

**RAPPAHANNOCK AREA COMMUNITY
SERVICES BOARD**

March 17, 2026

600 Jackson Street, Board Room 208
Fredericksburg, VA, 22401

AGENDA

- I. Call to Order, *Parcell*
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- III. Public Comment, *Parcell*
- IV. Employee Service Awards, *Wickens*
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 - 1. **Ellen Achiaa**, Direct Support Professional, Ross Drive ICF Group Home
 - 2. **Angela Berry**, Nurse Manager, ACT North
 - 3. **Evelyn Dixon**, Group Home Manager, Piedmont Drive Group Home
 - B. Ten Years:
 - 1. **Rachel Mcaleese**, Same Day Access Liaison, Fredericksburg
 - 2. **Ebony Williams**, Direct Support Professional, Wolfe Street ICF Group Home
- V. Licensures, *Wickens*
 - 1. **Grace Hood**, Licensed Child/Adolescent Therapist
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February 2026 Board of Directors Meeting Minutes

I. CALL TO ORDER

A meeting of the Board of Directors of the Rappahannock Area Community Services Board was held on February 17, 2026, at 600 Jackson Street and called to order by Chair, Jacob Parcell, at 3:00 p.m. *Attendees included:* Nancy Beebe, Claire Curcio, George Dallas, Susan Gayle, Greg Sokolowski, Ashley Terry, Carol Walker, Melissa White, Bridgette Williams, and Matthew Zurasky. *Absent:* Tiffany Haynes, Shawn Kiger, and Ken Lapin.

II. MINUTES, BOARD OF DIRECTORS, December 16, 2025

The Board of Directors moved to approve the minutes from the December 16, 2025 meeting.

ACTION TAKEN: The Board approved the December 16, 2025 minutes.

Moved by: Ms. Bridgette Williams

Seconded by: Ms. Claire Curcio

III. PUBLIC COMMENT

No Action Taken

IV. SERVICE AWARDS/RETIREMENTS

Mr. Joe Wickens recognized all employees with awards:

5 years

Tilisha Minor, Manager, Belmont, Supervised Apartment Program

Janet Victory, Case Manager, Rappahannock Regional Jail

Takia Kirk, MH Residential Specialist, Crisis Stabilization (not present)

Zainabu Koroma, Direct Support Professional, Merchant Sq. Supervised Apartment Program (not present)

10 years

Vickie Parker, Direct Support Professional, DD Residential Floater

Robert Rezendes, Compliance Specialist

Ashley Smith, Direct Support Professional, Scottsdale Estates Group Home

Gillian Crisp, Day Support Aide, Kings Hwy. (not present)

15 years

Amy Jindra, Director of Crisis Intervention Services

Margith Vaz, MH Residential Counselor, Home Road Supervised Apartment Program

Lisa Walker, Manager, New Hope Estates Group Home

Retirements

Anne Longenecker, Special Educator, PEID – with 26 years

Sherrie Johnson, Licensed Child/Adolescent Therapist – with 30 years

**both retirees received a personalized 3D Crystal Award*

V. **EMPLOYEE OF THE QUARTER** – Joy Allen, Developmental Support Coordinator, Stafford

VI. **BOARD CORE BEHAVIORS**, *Ms. Claire Curcio*

Ms. Curcio reminded the Board that we want to have open, honest and respectful communications with each other – we want to ask the tough questions while we are in the room and not afterward, and then move on to the next level of decision making.

VII. **BOARD PRESENTATION, Young Adult Survey (YAS)**, *Ms. Michelle Wagaman-*

Ms. Michelle Wagaman presented a PowerPoint overview of the third iteration of the Virginia Young Adult Survey (YAS), a statewide survey of young adults ages 18 to 25 designed to assess prevention needs within this population. She explained that the survey provides valuable local-level data used to inform prevention planning efforts. The survey is overseen by Omni, with Community Services Boards, coalitions, and community networks supporting participant recruitment within their respective communities.

VIII. **PROGRAM REPORTS**

A. **COMMUNITY SUPPORT SERVICES**, *Ms. Lacey Fisher Curtis*

1. **Program Update** - Ms. Fisher Curtis provided program updates across service areas, noting that Day Support has expanded community-only groups operating out of the YMCA, resulting in increased community engagement and revenue. DD Residential experienced an increase in vacancies over the past two months due to two deaths and several medical discharges. Referrals are being closely monitored to support timely placements. DD Support Coordination received 36 additional waivers in January and continues recruitment efforts to maintain staffing levels amid program growth and turnover; an Intake Support Coordinator position was added to focus on individuals new to waivers, services, and screening processes. Mental Health Residential reported that Home Road remains fully occupied with no vacancies. Permanent Supportive Housing received two referrals in January that remain in process and currently serves 77 individuals with 14 units available. Board discussion included the new DBHDS application process, with leadership noting that while more comprehensive, it captures important information upfront to better determine service appropriateness. Clarification was also provided regarding the Community Outreach Case Manager position. Hiring criteria and interview questions are being refined as the role is re-filled to better align with program expectations and support long-term retention.
2. **Residential Vacancies** – Ms. Fisher Curtis reported that 3 individuals have moved into Myers Drive Respite, with 2 additional move-ins scheduled within the next 60 days, 1 at Myers Drive Respite and 1 at Igo Road Group Home. Current vacancies remain at Leeland, Devon, Ruffins, and 1 at Igo Road, primarily due to higher medical needs. MH Residential admitted 1 new individual to Home Road, bringing that program to full capacity. At Lafayette, 3 transitional beds and 1 community bed remain vacant. Additionally, 2

individuals were successfully discharged to utilize ACT resources in the community, representing positive discharges.

B. CRISIS INTERVENTION SERVICES, *Ms. Amy Jindra*

- 1. Program Update** – Ms. Jindra reported that the winter storm was a central focus of program operations in January and expressed appreciation to staff for their exceptional efforts. Several staff members stayed multiple nights at Sunshine Lady House after being snowed in, while others experienced injuries from icy conditions or were involved in traffic accidents while traveling to work. Family members also assisted in supporting staff, reflecting a strong collective effort to maintain program operations. She further shared that ACT services continue to expand, Sunshine Lady House is exploring additional strategies to address barriers to admission, and Emergency Services partnered with the Stafford Sheriff's Department Co-Response Team and Juvenile Detectives to provide targeted psychoeducation for youth in crisis.
- 2. Emergency Custody Order (ECO)/Temporary Detention Order (TDO) Report – January 2026** – Ms. Jindra stated that Emergency Services staff completed 171 emergency evaluations in January. Fifty-six individuals were assessed under Emergency Custody Orders (ECOs), and 64 Temporary Detention Orders (TDOs) were served. Staff facilitated one admission to Western State Hospital. Additionally, 3 individuals were involuntarily hospitalized outside the agency's catchment area during January.
- 3. Crisis Intervention Team (CIT) and Co-Response Report** – Ms. Jindra reported that the CIT Assessment Center served 15 individuals during the month of January. She presented a chart detailing the number of Emergency Custody Orders (ECOs) by locality, the number of individuals transferred into Crisis Assessment Center (CAC) custody, and those who could have utilized the Assessment Center if additional capacity had been available. The Spotsylvania Co-Response Team served 21 individuals in January, while the Stafford Co-Response Team served 27. Recruitment efforts continue for the Fredericksburg Co-Response Therapist position. There was no CIT training in the month of January; however, they are collaborating with Quantico to provide CIT training for military officers.
- 4. Sunshine Lady House** – Ms. Jindra reported that Sunshine Lady House received 59 referrals during the month, accepted 49, and admitted 36 individuals. Several individuals declined admission due to snowstorm-related travel concerns, while three individuals already receiving care at Snowden or Spotsylvania Regional elected to remain there longer. Additional referrals required a higher level of medical care prior to admission and three individuals required inpatient medically managed detox services. January utilization totaled 165 bed days, reflecting a 46% utilization rate.

Ms. Jindra further reported that staff met with Rappahannock Creative Healthcare, a contracted partner, to review detox services and referral practices. The review focused particularly on alcohol detox due to delayed symptom onset and the potential for rapid medical deterioration. Admissions involving alcohol detox require careful individual assessment and observation during the initial days of care. The discussion confirmed that higher-acuity detox services require an on-site medical team; therefore, advanced cases continue to be referred to Spotsylvania Regional's voluntary detox unit.

C. **CLINICAL** *Ms. Jacque Kobuchi*

1. **Program Update** – Ms. Kobuchi reported that the school-based therapist position serving the City of Fredericksburg, which is partially funded by the Mary Washington Healthcare Foundation, will now have the remaining portion of funding supported by Fredericksburg City Schools. This decision reflects the school system’s recognition of the value of the position. As a result, the therapist will remain in place, ensuring continued services and program stability.
2. **State Hospital Census Report** -Ms. Kobuchi shared that there are currently four individuals on the Extraordinary Barriers List. There are 27 individuals that are at state hospitals receiving treatment from our catchment area.
3. **Same Day Access** - Ms. Kobuchi shared data on the number of intakes completed at our outpatient clinics and the percentage of those completed through Same Day Access. Individuals not seen through SDA received scheduled appointments, many times at their request or based on their needs.

D. **COMPLIANCE**, *Ms. Stephanie Terrell*

1. **Program Update** – Ms. Terrell reported that training will be conducted for a new maintenance ticketing system that will allow maintenance requests to be submitted and tracked electronically, improving the department’s ability to triage and manage issues efficiently. She also shared that the agency has developed an electronic audit tool through QI Folio for use by Emergency Services. In addition, an audit tool has been created for the ID/DD Residential program to conduct peer audits; the tool mirrors the compliance team’s chart audit process to promote consistency and strengthen quality oversight.
2. **Quality Assurance Report** – Ms. Terrell stated the Quality Assurance staff completed chart reviews for the following programs: Drug Court; and Project LINK. Corrective Action Plans were submitted for all discrepancies.
3. **Point-In-Time Survey** – Ms. Terrell reported that RACSB continues to utilize its point-in-time survey to gather feedback from individuals served and stakeholders to improve service delivery and overall satisfaction. The nine-question survey was distributed during the week of July 14, 2025, at all six outpatient clinics to individuals who attended appointments. A total of 777 surveys were completed, representing an 81% response rate from the 959 individuals seen during the survey period. While improved from recent years, response rates remain below pre-COVID levels, which averaged 93% in FY2020 and have remained under 72% since FY2022.
4. **Licensing Reports** – Ms. Terrell reported that the Department of Behavioral Health and Developmental Services (DBHDS) Office of Licensing issues reports when areas of non-compliance with regulatory requirements are identified, requiring agencies to submit corrective action plans. RACSB received approval for one corrective action plan during the month of January and ten corrective action plans during December. The attached report provides additional details regarding the citations and RACSB’s corrective actions.

The Board moved to approve the Corrective Action Plans

ACTION TAKEN: The Board approved the Corrective Action Plans

Moved by: Mr. Matt Zurasky

Seconded by: Ms. Nancy Beebe

E. COMMUNICATIONS, *Ms. Amy Umble*

1. **Communications Update** - Ms. Umble provided Board members with copies of the RACSB Annual Report, the VACSB Annual Report, and the January newsletter. She noted that the February newsletter was not available due to computer issues. Ms. Umble also shared that community event season is beginning.

F. PREVENTION & EARLY INTERVENTION, *Ms. Michelle Wagaman*

1. **Program Update** – Ms. Wagaman reported that the Virginia Young Adult Survey is open through April 30, 2026, targeting individuals ages 18–25, with Germanna Community College serving as an official survey partner. The first resilience-focused virtual Lunch and Learn was held January 29, 2026, with 43 attendees. Additionally, Healthy Families Rappahannock Area will participate in a February 26, 2026 roundtable hosted by the U.S. Department of Health and Human Services regarding MIECHV Program federal funding.

2. **Healthy Families Women and Girls Fund Application** –

Ms. Wagaman requested Board approval to submit a \$50,000 grant application to the Community Foundation of the Rappahannock River Region’s Women & Girls Fund for a one-year initiative titled “*Breaking Barriers to Employment for Mothers in Planning District 16.*” The project aims to support approximately 154 mothers enrolled in Healthy Families Rappahannock Area by providing employment readiness training, financial literacy education, and workforce connection opportunities to promote family stability and economic self-sufficiency.

The Board moved to approve the Grant Application

ACTION TAKEN: The Board approved the Grant Application

Moved by: Mr. George Dallas

Seconded by: Ms. Bridgette Williams

The Board took a ten-minute break

G. FINANCE, *Ms. Sara Keeler*

1. **Program Update** – Ms. Keeler reported that Kerlos Amir, Accounting Coordinator, resigned effective Friday. She also shared that Edward Laban has joined the agency as Financial Analyst and comes with strong references.

2. Ms. Keeler reviewed the Summary of Cash Investments.

3. Ms. Keeler reviewed the Other Post Employment Benefit.

4. Ms. Keeler reviewed the Health Insurance.

5. Ms. Keeler reviewed the Summary of Investments.

6. Ms. Keeler reviewed the Fee Revenue Reimbursement and Collections.

7. Ms. Keeler reviewed the Write-Off Report.

8. Ms. Keeler reviewed the Payroll Statistics.

Mr. Zurasky noted discrepancies in the Write-Off Report, observing that the Non-Covered Service totals did not align between November’s Current Month-to-Date and December’s Prior Month-to-Date figures. Ms. Keeler explained that the reports reflect a snapshot in time and that figures may continue to change after reporting deadlines. She indicated she would follow up with the Reimbursement

Coordinator for clarification and will review the reporting process to ensure consistency in the numbers presented to the Board.

During discussion of overtime hours, Mr. Zurasky asked which programs account for the majority of overtime. Ms. Keeler reported that overtime primarily occurs within Residential services. When asked about a target overtime level, Ms. Keeler stated the budget assumes zero overtime and that leadership monitors trends and unexpected increases. Mr. Wickens added that while the goal remains zero overtime, the agency has not yet achieved that target.

9. Ms. Keeler reviewed the Financial Summary.

Mr. Zurasky noted an error in the December financial summary under the Substance Abuse table (page 138), specifically related to the Expenditures Budget amount and percentage. Ms. Keeler stated that the correction had previously been made and she was unsure why the update did not save; she will review the report and make the necessary corrections.

The Board moved to approve the financial summaries for November and December, subject to necessary corrections.

ACTION TAKEN: The Board approved the financial summaries for November and December, subject to necessary corrections.

Moved by: Mr. Matthew Zurasky

Seconded by: Ms. Carol Walker

H. HUMAN RESOURCES, *Mr. Derrick Mestler*

1. **Program Update** – Mr. Mestler reported on several initiatives related to the strategic plan. He shared that Human Resources has begun providing feedback to employees regarding the January employee engagement survey, which achieved over 60% participation. Directors are currently reviewing results and finalizing action steps, including follow-up communication to employees and updates for the Board.

Mr. Mestler also reported that the agency has engaged the University of Mary Washington's Office of Continuing Professional Studies to conduct a Leadership Assessment. The assessment will help identify gaps in leadership development and inform the creation of a structured leadership education program for current and future RACSB leaders.

Additionally, Mr. Mestler noted that he attended the Rappahannock Region Healthcare Collaborative.

2. **Applicant and Recruitment Update** – Mr. Mestler noted that for the month of January, RACSB received 376 applications. Of the applications, 43 applicants listed the RACSB applicant portal as their recruitment source, 29 stated employee referrals as their recruitment source, and 300 listed job boards as their recruitment source. At the end of January, there were 30 open positions, 19 full-time, 11 part-time.

3. **Turnover Report** – Mr. Mestler reported that Human Resources processed a total of five employee separations during the month of January, including four voluntary separations and one involuntary separation. Ms. Terry inquired about the positions held by departing staff. Mr. Mestler noted that the information was not available by position but referred Board members to page 146 of the packet, where separations are detailed by organizational unit.

I. **DEPUTY EXECUTIVE DIRECTOR, Ms. Brandie Williams**

1. **Program Update** – Ms. Williams reported that DBHDS and CSBs continue coordination related to the Enterprise Data Warehouse (EDW) and HL7 Expansion cycle. RACSB remains the lead Netsmart CSB for MyAvatar users following the June 30, 2025 go-live and is utilizing a new data quality dashboard to improve error tracking and resolution. RACSB also chairs the DMC Data Mapping Workgroup supporting integration of reporting requirements into the EDW. Final HL7 expansion specifications have been released to vendors.

Ms. Williams further noted that the VACSB Administrative Policy Committee continues Performance Contract negotiations with DBHDS. DBHDS performance dashboards remain unavailable during the EDW transition, and RACSB participated as a beta tester, recommending additional development prior to release.

2. **Legislative Updates & Priorities** – Ms. Williams reported that RACSB continues to support advocacy efforts through participation in the Virginia Association of Community Services Boards (VACSB), which monitors legislation and advocates for behavioral health services statewide. Alison Standring and Brandie Williams represent RACSB on the VACSB Public Policy Committee.

Ms. Williams reviewed key items from the Governor’s introduced budget, including DBHDS funding and program changes, grants-to-localities adjustments, and DMAS proposals affecting crisis services, developmental disability waiver services, and behavioral health redesign. Ms. Williams will continue monitoring legislative developments and their potential impact on RACSB services.

Mr. Wickens then directed Board members to page 160 of the Board packet and highlighted Health Bill HB1282 regarding licensure by endorsement for licensed substance abuse treatment practitioners, introduced by Board member Ms. Bridgette Williams. Mr. Wickens invited Ms. Bridgette Williams to provide an update. Ms. Bridgette Williams reported that the bill has passed the House, advanced to the Senate with unanimous support. She expressed appreciation for the Board’s recognition.

3. **RACSB Strategic Plan Second Quarter Update** – Ms. Brandie Williams reported that implementation of the Strategic Plan continues to progress, with programs beginning to measure outcomes and demonstrate progress toward established goals. She noted that all programs have developed quantifiable measures for both effectiveness and access objectives,

representing a significant milestone for several areas. Tentative benchmarks have been established to track performance as metrics are implemented and monitored.

IX. REPORT FROM THE EXECUTIVE DIRECTOR, *Mr. Joseph Wickens*

Mr. Wickens reported that Governor Abigail Spanberger has appointed Daryl Washington, Executive Director of the Fairfax-Falls Church Community Services Board, as Commissioner of the Virginia Department of Behavioral Health and Developmental Services. Mr. Wickens noted that Mr. Washington's appointment is encouraging given his familiarity with CSB system strengths and challenges.

Mr. Wickens also recommended moving regular Board meetings from the third Tuesday of the month to the fourth Tuesday to allow additional time for staff to compile and review reports prior to distribution. He explained that programs currently work under tight timelines to prepare materials and that the additional week could improve report stability and review time. Board members discussed potential impacts, including concerns about financial reporting timelines and individual scheduling conflicts. Staff noted that the long-term goal is to finalize prior-month financial information by mid-month to support improved reporting timelines.

Following discussion, Mr. Parcell recommended tabling the matter until the next Board meeting to allow members time to review their schedules and consider the proposed change. The Board agreed to revisit the discussion at the next meeting, and the upcoming meeting will remain scheduled for the third Tuesday.

Mr. Wickens reported on the agency's response to the recent snowstorm which resulted in a four-day office closure. He noted that several outer county clinics were able to reopen sooner as road conditions improved. Mr. Wickens commended staff and leadership for quickly adapting operations to ensure continuity of services, including the use of telehealth for outpatient services. He recognized staff efforts to maintain operations under challenging conditions and shared that he signed fifty-two letters acknowledging employees who went above and beyond during the event. In response to a question from Mr. Zurasky, Mr. Wickens confirmed that no facility damages were reported.

X. BOARD TIME

- A.** Ms. White congratulated Ms. Jindra on her fifteen years of service and expressed appreciation to her staff for their hard work during the recent storm. She also commended Ms. Wagaman on her presentation and thanked the Finance team for their continued efforts. Ms. White noted interest in exploring survey opportunities with younger populations due to increasing concerns related to vaping in schools and expressed appreciation to Ms. Williams for her advocacy efforts.
- B.** Ms. Gayle, thank you for all that you do. I'm really looking forward to the results of the Young Adult Survey to see how that impacts our community.
- C.** Ms. Walker, thank you everyone, appreciate your service, congratulations Brandie, I've done some conferences as well and to have you in the top ten every time that's great. As always, I appreciate the detail everyone gives as well as the transparency.
- D.** Mr. Dallas, thanks for the great ice storm support, truly is amazing, the vignettes in report were pretty fun to read of the service given. Diana, thank you for handling my

inquiry I sent you. I'm also interested in any ride around program you may have so I can get better context and understanding.

- E. Ms. Curcio, I enjoyed reading about the storm collaboration, thank you for putting that kind of detail in the reports for us, I'm also very impressed with the changes in the accuracy of the reporting so thank you.
- F. Ms. Beebe, thank you everybody, great job Brandie, always enjoy Michelle's report, congratulations Amy on fifteen years. Great job with the snow.
- G. Ms. Williams, she said it all, and I'm glad HR didn't fire anyone.
- H. Ms. Terry, special thank you to all the employees who received service awards and congratulations to them. I'm looking forward to the Young Adult Survey and the progression of that. I enjoyed seeing the Valentine's Day sale and I'm looking forward to the Spring sale as well. It's nice to see that Home Road is 100% occupied. I also want to say thank you to all the staff who persevered through this weather because that ice was treacherous. The point-in-time survey, a shout out to all, I saw so many great things, I even tried to write down names but my list became so long-so just kudos to everyone there. Great work to Healthy Families and good luck on their visit. I would love to hear an update about that at our next meeting. I will be back to support with the birthday event – I have some donations that you're collecting for that project. Great work with compliance, finance and HR. Thank you to Brandie, Alison, and also Ms. Williams for being such a strong voice and advocate for us.
- I. Mr. Zurasky, thank you Mr. Wickens for sending out those appreciation letters to staff. I wondered how we were going to recognize people and I appreciate that people got recognized for their extra efforts. I also want to say my thanks for everyone who made sure our clients had their needs meet at that time.
- J. Mr. Sokolowski, thank you. I'm glad to see we are all in one piece after the storm. Glad to see everyone is healthy.
- K. Mr. Parcell, thank you everyone for the great reports. Looking back a year from now we are in a much better place from an initial performance side, we have received our first read out of the strategic plan also we are going to see a much more refined version of our actual reporting, so please reach out to Mr. Wickens if there are ways the Board can better support you in your jobs let us know. If there are ways we can better provide you feedback in these sessions let us know and we will talk about those and go over it. Thank you for all the hard work, it really means a lot.

XI. CLOSED MEETING – VA CODE § 2.2 – 3711 A (4), A (7), and A (15)

Mr. Parcell requested a motion for a closed meeting. Matters to be discussed:

- CRC

It was moved by Mr. Parcell and seconded by Mr. Zurasky that the Board of Directors of the Rappahannock Area Community Services Board convene in a closed meeting pursuant to Virginia Code § 2.2 – 3711 A (4) for the protection and privacy of individuals in personal matters not related to public business; and Virginia Code § 2.2 – 3711 A (15) to discuss medical records excluded from 2.2 – 3711 pursuant to subdivision 1 of 2.2 – 3705.5.

The motion was unanimously approved.

Upon reconvening, Mr. Parcell called for a certification from all members that, to the best of their knowledge, the Board discussed only matters lawfully exempted from statutory open meeting requirements of the Freedom of Information Act; and only public business matters identified in the motion to convene the closed meeting.

A roll call vote was conducted:

Greg Sokolowski – Voted Aye
Nancy Beebe – Voted Aye
Susan Gayle – Voted Aye
Ashley Terry – Voted Aye
Melissa White – Voted Aye
Claire Curcio – Voted Aye

Jacob Parcell – Voted Aye
Matthew Zurasky – Voted Aye
Bridgette Williams – Voted Aye
Carol Walker – Voted Aye
George Dallas – Voted Aye

The meeting adjourned at 6:16 PM.

Board of Directors Chair

Executive Director

Board Core Behaviors



Open and Honest
Communication



Ask
Tough Questions



Next Level
Decision Making

Community Support Services Board Report February 2026

DD Day Support Rappahannock Adult Activities, Inc. (RAAI) - Raven Neal

RAAI is currently supporting 131 individuals, with 3 additional individuals with start dates in March and April.

We are continuing to expand our Community Only program. We currently operate 3 groups at both our Ron Rosner and Massad YMCA's, and have just started our first group at the King George YMCA!

February community engagement hours for the month of February were 3.167. We are looking forward to the spring weather and being able to enjoy more outdoor activities! In the month of February, we volunteered in our community for 140 hours.

RAAI is continuing to hire for all open positions. We have continued to expand the Specialized Services team as they continue to grow and have three staff starting the next NEO for that team. We have hired a new Assistant Site Leader for the Kings Highway team and are interviewing for the Lead Specialist position for Specialized Services.

Horticulture is offering Volunteer Hours every Tuesday from 10:00am – 2:00pm at the Kings Highway greenhouse. We have had numerous volunteers join us each Tuesday. They have enjoyed different activities including making greenery centerpieces, labeling pots for the Spring Plant sale, and more!

Planning is underway to celebrate RAAI's 50th birthday! This event will be held on May 16th at 12:00pm at our Kings Highway location. We will have food trucks, individuals displaying and selling items that they make, face painting, music, and more! This will be a family fun event that is open to the community.

Spring Plant Sale planning and growing is currently underway. We are aiming to open after Easter.

RAAI Coordinators have been actively collaborating with regional high schools to provide presentations to families within Special Education departments regarding services available to individuals after they exit the school system. We look forward to continuing to strengthen these collaborative partnerships with local schools. At this time, we have met with Spotsylvania, Stafford, Caroline and King George schools.

Developmental Disabilities (DD) Residential Services - Courtney Ross

One individual successfully moved into Igo Road Group Home on February 27. One individual was accepted for placement into Myers Respite/Group Home with a move-in date scheduled in March.

During the month of February, two of our programs hosted gatherings that were well attended and enjoyed by all. On February 5, the individuals at Churchill Drive Group Home hosted a game night that provided a fun and engaging opportunity for social connection. On February 14, an individual residing at Lucas Street ICF celebrated her birthday by hosting a party for her peers and staff. In addition, many individuals across our residential programs attended the annual Night to Shine event on February 13, an occasion that individuals consistently look forward to each year.

The DD Residential program was also invited to apply for funding through the Ann Felder Community Foundation grant. An application was submitted to support the purchase of emergency preparedness equipment, including floor-to-stand lifting devices for use in our group home settings. These devices would allow staff to safely assist individuals who may experience a fall without injury but require additional support to stand. The grant application also included portable power banks for individuals in our Supervised Apartment Programs, which would provide a reliable source of power during outages as these settings are not equipped with backup generators.

Developmental Disabilities Support Services - Jen Acors

We are continuing to assist individuals who were awarded the DD waiver in January (meeting was postponed from December) get connected to services. Some are waiting on Medicaid, some are in the process of opening. We are preparing for the next Waiver Slot Assignment Committee meeting scheduled for 3/12/26 – for our next round of new waivers. We anticipate approx. 30 additional waiver slots to be assigned at this time. In addition, we have in the last week, requested 3 Community Living Waiver slots for individuals in emergent situations (one left her caregivers home and is couch surfing with a friend and needs supports to be safe, one whose parent recently passed away and her family is unable to provide the supports she needs and another who is incarcerated – he had a waiver prior to being incarcerated that reached the time that DBHDS provided instruction to send appeal rights and release the slots).

We have hired two staff members. Support Coordinator – Jennifer Hubert who started 3/2/26 and an Intake Support Coordinator who will start on 3/16/26.

Mental Health (MH) Residential Services - Nancy Price

MH Residential processed four transitional referrals in February. One individual was denied due to an extensive history (and recent incidents) of violence and self-harm. Another individual was offered an evaluation, but decided to discharge to another program before the evaluation could be completed. A 48-hour pass was completed 3/3-3/5 at LBH for one individual, and will be invited back for a second pass next week. Lastly, one individual is NGRI and completed a virtual evaluation with LBH, but is unable to come on passes due to his NGRI status. We are working closely with Liz Wells to ensure a smooth transition straight from the state hospital to LBH. While he has not been officially accepted yet, it is anticipated that he will be accepted to a

transitional bed at LBH once funding sources are in place to support with his needs and services until he begins receiving benefits.

MH Residential had multiple discharges and transitions in February. Two individuals discharged from River Place and moved into their own housing in the community. Home Road had one individual transition to LBH for additional support, while also hosting a trial pass for another LBH resident that is expected to be admitted in March. Another Home Road resident moved from a transitional bed at Home Road to a community bed at River Place.

Nancy Price continues to work with the Department of Social Services (DSS) to process Medicaid applications and spend downs in a timely manner. In February, DSS processed spend downs for two individuals that dated back to early/mid 2025. As a result, Home Road will receive Medicaid reimbursement in the amount of \$25,226.88 for services provided to one resident from May 2025 through February 2026. This individual now has full Medicaid, effective March 1, 2026. The authorization is still pending approval for the other individual.

PSH received two referrals in February, discharged one individual, and enrolled two new individuals. The total individuals enrolled in PSH is now 78, with 13 open slots. The PSH team is actively engaged in various monthly collaborative meetings in the community to identify folks that are in need of housing and/or services, or are currently housed and are in need of additional resources.

Nancy Price, Lacey Fisher Curtis and Chief Betsy Mason, conducted interviews for the Community Outreach Case Manager position. We are hopeful to have the position filled in March.

