter deleted from existing law.
Underlining indicates amendments to bill.
~~Strike out~~ indicates matter stricken from the bill by amendment or deleted from the law by amendment.

(2) THE GOVERNING BODY OF CHARLES COUNTY MAY GRANT, BY LAW, A PROPERTY TAX CREDIT AGAINST THE COUNTY PROPERTY TAX IMPOSED ON REAL PROPERTY THAT IS OWNED AND OCCUPIED AS THE PRINCIPAL RESIDENCE OF AN EMERGENCY RESPONDER OR AN UNMARRIED SURVIVING SPOUSE OF A DECEASED EMERGENCY RESPONDER IF THE FEDERAL ADJUSTED GROSS INCOME OF THE EMERGENCY RESPONDER OR THE UNMARRIED SURVIVING SPOUSE FOR THE IMMEDIATELY PRECEDING TAXABLE YEAR IS ~~$50,000~~ $150,000 OR LESS.

(3) THE GOVERNING BODY OF CHARLES COUNTY MAY PROVIDE, BY LAW, FOR:

(I) THE AMOUNT AND DURATION OF THE TAX CREDIT UNDER THIS SUBSECTION;

(II) ADDITIONAL ELIGIBILITY CRITERIA FOR THE CREDIT; AND

(III) ANY OTHER PROVISION NECESSARY TO IMPLEMENT THE CREDIT.

SECTION 2. AND BE IT FURTHER ENACTED, That this Act shall take effect June 1, 2023, and shall be applicable to all taxable years beginning after June 30, 2023.

Approved:

_____

Governor.

_____

Speaker of the House of Delegates.

_____

President of the Senate.