Memorandum

To: Joe Wickens, Executive Director

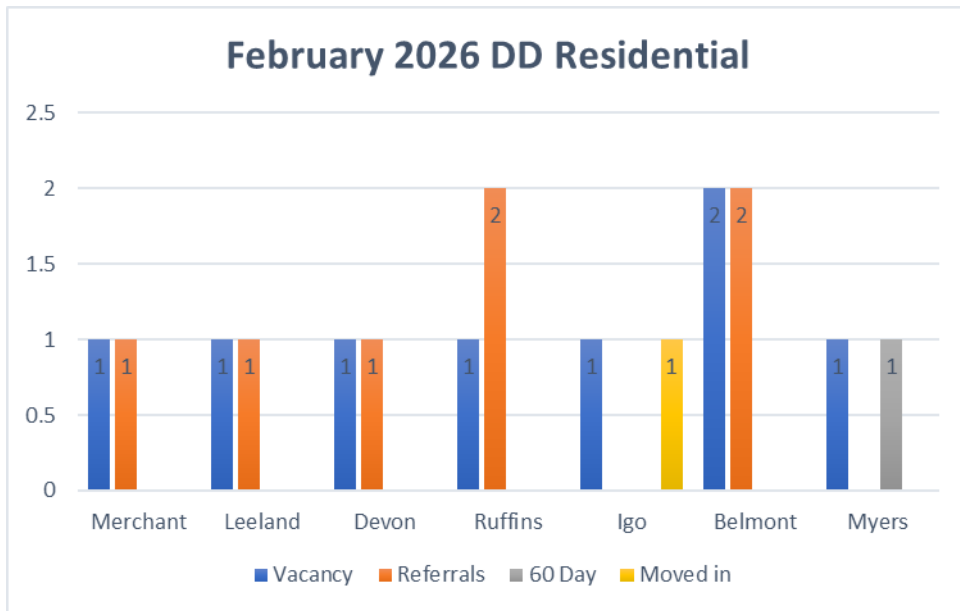
From: Lacey Fisher Curtis, CSS Director

Date: March 6th, 2026

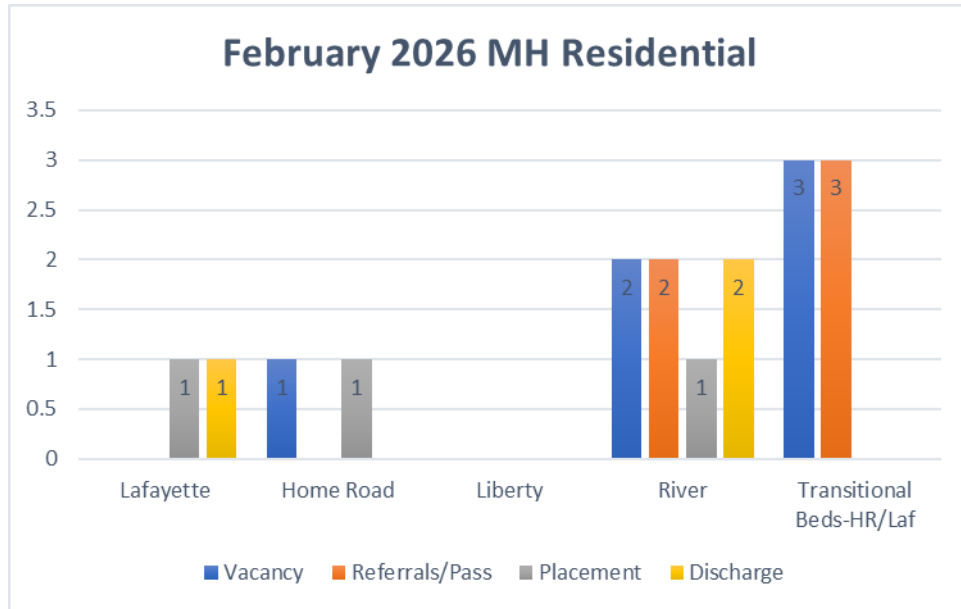
Re: Developmental Disabilities and Mental Health Residential Vacancies

RACSB residential programs continue to provide vital 24-hour care to individuals with intellectual developmental services as well as those individuals with serious mental illness.

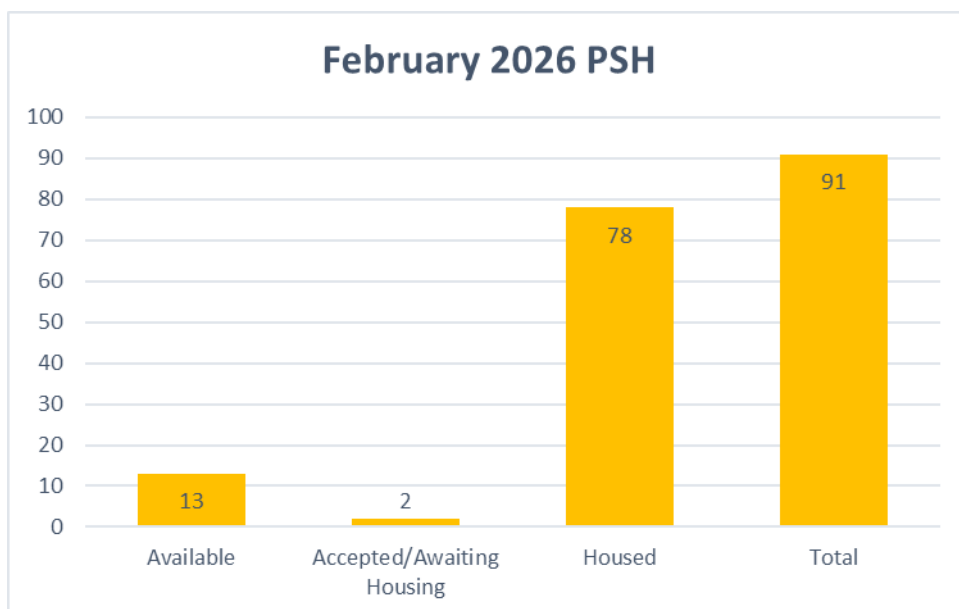
In February, one individual moved into Igo. Last resident at Myers has move in date set for 3/27/26 . Vacancies remain at Leeland, Devon, Ruffins, Igo, Belmont and Merchant. However, the program has received new referrals for almost all programs.



Mental Health Residential services had no new admissions but had multiple individuals step down to lower levels of support and two into community placements. Three transitional beds at Lafayette, two community beds at River, and one at Home Road remain vacant.



Permanent Supportive Housing (PSH) has 78 individuals currently housed with one individual admitted and two discharged in February. The program currently has two individuals accepted and two more who are being assessed for housing. PSH also provides case management to those individuals who are awaiting housing.



Memorandum

To: Joe Wickens, Executive Director
From: Lacey Fisher Curtis, CSS Director
Date: 3/2/26
Re: Anne Felder Grant Submissions for DD Programs

All of RACSB's Developmental Disability programs were invited to submit an application for the Anne Felder Grant through the Community Foundation. Established by Paula Felder to honor her daughter Anne, this fund will provide support that helps to improve and enrich the lives of the intellectually disabled and disadvantaged population of Fredericksburg.

DD Day Support- Requesting \$9,494.95 for sensory and adaptive equipment/activities.

Grant funds would help the individuals we support have the best day possible. Our goal at RAAI is for everyone to enjoy their day and benefit from their experience and time with us, whether that means time spent with community members or being supported on site at our day program with various activities. Though our ultimate goal is to engage folks in their community to the greatest extent possible, some individuals have support needs that make it challenging for them to be out and about for prolonged periods of the day. Individuals in our program with Autism and other significant support needs find comfort and interest on-site in sensory-based items and equipment. Often, these are items that assist them in calming, self-soothing, reducing anxiety, and in some cases, reducing self-injurious behaviors. Funds received through this grant would allow the agency to grow our evidence-based sensory items and equipment to the benefit of the individuals needing them in programming.

Strategic Focus 1: Support the needs and enrich the lives of individuals with intellectual disabilities. This project directly aligns with Strategic Focus 1 by increasing access, participation, and quality of life for individuals with intellectual disabilities served by RAAI through our Horticulture program. Grant funds will be used to purchase and install raised, accessible garden beds that allow individuals who use wheelchairs to fully participate in gardening activities. These raised beds will enable participants to independently access soil, plant crops, and water plants, significantly increasing their ability to engage in meaningful, hands-on work. By removing physical barriers, the project promotes independence, skill development, and personal achievement for individuals with intellectual disabilities. In addition, the accessible garden design will allow support staff and community volunteers to more effectively assist participants during activities, which will promote shared experience and foster positive, inclusive relationships between participants and members of the community. Funds will also be used to purchase an inclusive swing that can be utilized by all

members of the program, including individuals who use wheelchairs for mobility. This swing will provide an opportunity for participants with varying physical abilities to engage in the same activity together in an inclusive and socially meaningful setting. In addition to encouraging social connection, the swing will offer important sensory movement opportunities. Sensory-based movement is known to support emotional regulation, promote calming, reduce anxiety, and for some individuals, decrease self-injurious behaviors. Together, the accessible garden beds and inclusive swing will expand participation, promote social inclusion, and enrich daily experiences for individuals with intellectual disabilities, directly supporting the fund's goal of enhancing services and programs for this population

DD Residential- Requesting \$8,665.72 for Emergency Preparedness Equipment.

The proposed project is an Emergency Preparedness and Safety Enhancement Initiative focused on strengthening emergency response capacity for adults with developmental disabilities receiving residential services across eleven licensed group homes and two Supervised Apartment Program locations. The project specifically addresses two critical safety needs: the purchase of adaptive emergency response equipment to safely assist residents in the group home setting following non-injury falls, and the acquisition of portable power stations for residents in the Supervised Apartment setting to maintain health, safety, and communication capabilities during severe storms or extended power outages. Individuals with developmental disabilities frequently experience mobility limitations and medical conditions that increase fall risk and create safety concerns when staff are unable to safely assist a resident from the floor without specialized equipment.

Through this project, we aim to reduce injury risk to residents and staff by equipping all eleven group homes with adaptive lifting equipment designed to safely assist individuals who have fallen but are unable to independently stand. Additionally, we seek to ensure continuity of care and resident safety within our Supervised Apartment Programs by providing reliable backup power during emergencies. Portable power stations will allow residents to maintain lighting, communication access, medical devices, and essential supports during power outages. Overall, the project will strengthen emergency preparedness, promote safe response practices, and prevent avoidable hospitalizations or staff injuries resulting from unsafe manual lifting attempts.

Grant funding will be used to purchase adaptive lifting equipment for each of our eleven group homes to support safe response when a resident experiences a fall without injury but cannot be safely assisted from the floor through manual support alone. These devices will allow trained staff to reposition and assist residents safely while maintaining dignity and reducing risk of harm. In addition, funding will support the purchase of twelve portable power stations for our Supervised Apartment Programs. These portable power sources will provide emergency electricity during severe weather events or power outages to sustain lighting, phone charging, emergency communication, and critical health-related equipment until normal power is restored. This project benefits adults with ID/DD residing in our group homes and Supervised Apartment Programs who rely on staff assistance for mobility, safety, and daily living supports. Many individuals supported have balance challenges, aging-related mobility decline, or medical conditions that increase fall risk and limit independent recovery after a fall. Residents living independently within

supervised apartments are also particularly vulnerable during power outages, as disruptions may impact safety monitoring, medication routines, or communication with support staff. This initiative will also support direct support professionals whose safety is improved through access to proper adaptive equipment, as well as families and emergency responders who depend on safe residential environments. Falls and power outages represent two of the most common and high-risk emergency situations within community-based residential disability services. Without adaptive lifting equipment, staff may be forced to wait for emergency medical services or attempt unsafe manual assistance, increasing the likelihood of injury to both residents and caregivers. Similarly, severe storms and infrastructure disruptions can leave individuals without lighting, communication, or access to essential supports, creating heightened anxiety and safety risks. This project proactively addresses these predictable emergencies by ensuring appropriate equipment is readily available, allowing residents to remain safe in their homes while preventing unnecessary emergency room visits or service disruptions.

DD Support Coordination- Requesting \$10,000 for Printers/Scanners for Individuals' real time access

The project is to improve accessibility to individuals with intellectual/developmental disabilities who receive support coordination. Support Coordinators meet individuals with developmental disabilities and their families where it is best for the individual. Funding for portable scanners and printers will significantly enhance access to community services for individuals with developmental disabilities. Many individuals face barriers related to transportation, paperwork management, and digital access, which can delay or prevent enrollment in essential programs such as healthcare, housing, and employment supports. Portable equipment will allow staff to scan, print, and submit documentation directly within homes and community settings, reducing administrative delays and increasing successful service enrollment. This investment promotes equity, supports self-determination, and improves overall service efficiency by meeting individuals where they are. Currently, there are 40 support coordination staff members. A grant of \$10,000 will allow for \$250 for each support coordination staff member to have access to a portable/scanner and supplies.

Portable technology ensures that individuals with intellectual disabilities, who often also experience mobility challenges, sensory sensitivities, or transportation barriers receive equitable access to services. By meeting individuals where they are, the program reduces systemic barriers and promotes inclusive community participation.

Many individuals with intellectual/developmental disabilities face barriers related to transportation and paperwork management. This project will equip support coordinators, who visit individuals in their homes or in the community, with tools to help individuals access their paperwork more quickly and submit needed documents electronically when necessary. This could mean that information needed to retain Medicaid can be submitted at the time of the visit, instead of waiting until the support coordinator is back to the office. It also reduces the risk of misplaced documents.



Crisis Intervention Services Program Updates

March 2026

Crisis Intervention Services, Amy Jindra

The crisis intervention services divisions continue to strive to improve service delivery and access to care. During the month of February, the division director had the opportunity to participate in Crisis Intercept Mapping for service members, veterans, and families in our region. The Crisis Intercept Mapping workshop included nearly 20 community partners and agencies with the focus on how to build better networks of crisis related care for our veteran and service member communities. Also, the division director and emergency services coordinator participated in a training related to QI Folio's auditing platform. We appreciate the Compliance Division's support in developing an audit tool and facilitating the training opportunity.

Assertive Community Treatment (ACT) - Sarah McClelland

In February, both ACT North and ACT South transitioned to using Microsoft Teams for various processes and procedures mandated by our Fidelity Model. ACT is required to keep a “Daily Log” for each client which briefly describes what the client did each day. This is a document that captures 24 hours “look back” in the life of each client and is used daily in our Daily Team Meeting. In addition to the Client Log, ACT has now implemented a monthly staff schedule. This information is used to drive our Daily Team Meeting in which each client is staffed and various aspects of client care evaluated and discussed. ACT is working hard on transitioning to these new processes and procedures in order to obtain higher fidelity to the ACT model and implement feedback provided to ACT North during our TMACT review. This has also assisted staff in having up to date information at their fingertips and has improved and increased our internal communication with one another. We are still in the process of implementing a monthly client calendar, as well as, moving our group chat from iMessage to Teams which we anticipate will occur in March 2026.

ACT also has individuals that will be participating in Art of Recovery in March. In February, several individuals have enjoyed working on pieces they intend to submit to the art show.



As mentioned in January 2026, ACT has a strong focus on growing our program, partnering with community stakeholders, and enrolling additional referred individuals. Our current census is 75 and we intend to grow to 100 clients.

Sunshine Lady House, Crisis Stabilization, Latroy Coleman

The nursing team has hired three PRN staff to assist with programming. One of the three is currently completing onboarding. We are still hiring for another mental health specialist to assist with individual care and groups. The team continues to look for creative ways to boost morale and prompt a positive team environment. We have introduced a song of the day at our morning meetings to inspire and provide motivation for the work ahead.

The program also has introduced using various tools within Microsoft teams to help build communication, assure compliance, and improve service delivery. The Whiteboard features allow the program staff to truly work as a team in completion of various duties.

Emergency Services (ES) – Natasha Randall

During the month of February, Emergency Services (ES) facilitated a professional development opportunity for the Spotsylvania Co-Response Team, which included a ride-along with Albemarle County law enforcement. The Spotsylvania CIRT also participated in the Virginia Crisis Intervention Team (CIT) De-escalation Training held in Fairfax, Virginia. These experiences provided valuable cross-jurisdictional collaboration and enhanced the team's crisis response and de-escalation skills when working with individuals experiencing behavioral health crises.

MEMORANDUM

To: Joe Wickens, Executive Director

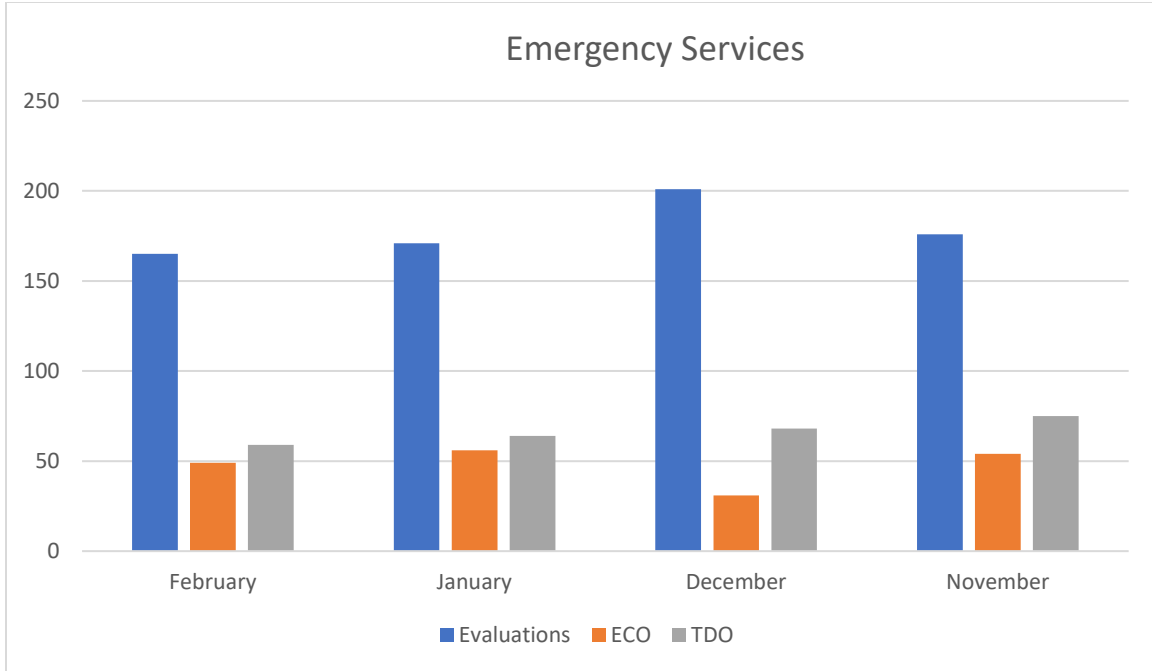
From: Natasha Randall, Emergency Services Coordinator

Date: March 5, 2026

Re: Emergency Custody Order (ECO)/Temporary Detention Order (TDO) Report – February 2026

In February, Emergency Services staff completed 165 emergency evaluations. Of these, forty-nine individuals were assessed under Emergency Custody Orders (ECOs), and fifty-eight Temporary Detention Orders (TDOs) were served. Staff facilitated one admission to Northern Virginia Mental Health Institute and three admissions to Commonwealth Center for Children and Adolescent. Additionally, two individuals were involuntarily hospitalized outside of the agency's catchment area during February.

Please see the attached data reports.



FY26 CSB/BHA Form (Revised: 07/01/2025)

CSB/BHA	Rappahannock Area Community Services Board	Month	February 2026						
1) Number of Emergency Evaluations	2) Number of ECOs			3) Number of Civil TDOs Issued	4) Number of Civil TDOs Executed				5) Number of Criminal TDOs Executed
	Magistrate Issued	Law Enforcement Initiated	Total		Minor	Older Adult	Adult	Total	
	165	25	24		49	58	6	6	

FY '26 CSB/BHA Form (Revised: 07/01/2025)

CSB/BHA	Rappahannock Area Community Services	Reporting month	February 2026	No Exceptions this month →		
Date	Consumer Identifier	3) Special Population Designation <small>(see definition)</small>	1a) Describe "other" in your own words <small>(see definition)</small>	2) "Last Resort" admission <small>(see definition)</small>	3) No ECO, but "last resort" TDO to state hospital <small>(see definition)</small>	4) Additional Relevant Information or Discussion <small>(see definition)</small>
2/8/2026	57452	Adolescent		YES	NO	CCCA
2/15/2026	109098	Adolescent		YES	no	CCCA
2/15/2026	40228	Older Adult with Medical Acuity		Yes	No	NVMHI
2/16/2026	107019	Child		Yes	No	CCCA

MEMORANDUM

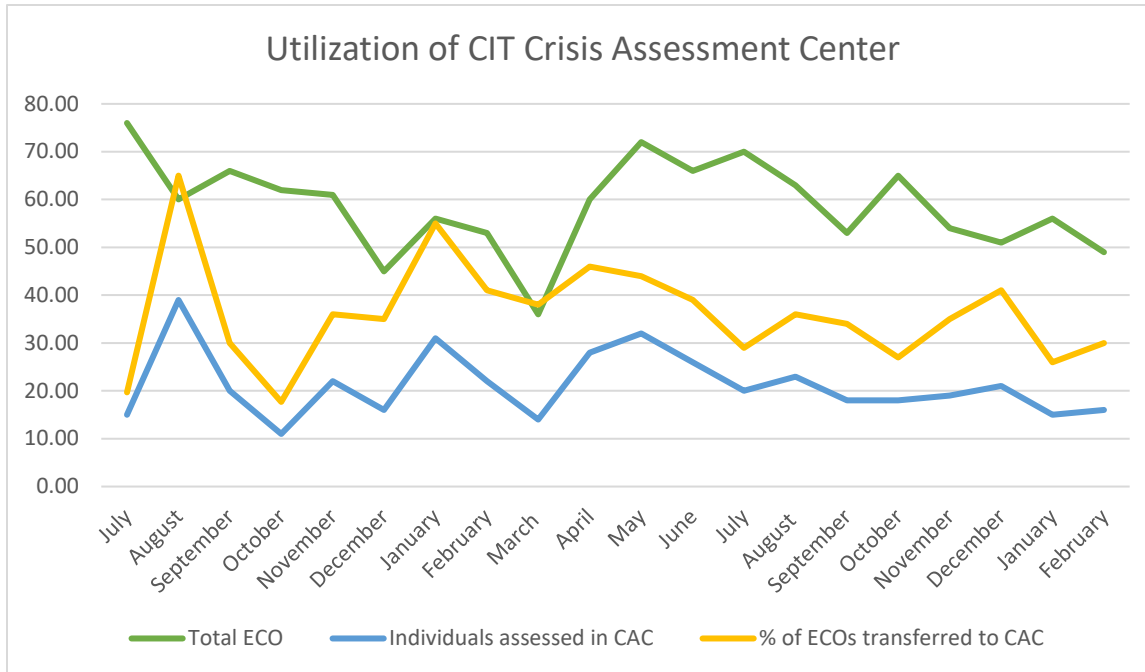
To: Joe Wickens, Executive Director
From: Natasha Randall, LCSW Emergency Services Coordinator
Date: March 5, 2026
Re: CIT and Co-Response Report

The CIT Assessment Center served 16 individuals in the month of February 2026. The number of persons served by locality were the following: Fredericksburg 5; Caroline 2; King George 0; Spotsylvania 2; Stafford 7; and 0 from other jurisdictions.

The chart below indicates the number of Emergency Custody orders by locality, those that were able to be transferred into CAC custody, and those who could have used the assessment center if there was additional capacity:

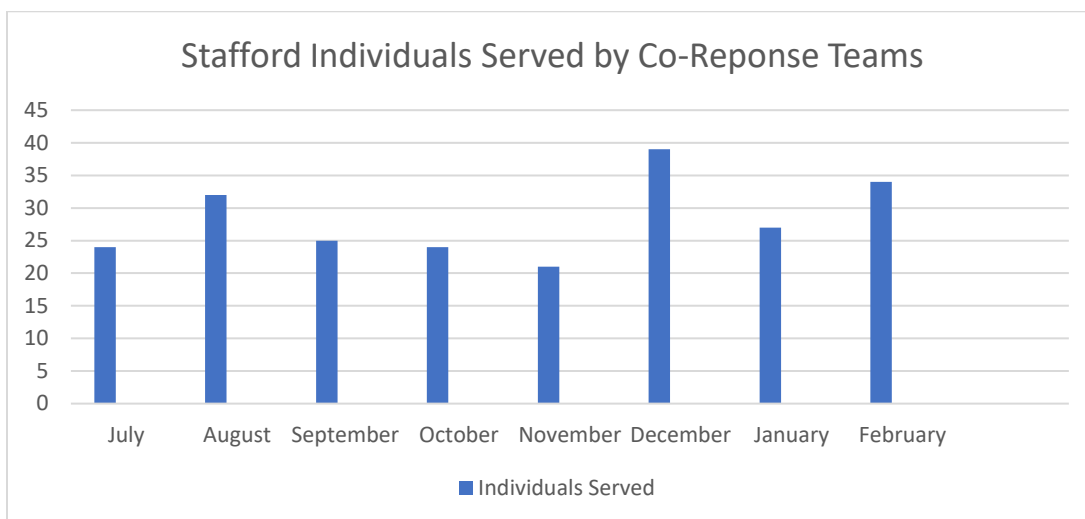
<u>Locality</u>	<u>Total ECO</u>	<u>Custody Transfer</u> <u>to CAC</u>	<u>Appropriate for</u> <u>CAC if Capacity</u>
Caroline	6	2	4
Fredericksburg	16	5	11
King George	0	0	0
Spotsylvania	4	2	2
Stafford	23	7	16
<u>Totals</u>	49	16	33

RAPPAHANNOCK AREA COMMUNITY SERVICES BOARD



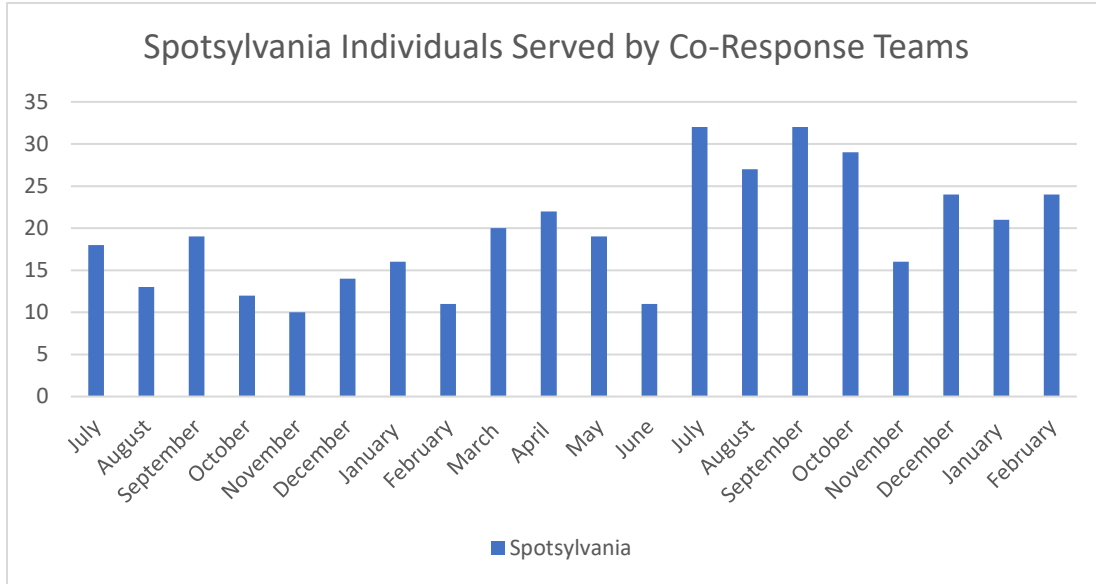
Co-Response

The Spotsylvania Co-Response Team served 21 individuals in the month of February and the Stafford Co-Response team served 27 individuals. The Fredericksburg Co-Response Therapist position remains vacant.



RAPPAHANNOCK AREA

COMMUNITY SERVICES BOARD



CIT Training

In February, an eight-hour CIT dispatcher training was conducted.

Memorandum

To: Joe Wickens, Executive Director

From: Amy Jindra, CIS Director

Date: March 6, 2026

Re: Sunshine Lady House Utilization

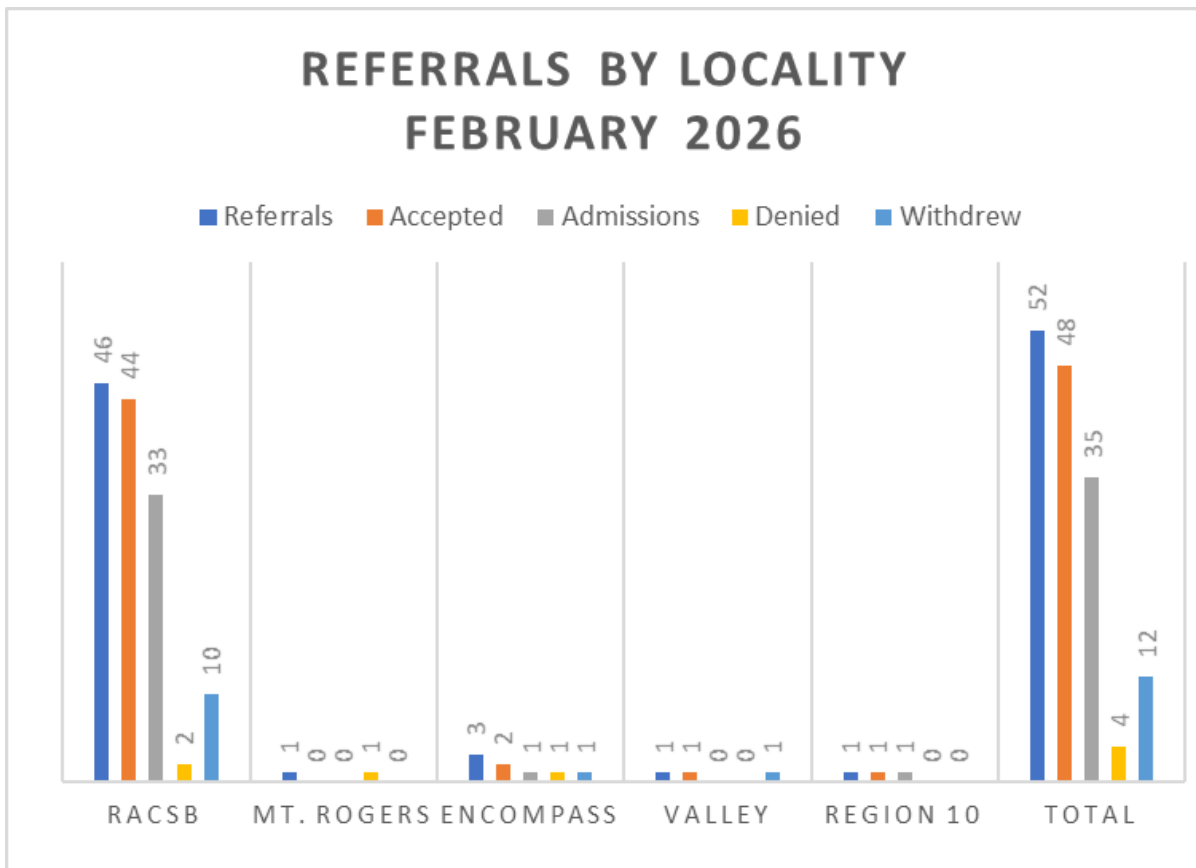
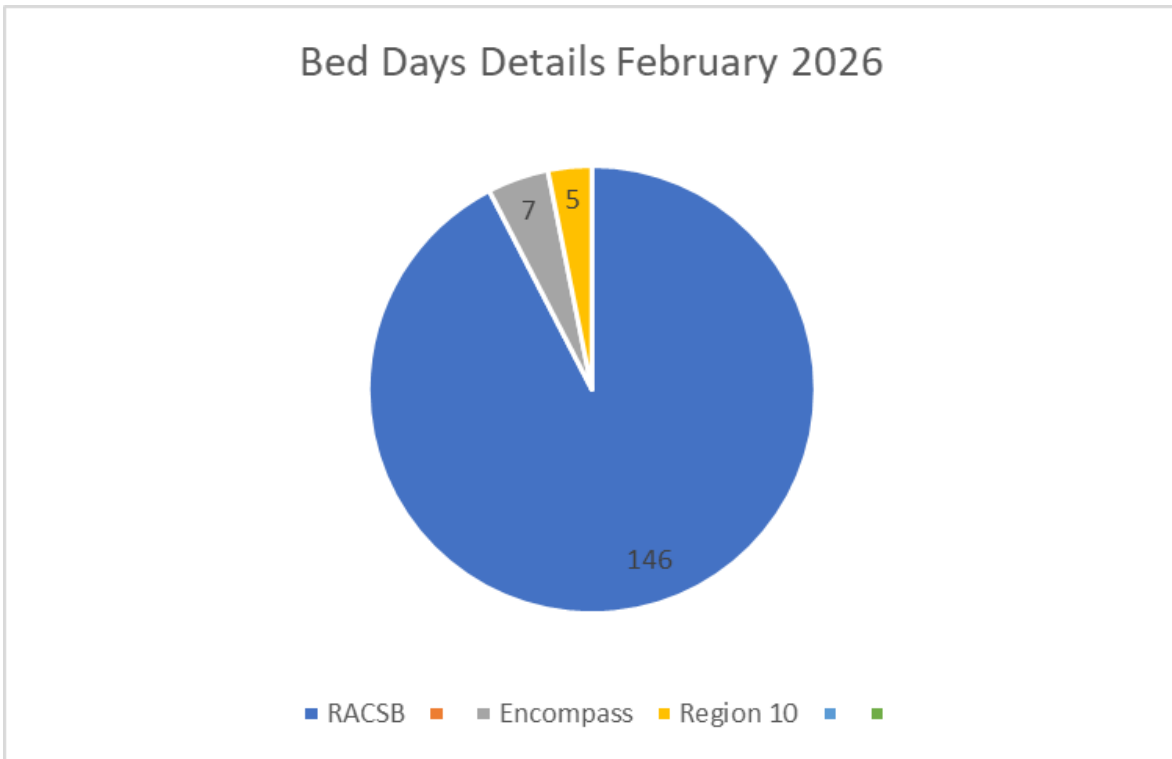
Sunshine Lady House for Wellness and Recovery, is a 12-bed, adult residential crisis stabilization unit. The program provides 24/7 access to services for individuals experiencing a psychiatric crisis. Services include medication management, therapy, peer support, nursing, restorative skill development, crisis interventions, coordination of care, and group support. The program strives to maintain a utilization rate of 75%.

Sunshine Lady House served 42 individuals during the month of February. Of those 42 guests, 7 had been admitted at the end of the previous month. The program received a total of 52 referrals, 46 from RACSB, 1 from Valley CSB, 3 from Encompass, 1 from Mt. Rogers, and 1 from Region 10. The program receives referrals from emergency services therapists in those different localities. Sunshine accepted 92% of referrals made to the program. Of those who did not admit, 3 individuals required extensive medical care, 1 was referred to inpatient detox, 4 engaged in other treatment programs, and 8 declined admission.

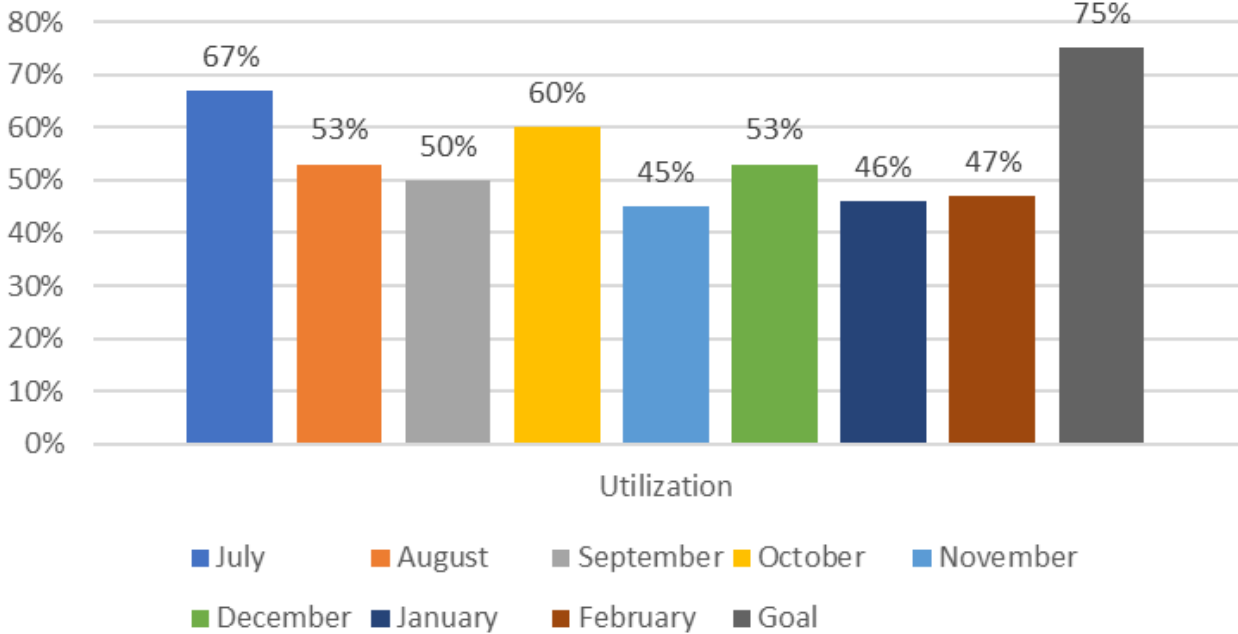
In addition to standard crisis stabilization services, 3 individuals were under observation protocols for substance use withdraw. While not intensive as medically managed detox, observation protocols allow for the program to prepare for more intensive supports within the ASAM 3.7 protocols should symptoms indicate the need.

TBD Solutions facilitated focus groups with 4 RACSB programs and 5 agency partners to gather information and solutions to support utilization of and access to Sunshine Lady House. Partner agencies included Snowden, Stafford Sheriff Department, Rappahannock Creative Health Care, Fredericksburg Police Department, and Department of Veterans Affairs. Kenmore Club, Emergency Services, Mental Health Case Management/Hospital Liaison, and Sunshine Lady House represented RACSB programs.

Below are graphs illustrating the data related to Sunshine Lady House's utilization.



Sunshine Lady House Utilization



To: Joseph Wickens, Executive Director
From: Jacqueline Kobuchi, Director of Clinical Services
Date: 3/6/2026
Re: Report to RACSB Board of Directors for the March Board Meeting

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Outpatient Services

Caroline Clinic - Nancy Love, LCSW

The Caroline Clinic continues to offer two weekly Substance Use groups. Last month, two individuals from group completed treatment and we also saw an increase in substance use referrals. Caroline Clinic clinicians completed 34 intakes in February. Sixteen were completed the same day the individual called in requesting services. Nine adult assessments and nine child and adolescent assessments were scheduled. Staff attended trainings last month on Solution Focused Therapy, Motivational Interviewing, and Compassion- Based Therapies. One of our clinicians represented RACSB at Black Mental Health training event commemorating Black History Month.

Fredericksburg and Children’s Services Clinic - Megan Hartshorn, LCSW

During the month of February, the Fredericksburg Clinic completed 94 intakes with adults seeking outpatient services. Out of the 94 intakes completed, 74 were completed by utilizing Same Day Access. Fifty-one intakes were completed in-person and 43 intakes were completed via telehealth. This was a shift from previous months, as more intakes were completed in-person in comparison to telehealth. The Children’s Services Clinic completed 14 scheduled intakes with children/adolescents. The Children’s Clinic was able to utilize Same Day Access for two children/adolescents via telehealth for children at the outer clinics. The Children’s Services Clinic has a current vacancy for a Child/Adolescent Therapist position and will be conducting interviews in the next month. The Fredericksburg Clinic welcomed two new staff at the front desk and they are in training. We are excited to welcome them to the Fredericksburg team!

King George Clinic - Sarah Davis, LPC

The King George Clinic continues to offer two weekly Substance Use groups and the weekly Wellness Group. This month, group topics included Pros/Cons, Addiction and the Brain, Effects of Alcohol, Stress Management, and Coping with Stress and Anxiety. There were three graduates from the Substance Use groups. The King George Clinic completed 27 new patient intakes during the month of February. Eighteen were completed via Same Day Access. Six were scheduled child and adolescent intakes and three were scheduled intakes. Two King George staff attended a two day training on Dialectical Behavior Therapy as well as a training on Emotional Freedom Techniques. One staff member attended a training on Ethics and Consent, Confidentiality, and Minors.

Stafford Clinic - Lindsay Steele, LCSW

During the month of February, the Stafford clinic met with clients in person, as well as virtually. The clinic has continued with Same Day Access on Mondays, Tuesdays, Wednesdays and Thursdays. Stafford clinicians completed 34 intakes for adults. Twenty-six of



those intakes were completed through Same Day Access and eight of those were scheduled due to being hospital discharges or in a priority population. Ten child/adolescent intakes were completed in the month of February. The child/adolescent therapist discharged three clients who successfully met their goals during the month of February. The child/adolescent therapist has continued to engage in EMDR consultation and one clinician completed the ASAM training.

Medical Services - Jennifer Hitt, RN

During the month of February, Outpatient Medical Services completed 114 new patient evaluations for medication management. Dr. Whipkey and Dr. Williams continue to cover the Mobile OBOT program as we are still in the process of interviewing and hiring a NP for the program. Second interviews will take place in March with the goal to submit a hire packet.

Case Management - Adult - Patricia Newman

The adult mental health case management team would like to celebrate the achievements of an individual enrolled in our services. This individual has been residing in RACSB's Supervised Apartment program since 2018. This individual has gained the independent living skills necessary to take the next step. Last week, with the help of his case manager, residential specialist, Kenmore Club assistant coordinator and some friends from the Kenmore Club, they were able to move into their very own apartment. Their case manager obtained donations from Habitat for Humanity, for all the furniture necessary to furnish their whole apartment. It was certainly exciting to see how excited they were to be transitioning to their own home.

Child and Adolescent Support Services - Donna Andrus, MS

In the month of February, Child and Adolescent Case Management continued to see an increase in number of kids at the Commonwealth Center for Children and Adolescents (CCCA), the only state hospital for children and adolescents in Virginia. In February, there were two discharges and three new admissions, one of which was a readmission within one week of discharge. At the end of February, we had 4 kids at the Commonwealth Center for Children and Adolescents. Our staff continues to work with CCCA staff on discharge planning and efforts to prevent readmissions. We continue to have difficulty identifying residential facilities to take children with challenging behaviors. We did have a successful discharge home from a local group home in February for a teen boy. Our staff worked closely with the individual, his parent, and the group home staff to set up discharge services to support the transition home after 8 months out of the home with placement in the juvenile detention center and then step down to the local group home.

Substance Use Services - Eleni McNeil, LCSW

During the month of February, the SUD program continued to interview applicants for the mobile OBOT's nurse practitioner position and began reviewing applications for the CSAC/Therapist position for the mobile OBOT program. The SUD Services Coordinator attended community stakeholder meetings including Save One Life FXBG and an open house for True North, a new treatment facility opening for men with substance use disorders in Fredericksburg. The SUD program also collaborated with Avenues Recovery and the new owner of Homes Empowering Recovery/Conscious Healing on their newest substance use treatment programs. A representative from the makers of Vivitrol presented on vivitrol treatment to enhance education amongst OBOT program personnel. Those served in the month of February in Fredericksburg SUD programs is as follows: Project LINK-34; OBOT-54; ARTS Case Management-42; SUD Outpatient (Fredericksburg)-73; SUD Peer Services- 14

Specialty Dockets - Nicole Bassing, LCSW

During the month of February, Adult Recovery Court welcomed two new participants, graduated three, and had no terminations. We currently have 36 active participants. The Rappahannock Veterans Docket welcomed one new participant, graduated three, and had no terminations. We currently have 14 active participants. The Spotsylvania Behavioral Health Docket did not add any new

participants or have any graduates this month, but had two unfortunate terminations. We currently have six active participants. The Juvenile Recovery Court did not add any new participants, did not have any graduations or terminations and is at six active participants. The Fredericksburg Therapeutic Docket currently has one active participant with no new clients added this month.

Jail and Detention Services - Portia Bennett

In February, a total of 33 residents were seen at the Rappahannock Juvenile Center for crisis, therapeutic, and medication management services. At the Rappahannock Regional Jail, a total of 112 individuals received crisis and/or therapeutic services, and total of 80 individuals received substance use services. The Psychiatric Nurse Practitioner saw a total of 74 individuals and 270 individuals were prescribed psychotropic medications. Tricia Jackson, Jail Based Mental Health Therapist, obtained her license as a Licensed Clinical Social Worker. Janet Victory, Jail Based Mental Health Case Manager, received her five-year service award.

MEMORANDUM

TO: Joe Wickens, Executive Director

FROM: Patricia Newman – Mental Health Case Management Supervisor
Elizabeth Wells – Lead State Hospital Liaison & NGRI Coordinator
Chanda Bernal – Adult Mental Health Case Manager

PC: Brandie Williams – Deputy Executive Director
Jacqueline Kobuchi, LCSW – Clinical Services Director
Lacey Fisher Curtis – Community Support Services Director
Amy Jindra – Crisis Intervention Services Director
Nancy Price – MH Residential Coordinator
Sarah McClelland - ACT Coordinator
Jennifer Acors – Coordinator Developmental Services Support Coordination

SUBJECT: State Hospital Census Report

DATE: March 17, 2026

State Hospital	New	Discharge	Civil	NGRI	Forensic	EBL	Total Census
Catawba Hospital		1					0
Central State Hospital	1	1		1			1
Eastern State Hospital		1					0
Northern Virginia Mental Health Institute	1						1
Piedmont Geriatric Hospital		3	3			2	3
Southern Virginia Mental Health Institute				1			1
Southwestern Virginia Mental Health Institute							0
Western State Hospital	5	2	3	4	14	2	21
Totals	7	8	6	6	14	4	27

Extraordinary Barriers List:

RACSB has four individuals on the Extraordinary Barriers List (EBL) who are hospitalized at Piedmont Geriatric Hospital (PGH) and Western State Hospital (WSH). Individuals ready for discharge from state psychiatric hospitals are placed on the EBL when placement in the community is not possible within 7 days of readiness, due to barriers caused by waiting lists, resource deficits, or pending court dates.

Piedmont Geriatric Hospital

Individual #1: Was placed on the EBL 2/20/26. Barriers to discharge include identifying and being accepted to a nursing home. This individual utilizes a wheelchair, presents with confusion at times and requires additional support as they can become combative when being redirected by staff. This individual's family is supportive and involved. Referrals are being sent out to nursing facilities and this individual will discharge once accepted to a facility.

Individual #2: Was placed on the EBL 3/5/26. Barriers to discharge include working through the guardianship process as well as identifying and being accepted to an assisted living facility (ALF). It has been determined that this individual is not able to make decisions on their own and will require a public guardian as the hospital has not been able to make contact with any family. Their treatment team will be requesting the appointment of a public guardian. Their treatment team is exploring potential ALFs and this individual will discharge once a guardian is in place and they are accepted to an ALF.

Western State Hospital

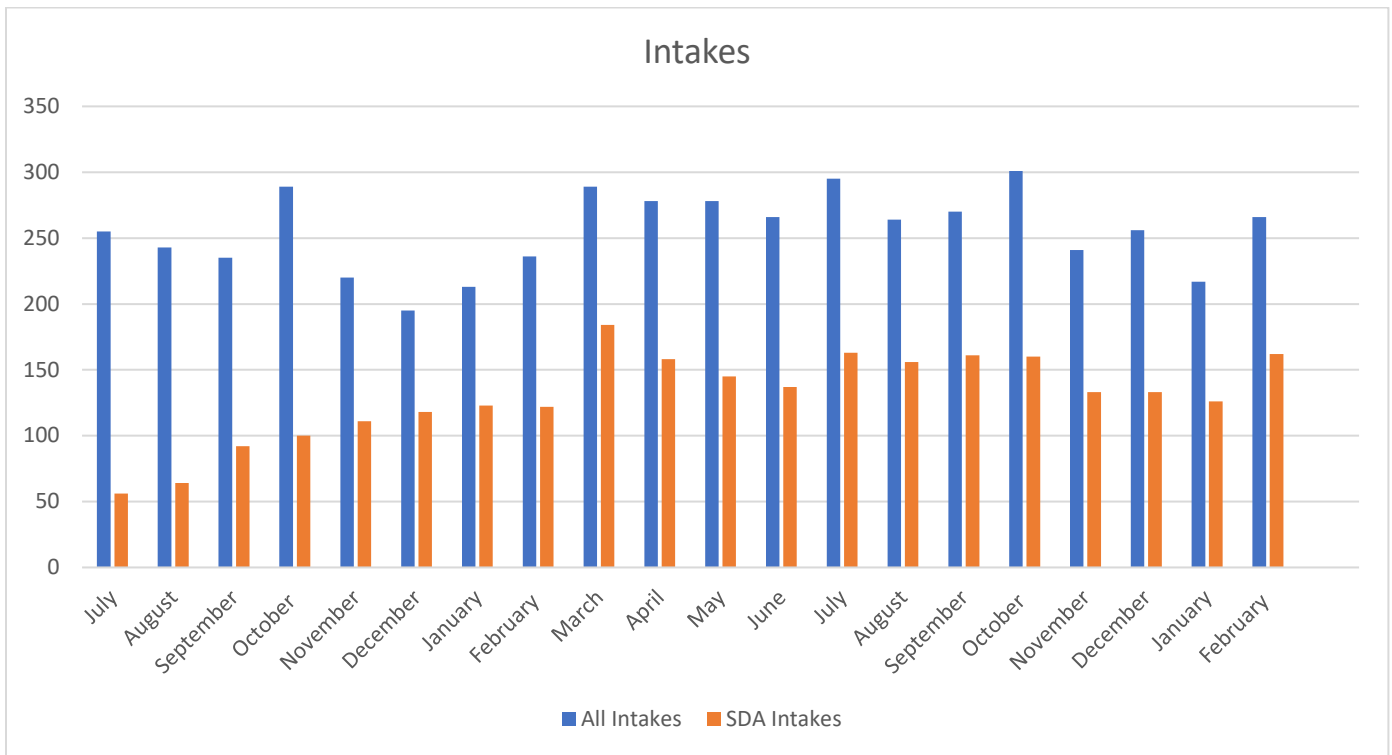
Individual #3: Was placed on the EBL 9/2/2025. Barriers to discharge include identifying and being accepted to an assisted living facility. This individual has a diagnosis of a neurocognitive disorder and is not able to reside independently. This individual's treatment team recently determined that this individual would be best supported in a memory care setting. This individual has been denied admission to some facilities due to a history of aggression as well as facilities not being able to meet their needs. Their team continues to send out referrals to assisted living facilities that have memory care units. This individual will discharge to the community once accepted to an ALF. It is likely that this individual will require Discharge Assistance Program (DAP) funds to help to pay for their care in the community.

Individual #4: Was placed on the EBL 1/14/26. Barriers to discharge include working through the Not Guilty by Reason of Insanity (NGRI) process. This individual has been completing passes to the community at Gateway Homes NGRI Group Home. Their passes have been successful and they will discharge to Gateway Homes when their Conditional Release Plan is approved by the Court in April.

MEMORANDUM

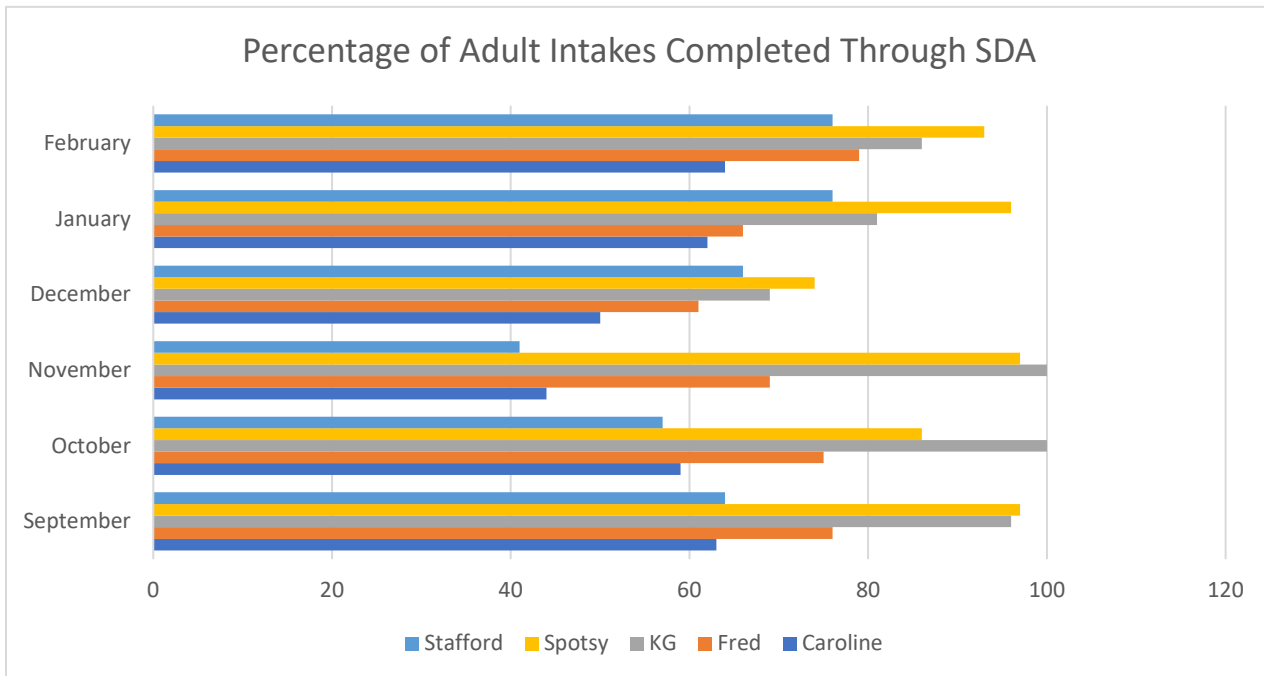
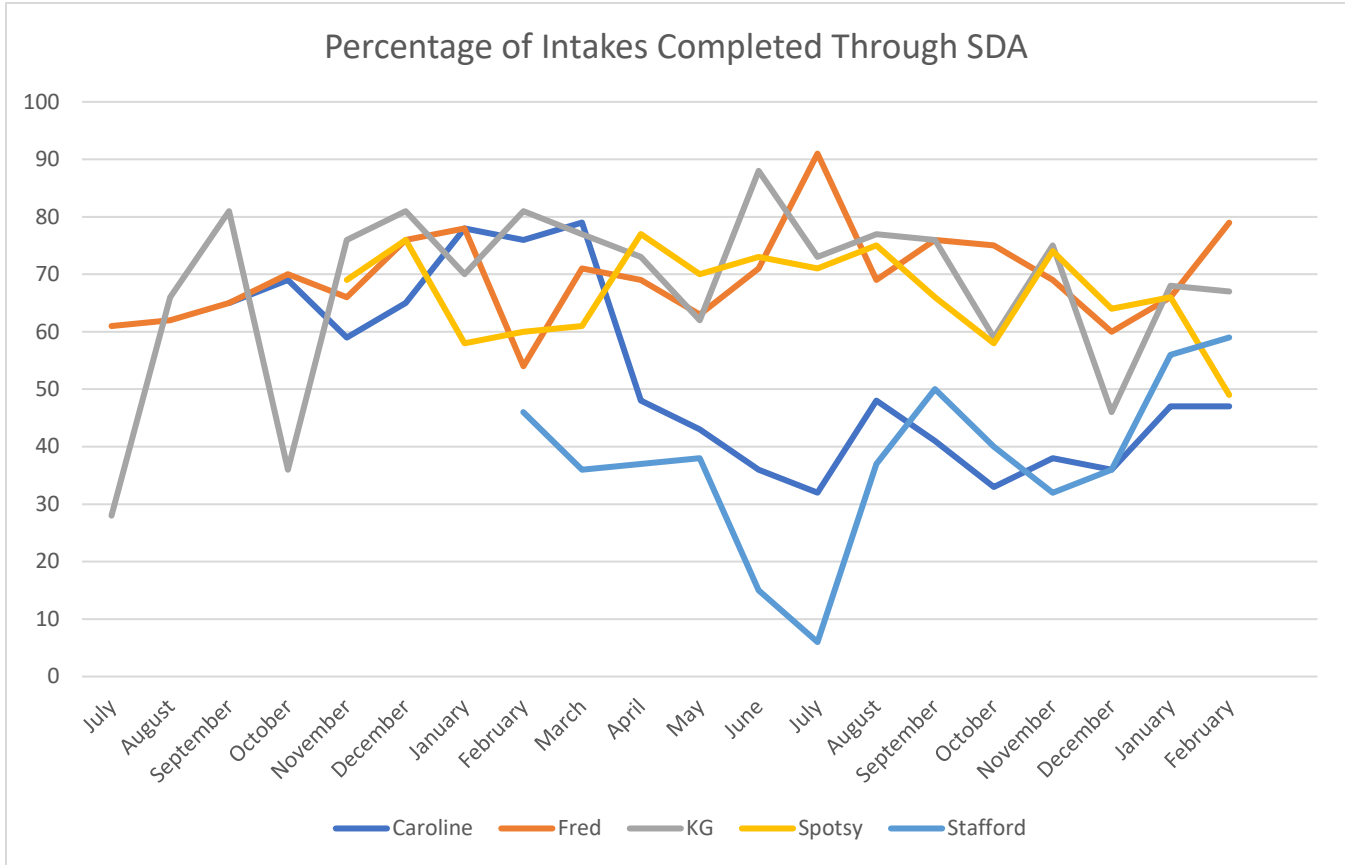
To: Joseph Wickens, Executive Director
From: Jacqueline Kobuchi, LCSW, Director of Clinical Services
Date: March 6, 2026
Re: Same Day Access

Below is data on the number of intakes completed at our outpatient clinics, and the percentage of those completed through Same Day Access. Individuals not seen through SDA received scheduled appointments, many times at their request or based on their needs. We saw an increase in demand for services in February, especially for children.



RAPPAHANNOCK AREA

COMMUNITY SERVICES BOARD



RACSB
Program Update Report
Compliance
February 2026

Incident Reports

- There were 252 Incident Reports entered into the Electronic Incident Report Tracker during the month of February. This is a decrease of 6 from January and an increase of 17 compared to December. All incident reports submitted were triaged by the compliance team.
- The top three categories of reports submitted in February were Health Concerns (101 reports), Individual Served Injury (38 reports), and Individual Served Safety (29 reports).
- The Compliance team entered 24 incident reports into the Department of Behavioral Health and Developmental Services (DBHDS) electronic incident reporting system during the month of February (20-Level 2, 4- Level 3). This was a decrease of 14 from the number of submitted reports during the month of January (24-Level 2, 14- Level 3), and a decrease of 11 from the number of submitted reports during the month of December (28-Level 2, 7-Level 3).
- There were two reports elevated to care concerns by DBHDS during February. Both reports related to a health concern (UTI) for 1 individual. Care concerns are reports that, based on the Office of Licensing's review of current serious incidents and review of other recent incidents related to an individual, result in recommendation that the provider consider re-evaluating an individual's needs and consider reviewing/updating the individual's current support plan. DBHDS recommends providers also review results of root-cause analysis completed on behalf of individuals and take the opportunity to determine if systemic changes (such as revisions to policies or procedures) and/or risk management and/or quality improvement plan updates are needed.
- DBHDS requires the completion of a root cause analysis for selected incident reports. The root cause analysis must be conducted within 30 days of staff's discovery of the incident. The compliance team requested specific programs, based on submitted incident reports, to complete required root cause analysis reports. A total of 28 root cause analyses reports were requested in the month of February; a decrease of 8 from the amount requested in January, and a decrease of 6 from those requested for the month of December. A total of 4 expanded root cause analyses reports were requested in February (these are more expansive reports usually requested after a series of serious incidents involving a specific individual).

Human Rights Investigations:

- The Compliance team did not have to conduct any human rights investigations in February.

Internal Reviewers:

- The Compliance Team provided consult to Healthy Families regarding re-opening an individual for services after their Electronic Health Record episode had already been closed.
- The Compliance Team completed an exit audit for a vacating RAAI staff member in February.
- As part of the Quality Improvement Plan, the Compliance team followed up with 5 different programs/departments to ensure corrective measures were completed and sustained for citations previously issued by DBHDS. Check-ins for corrective processes occur at 3-month and 6-month intervals following Corrective Action Plan (CAP) submission to DBHDS for issued citations. In February, 57 follow ups were completed (4 3-month check ins; 53 6-month check ins). Evidence of correction for all programs/departments was received, filed, and logged for each citation. Additionally, all submitted CAPs were deemed to be effective in resolving cited deficiencies; no CAP amendments were required to be submitted to DBHDS.
- The Compliance team began preparing for CARF by conducting pre-reviews for eligible charts, reviewing program policies, and reviewing accessibility documentation.

External Reviewers:

- Compliance team received and responded to 11 external requests for documentation from 6 different insurance providers seeking information for 56 different individuals' records.
- Compliance team received 3 communications throughout the month of February from Brian Dempsey, DBHDS Incident Management Specialist, regarding serious incident reports.

Complaint Call Synopsis

- The Compliance team did not receive any complaints in the month of February.

Special Projects

- QI Folio
 - The Compliance team scheduled follow up for the next phase of the QI Folio project (initiating its use for DD Residential Services). User guides for both Emergency Services and DD Residential Services have been prepared and uploaded in the Compliance Policy and Procedure section in Policy Pro.
- Facility and Grounds
 - The Compliance Team developed a maintenance tracker process and offered training to staff on how to submit requests for program maintenance needs.
 - The Compliance team checked all program cameras to ensure feeds were available and to ensure recording functionality was intact. Issues were reported to IT for remedy.

- Trainings
 - The Compliance team conducted an Incident Report Training on February 20, with Stafford RAAI staff.
 - The Compliance team conducted a CPR/First Aid/AED training on February 4.
 - The Compliance team conducted a Person-Centered Thinking Training on February 12, and 13.
 - The Compliance team conducted a Q-tip training on Root Cause Analyses on February 11, and a Q-tip training on the Maintenance Tracker on February 26.
 - The Compliance team attended DBHDS's Regional Nursing Meeting on "Heart Disease" on February 20.
 - The Compliance Team researched and provided resource material to Support Coordination in reference to completing specific fields on a Critical Incident Report.
- Pre-Program Audits
 - Compliance Specialist reviewed 30 quarterlies and 7 Individual Service Plans (ISPs) for ID/DD Residential Programs during the month of February. Feedback related to any discrepancies notes was provided to the group home supervisor and assistant coordinators.

MEMORANDUM

To: Joseph Wickens, Executive Director
From: Stephanie Terrell, Director of Compliance
Date: March 1, 2026
Re: 2nd Quarter FY 2026 Incident Report Review

The 2nd quarter incident summary report provides an overview of incident reports submitted by Rappahannock Area Community Services Board (RACSB) staff during the months of October 1, 2025, through December 31, 2025. The purpose of the report is to communicate information about trends, remain vigilant for emerging issues, and use data to plan, prioritize and implement preventative and proactive initiatives.

The population includes all individuals receiving services by the RACSB, which includes Mental Health (MH), Substance Use (SU), Developmental/Intellectual Disability (DD), and Prevention Services. RACSB provided services to 7,720 individuals, unduplicated by service area, from October 1, 2025 through December 31, 2025.

Compliance Staff received and triaged 762 Incident Reports from October 1, 2025 through December 30, 2025. This is an overall decrease of 46 reports from last quarter and an increase of 48 reports when compared to the 2nd quarter of FY2025. Of those 762 incident reports received, 134 incidents were reported to the Department of Behavioral Health and Developmental Services (DBHDS) through the Computerized Human Rights Information System (CHRIS) (96 Level 2, 26 Level 3, 12 Abuse/Neglect/Exploitation (ANE)).

Compliance staff triaged all incident reports into one of four categories.

1. **N/A** – these reports do not fit into DBHDS definitions of a serious incident. Incidents of this sort may be a staff having to report a child protective or adult protective case to the Department of Social Services, or an incident which occurs when the individuals is not in the provision of care, such as when a report is received by a Support Coordinator regarding an individual who resides with parent/guardian or a private provider.

DBHDS categories of serious incidents

2. **Level I:** a serious incident that occurs or originates during the provision of a service or on the premises of the provider that do not result in significant harm to individuals, but may include events that result in minor injuries that do not require medical attention, or events that have the potential to cause serious injury, even when no injury occurs.
3. **Level II:** a serious incident that occurs or originates during the provision of a service or on the premises of the provider that results in a significant harm or threat to the health and safety of an individual that does not meet the definition of a Level III serious incident. Level II serious incident also includes a significant harm or threat to the health or safety of others caused by an individual.
4. **Level III:** a serious incident whether or not the incident occurs while in the provision of a service or on the provider's premises and results in:
 - 1) Any death of an individual;
 - 2) A sexual assault of an individual;
 - 3) A serious injury of an individual that results in or likely will result in permanent physical or psychological impairment;
 - 4) A suicide attempt by an individual admitted for services that results in a hospital admission.

In addition to the 4 identified categories, DBHDS has identified seven specific health conditions which could result in a higher risk of death for individuals with intellectual and developmental disabilities. These health care concerns, which DBHDS classifies as the "fatal seven" include: Aspiration, Sepsis, Constipation, Dehydration, Falls, Seizures, and Pressure Injuries. Approximately 40% of all incident reports received this past quarter noted health concerns.

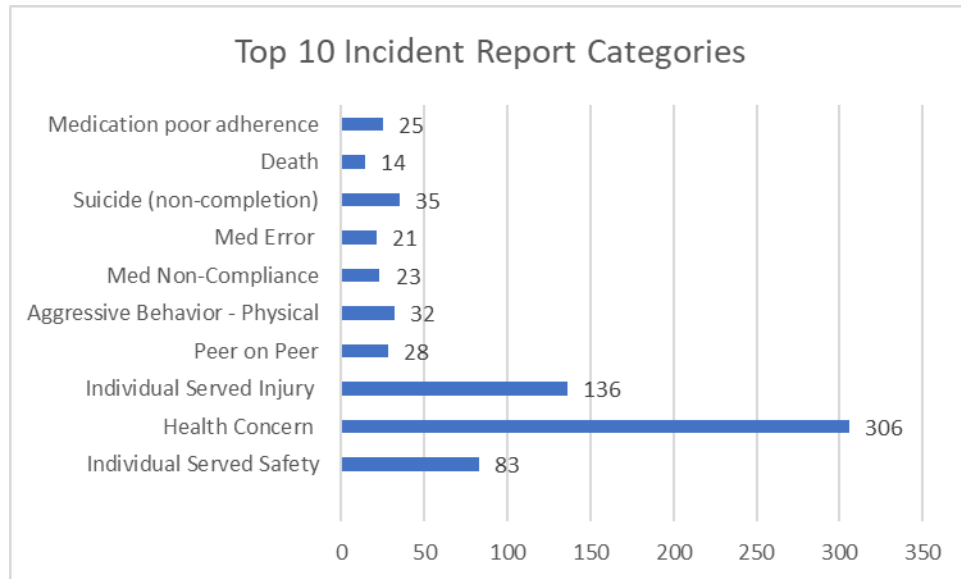
In addition to notifying the Compliance Team, program supervisors, and coordinators, staff must also notify the individual's parent/guardian/authorized representative, as appropriate, regarding an incident when it occurs. Verification of the notification and the parent/guardian/authorized representative response is to be included on the incident report.

Below is a list of the incident categories and the definition:

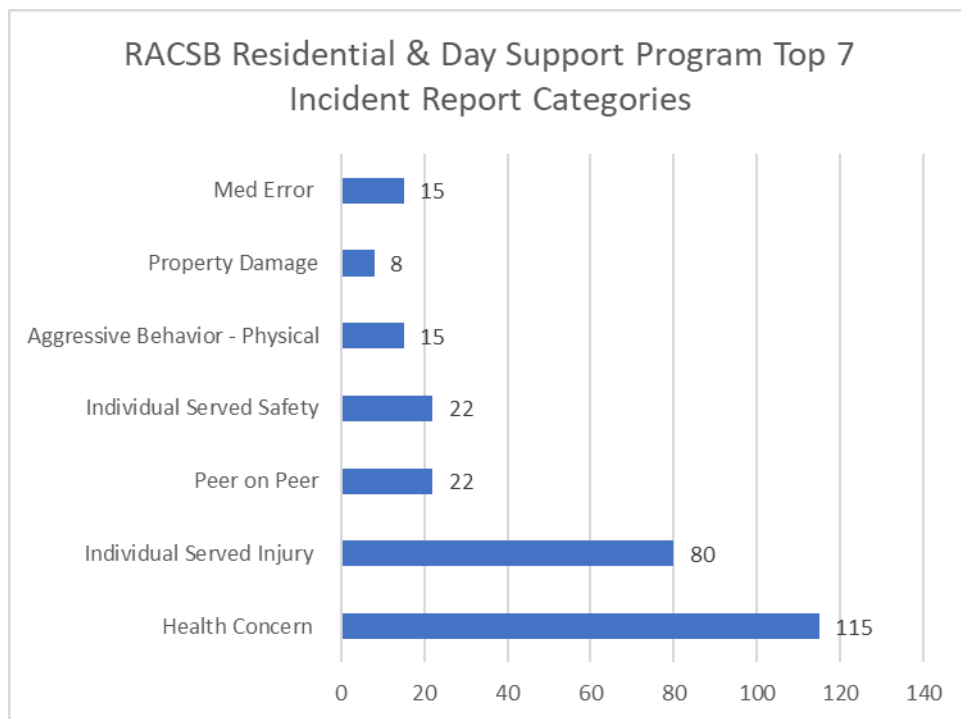
- Aggressive Behavior - Physical - hit, slap, push, shove, pull hair, spit, bite, intimidate, demean, threaten, curse etc...
- Aggressive Behavior - Verbal - yelling, screaming, intimidate, demean, threaten, curse etc...
- Individual Safety - situations that may cause a safety risk for individuals served involving physical environment or structures (faulty equipment, smoking.)
- Individual Injury - situations that may cause a safety risk for individuals served involving minor injury such as a scraped knee
- Health Concerns - individual served exhibiting health concerns, i.e. possible seizure activity, sick, sudden weight +/-, etc.
- Elopement/Wandering - unexpectedly leaving program/premises with possible risk to safety
- Biohazardous Accident - needle stick or instance requiring testing of individual served or staff
- Infection Control - lack of infection control and use of universal precautions in relation to risk of non-life-threatening communicable diseases i.e. Flu, Lice... etc...
- Exposure to Communicable Diseases - instance of exposure due to lack of infection control and/or use of universal precautions in relation to risky communicable diseases i.e. TB, HIV/AIDS, HEP A, B, C or MRSA...
- Vehicle Accident - Accident of RACSB or personal vehicle while delivering services. This requires additional paperwork and follow up to protocol contact Human Resources & Supervisor
- Peer-on-Peer - means a physical act, verbal threat, or demeaning expression by an individual against or to another individual that causes physical or emotional harm to that individual. Examples include hitting, kicking, scratching, and other threatening behavior.
- Property Damage - damage to property
- Weapon Use/Possession - Weapons are not allowed in any RACSB facility. Knives, carpet knives, swords, guns etc...
- Staff Injury - injury to staff- ensure proper HR forms are completed
- Use of Seclusion/Restraint - if emergency intervention required to deescalate threatening behavior
- Med Non-Compliance - not following medication regime- staff attempt evident- non-compliance
- Med Error - Staff additionally to complete med error report. error has been made in administering a medication to an individual (wrong - med, individual, route, dose, time)
- Possession of Illicit/Licit Substance - possession of illegal or non-prescribed drug - possible intent of abuse
- Sexual Assault - is an act in which a person intentionally sexually touches another person without that person's consent, or coerces or physically forces a person to engage in a sexual act against their will
- Suicide/Suicide Attempt - is the act of intentionally causing one's own death/is the act of intentionally unsuccessfully trying to cause one's own death
- Sentinel Events - An unexpected occurrence involving death or serious physical or psychological injury, or the risk thereof - warrants immediate investigation and response
- Other - incident which does not fit into a category above

Type	2nd quarter FY2025	1st quarter FY2026	2nd quarter FY2026	RACSB Residential & Day Support Programs
Accidental Overdose	0	2	3	0
Aggressive Behavior - Physical	25	36	32	13
Aggressive Behavior - Verbal	18	10	9	3
Bio hazardous Accident	0	0	0	0
Elopement/Wandering	8	11	5	0
Exposure to Communicable Diseases	0	0	0	0
Health Concern	256	310	306	115
Individual Served Injury	71	117	136	80
Individual Served Safety	89	76	83	22
Infection Control	0	3	0	0
Med Error	28	21	21	15
Med Non-Compliance	32	30	23	4
Medication poor adherence	14	36	25	1
other	0	0	0	0
Peer on Peer	60	65	28	22
Possession of Illicit/Licit Substances	3	0	0	0
Property Damage	13	9	10	8
Sentinel Event (death)	6	11	14	1
Self-Injurious Behavior (SIB)	14	13	10	3
Sexual Assault	2	6	4	1
Staff Injury	12	5	5	4
Suicide (non-completion)	32	29	35	1
Use of Seclusion/Restraint	1	1	0	0
Vehicle Accident	25	12	9	3
Weapon Use/Possession	0	1	1	0
Missing Person	5	2	3	1
Total	714	808	762	297

(Table 1) The table above depicts the total number of incident reports submitted across all RACSB locations and the subset of programs in which the incident is likely to occur on RACSB premise or during provision of services from October 1, 2025, through December 31, 2025. The column labeled “Residential and Day Support Programs” includes all ID/DD Residential Programs, MH Crisis Stabilization, MH Supervised Apartment Program, Rappahannock Adult Activities, Psychosocial Rehabilitation Program and the Boarding House Program.

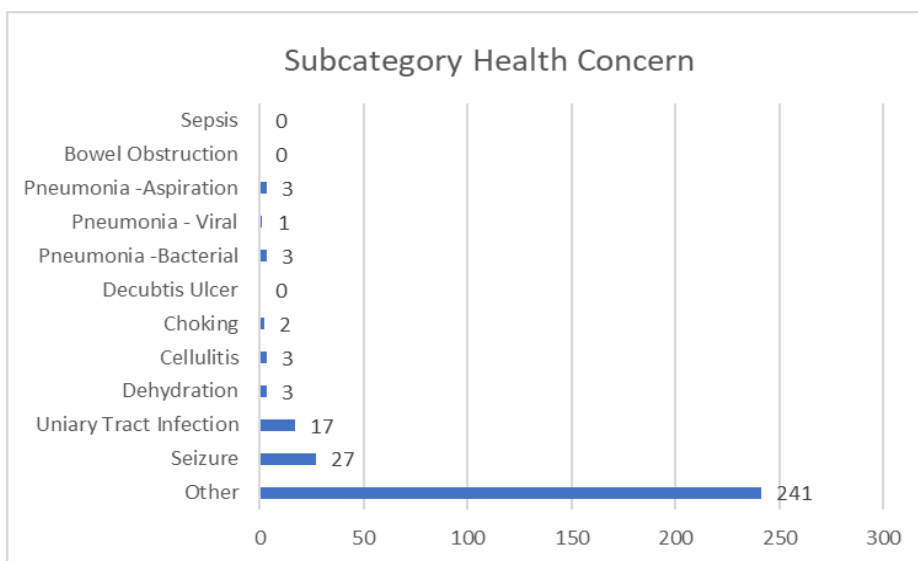


(Table 2) The chart above depicts the top ten incident categories with the highest occurrences across all RACSB Programs reported October 1, 2025, through December 31, 2025.



(Table 3) The chart above depicts the top seven incident categories for RACSB Residential & Day Support Program reported October 1, 2025, through December 31, 2025.

When compared to previous quarters, Health Concerns continues to be the category with the highest number of incidents. Health Concern incidents reported this quarter show an increase of 50 when compared to the same time period last fiscal year. The current quarter, the previous quarter and the same time period last fiscal year include similar health related incidents such as colds, flu, seizures, pneumonia, decubitus ulcer, choking, cellulitis, minor cuts, scratches, scrapes, vomiting, or diarrhea. There was a noted uptick in flu cases this quarter. Within the Health Concerns category, for this quarter, the top three reported subcategories are (241) Other, (27) Seizures, and (17) Urinary Tract Infections.

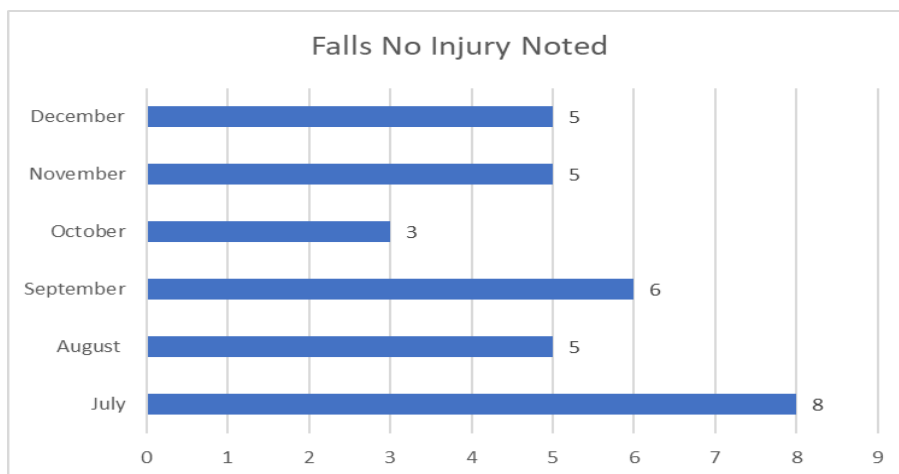


(Table 4) The chart above depicts the number of incidents submitted across all RACSB programs for the subcategories listed under the Health Concerns category during the time period of October 1, 2025, through December 31, 2025.

Based on review of the 27 incident reports submitted for seizures, there were four individuals that had more than one incident reported submitted. One individual had 5 different incidents of seizure activity during the quarter. Each of the individuals that experienced more than one incident of seizure activity this quarter have a medical diagnosis of a seizure disorder and take medications in an effort to control seizures.

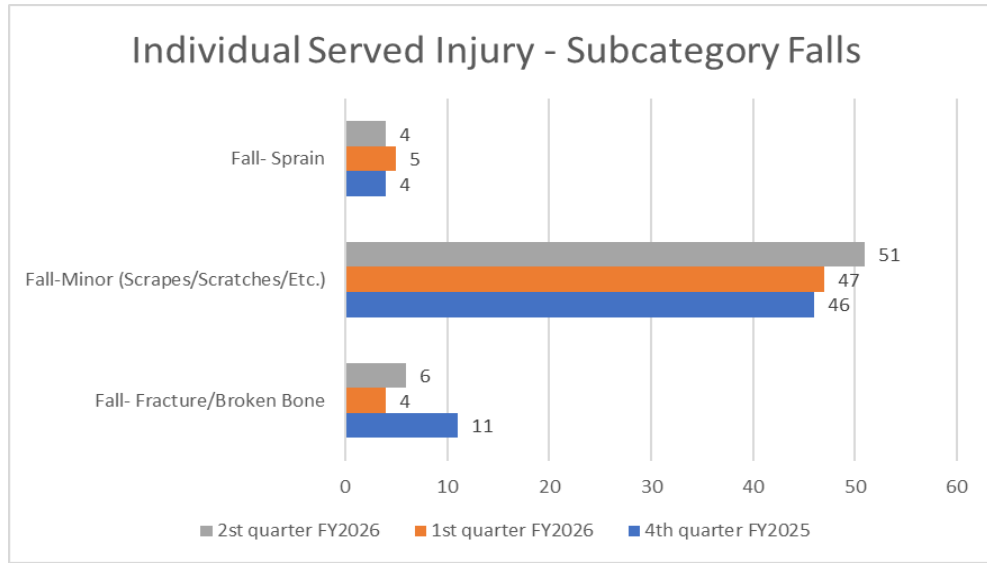
From July 1, 2025 to December 31, 2025, there have been five reported incidents of choking. Two of the incidents occurred during this quarter. One incident was reported by ID/DD Residential and one was reported by ID/DD Support Coordination. Both incidents involved different individuals choking during meal time, but only 1 required physical intervention/evaluation by EMTs. In review of the choking incidents, there were no noted trends.

Fourteen of the 115 health concerns reported by the subgroup of RACSB programs fell into one of the fatal seven health care concerns (aspiration, sepsis, falls, dehydration, seizures, pressure injuries, and constipation) identified by the Department of Behavioral Health and Developmental Services. The incident reports submitted consisted of two for diagnosis of aspiration and 12 for incidents involving a seizure.



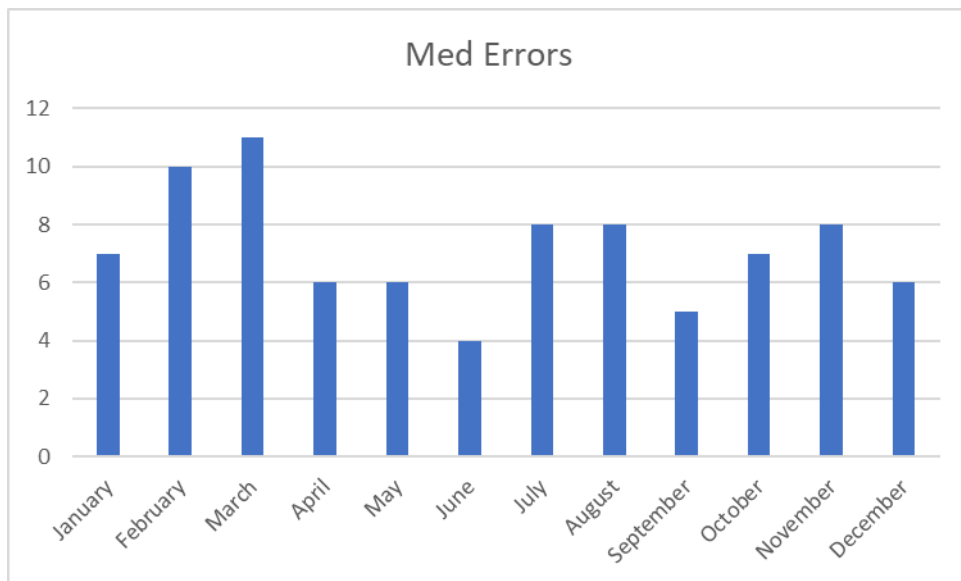
(Table 4) The table above depicts the number of incidents submitted across all RACSB programs for the subcategory of falls listed under the Individual Served Safety category during the time period of July 1, 2025, through December 31, 2025.

There were 13 falls reported during this quarter that did not result in injury. This is a decrease of 6 from the previous quarter and a decrease of 1 from the same time period last fiscal year. The only trend in these 13 reports is that they were all reported out of DD services (2 from ID/DD Residential, 2 from RAAI, and 9 from ID/DD Support Coordination).



(Table 5) The table above depicts the number of incidents submitted across all RACSB programs for the subcategories of falls listed under the Individual Served Injury category during the time period of October 1, 2025 through December 31, 2025, the 1st quarter of FY26, and 4th quarter of FY25.

There were 61 falls reported during this quarter that resulted in injury. This is an increase of five from the previous quarter. Thirty of those falls occurred during the provision of services; however, the majority of the falls resulted in a minor injury, such as scratches or scrapes. Six of the reported falls resulted in a fracture, only 1 of which occurred during provision of services. No falls resulting in a sprain were reported for the quarter during provision of services. One individual had 4 falls during the quarter related to progressing health issues. Otherwise, no apparent trends were noted.



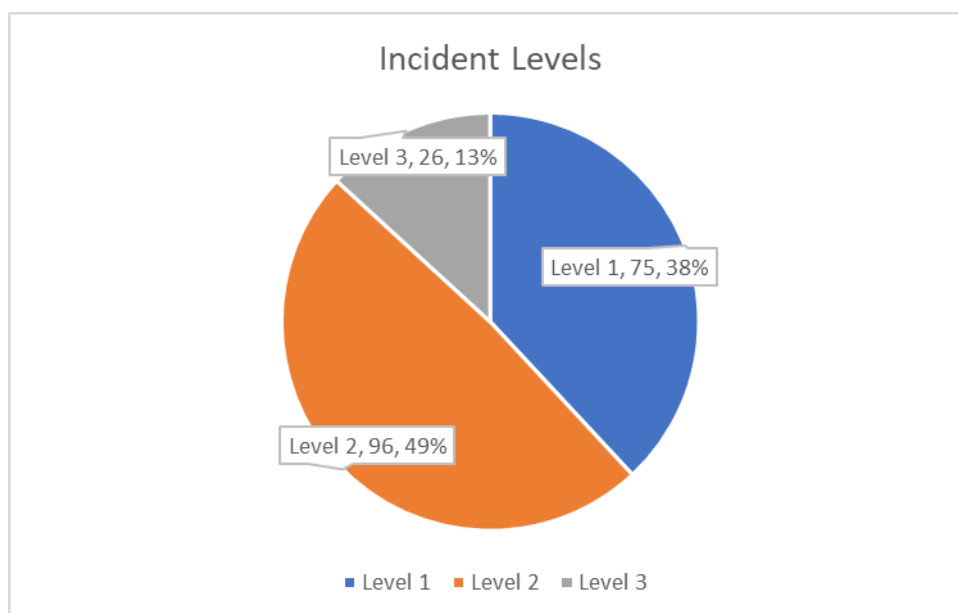
(Table 6) The table above depicts the number of incidents submitted across all RACSB programs for medication errors during the time period of January 1, 2025, through December 31, 2025.

A total of 21 medication errors occurred during the 2nd quarter. This is same number of medication error incidents from the previous quarter and a decrease of 7 from the 2nd quarter of FY2025. Of those 21 medication errors, 14 were reported from ID/DD Residential Services, four from ID/DD Support Coordination, two from MH Residential Services, and one from MH ACT. Most errors occurred due to staff not following the medication policy as written.

There were a total 28 incident reports submitted for peer-on-peer incidents for the quarter. Peer on peer incidents require an incident report be completed for each individual involved if the incident occurs during provision of service or if both/all of individuals involved receive RACSB Case Management/Support Coordination Services.

A decrease of 37 peer-on-peer incidents were reported in the second quarter compared to the incidents reported in the first quarter of FY26. One pattern was found in which one individual was directly involved in 6 peer-on-peer incidents, none of which he was the aggressor. None of these incidents occurred in the provision of services at RACSB. Another pattern identified one individual having aggressed against 3 separate individuals during the quarter, twice at home, and once in day support services.

No serious injuries resulted from the incidents reported. Each reported incident involved an isolated situation. In addition, staff immediately redirected and resolved the concerns.



(Table 7) The chart above depicts the total number of incident reports categorized by Incident Levels 1, 2, and 3 across all RACSB programs during the time period of October 1, 2025, through December 31, 2025.

There was a total of 75 incidents categorized as a level 1. Based on review of the level 1 incidents reported, there was an increase of one report from the previous quarter and an increase of 22 reports from 2nd quarter of FY2025. Of the 75 incidents categorized as a level 1, many were the result of minor or superficial cuts, scratches, or bruises, which required first aid or doctor appointments for cold/flu symptoms. Two ID/DD Residential programs submitted eight Level 1 reports apiece of the 75 incidents reports, but individuals involved and illness/medical needs were varied from these reports.

There were 96 incidents classified as a Level 2. This is an increase of four reports from the previous quarter and an increase of 48 reports when compared to the 2nd quarter of FY25. Root Cause Analyses were conducted for all Level 2 Incidents. Mental Health ACT Program submitted the highest number of Level 2 incident reports with 14 submitted incidents. Three of those incidents involved the same individual. Health concerns comprised the majority of Level 2 reports for the quarter.

There was a total of 26 incidents classified as a Level 3. Based on review of the Level 3 incident reports, there was the same number from the previous quarter and an increase of 11 reports when compared to 2nd quarter of FY2025. A Root Cause Analysis was conducted for each of the Level 3 Incidents.

Program actions as a result of Incident Reports

1. Action plans for staff discovered speeding with program participants onboard vehicles in camera-monitored zones included re-training of staff on agency and DBHDS policies.
2. Action plans for emergency medical response incidents have included retraining of staff on policies, procedures, and expectations.
3. Environmental modifications have been made in response to several incidents, 2 of which included removing tripping hazards, and putting door chimes in at one location.
4. Action steps for falls have included providing additional monitoring for fall/trip hazards, adding additional staff support in bathrooms as needed, updating plans of support, helping point out more accessible pathways to individuals when navigating in their community, and making environmental changes where needed to limit the risk of falls.
5. Action steps taken for reports or concerns for safety have resulted in personnel action, reporting to APS/CPS as mandated, increased monitoring, and increased supervision of staff.
6. Action steps implemented for aggressive behavior included recommendations for behavior plans, assisting the individual in learning and using coping skills during times when they become upset, review and revision of individual's service plan, and continuance of using interventions that are currently in the individual's service plan.
7. Action plans for health concerns varied based on the concern. RACSB staff contact 911 in cases of medical emergencies. Ad-hoc medical appointments will continue to be made by RACSB staff to address health concerns for those individuals residing in RACSB residential programs. In addition, for RACSB non-residential programs staff will continue to assist individuals and family members with health concerns that are identified during program hours.
8. Several programs responded to the increases in reported flu cases by supporting and encouraging individuals to obtain flu shots.
9. For those incidents which involve individuals that do not reside in RACSB residential programs, Support Coordinators and Case Managers continue to monitor health concerns and document in case notes. They continue to report incidents of concern into the IR tracker for monitoring purposes.
10. Root cause analyses were conducted on all incidents that fell into the Level 2 or Level 3 category. Some incidents required an enhanced root cause analysis due to the number of instances that an individual has experienced or has been observed at the hospital for the same or related event within a specific timeframe. Findings of root cause analyses resulted in programs revisiting individual service plans, behavior plans, ad-hoc reviews of program files, policy and procedure revisions, staff training, and personnel action.

MEMORANDUM

To: Joe Wickens, Executive Director
From: Stephanie Terrell, Director of Compliance
Date: March 2, 2026
Re: Licensing Reports

The Department of Behavioral Health and Developmental Services' (DBHDS), Office of Licensing issues licensing reports for areas in which the Department finds agencies in non-compliance with applicable regulations. The licensing report includes the regulatory code which applies to the non-compliance and a description of the non-compliance. The agency must respond to the licensing report by providing a Corrective Action Plan (CAP) to address the areas of noncompliance.

Rappahannock Area Community Services Board (RACSB) received approval for 3 CAPs during the month of February. One CAP related to a founded allegation of neglect on the part of program staff and a failure to ensure participation in decision making and consent with respect to services (DD Residential). One CAP related to a founded allegation of exploitation on the part of program staff and a contracted provider (DD Residential). Lastly, one CAP related to a founded allegation of staff hindering participation and decision making/consent for services for an individual (MH Outpatient).

The attached CAPs provide additional details regarding the citations and RACSB's responses/actions.

**DEPARTMENT OF BEHAVIORAL HEALTH AND DEVELOPMENTAL SERVICES
CORRECTIVE ACTION PLAN**

License #: 101-08-011
Organization Name: Rappahannock Area Community Services Board

Date of Inspection: 02-03-2026
Program Type/Facility Name: 08-011 South Main Steet Home

<u>Standard(s) Cited</u>	<u>Comp</u>	<u>Description of Noncompliance</u>	<u>Actions to be Taken</u>	<u>Planned Comp. Date</u>
12VAC35-105-150. (4) - The provider including its employees, contractors, students, and volunteers shall comply with: 4. Section 37.2-400 of the Code of Virginia and related human rights regulations adopted by the state board;	N	South Main Steet Home This regulation was NOT MET as evidenced by: See OHR citation below.		
12VAC35-115-50. B. (2) - In receiving all services, each individual has the right to: 2. Be protected from harm including abuse, neglect, and exploitation.	N	South Main Steet Home This regulation was NOT MET as evidenced by: CHRIS #20260001 "Exploitation" means the misuse or misappropriation of the individual's assets, goods, or property. Exploitation is a type of abuse. (See § 37.2-100 of the Code of Virginia.) Exploitation also includes the use of a position of authority to extract personal gain from an individual. Exploitation includes violations of 12VAC35-115-120 and 12VAC35-115-130. Exploitation does not include the billing of an individual's third party payer for services. Exploitation also does not include instances of use or appropriation of an individual's assets, goods or property when permission is given by the individual or his authorized representative. <ul style="list-style-type: none"> • Provider substantiated exploitation based on the following. <ul style="list-style-type: none"> ◦ Individual #1's brother reported to Employee #1 on January 2, 2026, concerns regarding the discovery of missing personal items and money on behalf of Individual #1. ◦ Individual #1 recently moved into Entity #1 having formerly resided in the home of 	PR) 02/23/2026 Notice to terminate contract with Employee #1 will be issued by 3/31/2026. The agency will reimburse the individual for items identified as missing and/or misappropriated. On 2/18/2026, corrective action was issued to the Sponsored Placement Specialist who was the authorized signer responsible for overseeing Individual #1's bank account and who did not follow agency financial policies regarding representative payee responsibilities in a manner that protected Individual #1 from exploitation. On 2/18/2026, the Sponsored Placement Supervisor was issued corrective action for not ensuring program policy regarding personal possessions was implemented to prevent Individual #1 from exploitation. On 2/11/2026, all authorized signers in the Sponsored Placement program were re-trained on the agency financial policy regarding representative payee responsibilities. This training was documented on a training log and uploaded into the agency on-line training platform in their employee profiles. By 3/31/2026,	04/01/2026 00:00:00

**DEPARTMENT OF BEHAVIORAL HEALTH AND DEVELOPMENTAL SERVICES
CORRECTIVE ACTION PLAN**

License #: 101-08-011

Organization Name: Rappahannock Area Community Services Board

Date of Inspection: 02-03-2026

Program Type/Facility Name: 08-011 South Main Steet Home

Standard(s) Cited	Comp	Description of Noncompliance	Actions to be Taken	Planned Comp. Date
		<p>Employee #2.</p> <ul style="list-style-type: none"> ◦ Individual #1's brother reported that Employee #2 did not return the following personal items of Individual#1 to be stored at the brother's home when Individual #1 was admitted to Entity #1. <ul style="list-style-type: none"> ▪ Porcelain and collectible dolls (several) ▪ TV stand and a bed frame ▪ Jewelry box (two) • Money was withdrawn from Individual #1's bank account for Individual #1's birthday; however, Individual #1 was in the hospital on their birthday, and was not reimbursed these funds, having never returned to Employee #1's home. • Individual #1's account showed that Individual #1 had, on occasion, paid for birthday celebrations other than Individual #1's own, including Employee #1's grandchildren. There is no evidence that Individual #1 granted permission for the use of funds in this manner. <p>Misuse or misappropriation of the individual's assets, goods, or property meets the regulatory definition of "exploitation", and is a violation of 12VAC35-115-50 (B)(2).</p>	<p>all authorized signers and all Sponsored providers will be re-trained on the program policy regarding personal possessions inventory and boundaries regarding gift giving by individuals to providers or their families including proper documentation to evidence their request and/or approval.</p> <p>By 3/31/2026, the Sponsored Placement program policy will be revised to ensure procedures are in place to describe how the agency financial policy will specifically be implemented within the Sponsored Placement program. The Sponsored Placement Supervisor and Sponsored Placement Specialists will attest to their understanding of this policy by 3/31/2026 in the agency's on-line training platform under their employee profile.</p> <p>The personal possessions inventory log will be monitored by the Sponsored Placement Specialists on a monthly basis effective 4/1/2026. The Sponsored Placement Supervisor will complete a documented review of at least three individuals' financial transactions per month to ensure proper documentation was provided and procedures were followed effective 4/1/2026.</p> <p>OHR/OLR) Accepted 02/25/2026</p>	

**DEPARTMENT OF BEHAVIORAL HEALTH AND DEVELOPMENTAL SERVICES
CORRECTIVE ACTION PLAN**

License #: 101-08-011

Date of Inspection: 02-03-2026

Organization Name: Rappahannock Area Community Services Board

Program Type/Facility Name: 08-011 South Main Steet Home

<u>Standard(s) Cited</u>	<u>Comp</u>	<u>Description of Noncompliance</u>	<u>Actions to be Taken</u>	<u>Planned Comp. Date</u>
General Comments / Recommendations:				
I understand it is my right to request a conference with the reviewer and the reviewer's supervisor should I desire further discussion of these findings. By my signature on the Corrective Action Plan, I pledge that the actions to be taken will be completed as identified by the date indicated.				
LeQuetta Hayes, Human Rights		(Signature of Organization Representative)		Date
C = Substantial Compliance, N = Non Compliance, NS = Non Compliance Systemic, ND = Non Determined				

**DEPARTMENT OF BEHAVIORAL HEALTH AND DEVELOPMENTAL SERVICES
CORRECTIVE ACTION PLAN**

License #: 101-01-001
Organization Name: Rappahannock Area Community Services Board

Date of Inspection: 01-23-2026
Program Type/Facility Name: 01-001 Stonewall Estates Group Home

<u>Standard(s) Cited</u>	<u>Comp</u>	<u>Description of Noncompliance</u>	<u>Actions to be Taken</u>	<u>Planned Comp. Date</u>
12VAC35-105-150. (4) - The provider including its employees, contractors, students, and volunteers shall comply with: 4. Section 37.2-400 of the Code of Virginia and related human rights regulations adopted by the state board;	N	Stonewall Estates Group Home This regulation was NOT MET as evidenced by: See OHR citations below.		3/13/2026
12VAC35-115-50. B. (2) - In receiving all services, each individual has the right to: 2. Be protected from harm including abuse, neglect, and exploitation.	N	Stonewall Estates Group Home This regulation was NOT MET as evidenced by: CHRIS #20250041 and #20250042 This regulation was NOT MET as evidenced by: "Neglect" means failure by a person, program, or facility operated, licensed, or funded by the department, excluding those operated by the Department of Corrections, responsible for providing services to do so, including nourishment, treatment, care, goods, or services necessary to the health, safety, or welfare of an individual receiving care or treatment for mental illness, intellectual disability, or substance abuse. <ul style="list-style-type: none"> • Provider substantiated for neglect based on the following: <ul style="list-style-type: none"> ◦ Medical care was not sought when staff noticed progression of symptoms (i.e. Individual #1 was becoming weaker) following diagnosis of Diagnosis #1. ◦ On December 24, 2025, staff failed to provide 	PR) 02/11/2026 PR: Employee #3 was issued corrective action on 2/4/2026 in regards to neglect with respect to the delay in seeking treatment for the affected individual. Employee #8 is no longer employed with the agency effective 1/9/2026. Employee #3 will be provided refresher training and sign off on their understanding on an attestation regarding the Emergency Preparedness policy with emphasis on seeking medical treatment and response to falls, Informed Consent for Psychotropic medication requirements, the importance of ensuring Flu shots are obtained dependent upon individual and guardian consent and wishes, and documentation requirements regarding medical visits and medication changes by 2/28. Additionally, all Stonewall Estates Group Home staff will receive refresher training regarding medical treatment and response to falls and attest to the Emergency Preparedness policy by 3/13/2026. Systematically, all group home program managers and assistant managers will be	3/13/2026

**DEPARTMENT OF BEHAVIORAL HEALTH AND DEVELOPMENTAL SERVICES
CORRECTIVE ACTION PLAN**

License #: 101-01-001

Organization Name: Rappahannock Area Community Services Board

Date of Inspection: 01-23-2026

Program Type/Facility Name: 01-001 Stonewall Estates Group Home

Standard(s) Cited	Comp	Description of Noncompliance	Actions to be Taken	Planned Comp. Date
		<p>timely support to the individual. Video review revealed the following:</p> <ul style="list-style-type: none"> ▪ At approximately 1:20PM on December 24, 2025, Individual #1 slid down in the recliner, but seemed unable to bear weight when staff was trying to help Individual #1 reposition back up into the chair. ▪ Consequently, Individual #1 ended up sliding slowly onto the floor. ▪ A single staff member was unable to support Individual #1 up and into another chair despite continued efforts to assist Individual #1. ▪ At approximately 2:05 PM, an oncoming second staff member added support, which finally resulted in Individual #1 being able to be repositioned into a chair. ▪ Individual #1 remained on the floor from approximately 1:20PM until 2:05PM without further staff intervention during that time. ▪ Individual #1 could not bear weight when staff attempted to assist Individual #1 in repositioning in the chair. ▪ It is significant to note that the individual typically was able to bear weight and remain seated in the chair without support; as a result, this suggests deterioration of the 	<p>provided refresher training and sign off on their understanding on an attestation regarding the Emergency Preparedness policy with emphasis on seeking medical treatment and response to falls, Informed Consent for Psychotropic medication requirements, the importance of ensuring Flu shots are obtained dependent upon individual and guardian consent and wishes, and documentation requirements regarding medical visits and medication changes by 3/13/2026. Additionally, staff at all DD Residential group homes will review and attest to the Emergency Preparedness policy by 3/13/2026.</p> <p>All RACSB staff, volunteers, and contractors will be required to undergo a Human Rights training upon recruitment and at a minimum of annually thereafter to help ensure continued understanding of their roles and responsibilities in preventing abuse, neglect, and exploitation of individuals in services.</p> <p>The Compliance team will monitor incident reports on a daily basis to help ensure systematically that incidents of this nature are identified and mitigated quickly or avoided altogether.</p> <p>OHR/OLR) Accepted 02/13/2026</p>	

**DEPARTMENT OF BEHAVIORAL HEALTH AND DEVELOPMENTAL SERVICES
CORRECTIVE ACTION PLAN**

License #: 101-01-001

Date of Inspection: 01-23-2026

Organization Name: Rappahannock Area Community Services Board

Program Type/Facility Name: 01-001 Stonewall Estates Group Home

<u>Standard(s) Cited</u>	<u>Comp</u>	<u>Description of Noncompliance</u>	<u>Actions to be Taken</u>	<u>Planned Comp. Date</u>
		<p>individual's health condition Diagnosis #1.</p> <ul style="list-style-type: none"> ▪ During the course of the investigation, it was also revealed that the provider had failed to assist the individual in obtaining Medication #2. <ul style="list-style-type: none"> • Employee #3 stated the following: "Individual #1 did not receive [Medication #2] due to the group home being short-staffed." • The provider has determined this to be substantiated as neglect for failure to provide services necessary for health, safety, and welfare of a person receiving services. ▪ Provider failed to provide adequate staffing given the needs of the individuals in the home at the time, resulting in failure to provide support necessary to Individual #1. ▪ Further, in OHR communication with Individual #1's Legal Guardian, the following was revealed: <ul style="list-style-type: none"> • On December 29, 2025, Individual #1 was admitted around 8:00AM to Entity #1 for trouble breathing related to Diagnosis #1. • Individual #1 then required transport to Entity #2 at 		

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CORRECTIVE ACTION PLAN**

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Organization Name: Rappahannock Area Community Services Board

Program Type/Facility Name: 01-001 Stonewall Estates Group Home

<u>Standard(s) Cited</u>	<u>Comp</u>	<u>Description of Noncompliance</u>	<u>Actions to be Taken</u>	<u>Planned Comp. Date</u>
		<p>12:30AM on December 30, 2025, where Individual #1 was diagnosed with Diagnosis #2.</p> <ul style="list-style-type: none"> • Individual #1 was reportedly sedated and intubated to manage Individual #1's low blood pressure and low oxygen levels, and was placed in the Intensive Care Unit due to the severity of Individual #1's medical condition. • As of this date, January 23, 2026, Individual #1 remains hospitalized at Entity #2, and is unable to be supported by the provider at discharge due to continued health concerns related to this illness. • Provider failed to recognize the individual's continued decline in health following the original diagnosis of Diagnosis #1, and failed to seek timely medical assessment and treatment related to the individual's health and safety. ▪ On 12/30/2025, Individual #1's Legal Guardian reported concerns that Individual #1 was medically neglected related to an overlooked Medication #1 having not been administered in 2024 due a change in management at the group home. <ul style="list-style-type: none"> • The Legal Guardian was 		

**DEPARTMENT OF BEHAVIORAL HEALTH AND DEVELOPMENTAL SERVICES
CORRECTIVE ACTION PLAN**

License #: 101-01-001

Organization Name: Rappahannock Area Community Services Board

Date of Inspection: 01-23-2026

Program Type/Facility Name: 01-001 Stonewall Estates Group Home

<u>Standard(s) Cited</u>	<u>Comp</u>	<u>Description of Noncompliance</u>	<u>Actions to be Taken</u>	<u>Planned Comp. Date</u>
		<p>concerned that Medication #1 was discontinued without knowledge or discussion.</p> <ul style="list-style-type: none"> In a review of the services record, it was revealed that Medication #1 was, in fact, discontinued in July, 2024. Following discovery that Medication #1 had been discontinued, Individual #1 experienced behaviors not in line with baseline. Legal Guardian attended the next doctor's visit, where Medication #1 was reintroduced. <p>As a result, the provider has determined the allegation of neglect involving Medication #1 delay to be substantiated as failure to provide services necessary for health, safety, and welfare of a person receiving services.</p>		
12VAC35-115-70. A. (2a) (1) - Each individual has a right to participate meaningfully in decisions regarding all aspects of services affecting him. This includes the right to: 2. Give or not give informed consent to receive or participate in	N	<p>Stonewall Estates Group Home</p> <p>This regulation was NOT MET as evidenced by:</p> <p>"Informed consent" means the voluntary written agreement of an individual, or that individual's authorized representative, to surgery, electroconvulsive treatment, use of psychotropic medications, or any other treatment or service that poses a risk of harm greater than that ordinarily encountered in daily life or for participation in human research. To be voluntary, informed consent must be given freely and without undue inducement; any</p>	<p>PR) 02/11/2026</p> <p>PR: Employee #8 is no longer employed with the agency effective 1/9/2026. Employee #3 will be provided refresher training and sign off on their understanding on an attestation regarding Informed Consent for Psychotropic medication requirements and documentation requirements regarding medical visits and medication changes by 2/28.</p> <p>Systematically, all group home program managers and assistant managers will be</p>	3/13/2026

**DEPARTMENT OF BEHAVIORAL HEALTH AND DEVELOPMENTAL SERVICES
CORRECTIVE ACTION PLAN**

License #: 101-01-001
Organization Name: Rappahannock Area Community Services Board

Date of Inspection: 01-23-2026
Program Type/Facility Name: 01-001 Stonewall Estates Group Home

<u>Standard(s) Cited</u>	<u>Comp</u>	<u>Description of Noncompliance</u>	<u>Actions to be Taken</u>	<u>Planned Comp. Date</u>
<p>treatment or services that pose a risk of harm greater than ordinarily encountered in daily life and to participate in human research except research that is exempt under § 32.1-162.17 of the Code of Virginia. Informed consent is always required for surgical procedures, electroconvulsive treatment, or use of psychotropic medications: 2a. To be informed, consent for any treatment or service must be based on disclosure of and understanding by the individual or his authorized representative of the following information:</p> <p>1. An explanation of the treatment, service, or research and its purpose;</p>		<p>element of force, fraud, deceit, or duress; or any form of constraint or coercion.</p> <p>CHRIS Abuse #20250042</p> <p>This regulation was NOT MET as evidenced by:</p> <ul style="list-style-type: none"> Advocate substantiated violation due to the following: <p>Provider failed to obtain written agreement from the individual or the individual's authorized representative relative to the use of Medication #3, which is a psychotropic medication.</p>	<p>provided refresher training and sign off on their understanding on an attestation regarding Informed Consent for Psychotropic medication requirements and documentation requirements regarding medical visits and medication changes by 3/13/2026.</p> <p>All RACSB staff, volunteers, and contractors will be required to undergo a Human Rights training upon recruitment and at a minimum of annually thereafter to help ensure continued understanding of their roles and responsibilities in preventing abuse, neglect, and exploitation of individuals in services.</p> <p>The Compliance team will monitor incident reports on a daily basis to help ensure systematically that incidents of this nature are identified and mitigated quickly or avoided altogether.</p> <p>OHR/OLR) Accepted 02/13/2026</p>	

**DEPARTMENT OF BEHAVIORAL HEALTH AND DEVELOPMENTAL SERVICES
CORRECTIVE ACTION PLAN**

License #: 101-01-001

Date of Inspection: 01-23-2026

Organization Name: Rappahannock Area Community Services Board

Program Type/Facility Name: 01-001 Stonewall Estates Group Home

<u>Standard(s) Cited</u>	<u>Comp</u>	<u>Description of Noncompliance</u>	<u>Actions to be Taken</u>	<u>Planned Comp. Date</u>
General Comments / Recommendations:				
I understand it is my right to request a conference with the reviewer and the reviewer's supervisor should I desire further discussion of these findings. By my signature on the Corrective Action Plan, I pledge that the actions to be taken will be completed as identified by the date indicated.				
LeQuetta Hayes, Human Rights		(Signature of Organization Representative)		Date
C = Substantial Compliance, N = Non Compliance, NS = Non Compliance Systemic, ND = Non Determined				

**DEPARTMENT OF BEHAVIORAL HEALTH AND DEVELOPMENTAL SERVICES
CORRECTIVE ACTION PLAN**

License #: 101-07-003

Organization Name: Rappahannock Area Community Services Board

Date of Inspection: 01-30-2026

Program Type/Facility Name: 07-003 Fredericksburg Clinic

<u>Standard(s) Cited</u>	<u>Comp</u>	<u>Description of Noncompliance</u>	<u>Actions to be Taken</u>	<u>Planned Comp. Date</u>
12VAC35-105-150. (4) - The provider including its employees, contractors, students, and volunteers shall comply with: 4. Section 37.2-400 of the Code of Virginia and related human rights regulations adopted by the state board;	N	Fredericksburg Clinic This regulation was NOT MET as evidenced by: See OHR citation below.		
12VAC35-115-70. B. (2) - The provider's duties. 2. Providers shall ask the individual to express his preferences about decisions regarding all aspects of services that affect him and shall honor these preferences to the extent possible.	N	Fredericksburg Clinic This regulation was NOT MET as evidenced by: During an internal investigation the provider determined the following: <ul style="list-style-type: none"> • Employee 1 prohibited Individual 1 from recording therapy sessions which hindered Individual 1's participation in decision making and consent for continuing services. • The financial intake process in place hindered Individual 1's participation in decision making and consent for services. 	PR) 02/23/2026 Clinic Coordinator is developing a policy to address video recording by individuals served in session. A new workflow is being implemented at the front desk to ensure that prior to completing intake assessments, signatures will be required on financial paperwork for in person appointments. Clinic Coordinator has reached out to IT to discuss ways to obtain signatures for clients who are virtual. Once created, all staff at the Fredericksburg Clinic will need to attest the new policy in Policy Pro. This policy will be reviewed at each monthly staff meeting to ensure that employees are not hindering consent to services. Lead Office Manager has advised Fredericksburg Front Desk that all individuals presenting to their intake appointment in person must sign financial paperwork. Clinic Coordinator has requested to meet with IT Coordinator to discuss options for telehealth clients, such as DocuSign or the patient portal. Clinic Coordinator	03/16/2026 00:00:00

**DEPARTMENT OF BEHAVIORAL HEALTH AND DEVELOPMENTAL SERVICES
CORRECTIVE ACTION PLAN**

License #: 101-07-003

Organization Name: Rappahannock Area Community Services Board

Date of Inspection: 01-30-2026

Program Type/Facility Name: 07-003 Fredericksburg Clinic

<u>Standard(s) Cited</u>	<u>Comp</u>	<u>Description of Noncompliance</u>	<u>Actions to be Taken</u>	<u>Planned Comp. Date</u>
			<p>discussed not providing services to individuals unless the financial paperwork has been signed.</p> <p>Clinic Coordinator will include the new policy on monthly staff agendas.</p> <p>Clinic Coordinator will complete monthly audits on individuals receiving therapy services to ensure the financial paperwork has a signature.</p> <p>Clinic Coordinator will provide a recording policy to the Clinical Services Director to review by 2/28/26.</p> <p>The front desk has implemented obtaining signatures on financial paperwork for all in person intake appointments, effective 2/9/26. Procedure for virtual or telehealth appointments will be created by 3/15/26.</p> <p>OHR/OLR) Accepted 02/23/2026</p>	

General Comments / Recommendations:

I understand it is my right to request a conference with the reviewer and the reviewer's supervisor should I desire further discussion of these findings. By my signature on the Corrective Action Plan, I pledge that the actions to be taken will be completed as identified by the date indicated.

Artea Ambrose, Human Rights

(Signature of Organization Representative)

Date

C = Substantial Compliance, N = Non Compliance, NS = Non Compliance Systemic, ND = Non Determined

Communications Update, March 2026

RACSB was present at these community events:

- Feb. 7, Stafford County Schools Health and Wellness Fair
- Feb. 19, Spotsylvania Elementary School Community Night
- Feb. 25, Black Mental Health Panel
- Feb. 25, District 21 family reunification event
- Feb. 28, Coldest Night of the Year

Additional communications information:

- 145 social media posts in February
- One blog post: Lent and Mental Health: Reflecting on Hope
- Two editions of Inside RACSB
- Two Spark news posts
- 11 Engage posts
- Employee engagement initiatives: We are doing monthly service projects to connect HopeStarters to our mission and to each other. February's project was creating birthday cake kits for the Fredericksburg Area Food Bank. We assembled and donated 56 birthday kits.
- RACSB had a team at the Coldest Night of the Year, a walk that raises money for our community partner, Micah Ecumenical Ministries.
- Website: We are moving to a new hosting platform. This won't have an impact on the outward-facing part of the website but should help with a lag we've been experiencing on the backend of the website. Also updated the Medicaid Waiver guide to reflect changes made to support coordination intake (and fixed several broken links that

RAPPAHANNOCK AREA

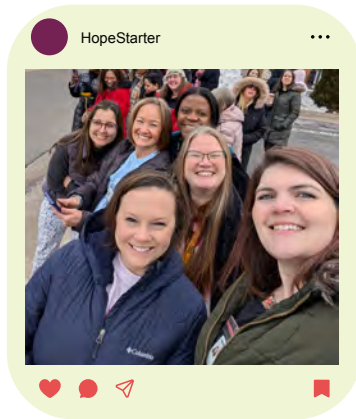
COMMUNITY SERVICES BOARD

occurred when the Arc of Virginia changed the URLs of all of its pages) and switched the information for all of our virtual support groups to reflect changes made when we switched to a new platform for those meetings.

Facebook

3,335 followers • 67 posts • 86,279 impressions • 140 shares • 1,316 reactions

Top Posts:



- 18,148 views
- 625 interactions
- 5 comments
- 3 shares

Analysis: This post was on a national topic of great interest and the peace walks had a social media team that shared posts about the walk with a large audience
Friday morning
8 hashtags



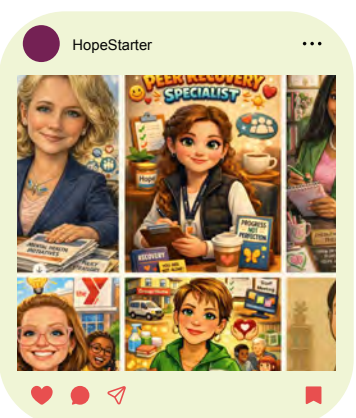
- 7,174 views
- 103 interactions
- 22 comments

Analysis: Retirement, popular employee who worked at RACSB for 30 years; photos of employees, multiple photos
Tuesday afternoon
8 emojis



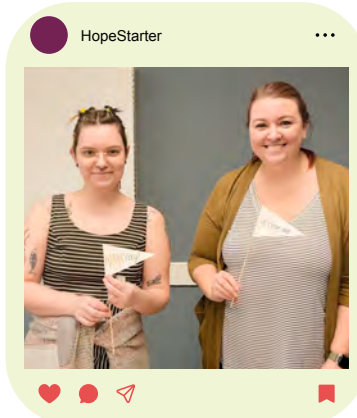
- 1,780 views
- 69 interactions
- 4 shares

Analysis: Photos of staff, weather (local topic of interest), positive/gratitude post
Tuesday evening
5 emojis



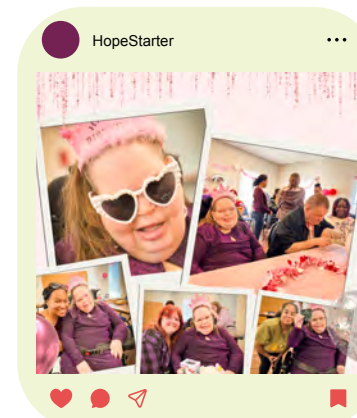
- 4,135 views
- 53 interactions
- 50 reactions
- 2 comments

Analysis: Fun topic, social media trend, multiple illustrations
Wednesday evening
6 emojis
4 hashtags



- 2,007 views
- 50 interactions
- 48 reactions
- 2 shares

Analysis: Unusual project, multiple staff pictures, community partner,
Friday afternoon
18 emojis



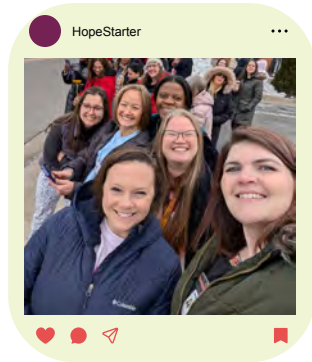
- 2,629 views
- 95 interactions
- 83 reactions
- 10 comments

Analysis: individual served, fun photos,
Wednesday afternoon
15 emojis
9 hashtags

Instagram

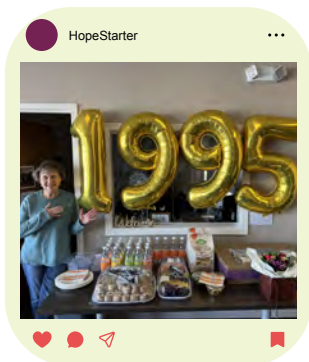
489 followers • 48 posts • 3,216 impressions • 168 reactions

Top Posts:



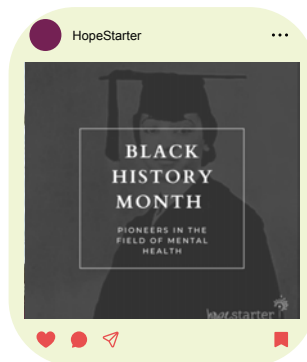
- 236 views
- 116 accounts reached
- 24 interactions

Analysis: This post was on a national topic of great interest and the peace walks had a social media team that shared posts about the walk with a large audience
Friday morning
8 hashtags



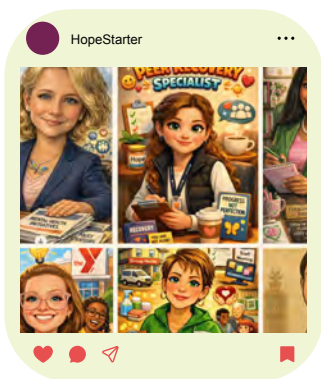
- 193 views
- 79 accounts reached
- 19 interactions

Analysis: Retirement, popular employee who worked at RACSB for 30 years; photos of employees, multiple photos
Tuesday afternoon
9 emojis



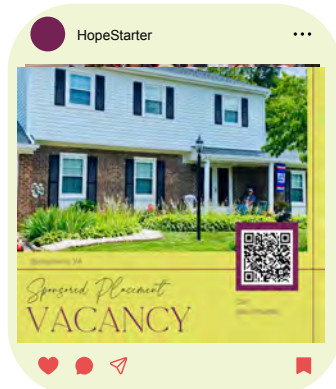
- 86 views
- 45 accounts reached
- 15 interactions
- 2 comments

Analysis: Interesting topic, history, carousel post, Sunday afternoon
11 hashtags



- 183 views
- 72 accounts reached
- 10 interactions

Analysis: Fun topic, social media trend, multiple illustrations
Wednesday evening
6 emojis
4 hashtags



- 126 views
- 62 accounts reached
- 8 interactions

Analysis: Informative, community resource, Tuesday afternoon
2 emojis
3 hashtags

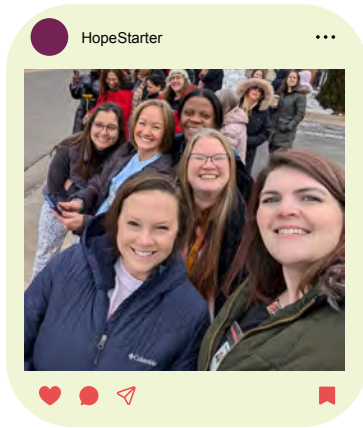


- 70 views
- 35 accounts reached
- 3 interactions

Analysis: video, announcement (new deadline for Art of Recovery)
Tuesday afternoon
2 emojis
One hashtag

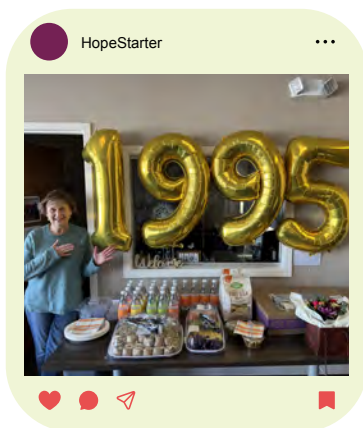
LinkedIn

844 followers • 30 posts • 2,466 impressions • 84 reactions



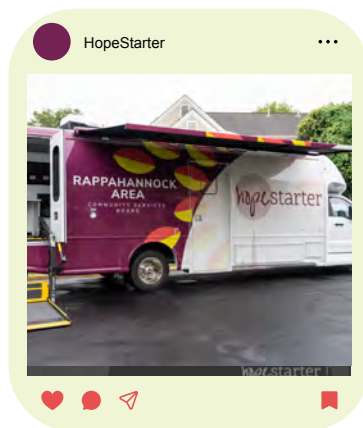
- 301 impressions
- 137 engagements
- 118 clicks
- 18 reactions

Analysis: This post was on a national topic of great interest and the peace walks had a social media team that shared posts about the walk with a large audience
Friday morning
8 hashtags



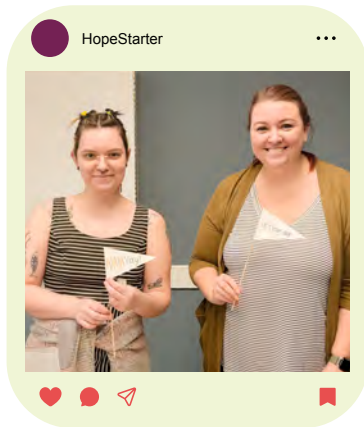
- 406 impressions
- 180 engagements
- 169 clicks
- 10 reactions

Analysis: Retirement, popular employee who worked at RACSB for 30 years; photos of employees, multiple photos
Tuesday afternoon
9 emojis



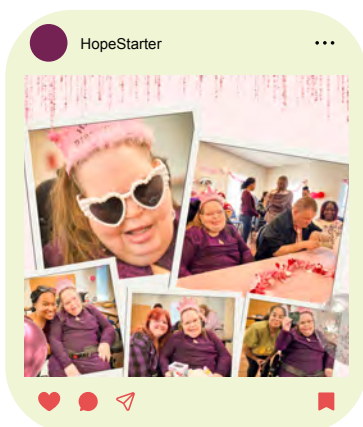
- 250 impressions
- 26 engagements
- 13 clicks
- 11 reactions

Analysis: Important information, local resources
Monday night
10 emojis



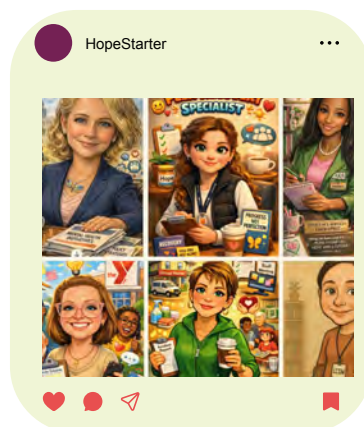
- 148 impressions
- 166 engagements
- 156 clicks
- 10 reactions

Analysis: Unusual project, multiple staff pictures, community partner,
Friday afternoon
18 emojis



- 97 impressions
- 78 engagements
- 77 clicks
- 1 reaction

Analysis: individual served, fun photos,
Wednesday afternoon
15 emojis
9 hashtags



- 178 impressions
- 96 engagements
- 87 clicks
- 7 reactions

Analysis: fun topic, social media trend, several illustrations
6 emojis
4 hashtags



Prevention and Early Intervention Services Program Updates

Michelle Wagaman, Director

mwagaman@rappahannockareacsb.org
540-374-3337, ext. 7520

March 2026

Top 5 for March:

1. The Virginia Young Adult Survey is now live and runs through April 30, 2026. The survey targets those ages 18 to 25 regarding substance use and mental wellness. As of March 5, 2026, RACSB has 132 completed responses and 102 fulfilled incentives. This is 66% towards the state provided target of 200 responses. Statewide, there are 1,924 responses. If every CSB reaches their target, there would be 6,000 responses.
2. The Suicide Prevention Coalition hosted SAMSHA technical assistance for Crisis Intercept Mapping for the population of Service Members, Veterans and their Families. This 1.5 day workshop was held February 20-21, 2026 with 20 participants. A written report will be made available soon and will be reviewed at the April coalition meeting.
3. Early Intervention received 73 referrals in February (increase from 50 the prior month).
4. Healthy Families Rappahannock Area participated in a roundtable hosted by the US Health and Human Services and the Office of the Second Lady. Held February 26, 2026, the focus was on the Maternal, Infant and Early Childhood Home Visiting (MIECHV) Program federal funding.
5. We hosted our sixth cohort for ACE Interface Train-the-Presenter with 11 new presenters (February 25-27).

Upcoming Events:

- The Suicide Prevention Coalition is bringing Full Circle Grief to the community to facilitate a post-vention workshop on March 12, 2026.
- The Trauma Informed Care Workgroup of the Criminal Justice Reform Alliance is hosting a series of virtual lunch and learns focused on resilience. The second session is scheduled for April 30, 2026 at noon. To learn more and to register: <https://www.signupgenius.com/go/Resilience-lunch-and-learn>
- Operation Medicine Cabinet (DEA Drug Takeback Day) is coming up on April 25, 2026 from 10:00 a.m. to 2:00 p.m. at multiple locations throughout Planning District 16.

Parent Education – Infant Development Program

There are currently 508 children enrolled in the program receiving a combination of services to include service coordination, speech therapy, physical therapy, occupational therapy and educational developmental services. We are scheduling 14 consistent assessments per week. We had 73 referrals in February. There are currently 14 providers on staff. PE-ID has one (1) open position at this time to replace a recently retired Developmental Specialist. We are working to streamline some of our practices to including securing and the use of interpreters. We are currently piloting AI interpretation devices.

Part C and Infant/Child Case Management

Alison Standring, Part C System Manager, represented RACSB and/or the Council Coordinators Association (CoCoA) as co-chairperson in the following groups and/or meetings since the last report: Rappahannock Area Interagency Coordinating Council meeting January 15 and February 19; Northern Virginia Region Local System Managers meeting February 3 and March 3; VACSB Clearinghouse meetings January 14, 21, 28, February 4, 11, 18, 25; VACSB Legislative Conference January 20; VACSB Developmental Services Council meeting January 20; Statewide Local System Managers meeting February 12; Collaborative for Youth and Families February 13; Virginia Leadership for Developmental Disabilities meeting February 23; VACSB State Steering Committee meeting February 23; Opioid Workgroup February 24; Ready Region North Central meeting March 4; and CoCoA Steering committee meeting March 5 as chairperson.

Infant Case Managers received 50 referrals in the month of January and 73 in February (30 of those were received in a single week).

Substance Abuse Prevention

RACSB Prevention Services continues substance abuse prevention efforts specifically targeting youth. In response to the opioid epidemic and legalization of adult-use cannabis, our target demographics includes adults.

Youth Education/Evidence Based Curriculum – Jennifer Bateman, Prevention Specialist, continues facilitation of the HALO (Healthy Alternatives for Little Ones) curriculum with St. Paul’s and 4Seasons day care/preschool centers in King George County this month.

Coalitions – The Community Collaborative for Youth and Families met February 13, 2026 in place of the annual Youth First Conference which is being paused in 2026. Keith Cartwright, former DBHDS ACEs Coordinator, presented. The next meeting will be April 10, 2026 at 9:00 a.m. at the RACSB at River Club Office. The meeting will be used as a focus group for the Teen Violence Prevention Workgroup. To learn more: <https://www.thecommunitycollaborative.org/>

Tobacco Control – The Prevention Services Team is actively working to complete the new cycle of the merchant education by June 30, 2026. We will be visiting nearly 300 tobacco and vape merchants to provide education and complete store audits.

Alcohol and Vaping Prevention Education – Jennifer Bateman, Prevention Specialist, spent significant time in February and March directly in the middle and high schools. Presentations took place at Ni River Middle School, King George Middle and High School, and Spotsylvania High School. She has reached 1,770 students so far this academic year!

Suicide Prevention Initiatives

RACSB Prevention Services takes an active role in suicide prevention initiatives including:

ASIST (Applied Suicide Intervention Skills Training) – This Living Works curriculum is a 2-day interactive workshop in suicide first aid. Participants learn how to recognize when someone may have thoughts of suicide and to work with the individual to create a plan that will support their immediate safety. The curriculum has been updated and the new versions will be implemented beginning in 2026.

The training will be held on the following dates in 2026: March 25-26; July 28-29; and September 23-24 (8:30 a.m. to 5:00 p.m. both days).

To register: <https://www.signupgenius.com/go/RACSB-ASIST-Training2026>

Mental Health First Aid – This 8-hour course teaches adults how to identify, understand, and respond to signs of mental health and substance use disorders. The training introduces common mental health challenges and gives participants the skills to reach out and provide initial support to someone who may be developing a mental health or substance use problem and connect them to the appropriate care.

Adult Mental Health First Aid trainings will be held on the following dates in 2026: April 7; July 21; September 29; and December 25 (from 8:30 a.m. to 5:00 p.m.).

Mental Health First Aid in Spanish trainings are scheduled for the following dates in 2026: May 5; August 4; and October 15 (from 8:30 a.m. to 5:00 p.m.).

Youth Mental Health First Aid training is scheduled for the following dates in 2026: May 12; August 18; and November 3 (from 8:30 a.m. to 5:00 p.m.).

To register for Adult Mental Health First Aid Training:

<https://www.signupgenius.com/go/RACSB-MHFA2026>

To register for Adult Mental Health First Aid in Spanish Training:

<https://www.signupgenius.com/go/RACSB-MHFA-Spanish2026>

To register for Youth Mental Health First Aid Training:

<https://www.signupgenius.com/go/RACSB-YMHFA2026>

safeTALK – This 3-hour suicide alertness training encourages participants to learn how to prevent suicide by recognizing signs, engaging the individual, and connecting them to community resources for additional support.

safeTALK will be held on the following dates in 2026: April 28 (9:00 a.m. to noon); June 4 (9:00 a.m. to noon); September 16 (2:00 p.m. to 5:00 p.m.); and November 16 (1:00 p.m. to 4:00 p.m.).

To register for safeTALK Training:

<https://www.signupgenius.com/go/RACSB-SafeTALK2026>

Lock and Talk Virginia – Region 1 partnered with the Virginia Department of Education to address recent legislation related to providing parents with information and resources related to mental health and self-harm. Michelle Wagaman represented Lock and Talk in a presentation to school divisions on March 4, 2026. It was attended by more than 220 school personnel from across the state.

Lock and Talk Virginia has launched a safe storage map on its website, www.lockandtalk.org. This is another option for community members who find themselves in a mental health crisis to put time and distance between themselves and lethal means. Our appreciation to the Fredericksburg Police Department, Caroline County Sheriff's Office, and King George County Sheriff's Office for their participation. We hope to continue adding locations to the map.

Suicide Prevention Coalition – The subgroups formed to address focus areas of teens/young adults; older adults; and first responders/veterans continue to meet and identify goals. The next coalition

meeting is scheduled for April 27, 2026 at 1:00 p.m. The meeting will focus on the report of the SMVF Crisis Intercept Mapping. The Youth and Young Adult workgroup will continue meeting in the afternoon to accommodate high school student schedules. We are moving forward with the creation of a local suicide prevention toolkit. The coalition is hosting a full day workshop on March 12, 2026 on post-vention (community response following suicide death). We currently have more than 40 registered.

State Opioid Response (SOR)

RACSB Prevention Services is actively engaged with community partners to address the opioid response in the areas of prevention, harm reduction, treatment, and recovery.

Coalitions – The Opioid Workgroup meets monthly and is an interdisciplinary professional group. Plans for 2026 are underway to update the group mission and vision. We continue to provide support to the Save 1 Life Fredericksburg harm reduction initiative.

REVIVE! Naloxone Training and Dispensing – RACSB continues to host virtual trainings twice a month. Additionally, we schedule and host trainings upon the request of community partners. DBHDS has hired a new REVIVE coordinator and we look forward to their renewed efforts to support community implementation.

To register for REVIVE! Trainings:

<https://www.signupgenius.com/go/RACSB-REVIVE2026>

Additional Initiatives

Responsible Gaming and Gambling – RACSB is continuing an increase of social media posts related to responsible gambling in recognition of March as Problem Gambling Awareness Month and leading up to the March Madness basketball tournament.

Gambling comes in many different forms. Commercial gambling includes lotteries, instant lotteries, number games (such as Lotto and Keno), sports betting, horse betting, poker and other card games, casino table games (such as roulette and craps), bingo, and electronic gaming machines (EGMs). We are working to better distinguish between these types of gambling and e-sports or online gaming.

ACEs Interface – RACSB Prevention Services offers in-person trainings for community members to learn more about the impact of adversity in childhood on brain development and how toxic stress can impact individual and community health.

RACSB hosted our sixth cohort for ACE Interface train-the-presenters on February 25, 26, and 27, 2026. A total of 11 completed and are now certified. Partnering organizations include Caroline County YMCA, Empowerhouse, Fairfax-Falls Church CSB, Horizon CSB, Middle Peninsula – Northern Neck CSB, Southside CSB, and interested community members. The next cohort is scheduled for August and already has 13 registered.



RACSB Prevention is part of the Trauma Informed Care Workgroup under the Criminal Justice Reform Alliance. The group will host quarterly virtual lunch and learns in 2026. The next one is scheduled for April 30, 2026 at noon and Keith Cartwright is present “Relationships, Relationships, Relationships!”

Plans are underway for a third book club session utilizing the book “Burnout: The Secret to Unlocking the Stress Cycle” by Emily Nagoski, PhD, and Amelia Nagoski, DMA. This will launch the first week in May in recognition of Resilience Week in Virginia.

Community Resilience Initiative –Course 1 Trauma Informed and Course 2 Trauma Supportive are each 6-hour courses that cover brain science, the individual experiences and ways to build individual and community resilience. (Course 1 is a pre-requisite for Course 2). The classes are held from 9:00 a.m. to 4:00 p.m.

Course 1 is scheduled for April 9, July 14, and October 22.

Course 2 is scheduled for May 28 and November 12.

To register: <https://www.signupgenius.com/go/RACSB-CRI-Training2026>

Activate Your Wellness – DBHDS initiative that is primarily a social norms campaign with social media, print materials, and short videos. RACSB continues to utilize this content for “Wellness Wednesday” posts.

Healthy Families Rappahannock Area

HFRA helps parents **IDENTIFY** the best version of themselves, **PARTNERS** with parents with success in parenting, and **EMPOWERS** parents to raise healthy children.

March 2026

LOCALITY	NUMBER OF REFERRALS	ASSESSMENTS	NUMBER OF FAMILIES RECEIVING HOME VISITS	NEW ENROLLEES YEAR-TO-DATE
CAROLINE COUNTY	1	1	6	2
CITY OF FREDERICKSBURG	7	6	33	12
KING GEORGE COUNTY	2	2	6	0
SPOTSYLVANIA COUNTY	7	4	57	13
STAFFORD COUNTY	7	5	37	10
OUT OF AREA (REFERRED TO OTHER HF SITES)	0	0	0	0
TOTAL	24	18	139	37

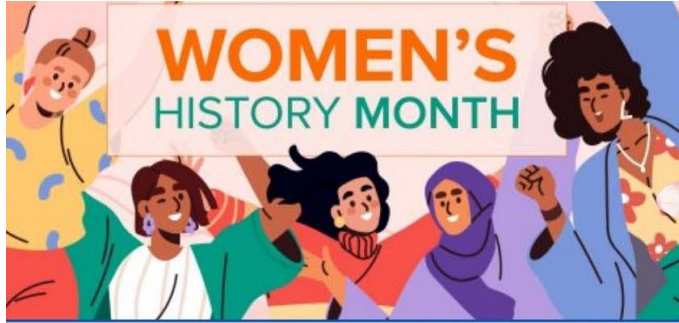
HFRA participated in the MIECHV roundtable with the Second Lady’s Office in Washington D.C. (additional photos included in monthly newsletter that follows). This roundtable was a discussion to highlight early learning and literacy by supporting parents as their child’s first teacher. This discussion was only between leadership, home visitors and families. Ivy Lee, Family Support Specialist, accompanied family served, Jadia with baby Genesis, as representatives of HFRA as well as the Commonwealth of Virginia. Together, they shared with leadership about importance of home visits and the impact it has on the family. HFRA was the only home visiting program from Virginia to participate.

Attendees also present in support of home visiting included: Kathleen Strader, Healthy Families America; Andelicia Neville, MIECHV Project Director; Martacelis Fuentes, HFRA Program Supervisor; and Lixlia Planell-Jones, HFRA Family Support Specialist. On the Federal level, attendees included:

- Tom Engels, Administrator, Health Resources and Services Administration
- Wendy Qiu, Project and Policy Advisor to Second Lady Usha Vance, Office of the Second Lady
- Dr. Alex Adams, Assistant Secretary for Family Support, Administration for Children and Families
- Grace Graham, Deputy FDA Commissioner and Senior Counselor to the Secretary, U.S. Department of Health and Human Services
- Bridget Visconti, Senior Legislative Analyst Office of Representative Rudy Yakym (R-IN)

The program is preparing to host its first mid-year graduation celebration on March 21, 2026 at River Club. We're hopeful that hosting twice a year will facilitate additional family participation.





WOMEN'S HISTORY MONTH

Healthy Families
Rappahannock Area
Newsletter



March 2026



Mel's Desk

I can't believe, it's already March (the last month of the first quarter). A few thoughts that keep taking over are how important it is to have love for your community and the desire to make a difference in the lives of families we serve as well as right here in our own community. Every day, I am reminded that strong communities build strong families.

And this is where YOU come to mind. My team and I talk about how to support the families better at every meeting and one unanimous thought is more people like you joining our Village. As we continue walking alongside parents during pregnancy and the early years of their child's life, we see firsthand how compassionate support, trusted relationships, and access to resources can transform outcomes for mothers and babies. This season, we are especially focused on increasing every families awareness of amazing programs available to support on this journey of parenthood. I truly believe in the old African Proverb that it "Takes a Village" and that is why we are working towards building a team of community partners that are interested in being involved in "Our Village". Your partnership, advocacy, and belief makes this work possible. Together, we are nurturing healthier families today and brighter futures for generations to come. Are you ready to be a part of Our Village?

-Melodie "Mel" Jennings



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www.healthyfamiliesrappahannock.org



Special Thank You to Our Incredible Team — and a Very Special Family

On February 26, Martacelis Fuentes, Lixlia Jones, and Ivy Lee plus mommy Jadia and baby Genesis loaded up and headed to Washington D.C. for the **Maternal, Infant, and Early Childhood (MIECHV) Home Visiting Roundtable.**

This roundtable discussion was to highlight how home visiting advances early learning and literacy by supporting parents as their child's first teachers. Families and home visitors shared firsthand perspectives on how voluntary, evidenced-based home visiting strengthens language development, school readiness, and family well-being.

By sharing their expertise and lived experiences, they have helped to elevate the impact of home visiting and highlight the critical importance of home visiting programs across the nation.

We are so Thankful for them being passionate advocates, thoughtful leaders, and powerful ambassadors for our community. This type of dedication continues to strengthen not only our program, but the broader movement of home visiting across Virginia and beyond.

Support Shoutouts

This month's shout outs belong to

- From the Heart
- Little Hands
- Michelle Hareras

We are truly Thankful for all the Support you give!

Be A Part of the Village
Scan to Donate



Community Partners. We Need You!

Community is the foundation of healthy families. When we show up for one another, through support, advocacy, shared resources, and collective action; we create environments where parents feel seen, valued, and empowered. Strong communities reduce isolation, strengthen resilience, and ensure that no mother or child has to navigate life's most vulnerable seasons alone.

Your involvement matters because meaningful change does not happen in isolation. Whether through partnership, advocacy, volunteering, or investment, your engagement helps expand access to maternal health support, early childhood resources, and equitable opportunities for families. When you choose to be involved, you become part of the village.

**Community Advisory Committee meets every other month...Contact us today for more information
hfra@rappahannockareacs.org**



www.healthyfamiliesrappahannock.org

March 2026

CALL

To

ACTION!



Refer
a family

scan QR

Join Our Village

email us today at hfra@rappahannockareacsb.org

MAKE
a donation



www.healthyfamiliesrappahannock.org

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COMMUNITY SERVICES BOARD



What's Happening This Month

March 2026



Color Fun

10 am - 11 am
Fredericksburg Preschool
Heritage Park
1003 Heritage Place
Fredericksburg, VA 22401

Wednesday, March 11, 2026



1 pm - 2 pm
Hillcrest UMC
2208 Lafayette Blvd,
Fredericksburg

Help with Storytime and/or Crafts is always welcomed!
Contact Laurie: lstrother@rappahannockareacs.org
if you are interested in participating in our Playgroups



Celebrating Our Sprouts Graduation
March 21, 2026

RIVERCLUB

10825 Tidewater Tr, Fredericksburg VA 22408

10 a.m. to 12 p.m.

CONTACT US

hfra@rappahannocareacs.org

540-374-3366

www.healthyfamiliesrappahannock.org



**Finance Department
February 2026 Program Updates**

Staffing Changes and Opportunities:

Kerlos Amir, Accounting Coordinator, has terminated his employment with RACSB. Kelli Lawrence-Byrd, previously Assistant Accounting Coordinator, has been promoted to Accounting Coordinator. The organization is currently reviewing applications to fill the Assistant Accounting Coordinator position.

We continue to only utilize our financial consultant, Kelly Young Marinoff, on an as-needed basis for software-related support inquiries.

Reimbursement Department:

The Reimbursement team is actively working to resolve outstanding issues for claims aged over 60 days, prioritizing them from oldest to newest. Additionally, we are beginning to compile appeals documentation for all outstanding Anthem claims related to their system issue. This documentation will be submitted to Virginia Department of Medical Assistance Services (DMAS) for review and to support further escalation toward resolution.

Accounting Department:

The Accounting Department has completed the mid-year report filing to the DBHDS. The team is currently preparing preliminary materials for the FY2027 budget and continues to ensure that grant reimbursement submissions remain current. Additionally, staff are engaged in cross-training on essential duties to strengthen departmental coverage and maintain operational continuity.

Summary of Cash Investments

Depository		Rate	Comments
Atlantic Union Bank			
Checking	\$ 5,171,578	2.50%	
Investment Portfolio			
Cash Equivalents	1,833,717		
Fixed Income	7,579,120		
Total Investment	<u>\$ 9,412,837</u>		
Total Atlantic Union Bank	<u>\$ 14,584,415</u>		
Other			
Local Gov. Investment Pool	<u>7,128,856</u>	3.80%	Avg. Monthly Yield
Total Investments	\$ 21,713,272		

Other Post-Employment Benefit (OPEB)

	Cost Basis	Cost Variance From Inception	Market Basis	Market Variance From Inception
Initial Contribution	\$ 954,620		\$ 954,620	
FY 2024 Year-End Balance	\$ 2,131,014	\$ 1,176,394	\$ 4,489,220	\$ 3,534,600
FY 2025 Year-End Balance	\$ 2,130,913	\$ 1,176,293	\$ 4,527,191	\$ 3,572,571
Balance at 7/31/2025	\$ 2,130,413	\$ 1,175,793	\$ 4,552,431	\$ 3,597,811
Balance at 8/30/2025	\$ 2,130,413	\$ 1,175,793	\$ 4,656,347	\$ 3,701,727
Balance at 9/30/2025	\$ 2,130,413	\$ 1,175,793	\$ 4,735,433	\$ 3,780,813
Balance at 10/31/2025	\$ 2,130,413	\$ 1,175,793	\$ 4,787,095	\$ 3,832,475
Balance at 11/30/2025	\$ 2,130,413	\$ 1,175,793	\$ 4,815,105	\$ 3,860,485
Unrealized Gain/(Loss)			\$ 44,393	
Balance at 12/31/2025	\$ 2,130,413	\$ 1,175,793	\$ 4,859,497	\$ 3,904,877
Unrealized Gain/(Loss)			\$ 103,485	
Realized Gain/(Loss)			\$ 676	
Fees & Expenses			\$ (1,184)	
Balance at 1/31/2026	\$ 2,130,413	\$ 1,175,793	\$ 4,962,474	\$ 3,904,877

Health Insurance

FY 2026	Monthly Premiums	Monthly Claims & Fees	Interest	Balance
Beginning Balance				\$3,033,340
July	\$5,773	\$305,482	\$1,209	\$2,734,840
August	\$5,721	\$351,112	\$1,076	\$2,390,525
September	\$6,409	\$283,105	\$925	\$2,114,754
October	\$5,456	\$367,077	\$812	\$1,753,946
November	\$212,171	\$287,241	\$691	\$1,679,568
December	\$425,834	\$473,491	\$743	\$1,632,653
January	\$429,881	\$610,812	\$679	\$1,452,402
February	\$672,215	\$435,917	\$627	\$1,689,327
YTD Total	\$1,763,459	\$3,114,236	\$6,763	\$1,689,327

Historical Data	Average Monthly Claims	Monthly Average Difference from PY	Highest Month
FY 2026	\$389,279	\$92,015	\$610,812
FY 2025	\$297,264	\$41,811	\$380,808
FY 2024	\$255,453	\$41,076	\$593,001
FY 2023	\$214,376	(\$97,137)	\$284,428
FY 2022	\$311,513	(\$24,129)	\$431,613
FY 2021	\$335,642	\$14,641	\$588,906

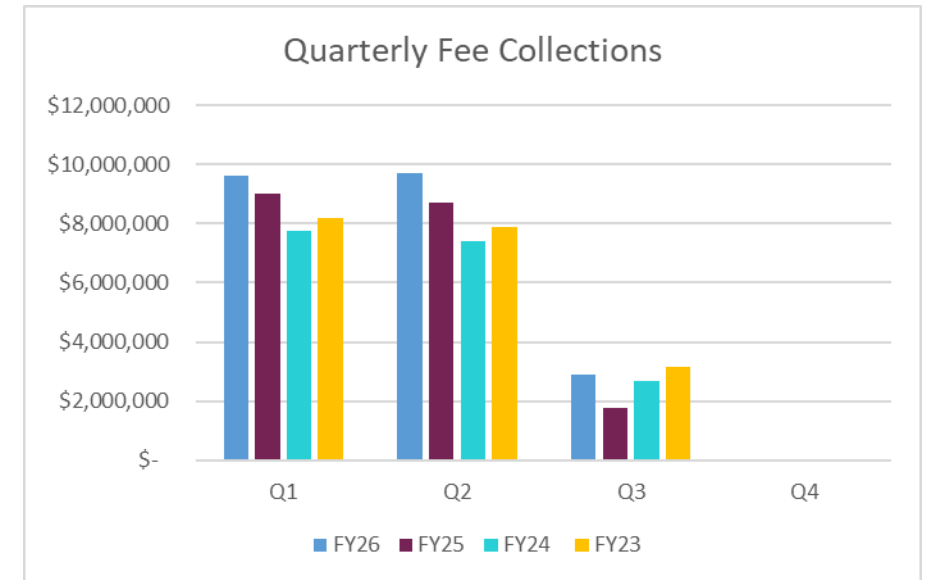
Summary of Investments

Asset Description	Shares/Face Value	Market Value	Total Cost	Unrealized Gain/Loss	Est. Income	Yield to Maturity	Yield to Cost
State Street U.S. Government Money Market	\$ 45,412.95	\$ 45,412.95	\$ 45,412.95	\$ -	\$ 1,518.15	3.64%	3.64%
US Treasury Bill(03/19/2026)	\$ 500,000.00	\$ 499,345.00	\$ 485,496.71	\$ 13,848.29	\$ 14,503.29	3.31%	4.06%
US Treasury Bill(04/02/2026)	\$ 300,000.00	\$ 299,184.00	\$ 298,760.60	\$ 423.40	\$ 1,239.40	3.47%	3.69%
US Treasury Bill(05/26/2026)	\$ 500,000.00	\$ 495,985.00	\$ 494,091.32	\$ 1,893.68	\$ 5,908.68	3.57%	3.67%
US Treasury Bill(07/09/2026)	\$ 500,000.00	\$ 493,790.00	\$ 482,569.63	\$ 11,220.37	\$ 17,430.37	3.60%	3.95%
Total Cash Equivalents	\$ 1,845,412.95	\$ 1,833,716.95	\$ 1,806,331.21	\$ 27,385.74	\$ 40,599.89	3.52%	3.80%
US Treasury Note (10/15/2026)	\$ 500,000.00	\$ 502,775.00	\$ 502,488.50	\$ 286.50	\$ 23,125.00	3.64%	4.11%
US Treasury Note(11/30/2026)	\$ 600,000.00	\$ 589,500.00	\$ 587,578.13	\$ 1,921.87	\$ 7,500.00	3.58%	3.56%
US Treasury Note (06/15/2026)	\$ 500,000.00	\$ 500,630.00	\$ 500,392.18	\$ 237.82	\$ 20,625.00	3.65%	3.96%
US Treasury Note(01/31/2027)	\$ 500,000.00	\$ 502,090.00	\$ 501,761.14	\$ 328.86	\$ 20,625.00	3.55%	3.76%
US Treasury Note (03/15/2027)	\$ 500,000.00	\$ 503,155.00	\$ 496,308.59	\$ 6,846.41	\$ 21,250.00	3.51%	4.52%
US Treasury Note (04/30/2026)	\$ 500,000.00	\$ 500,825.00	\$ 499,023.44	\$ 1,801.56	\$ 24,375.00	3.75%	4.98%
US Treasury Note (08/15/2027)	\$ 500,000.00	\$ 500,940.00	\$ 497,423.79	\$ 3,516.21	\$ 18,750.00	3.45%	4.10%
US Treasury Note(11/15/2027)	\$ 500,000.00	\$ 489,005.00	\$ 488,059.43	\$ 945.57	\$ 11,250.00	3.42%	3.50%
US Treasury Note (8/31/2026)	\$ 500,000.00	\$ 500,085.00	\$ 498,545.10	\$ 1,539.90	\$ 18,750.00	3.68%	4.35%
US Treasury Note (02/29/2028)	\$ 500,000.00	\$ 503,925.00	\$ 499,988.22	\$ 3,936.78	\$ 20,000.00	3.40%	4.00%
US Treasury Note(05/15/2028)	\$ 500,000.00	\$ 492,560.00	\$ 492,586.18	\$ (26.18)	\$ 14,375.00	3.39%	3.50%
US Treasury Note(09/15/2028)	\$ 500,000.00	\$ 497,420.00	\$ 496,308.59	\$ 1,111.41	\$ 16,875.00	3.39%	3.64%
US Treasury Note(11/15/2028)	\$ 1,000,000.00	\$ 997,540.00	\$ 998,535.16	\$ (995.16)	\$ 35,000.00	3.39%	3.55%
US Treasury Note(02/15/2029)	\$ 500,000.00	\$ 498,670.00	\$ 500,000.00	\$ (1,330.00)	\$ 17,500.00	3.39%	3.50%
Total Fixed Income	\$ 7,600,000.00	\$ 7,579,120.00	\$ 7,558,998.45	\$ 20,121.55	\$ 270,000.00	3.51%	3.93%
2/28/2026		\$ 9,412,836.95	\$ 9,365,329.66	\$ 47,507.29	\$ 310,599.89	3.51%	3.91%

Fee Revenue Reimbursement- January 31, 2026

RAPPAHANNOCK AREA COMMUNITY SERVICES BOARD						
FEE REVENUE REIMBURSEMENT REPORT AS OF JANUARY 31, 2026						
AGED CLAIMS		Current Month		Prior Month		Prior Year
Total Claims Outstanding	Total	100%	\$5,307,799	100%	\$5,444,181	100% \$7,645,881
	Consumers	36%	\$1,929,705	35%	\$1,893,371	50% \$3,812,173
	3rd Party	64%	\$3,378,095	65%	\$3,550,810	50% \$3,833,708
Claims Aged 0-29 Days	Total	54%	\$2,861,012	56%	\$3,023,888	45% \$3,461,985
	Consumers	1%	\$31,324	0%	\$21,601	1% \$67,311
	3rd Party	3%	\$174,347	3%	\$174,347	44% \$3,394,674
Claims Aged 30-59 Days	Total	3%	\$146,232	3%	\$167,993	3% \$256,050
	Consumers	1%	\$31,027	1%	\$40,431	1% \$84,050
	3rd Party	2%	\$115,204	2%	\$127,562	2% \$172,000
Claims Aged 60-89 Days	Total	3%	\$141,397	2%	\$106,366	1% \$104,441
	Consumers	1%	\$38,763	1%	\$35,112	0% \$4,992
	3rd Party	2%	\$102,635	1%	\$71,254	1% \$99,449
Claims Aged 90-119 Days	Total	2%	\$94,802	4%	\$200,885	3% \$247,766
	Consumers	1%	\$35,667	1%	\$33,589	3% \$193,704
	3rd Party	1%	\$59,136	3%	\$167,296	1% \$54,062
Claims Aged 120+ Days	Total	39%	\$2,064,365	36%	\$1,938,696	47% \$3,576,639
	Consumers	34%	\$1,792,924	32%	\$1,762,638	45% \$3,462,116
	3rd Party	5%	\$271,441	3%	\$176,057	1% \$114,523

CLAIM COLLECTIONS	
Current Year To Date Collections	\$22,235,315
Prior Year To Date Collections	\$19,477,889
\$ Change from Prior Year	\$2,757,426
% Change from Prior Year	14%



Write-off Report

Month: Jan 2026		
Write Off Code	Current MTD	Prior Year MTD
BAD ADDRESS	\$ -	\$ 550
BANKRUPTCY	\$ -	\$ -
DECEASED	\$ 847	\$ -
NO FINANCIAL AGREEMENT	\$ 1,567	\$ 35,410
SMALL BALANCE	\$ -	\$ 33
UNCOLLECTABLE	\$ -	\$ 367
FINANCIAL ASSISTANCE	\$ 143,116	\$ 119,188
NO SHOW	\$ 60	\$ 160
MAX UNITS/BENEFITS	\$ 34,075	\$ 10,894
PROVIDER NOT CREDENTIALLED	\$ -	\$ 910
DIAGNOSIS NOT COVERED	\$ 630	\$ -
NON-COVERED SERVICE	\$ 199	\$ (38,206)
SERVICES NOT AUTHORIZED	\$ 9,453	\$ 2,558
PAST BILLING DEADLINE	\$ 160	\$ 1,262
INSUFFICIENT DOCUMENTATION	\$ 69,318	\$ -
MCO DENIED AUTH	\$ 13,740	\$ -
INCORRECT PAYER	\$ 1,770	\$ 1,597
INVALID MEMBER ID	\$ -	\$ -
INVALID POS/CPT/MODIFIER	\$ 65	\$ 100
NO PRIMARY EOB	\$ -	\$ 367
SPENDDOWN NOT MET	\$ 48,738	\$ 54,523
TOTAL	\$ 323,738	\$ 189,713

Year to Date: July - Jan 2026		
Write Off Code	Current YTD	Prior YTD
BAD ADDRESS	\$ 9,184	\$ 48,118
BANKRUPTCY	\$ 3,020	\$ -
DECEASED	\$ 2,875	\$ 1,530
NO FINANCIAL AGREEMENT	\$ 85,147	\$ 57,594
SMALL BALANCE	\$ 728	\$ 404
UNCOLLECTABLE	\$ 3,868	\$ 2,467
FINANCIAL ASSISTANCE	\$ 1,437,793	\$ 1,203,737
NO SHOW	\$ 11,979	\$ 3,372
MAX UNITS/BENEFITS	\$ 400,498	\$ 269,722
PROVIDER NOT CREDENTIALLED	\$ 2,896	\$ 10,380
DIAGNOSIS NOT COVERED	\$ 2,846	\$ 4,988
NON-COVERED SERVICE	\$ 38,033	\$ 49,141
SERVICES NOT AUTHORIZED	\$ 123,118	\$ 93,110
PAST BILLING DEADLINE	\$ 6,978	\$ 3,405
INSUFFICIENT DOCUMENTATION	\$ 73,003	\$ 937
MCO DENIED AUTH	\$ 96,661	\$ 9,033
INCORRECT PAYER	\$ 26,999	\$ 20,253
INVALID MEMBER ID	\$ 710	\$ -
INVALID POS/CPT/MODIFIER	\$ 680	\$ 100
NO PRIMARY EOB	\$ 5,252	\$ 2,885
SPENDDOWN NOT MET	\$ 141,818	\$ 250,528
TOTAL	\$ 2,474,088	\$ 2,031,705

Payroll Statistics FY2026

Pay Date	Overtime Hours	Overtime Cost	Average Cost per hour-Overtime	2P Hours	2P Cost	Average Cost per hour-2p	Total Hours	Total Costs
7/11/2025	73.5	\$2,911.46	\$39.61	33.5	\$1,421.70	\$42.44	107	\$4,333.16
7/25/2025	105	\$4,242.78	\$40.41	62	\$2,274.32	\$36.68	167	\$6,517.10
8/8/2025	113.25	\$4,479.56	\$39.55	27.5	\$1,024.79	\$37.27	140.75	\$5,504.35
8/22/2025	105	\$4,497.43	\$42.83	65.75	\$2,703.77	\$41.12	170.75	\$7,201.20
9/5/2025	100	\$4,460.95	\$44.61	45.5	\$3,331.48	\$73.22	145.5	\$7,792.43
9/19/2025	111.75	\$4,500.36	\$40.27	161.75	\$6,688.84	\$41.35	273.5	\$11,189.20
10/3/2025	123.5	\$5,098.84	\$41.29	53	\$2,149.33	\$40.55	176.5	\$7,248.17
10/17/2025	161	\$6,637.94	\$41.23	49.25	\$2,250.06	\$45.69	210.25	\$8,888.00
10/31/2025	146.25	\$5,819.81	\$39.79	49.75	\$2,256.00	\$45.35	196	\$8,075.81
11/14/2025	163.57	\$6,500.68	\$39.74	39.67	\$2,055.09	\$51.80	203.24	\$8,555.77
11/28/2025	222.75	\$8,784.39	\$39.44	182	\$7,094.11	\$38.98	404.75	\$15,878.50
12/12/2025	120.75	\$4,795.23	\$39.71	47.5	\$2,646.26	\$55.71	168.25	\$7,441.49
12/26/2025	174.73	\$7,148.91	\$40.91	36.5	\$1,566.23	\$42.91	211.23	\$8,715.14
1/9/2026	148	\$5,937.04	\$40.12	63.25	\$2,805.76	\$44.36	211.25	\$8,742.80
1/23/2026	103.5	\$4,305.79	\$41.60	33.5	\$1,803.59	\$53.84	137	\$6,109.38
2/6/2026*	254.5	\$9,792.41	\$38.48	41	\$1,915.29	\$46.71	295.5	\$11,707.70
2/20/2026	50.35	\$2,025.40	\$40.23	34.75	\$2,341.23	\$67.37	85.1	\$4,366.63
3/6/2026	21	\$873.72	\$41.61	40.5	\$2,715.08	\$67.04	61.5	\$3,588.80
Grand Total	2298.4	\$92,812.70	\$40.38	1066.67	\$49,042.93	\$45.98	3365.07	\$141,855.63

*2P hours/cost corrected from last meeting

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MENTAL HEALTH

PROGRAM	REVENUE			EXPENDITURES			ACTUAL VARIANCE	VARIANCE / REVENUE
	BUDGET FY 2026	ACTUAL YTD	%	BUDGET FY 2026	ACTUAL YTD	%		
INPATIENT	0	16,950	0.00%	0	16,950	0.00%	-	0%
OUTPATIENT (FED)	3,559,688	2,121,021	59.58%	3,559,688	2,089,471	58.70%	31,550	1%
MEDICAL OUTPATIENT (R) (FED)	4,432,876	2,595,286	58.55%	4,432,876	2,523,436	56.93%	71,850	3%
ACT NORTH (R)	1,108,186	728,121	65.70%	1,108,186	648,862	58.55%	79,259	11%
ACT SOUTH (R)	1,057,760	800,789	75.71%	1,057,760	605,869	57.28%	194,920	24%
CASE MANAGEMENT ADULT (FED)	1,377,302	803,261	58.32%	1,377,302	799,640	58.06%	3,621	0%
CASE MANAGEMENT CHILD & ADOLESCENT (FED)	1,171,251	607,818	51.89%	1,171,251	644,228	55.00%	(36,409)	-6%
PSY REHAB & KENMORE EMP SER (R) (FED)	861,864	523,899	60.79%	861,864	496,339	57.59%	27,560	5%
PERMANENT SUPPORTIVE HOUSING (R)	4,079,960	4,636,724	113.65%	4,079,960	1,938,225	47.51%	2,698,499	58%
CRISIS STABILIZATION (R)	2,984,567	1,552,067	52.00%	2,984,567	1,642,503	55.03%	(90,436)	-6%
SUPERVISED RESIDENTIAL	702,775	386,225	54.96%	702,775	433,181	61.64%	(46,957)	-12%
SUPPORTED RESIDENTIAL	1,115,708	523,819	46.95%	1,115,708	645,262	57.83%	(121,443)	-23%
JAIL DIVERSION GRANT (R)	0	1,000	#DIV/0!	0	0	#DIV/0!	1,000	100%
JAIL & DETENTION SERVICES	796,633	260,192	32.66%	796,633	475,515	59.69%	(215,323)	-83%
SUB-TOTAL	23,248,570	15,557,172	67%	23,248,570	12,959,481	56%	2,597,691	17%

DEVELOPMENTAL SERVICES

PROGRAM	REVENUE			EXPENDITURES			ACTUAL VARIANCE	VARIANCE / REVENUE
	BUDGET FY 2026	ACTUAL YTD	%	BUDGET FY 2026	ACTUAL YTD	%		
CASE MANAGEMENT	5,009,320	3,424,687	68.37%	5,009,320	2,795,005	55.80%	629,683	18%
DAY HEALTH & REHAB *	5,928,581	3,616,677	61.00%	5,928,581	3,335,494	56.26%	281,183	8%
GROUP HOMES	7,177,971	4,649,566	64.78%	7,177,971	4,104,239	57.18%	545,327	12%
RESPIRE GROUP HOME	742,838	88,016	11.85%	742,838	313,922	42.26%	(225,906)	-257%
INTERMEDIATE CARE FACILITIES	5,382,884	2,519,241	46.80%	5,382,884	2,886,152	53.62%	(366,911)	-15%
SUPERVISED APARTMENTS	1,869,743	1,771,978	94.77%	1,869,743	1,103,996	59.05%	667,982	38%
SPONSORED PLACEMENTS	2,412,624	1,471,942	61.01%	2,412,624	1,208,362	50.08%	263,580	18%
SUB-TOTAL	28,523,961	17,542,107	61.50%	28,523,961	15,747,170	55.21%	1,794,937	10%

(R) Restricted Funding within program
(FED) Federal Reimbursement process within program

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SUBSTANCE ABUSE

PROGRAM	REVENUE			EXPENDITURES			ACTUAL VARIANCE	VARIANCE / REVENUE
	BUDGET FY 2026	ACTUAL YTD	%	BUDGET FY 2026	ACTUAL YTD	%		
SA OUTPATIENT (R) (FED)	2,049,386	1,156,300	56.42%	2,049,386	1,155,743	56.39%	557	0%
MAT PROGRAM (R) (FED)	1,254,477	379,938	30.29%	1,254,477	758,943	60.50%	(379,005)	-100%
CASE MANAGEMENT(with LINK) (R) (FED)	404,098	233,773	57.85%	404,098	267,790	66.27%	(34,017)	-15%
RESIDENTIAL (R)	36,612	21,852	59.69%	36,612	6,465	17.66%	15,387	70%
PREVENTION (R) (FED)	521,955	313,808	60.12%	521,955	345,517	66.20%	(31,709)	-10%
SUB-TOTAL	4,266,528	2,105,671	49%	4,266,528	2,534,458	59%	(428,787)	-20%

SERVICES OUTSIDE PROGRAM AREA

PROGRAM	REVENUE			EXPENDITURES			ACTUAL Variance	VARIANCE / REVENUE
	BUDGET FY 2026	ACTUAL YTD	%	BUDGET FY 2026	ACTUAL YTD	%		
EMERGENCY SERVICES (R)	2,040,456	1,792,750	87.86%	2,040,456	1,027,157	50.34%	765,593	43%
CHILD MOBILE CRISIS (R)	271,050	154,576	57.03%	271,050	106,914	39.44%	47,662	31%
CIT ASSESSMENT SITE (R)	329,029	213,460	64.88%	329,029	214,185	65.10%	(725)	0%
CONSUMER MONITORING (R) (FED)	-	0	#DIV/0!	0	189,036	#DIV/0!	(189,036)	0%
ASSESSMENT AND EVALUATION (R)	514,373	294,075	57.17%	514,373	309,728	60.21%	(15,652)	-5%
SUB-TOTAL	3,154,908	2,454,861	77.81%	3,154,908	1,847,020	58.54%	607,841	25%

ADMINISTRATION

PROGRAM	REVENUE			EXPENDITURES			ACTUAL VARIANCE
	BUDGET FY 2026	ACTUAL YTD	%	BUDGET FY 2026	ACTUAL YTD	%	
ADMINISTRATION (FED)	826,292	386,808	46.81%	826,292	386,808	46.81%	0
PROGRAM SUPPORT	27,600	16,100	58.33%	27,600	16,100	58.33%	0
SUB-TOTAL	853,892	402,908	47.18%	853,892	402,908	47.18%	0
ALLOCATED TO PROGRAMS				4,268,473	3,126,283	73.24%	

(R) Restricted Funding within program
(FED) Federal Reimbursement process within program

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FISCAL AGENT AND OTHER PROGRAMS

PROGRAM	REVENUE			EXPENDITURES			ACTUAL VARIANCE	VARIANCE / REVENUE
	BUDGET FY 2026	ACTUAL YTD	%	BUDGET FY 2026	ACTUAL YTD	%		
INTERAGENCY COORDINATING COUNCIL (R)	1,896,364	1,091,128	57.54%	1,896,364	871,534	45.96%	219,594	20%
INFANT CASE MANAGEMENT (R)	939,818	463,861	49.36%	939,818	531,626	56.57%	(67,765)	-15%
EARLY INTERVENTION (R)	2,719,353	1,230,849	45.26%	2,719,353	1,611,181	59.25%	(380,332)	-31%
TOTAL PART C	5,555,535	2,785,838	50.15%	5,555,535	3,014,341	54.26%	(228,503)	-8%
HEALTHY FAMILIES (R)	1,246,855	372,082	29.84%	1,246,855	709,398	56.90%	(337,317)	-91%
TOTAL HEALTHY FAMILY	1,246,855	372,082	29.84%	1,246,855	709,398	56.90%	(337,317)	-91%
COMMUNITY OUTREACH	118,307	56,288	47.58%	118,307	48,735	41.19%	7,553	13%
TOTAL COMMUNITY OUTREACH	118,307	56,288	47.58%	118,307	48,735	41.19%	7,553	13%

(R) Restricted Funding within program
(FED) Federal Reimbursement process within program

RACSB
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RECAP FY 2026 BALANCES

	<u>REVENUE</u>	<u>EXPENDITURES</u>	<u>NET</u>	<u>NET / REVENUE</u>
MENTAL HEALTH	15,557,172	12,959,481	2,597,691	17%
DEVELOPMENTAL SERVICES	17,542,107	15,747,170	1,794,937	10%
SUBSTANCE ABUSE	2,105,671	2,534,458	(428,787)	-20%
SERVICES OUTSIDE PROGRAM AREA	2,454,861	1,847,020	607,841	25%
ADMINISTRATION	402,908	402,908	0	0%
FISCAL AGENT PROGRAMS	3,214,208	3,772,474	(558,266)	-17%
TOTAL	41,276,927	37,263,511	4,013,416	10%

RECAP FY 2025 BALANCES

	<u>REVENUE</u>	<u>EXPENDITURES</u>	<u>NET</u>	<u>NET / REVENUE</u>
MENTAL HEALTH	15,540,800	13,387,969	2,152,832	14%
DEVELOPMENTAL SERVICES	15,170,829	17,113,906	(1,943,077)	-13%
SUBSTANCE ABUSE	2,520,658	2,369,041	151,617	6%
SERVICES OUTSIDE PROGRAM AREA	2,097,385	2,064,501	32,883	2%
ADMINISTRATION	956,866	956,866	0	0%
FISCAL AGENT PROGRAMS	3,735,663	4,196,605	(460,943)	-12%
TOTAL	40,022,201	40,088,889	(66,688)	0%

	<u>\$ Change</u>	<u>% Change</u>
Change in Revenue from Prior Year	\$ 1,254,726	3.14%
Change in Expense from Prior Year	\$ (2,825,377)	-7.05%
Change in Net Income from Prior Year	\$ 4,080,104	-6118.20%

*Unaudited Report

RAPPAHANNOCK AREA
COMMUNITY SERVICES BOARD

MEMORANDUM

To: Joe Wickens, Executive Director

From: Sara Keeler, Director of Finance and Administration

Date: March 6, 2026

Re: Investment Strategy Update & Recommendation for Board Approval

At the September 2025 Board meeting, representatives from Atlantic Union Bank presented recommendations regarding RACSB's investment strategy. Their proposal included maintaining our existing investments with Atlantic Union Bank and participating in the Virginia Municipal Investment Trust (VA MINT).

VA MINT, which officially launched on July 1, 2025, is a pooled investment fund similar to the Local Government Investment Pool (LGIP), in which RACSB currently participates. Atlantic Union Bank indicated that VA MINT is designed to outperform LGIP in terms of net interest earnings after fees.

During the October 2025 Board meeting, the Board elected to delay participation in VA MINT to allow time to evaluate its performance relative to LGIP. Staff has since monitored VA MINT's performance and can confirm that over the past six months, VA MINT has outperformed LGIP by an average of 14 basis points (0.14%) per month.

Staff Recommendation:

Staff recommends adopting a resolution to authorize participation in VA MINT, thereby allowing investment in the pooled fund.

A RESOLUTION AUTHORIZING PARTICIPATION IN THE VIRGINIA MUNICIPAL INVESTMENT TRUST FOR THE PURPOSE OF INVESTING FUNDS BELONGING TO THE RAPPAHANNOCK AREA COMMUNITY SERVICE BOARD, IN CERTAIN AUTHORIZED INVESTMENTS IN ACCORDANCE WITH SECTIONS 2.2-4501 *et seq.* AND 15.2-1300 OF THE VIRGINIA CODE.

WHEREAS, Section 15.2-1500 of the Virginia Code provides, in part, that every locality shall provide for all the governmental functions of the locality, including, without limitation, the organization of all departments, offices, boards, commissions and agencies of government, and the organizational structure thereof, which are necessary to carry out the functions of government; and

WHEREAS, the Investment of Public Funds Act (Va. Code §§ 2.2-4500 through 2.2-4519) lists the eligible categories of securities and investments in which municipal corporations, other political subdivisions and other public bodies are authorized to invest funds belonging to them or within their control; and

WHEREAS, Section 15.2-1300 of the Virginia Code provides that any power, privilege or authority exercised or capable of exercise by any political subdivision of the Commonwealth of Virginia may be exercised and enjoyed jointly with any other political subdivision having a similar power, privilege or authority pursuant to agreements with one another for joint action in accordance with the provisions of that Code section; and

WHEREAS, the City of Danville, Virginia and the County of Henry, Virginia have jointly established and are participating in the Virginia Municipal Investment Trust (the "Trust Fund"), also known as "Virginia MINT," and have provided in their trust agreement for participation by other eligible governmental entities that execute a Joint Exercise of Powers agreement; and

WHEREAS, it appearing to the governing body of the Rappahannock Area Community Services Board, that it is in the best interests of the Board to become a Participating Political Subdivision in the Trust Fund; and

WHEREAS, the individual holding the title of Executive Director, is chief investment officer of the Rappahannock Area Community Services Board, and has the authority and responsibility under Virginia law to determine the manner in which funds under his control will be invested;

NOW, THEREFORE THE BOARD OF THE RAPPAHANNOCK AREA COMMUNITY SERVICES BOARD HEREBY RESOLVES:

§ 1 That, pursuant to Sections 2.2-4501 *et seq.* and 15.2-1300 of the Virginia Code, the Rappahannock Area Community Services Board, hereby establishes a trust for the purpose of investing funds, other than sinking funds, determined to derive the most benefit from this investment strategy, in investments authorized under the Investment of Public Funds Act, jointly with other participating political subdivisions and public bodies in the Trust Fund. A copy of the Virginia Municipal Investment Trust Fund Agreement (“Trust Fund Agreement”) is attached and incorporated in this resolution as Exhibit A.

§ 2 That the Rappahannock Area Community Services Board, hereby agrees to become a “Participating Political Subdivision” in the Trust Fund as further defined in the Agreement.

§ 3 That the Rappahannock Area Community Services Board, hereby designates the Executive Director to serve as its trustee with respect to the Trust Fund and determine what funds shall be invested in the Trust Fund.

§ 4 That the Rappahannock Area Community Services Board, hereby authorizes its above-designated trustee to execute and deliver the Joint Exercise of Powers Agreement for Participating Political Subdivisions under the Virginia Municipal Investment Trust (“Joint Exercise of Powers Agreement”), a copy of which is attached and incorporated in this resolution as Exhibit B.

§ 5 This resolution shall be in force and effect upon its adoption.

Adopted _____, 20__.

Attested: _____

Exhibits: Trust Fund Agreement (“Exhibit A”)
Trust Joinder Agreement (“Exhibit B”)

VIRGINIA MUNICIPAL INVESTMENT TRUST
TRUST FUND AGREEMENT

THIS AGREEMENT (the “Agreement”) is made by and among the Participating Political Subdivisions that are signatories hereto; the Participating Political Subdivisions that execute Trust Joinder Agreements, in a form substantially similar to the document attached as Exhibit A hereto, for the purpose of participating in the Virginia Municipal Investment Trust (“VA MINT,” or the “Trust”); their duly elected Treasurers or other Chief Investment Officers, as appropriate, who are empowered by law to invest the public funds of such Participating Political Subdivisions; and those individuals named as Trustees pursuant to Section 107 hereof and their successors (the “Board of Trustees,” or the “Board”).

WITNESSETH:

WHEREAS, Section 15.2-1500 of the Virginia Code provides, in part, that every locality shall provide for all the governmental functions of the locality, including, without limitation, the organization of all departments, offices, boards, commissions and agencies of government, and the organizational structure thereof, which are necessary to carry out the functions of government; and

WHEREAS, Chapter 45 of Title 2.2 of the Virginia Code (§§ 2.2-4500 *et seq.*) of the Virginia Code provides that all municipal corporations and other political subdivisions may invest any and all moneys belonging to them or within their control, other than sinking funds, in certain authorized investments; and

WHEREAS, Section 15.2-1300 of the Virginia Code provides that any power, privilege or authority exercised or capable of exercise by any political subdivision of the Commonwealth of Virginia may be exercised and enjoyed jointly with any other political subdivision of the Commonwealth having a similar power, privilege or authority pursuant to agreements with one another for joint action pursuant to the provisions of that section; and

WHEREAS, the City of Danville and the County of Henry (the “Initial Participants”) have adopted ordinances or resolutions, or otherwise taken steps required by law or rule, to authorize and approve participation in the Virginia Municipal Investment Trust Fund for each such locality; and

WHEREAS, the Participating Political Subdivisions and their Treasurers or Chief Investment Officers and the Board of Trustees of the Virginia Municipal Investment Trust Fund (herein referred to as the “Trust Fund”) hereby establish a trust for the purpose of investing monies belonging to or within the control of the Participating Political Subdivisions, respectively, other than sinking funds, in investments authorized under Chapter 45 of Title 2.2 of the Virginia Code (§§ 2.2-4500 *et seq.*); and

WHEREAS, the parties intend that the Trust Fund hereby established shall constitute a tax-exempt governmental trust under Section 115 of the Internal Revenue Code of 1986, as amended;

NOW, THEREFORE, The Participating Political Subdivisions, together with their Treasurers or Chief Investment Officers, hereby establish with the Board of Trustees, and the Board of Trustees hereby accepts, under the terms of this Agreement, a trust for the purpose of investing moneys belonging to or within the control of the respective Participating Political Subdivisions as allowed by law; and, further, the parties hereto mutually agree as follows:

ARTICLE I
GENERAL PROVISIONS

Section 100. APPLICATION.

The provisions of this Article I are general administrative provisions applicable to each Part of this Agreement and provisions applicable to the Board of Trustees.

Section 101. NAME

The name of the trust created by this Agreement shall be the “Virginia Municipal Investment Trust” and the Board and/or any other authorized individual or entity shall conduct and carry on the activities of the Trust established hereunder, execute all documents, and sue or be sued, under that name. The Board may use such other formal or informal designations, including “VA MINT,” in connection with the business of the Trust, and may adopt such other names for the Trust as the Board deems proper, and the Trust may hold property and conduct its activities under such adopted designations or names. The Board shall take such action as they, acting with the advice of counsel, shall deem necessary or appropriate to file or register such names in accordance with the laws of the Commonwealth of Virginia or the United States of America so as to protect and reserve the right of the Trust in and to such names.

Section 102. DEFINITIONS.

The following definitions shall apply to this Agreement, unless the context of the term indicates otherwise, and shall govern the interpretation of this Agreement:

102.1 Administrator. The term “Administrator” shall mean a person or other qualified entity duly designated by the Board of Trustees pursuant to the terms hereof to administer VA MINT.

102.2 Beneficial Interest. The right of a party to some distribution or benefit from VA MINT; a vested interest in VA MINT’s assets.

102.3 Business Day. Means a day on which banks are not required or authorized by law to close in the State and on which the Investment Manager or Custodian is not closed.

102.4 Code. The term “Code” means the Internal Revenue Code of 1986, as amended, and, as relevant in context, the Internal Revenue Code of 1954, as amended.

102.5 Custodian. The term “Custodian” means U.S. Bank, or any other bank, mutual fund, insurance company or other qualified entity selected by the Board of Trustees, under a separate

written document with each, to accept contributions from Participating Political Subdivisions and to otherwise hold some or all of the assets of VA MINT.

102.6 Effective Date. The term “Effective Date” means the date coinciding with the last to occur of each of the following events: (i) passage of an ordinance by either or both of the Initial Members approving such governmental entity or entities as Participating Political Subdivisions in VA MINT; (ii) execution by the authorized officer of each such governmental entity of the Trust Joinder Agreement; and (iii) execution of this Agreement by all members of the initial Board of Trustees and the Administrator.

102.7 Participating Political Subdivision. The term “Participating Political Subdivision” means any county, city, town, or other political subdivision within the State whose governing body has passed an ordinance or resolution to participate in VA MINT, or is otherwise entitled to participate in accordance with State law, and whose Treasurer or Chief Investment Officer, serving as trustee for such Participating Political Subdivision, executes a Trust Joinder Agreement, as provided in Section 301 hereof.

102.8 Treasurer. The term “Treasurer” means an officer described in Article VII, Section 4, of the Constitution of Virginia who shall serve as the trustee and representative of its Participating Political Subdivision for purposes of this Agreement. Nothing in this Agreement shall be construed to limit the discretion of a duly elected Treasurer to invest the public funds of his or her political subdivision in any manner otherwise permitted by law, nor shall the decision of any local governing body to become a Participating Political Subdivision under this agreement compel any duly elected Treasurer having responsibility for such investments of public funds to invest any the locality’s funds in VA MINT created under this Agreement.

102.9 Chief Investment Officer. The term “Chief Investment Officer” means an officer designated by the governing body of a Participating Political Subdivision to invest public funds on behalf of the political subdivision and to serve as the trustee of such Participating Political Subdivision with respect to VA MINT. The term “Chief Investment Officer” may include certain individuals holding the title of “treasurer” for the political subdivision but who are not included in the definition in Subsection 102.8. Each Treasurer or Chief Investment Officer, as the case may be, shall be the trustee and representative of his or her Participating Political Subdivision for purposes of this Agreement and shall serve on the Board of Trustees established hereby.

102.10 Fiscal Year. The first fiscal year of VA MINT shall be a short fiscal year beginning on the Effective Date of this Agreement and ending on June 30, 2024. Each subsequent fiscal year of VA MINT shall begin on the first day of July and end on the thirtieth day of June.

102.11 Investment Manager or AUMA. The term “Investment Manager” or “AUMA” shall mean Atlantic Union Municipal Advisors, Inc., a Virginia Corporation, and/or any person or persons appointed, employed, or contracted with by the Administrator on behalf of the Trust pursuant to Section 202.3 hereof.

102.12 Investment Policy. The term “Investment Policy” means the Virginia Municipal Investment Trust Investment Policy, as established by the Board of Trustees, as may be amended from time to time.

102.13 Prudent Person. A person who conducts himself faithfully, with intelligence, and exercising sound discretion in the management of his affairs, not in regard to speculation, but in regard to the permanent disposition of his funds, considering the probable income, as well as the probable safety of capital to be invested.

102.14 State. The term “State” means the Commonwealth of Virginia.

102.15 Supermajority. When used with reference to a vote hereunder, the term “Supermajority” shall mean the vote of not less than 75% of those entitled to vote.

102.16 Trust Fund, Trust, or VA MINT. The terms “Trust Fund,” “Trust,” or “VA MINT” shall mean the Virginia Municipal Investment Trust, comprising of all of the assets set aside hereunder.

102.17 Trust Joinder Agreement. The term “Trust Joinder Agreement” means the agreement, in the form attached hereto as Exhibit A or any form substantially similar, pursuant to which a Participating Political Subdivision participates in VA MINT once executed by a duly authorized officer of such Participating Political Subdivision and, in connection with which, the Treasurer or Chief Investment Officer, as the case may be, serves as the trustee of such Participating Political Subdivision, and thereby agrees to be bound by the terms and conditions of the Virginia Municipal Investment Trust Fund Agreement, as provided in Article III hereof.

102.18 Trustees. The term “Trustees” means the individuals who serve on the Board of Trustees of VA MINT pursuant to Section 107 hereof and their successors.

102.19 Virginia Code. The term “Virginia Code” means the laws embraced in the titles, chapters, articles and sections designated and cited as the “Code of Virginia,” under the laws of the State.

102.20 Enhanced Cash Pool. The name of one of the portfolios of VA MINT, into which assets of VA MINT are invested for purposes of providing VA MINT participants with safety of principal, liquidity and return by taking moderate interest rate and liquidity risk by investing in a diversified portfolio of high-quality securities. While not guaranteed, the Enhanced Cash Pool intends to maintain a Net Asset Value of \$1.00 per share.

102.21 Flex-Term Pool. The name of one of the portfolios of VA MINT, into which assets of VA MINT are invested for purposes of providing a series of investment options subject to pre-set redemption periods ranging from 60 days to one year from the time of investment, to meet the cash management needs of the Participating Political Subdivisions. The Virginia MINT Flex Term Pool will seek to provide the highest investment return consistent with maintaining principal at maturity and meeting such pre-set redemption schedule.

Section 103. GENERAL DUTIES AND MEETINGS OF THE BOARD OF TRUSTEES.

103.1 General Duties. The Board of Trustees and each Investment Manager appointed pursuant to this Agreement shall discharge their respective duties under this Agreement solely as follows: (i) except as otherwise provided by any applicable provision of any statute, regulation, ordinance, or resolution, for the exclusive purpose of fulfilling the investment objectives of the

Participating Political Subdivisions and defraying the reasonable expenses of administering VA MINT; (ii) with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of like character and with like aims; and (iii) by diversifying the investments of VA MINT so as to minimize the risk of large losses unless under the circumstances, it is clearly prudent not to do so. However, the duties and obligations of the Board of Trustees and each Investment Manager, respectively, as such, shall be limited to those expressly imposed upon them, respectively, by this Agreement. The Board of Trustees shall administer VA MINT in compliance with Chapter 45 of Title 2.2 of the Virginia Code (§§ 2.24500 et. seq.)

103.2 Authority of the Trustees. The Trustees shall have the power and authority and shall be charged with the duty of general supervision and operation of VA MINT and shall conduct the business and activities of VA MINT in accordance with this Agreement, the Trust Joinder Agreements, rules and regulations adopted by the Board of Trustees and applicable law.

103.3 Trustees' Liabilities. No Trustee shall be liable: for any act of omission or commission by any other Trustee; for any action taken pursuant to this Agreement in good faith; or for an act of omission except bad faith or gross negligence. The Trustees are hereby authorized and empowered to obtain, at the expense of VA MINT, liability insurance fully protecting the respective Trustees, the Administrator, and VA MINT from any loss or expense incurred, including reasonable attorney's fees, for all acts of the Trustees except bad faith or gross negligence. VA MINT shall save, hold harmless and indemnify the Trustees from any loss, damage or expense incurred by said persons or entities while acting in their official capacity excepting bad faith or gross negligence.

103.4 Standard of Review. In evaluating the performance of the Trustees, compliance by the Trustees with this Agreement must be determined in light of the facts and circumstances existing at the time of the Trustees' decision or action and not by hindsight.

103.5 Limitations on Liabilities. The Trustees' responsibilities and liabilities shall be subject to the following limitations:

103.5.1 The Trustees shall have no duties other than those expressly set forth in this Agreement and those imposed on the Trustees by applicable laws.

103.5.2 The Trustees shall be responsible only for money actually received by the Trustees, and then to the extent described in this Agreement.

103.5.3 The Trustees shall not be responsible for the correctness of any determination of payments or disbursements from VA MINT.

103.5.4 The Trustees shall have no liability for the acts or omissions of any predecessor or successor in office.

103.5.5 The Trustees shall have no liability for (i) the acts or omissions of any Investment Manager or Managers; (ii) the acts or omissions of any insurance company; (iii) the acts or omissions of any mutual fund; or (iv) following directions that

are given to the Trustees by the Treasurer or Chief Investment Officer in accordance with this Agreement.

103.6 Reliance on Counsel. The Board of Trustees may employ, retain or consult with legal counsel, who may be counsel for the Administrator, concerning any questions which may arise with reference to the duties and powers or with reference to any other matter pertaining to this Agreement; and the opinion of such counsel shall be full and complete authorization and protection in respect of any action taken or suffered by the Trustees in good faith in accordance with the opinion of such counsel, and the Trustees shall not be individually or collectively liable therefor.

103.7 Meetings.

103.7.1 The Board of Trustees shall meet at least three times per year, and more frequently if called, at the principal office of VA MINT or at such other location as may be acceptable to a majority of the Trustees, including via a virtual, online secure meeting platform. One such meeting of the Board of Trustees shall be held as soon as practicable after the adjournment of the annual meeting of Treasurers or Chief Investment Officers of Participating Political Subdivisions at such time and place as the Board of Trustees may designate. Other meetings of the Board of Trustees shall be held at places within the Commonwealth of Virginia and at times fixed by resolution of the Board of Trustees, or upon call of the Chairperson of the Board or a majority of the Trustees, on not less than ten (10) days' advance notice. Such notice shall be directed to the Trustees by U. S. mail to the respective addresses of the Trustees as recorded in the office of VA MINT or by electronic mail. The notice of any special meetings of the Board of Trustees shall state the purpose of the meeting.

103.7.2 A majority of the number of Trustees elected and serving at the time of any meeting shall constitute a quorum for the transaction of business. Each Trustee shall be entitled to cast a single vote of equal weight on each question coming before the Board. Proxy voting is not allowed. The act of a majority of Trustees present at a meeting at which a quorum is present, shall be the act of the Board of Trustees unless otherwise specified in this agreement. Less than a quorum may adjourn any meeting. Robert's Rules of Order shall be the parliamentary authority to govern meetings of the Board, unless the Board adopts such other authority.

103.8 Office of VA MINT. The Administrator shall establish, maintain and provide adequate funding for an office for the administration of VA MINT. The initial address of the office for the administration of VA MINT shall be 4300 Cox Road, Glen Allen, VA 23060, unless and until the Administrator establishes another office. The address of such office is to be made known to the parties interested in or participating in VA MINT and to the appropriate governmental agencies. The official books and records pertaining to VA MINT and its administration shall be kept and maintained at the by the Administrator at the office of VA MINT.

103.9 Execution of Documents. A certificate signed by a person designated hereunder by the Board of Trustees to serve as Secretary shall be evidence of the action of the Trustees, and any

such certificate or other instrument so signed shall be kept and maintained at the office of VA MINT and may be relied upon as an action of the Trustees.

103.10 Appointment and Removal of Administrator. The Board of Trustees may appoint an Administrator pursuant to an administrative services agreement between the parties. The Board of Trustees shall provide compensation for the Administrator to administer the affairs of VA MINT. Any three (3) Trustees may call for a vote of the Board of Trustees to remove the Administrator by providing no less than 30 days' notice to the other Trustees and to the Administrator. A vote will be scheduled at the next meeting of the Board of Trustees, for which sufficient notice can be given, at which meeting the Administrator may be removed on the vote of a Supermajority of the members of the Board of Trustees then serving. Upon removal of the Administrator, the Board of Trustees shall designate a successor Administrator.

103.11 Duty to Furnish Information. The Treasurers or Chief Investment Officers and the Board of Trustees shall furnish to each other any document, report, return, statement, or other information that the other reasonably deems necessary to perform duties imposed under this Agreement or otherwise imposed by law.

103.12 Reliance on Communications. The Board of Trustees may rely upon a certification of a Treasurer or Chief Investment Officer with respect to any instruction, direction, or approval of its Participating Political Subdivision and may continue to rely upon such certification until a subsequent certification is filed with the Trustees. The Trustees shall have no duty to make any investigation or inquiry as to any statement contained in any such writing but may accept the same as fully authorized by the Treasurer or Chief Investment Officer and its Participating Political Subdivision.

Section 104. ADMINISTRATIVE POWERS AND DUTIES.

104.1 Trustees. The Board of Trustees, in addition to all powers and authorities under common law or statutory authority, including Chapter 45 of Title 2.2 of the Virginia Code (§§ 2.2-4500 *et seq.*), and subject to the requirements and limitations imposed by the common law or statutory authority, including Chapter 45 of Title 2.2 of the Virginia Code (§§ 2.2-4500 *et seq.*), shall have and in its sole and absolute discretion may exercise from time to time and at any time, either through its own actions, delegation to the Administrator or any other third party as selected by the Board of Trustees, or through a Custodian selected by the Board of Trustees the following administrative powers and authority with respect to VA MINT:

104.1.1 To receive for the purposes hereof all cash contributions paid to it by or at the direction of the Participating Political Subdivisions or their Treasurers or Chief Investment Officers.

104.1.2 To hold, invest, reinvest, manage, administer and distribute cash balances as shall be transferred to the Trustees from time to time by the Participating Political Subdivisions or their Treasurers or Chief Investment Officers and the increments, proceeds, earnings and income thereof for the exclusive benefit of Participating Political Subdivisions.

104.1.3 To continue to hold any property of VA MINT that becomes otherwise unsuitable for investment for as long as the Board of Trustees in its discretion deems desirable; to reserve from investment and keep unproductive of income, without liability for interest, cash temporarily awaiting investment and such cash as it deems advisable, or as the Administrator from time to time may specify, in order to meet the administrative expenses of VA MINT or anticipated distributions therefrom.

104.1.4 To hold property of VA MINT in the name of VA MINT, or in the name of a nominee or nominees (*e.g.*, registered agents), without disclosure of the trust, or in bearer form so that it will pass by delivery, but no such holding shall relieve the Board of Trustees of its responsibility for the safe custody and disposition of VA MINT property in accordance with the provisions of this Agreement; the books and records of the Board of Trustees shall show at all times that such property is part of VA MINT and the Board of Trustees shall be absolutely liable for any loss occasioned by the acts of its nominee or nominees with respect to securities registered in the name of the nominee or nominees.

104.1.5 To employ in the management of VA MINT suitable agents, attorneys, advisors, and other professionals, without liability for any loss occasioned by any such person, so long as they are selected with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of a like character and with like aims.

104.1.6 To make, execute and deliver, as trustee, any deeds, conveyances, leases, mortgages, contracts, waivers, or other instruments in writing that it may deem necessary or desirable in the exercise of its powers under this Agreement.

104.1.7 To do all other acts that it may deem necessary or proper to carry out any of the powers set forth in this Section 104 or Section 202, to administer or carry out the purposes of VA MINT, or as otherwise is in the best interests of VA MINT; provided, however, the Board of Trustees need not take action unless in its opinion there are sufficient Trust Fund assets available for the expense thereof.

104.1.8 To adopt rules and regulations governing the Trustees' operations and procedures.

104.1.9 To contract with municipal corporations, political subdivisions, and other public entities of State or of local government and private entities for the provision of Trust Fund services and for the use or furnishing of services and facilities necessary, useful, or incident to providing Trust Fund services.

104.1.10 To advise the Administrator on the establishment of expectations with regard to the provision of administrative services and the establishment of appropriate fee levels.

104.1.11 To establish and charge fees for participation in VA MINT and for additional administrative services provided to a Participating Political Subdivision in addition to any fees charged by other administrative service providers.

104.1.12 To collect and disburse all funds due or payable from VA MINT, under the terms of this Agreement.

104.1.13 To provide for and promulgate all rules, regulations, and forms deemed necessary or desirable in contracting with Treasurers and Chief Investment Officers and their Participating Political Subdivisions, in fulfilling the Trustees' purposes and in maintaining proper records and accounts.

104.1.14 To employ insurance companies, banks, trust companies, investment brokers, investment advisors, or others as agents for the receipt and disbursement of funds held in trust for Participating Political Subdivisions.

104.1.15 To determine, consistent with the applicable law and the procedures under VA MINT, all questions of law or fact that may arise as to investments and the rights of any Participating Political Subdivision to assets of VA MINT.

104.1.16 Subject to and consistent with the Code and the Virginia Code, to construe and interpret the Trust Agreement and to correct any defect, supply any omissions, or reconcile any inconsistency in the Agreement.

104.1.17 To contract for, purchase or otherwise procure insurance and investment products.

104.1.18 To employ transfer agents for the purposes of maintaining records of the funds and investments held by VA MINT and providing the usual and customary services performed by transfer agents.

104.2 Administrator. Pursuant to an administrative services agreement between the Board of Trustees and the Administrator, the Administrator shall have the power and authority to implement policy and procedural matters as directed by the Board of Trustees as they relate to the ongoing operation and supervision of VA MINT and the provisions of this Agreement and applicable law. The Administrator shall immediately make application for appropriate insurance, to any company designated by the Board of Trustees, in such amount as may be specified by the Board of Trustees. The premium on such bond or insurance shall be paid from VA MINT, which bond or insurance shall be continued in force in such amount as the Board of Trustees may from time to time require. If the Administrator's bond or insurance coverage is refused, or is ever cancelled, the Administrator may be removed on a Supermajority vote of the Trustees then serving.

Section 105. TAXES, EXPENSES AND COMPENSATION OF TRUSTEES.

105.1 Taxes. The Administrator, without direction from the Board of Trustees, shall pay out of VA MINT all taxes, if any, properly imposed or levied with respect to VA MINT, or any

part thereof, under applicable law, and, in its discretion, may contest the validity or amount of any tax, assessment, claim or demand respecting VA MINT or any part thereof.

105.2 Expenses and Compensation. The Board of Trustees is authorized to set aside from Participating Political Subdivision contributions received and the investment income earned thereon a reasonable sum for the operating expenses and administrative expenses of VA MINT including but not limited to, the employment of such administrative, legal, accounting, and other expert and clerical assistance, and the purchase or lease of such materials, supplies and equipment as the Board of Trustees, in its discretion, may deem necessary or appropriate in the performance of its duties, or the duties of the agents or employees of VA MINT or the Trustees. All remaining funds received by the Trust shall be set aside, managed, and used only for the benefit of Participating Political Subdivisions.

Section 106. COMMUNICATIONS.

Until notice is given to the contrary, communication to the Trustees or to the Administrator shall be sent to them at the initial office of VA MINT in care of the Administrator at the address set forth in Section 103.8 hereof. Thereafter, communications to the Trustees or to the Administrator shall be sent to them at the duly established office of VA MINT.

Section 107. APPOINTMENT, RESIGNATION OR REMOVAL OF TRUSTEES.

107.1 Appointment of Trustees and Length of Appointment. The initial number of voting Trustees serving on the Board of Trustees shall be two, and the total number of voting Trustees shall be no more than five (5).

107.1.1 The initial group of Trustees to establish VA MINT shall be the following: (a) the Treasurer or other duly appointed Chief Investment Officer or other representative of the City of Danville; and (b) the Treasurer or other duly appointed Chief Investment Officer or other representative of the County of Henry.

107.1.2 Thereafter, each Treasurer or other duly appointed Chief Investment Officer or other representative of subsequent Participating Political Subdivisions shall become Trustees, until such time as the total number of Trustees shall be five (5).

107.1.3 The Administrator shall serve as a non-voting *ex officio* trustee.

107.1.4 On no less than an annual basis, the Board of Trustees shall appoint a chairperson to lead the meetings of the Board of Trustees.

107.1.5 The Board of Trustees may, by approval of a majority of the then-serving Trustees, appoint such non-voting trustees to the Board of Trustees as it deems appropriate.

107.2 Designation. A Treasurer or other duly appointed Chief Investment Officer shall have the authority to appoint a delegate to discharge his or her duties as member of the Board of

Trustees hereunder, and such individual shall be deemed a member of the Board of Trustees upon such designation.

107.3 Restrictions on Board Service. No individual Trustee may be elected or continue to serve as a Trustee after becoming an owner, officer or employee of the Administrator, an Investment Manager or a Custodian.

107.4 Resignation of a Trustee.

107.4.1 A Trustee may resign from all duties and responsibilities under this Agreement by giving written notice to the Chairperson of the Trustees.

107.4.2 The Chairperson may resign from all duties and responsibilities under this Agreement by giving written notice to all of the other Trustees. Such notice shall state the date such resignation shall take effect and such resignation shall take effect on such date but not later than sixty (60) days after the date such written notice is given.

107.4.3 Any Trustee, upon leaving office, shall forthwith turn over and deliver to the Administrator at the principal office of VA MINT any and all records, books, documents or other property in his or her possession or under his or her control which belong to VA MINT.

107.4.4 Upon such resignation, the Participating Political Subdivision represented by the resigning Trustee shall appoint a new Trustee to serve in his/her stead.

107.5 Removal of a Trustee.

107.5.1 Each Trustee, unless due to resignation, death, incapacity, removal, or conviction of a felony or any offense for which resignation is required as defined in Virginia Code § 9.1-902, shall serve and shall continue to serve as Trustee hereunder, subject to the provisions of this Agreement. If a Trustee is removed hereunder, then the Participating Political Subdivision represented by such removed Trustee shall appoint a successor Trustee.

107.5.2 A Trustee shall relinquish his or her office or may be removed by a majority vote of the Trustees then serving or *ipso facto* when the Political Subdivision that he/she represents is no longer a Participating Political Subdivision in VA MINT. Notice of removal of a Trustee shall be furnished to the other Trustees by the Chairperson of the Trustees and shall set forth the effective date of such removal. Notice of removal of the Chairperson shall be furnished to the other Trustees by the Administrator and shall set forth the effective date of such removal.

107.5.3 Upon removal of a Trustee where the Political Subdivision that he/she represents is no longer a Participating Political Subdivision in VA MINT, a successor Trustee shall be elected forthwith by the affirmative vote of the majority of the remaining Trustees, even if such remaining Trustees constitute less than a quorum of the Board of Trustees. The notice of the election of a successor Trustee shall be furnished to the other Trustees by the Chairperson.

107.5.4 A Trustee shall relinquish his or her office *ipso facto* when he or she no longer serves as Treasurer, Chief Investment Officer, or other duly appointed representative of a Participating Political Subdivision. In that case, and notwithstanding anything herein to the contrary, such Trustee shall be replaced by the then-current Treasurer, Chief Investment Officer, or other duly appointed representative of the same Participating Political Subdivision.

107.6 Trustees' Rights. In case of the death, resignation or removal of any one or more of the Trustees, the remaining Trustees shall have the powers, rights, estates and interests of this Agreement as Trustees and shall be charged with the duties of this Agreement; provided in such cases, no action may be taken unless it is concurred in by a majority of the remaining Trustees. However, if such vacancies leave less than a quorum of Trustees, the remaining trustees may only act to appoint successors. Only after a quorum has been established may the Trustees take the other actions established in this subsection.

Section 108. BONDING.

The Board of Trustees shall immediately make application for a fidelity bond or other appropriate insurance, to any company designated by the Board of Trustees, in such amount as may be specified by the Board of Trustees. Premiums on such bond or insurance shall be paid from VA MINT, which bond or insurance shall be continued in force in such amount as the Board of Trustees may from time to time require. If such a bond or insurance coverage is refused or cancelled due to the service on the Board of Trustees by any Trustee, except with the Board of Trustees' approval, such Trustee may be removed from office by majority vote of the Trustees then serving.

ARTICLE II
INVESTMENTS

Section 200. APPLICATION.

The provisions of Article apply to the investments of VA MINT.

Section 201. ADMINISTRATION OF TRUST.

201.1 General. All such assets shall be held by the Trustees in VA MINT.

201.2 Contributions. The Board of Trustees hereby delegates to the Custodian the responsibility for accepting cash contributions to VA MINT, and the Custodian shall have the responsibility for accepting cash contributions by Participating Political Subdivisions. Assets held in VA MINT shall be dedicated to the benefit of each Participating Political Subdivision, respectively, or to defraying reasonable expenses of VA MINT. All contributions by a Participating Political Subdivision shall be transferred to VA MINT to be held, managed, invested and distributed as part of VA MINT by the Trustees in accordance with the provisions of this Agreement and applicable law.

201.3 Applicable Laws and Regulations. The Board of Trustees shall be authorized to take the steps it deems necessary or appropriate to comply with any laws or regulations applicable to VA MINT.

201.4 Accumulated Share. No Participating Political Subdivision shall have any right, title or interest in or to any specific assets of VA MINT, but shall have an undivided beneficial interest in VA MINT; however, there shall be a specific accounting of assets allocable to each Participating Political Subdivision.

Section 202. MANAGEMENT OF INVESTMENTS OF VA MINT.

202.1 Authority of Trustees. Except as otherwise set forth in this Section 202, and except as otherwise provided by law, the Board of Trustees shall have exclusive authority and discretion to manage and control the assets of VA MINT held by them pursuant to the guidelines established by the Board of Trustees in the Investment Policy.

202.2 Investment Policy. The Board of Trustees, as its primary responsibility under this Agreement, shall develop and adopt written Investment Policies establishing guidelines applicable to the investment of the assets of VA MINT, and from time to time shall modify such Investment Policies, in light of the short and long-term financial interests of the Participating Political Subdivisions and VA MINT. The Investment Policies shall serve as the description of the funding policies and method for VA MINT.

202.3 Investment Manager.

202.3.1 From time to time, the Administrator may, pursuant to approval of the Board of Trustees, appoint one (1) or more independent Investment Manager, pursuant to a written investment advisory or management agreement with each, describing the powers and duties (including the compensation) of the Investment Manager with regard to the management of all or any portion of any investment or trading account of VA MINT. The Investment Manager shall review with the Board of Trustees, a minimum of every calendar quarter: the Investment Policy; the suitability of VA MINT's investments with regard to applicable law, sound investment practices, and in consideration of expected distribution policies of the investments; the performance of the Investment Managers; the asset allocations maintained by the Investment Managers; and the investments' and asset allocation's consistency with the objectives of the Investment Policy.

202.3.2 The initial Investment Manager shall be AUMA. The Board of Trustees hereby ratifies such appointment. The Investment Manager will serve at the pleasure of the Board of Trustees and will be compensated for its recurring, usual and customary services.

202.3.3 The Investment Manager shall maintain an asset allocation for VA MINT, in its reasonable discretion, that is consistent with the objectives of the Investment Policy and applicable law.

202.3.4 AUMA, and any subsequently appointed Investment Manager, may be removed upon the votes of a Supermajority of the then-constituted Board of Trustees.

202.4 Custodian.

202.4.1 The Custodian is responsible for holding all funds and securities in a separate account in the name of VA MINT, collecting all income and principal due VA MINT from securities held, accepting contributions and distributing redemptions, and properly accepting for delivery and/or delivering securities in accordance with the contract between VA MINT and the Custodian.

202.4.2 The Board on behalf of VA MINT shall employ a bank or trust company organized under the laws of the United States of America or the Commonwealth of Virginia. The Custodian shall be subject to such restrictions, limitations, and other requirements set forth in a Custodian Agreement to be entered into between the Board and the Custodian.

202.4.3 The Custodian shall have such duties as are set forth in the Custodian Agreement. Such agreement shall also provide that it may be terminated at any time without cause and without the payment of any penalty within an appropriate time specified in such agreement. In the event that, at any time, the Custodian shall resign or shall be terminated the Board shall appoint a successor.

202.4.4 The initial Custodian shall be U.S. Bank, and such appointment is hereby ratified by the Board of Trustees.

202.4.5 The Custodian shall be compensated for its recurring, usual and customary services.

202.5 Absence of Trustees' Responsibility for Investment Manager. Except to the extent provided herein, the Board of Trustees, collectively and individually, shall not be liable for any act or omission of any Investment Manager and shall not be under any obligation to invest or otherwise manage the assets of VA MINT that are subject to the management of any Investment Manager. Without limiting the generality of the foregoing, the Board of Trustees shall be under no duty at any time to make any recommendation with respect to disposing of or continuing to retain any such asset. Furthermore, the Board of Trustees, collectively and individually, shall not be liable by reason of its taking or refraining from taking the advice of the Investment Manager any action pursuant to this Section, nor shall the Board of Trustees be liable by reason of its refraining from taking any action to remove or replace any Investment Manager; and The Board of Trustees shall be under no duty to make any review of an asset acquired at the direction or order of an Investment Manager.

202.6 Reporting. The Board of Trustees shall be responsible for and shall cause to be filed periodic audits, valuations, reports and disclosures of VA MINT as are required by law or agreements. Notwithstanding anything herein to the contrary, the Board of Trustees shall cause VA MINT to be audited by a certified public accounting firm retained for this purpose at least once each year. The Board of Trustees may employ professional advisors to prepare such audits, valuations, reports and disclosures and the cost of such professional advisors shall be borne by VA MINT.

202.7 Commingling Assets. Except to the extent prohibited by applicable law, the Board of Trustees may commingle the assets of all Participating Political Subdivisions held by the Board of Trustees under this Agreement for investment purposes in VA MINT and shall hold VA MINT in trust and manage and administer the same in accordance with the terms and provisions of this Agreement. However, the assets of each Participating Political Subdivision shall be accounted for separately.

202.7 Record of Shares. The Trust shall maintain records which shall contain the names and addresses of Participating Political Subdivisions; the number of shares representing their respective interests hereunder; and a record of all allocations and redemptions. Such records shall be conclusive as to the identity of the Participating Political Subdivisions to which shares are allocated. Only those Participating Political Subdivisions whose allocation of shares is recorded in the Trust records shall be entitled to receive distributions with respect to shares or otherwise to exercise or enjoy the rights and benefits related to the beneficial interests represented by the shares. No Participant shall be entitled to receive any distribution, nor to have notices given to it, until it has given its appropriate address to the Trust.

202.9 Maintenance of Records. The Administrator, or such other entity appointed by the Board, shall record the allocations of shares in the records of the Trust.

202.10 No Transfer of Shares. The beneficial interests measured by the shares shall not be transferable, in whole or in part, other than to VA MINT itself for purposes of redemption. However, shares may be redeemed from one Participating Political Subdivision's account and the proceeds deposited directly into another Participating Political Subdivision's account upon instructions received from both respective Participants.

202.11 Limitation of Responsibility. The Board of Trustees shall not, nor shall the Participating Political Subdivisions or any officer or other agent of the Trust, be bound to determine the existence of any trust, express, implied or constructive, or of any charge, pledge or equity to which any of the shares or any interest therein are subject, or to ascertain or inquire whether any redemption of any such shares by any Participating Political Subdivision or its representatives is authorized by such trust, charge, pledge or equity, or to recognize any person as having any interest therein except the Participating Political Subdivision recorded as the Participating Political Subdivision to which such shares are allocated. The receipt of moneys by the Participating Political Subdivision in whose name any share is recorded or by the duly authorized agent of such Participating Political Subdivision shall be a sufficient discharge for all moneys payable or deliverable in respect of such shares and from all responsibility to see the proper application thereof.

Section 203. ACCOUNTS.

The Board of Trustees shall keep or cause to be kept at the expense of VA MINT accurate and detailed accounts of all its receipts, investments and disbursements under this Agreement, with the Trustees causing the Investment Manager to account separately for each Investment Manager's portion of VA MINT.

Section 204. DISBURSEMENTS FROM THE TRUST.

204.1 Trust Payments. The Board of Trustees hereby delegates to the Administrator the responsibility for making payments from VA MINT, in accordance with rules and regulations established by the Board of Trustees. Payments from VA MINT shall be made by electronic transfer or check (or the check of an agent) for deposit to the order of the payee. Payments or other distributions hereunder may be mailed to the payee at the address last furnished to the Administrator. The Trustees shall not incur any liability on account of any payment or other distribution made by VA MINT in accordance with this Section. Such payment shall be in full satisfaction of claims hereunder against the Trustee, Administrator or Participating Political Subdivision.

204.2 Payments from the Trust to Participating Political Subdivisions. Any and all allocated shares may be redeemed at the option and as directed by the Treasurer of Chief Investment Officer of each Participating Political Subdivision upon and subject to the terms and conditions provided in this Agreement and the Investment Policy. VA MINT shall, upon application of any Participating Political Subdivision, redeem from such Participating Political Subdivision allocated shares for an amount per share equivalent to the proportional interest in the net assets of VA MINT at the time of the redemption. The procedures for effecting redemption shall be prescribed by the Board; provided, however, that such procedures shall not be structured so as to substantially and materially restrict the ability of the Participating Political Subdivisions to withdraw funds from the Trust.

204.3 Allocation of Expenses.

204.3.1 The Board of Trustees shall pay all expenses of VA MINT from the assets in VA MINT. All expenses of VA MINT, which are allocable to a particular investment option or account, may be allocated and charged to such investment option or account as determined by the Trustees.

204.3.2 All expenses of VA MINT which are not allocable to a particular investment option or account shall be charged to each such investment option or account in the manner established by the Trustees.

204.3.3 The Board of Trustees hereby directs the Administrator to pay such necessary and customary fees and expenses already incurred and associated with the formation and operation of VA MINT until the Effective Date, including legal, accounting, and other expenses, upon request, and to reimburse, upon request, any other entity advancing payment for such fees and expenses, and hereby ratifies any and all agreements with service providers and expenses incurred to date.

Section 205. INVESTMENT PORTFOLIOS.

205.1 Establishment of Portfolios. The Board of Trustees shall initially establish two (2) investment portfolios within VA MINT pursuant to the Investment Policies, for communication to, and acceptance by, Treasurers and Chief Investment Officers:

205.1.1 Enhanced Cash Pool. This pool is established so that VA MINT may make investments therein for purposes of providing VA MINT participants with safety of

principal, liquidity and return by taking moderate interest rate and liquidity risk by investing in a diversified portfolio of high-quality securities.

205.1.2 Virginia MINT Flex Term Pool. This pool is established so that VA MINT may make investments therein for purposes of providing a series of investment options subject to pre-set redemption periods ranging from 60 days to one year from the time of investment, to meet the cash management needs of the Participating Political Subdivisions.

205.2 Separately Managed Accounts. The Board of Trustees authorizes the Investment Manager to offer, and each Participating Political Subdivision to participate in, a separately managed account program (“SMA”), at the discretion of each Participating Political Subdivision. By the SMA, each Participating Political Subdivision electing to participate may invest in longer-term fixed income securities, in a customized manner as coordinated between the Investment Manager and each Participating Political Subdivision that elects to participate in the SMA. The Investment Manager shall establish “break points” for fees associated with participation in the SMA, which break points shall be cumulative across all Participating Political Subdivisions that participate in the SMA, such that the total number of assets directed to the SMA from all Participating Political Subdivisions (and not per each Participating Political Subdivision) shall be used to determine the appropriate fee break point. The SMA shall conform to the Investment Policies and the terms thereof shall be agreed to by the Investment Manager and the Participating Political Subdivision.

205.3 Other Investment Options.

205.3.1 Upon consultation with the Investment Manager, the Board of Trustees may develop additional investment options, reflecting different risk/return objectives and corresponding asset mixes, for selection by Treasurers and Chief Investment Officers, as alternatives to the current investment options.

205.3.2 The determination to add alternative investment options to the Investment Policies, and the development of each such investment option, are within the sole and absolute discretion of the Board of Trustees. The Trustees shall transfer to any deemed investment option developed hereunder such portion of the assets of VA MINT as appropriate.

205.5.3 The Trustees shall manage, acquire, or dispose of the assets in an investment option in accordance with the directions given by each Treasurer or Chief Investment Officer. All income received with respect to, and all proceeds received from, the disposition of property held in an investment option shall be credited to, and reinvested in, such investment option.

205.5.4 If multiple investment options are developed, from time to time, the Board of Trustees may eliminate an investment option, and the proceeds thereof shall be reinvested in the remaining investment option having the shortest duration of investments unless another investment option is selected in accordance with directions given by the Treasurer or Chief Investment Officer.

205.5.6 Separate investment funds within VA MINT and varying percentages of investment in any such separate investment fund by the Participating Political Subdivisions, to the extent so determined by the Board of Trustees, are expressly permitted.

ARTICLE III **PARTICIPATING POLITICAL SUBDIVISIONS**

Section 300. APPLICATION.

The provisions of This Article III set forth the rights of Participating Political Subdivisions.

Section 301. PARTICIPATING POLITICAL SUBDIVISIONS.

301.1 Approval. The Board of Trustees or its designee shall receive applications from Treasurers and Chief Investment Officers of Participating Political Subdivisions for membership in VA MINT and shall approve or disapprove such applications for membership in accordance with the terms of this Agreement, the Trust Joinder Agreement, and the rules and regulations established by the Board of Trustees for admission of new Participating Political Subdivisions. The Board of Trustees shall have total discretion in determining whether to accept a new member. The Board of Trustees may delegate the authority for membership approval to the Administrator.

301.2 Execution of Trust Joinder Agreement. Once the governing body of a political subdivision has approved an ordinance or resolution to participate in VA MINT, its Treasurer or Chief Investment Officer, serving as trustee for such political subdivision, may execute a Trust Joinder Agreement in such form and content as set forth in Exhibit A hereto, or as otherwise prescribed by the Board of Trustees. By the execution of the Trust Joinder Agreement, the Participating Political Subdivision agrees to be bound by all the terms and provisions of this Agreement, the Trust Joinder Agreement, and any rules and regulations adopted by the Trustees under this Agreement. The Treasurer or Chief Investment Officer of each Participating Political Subdivision, serving as such Participating Political Subdivision's trustee shall represent such Participating Political Subdivision's interest in all meetings, votes, and any other actions to be taken by a Participating Political Subdivision hereunder, provided that a Treasurer who elects not to invest public funds pursuant to the Joinder Agreement shall have no obligation to serve as a trustee for his or her locality.

301.3 Continuing as a Participating Political Subdivision. Application for participation in this Agreement, when approved in writing by the Board of Trustees or its designee, shall constitute a continuing contract for each succeeding fiscal year unless terminated by the Trustees or unless the Participating Political Subdivision resigns or withdraws from this Agreement by written notice sent by its duly authorized official. The Board of Trustees may terminate a Participating Political Subdivision's participation in this Agreement for any reason by vote of a Supermajority of the voting members of the Board of Trustees present at a duly called meeting. If the participation of a Participating Political Subdivision is terminated, the Board of Trustees and the Administrator shall effect the withdrawal of such Participating Political Subdivision's beneficial interest in VA MINT and removal of such Participating Political Subdivision's Trustee representative in accordance with its usual withdrawal policies.

ARTICLE IV
OFFICERS

Section 400. APPLICATION.

The provisions of Article IV set forth provisions regarding the officers of VA MINT.

Section 401. ELECTION AND REMOVAL OF OFFICERS.

401.1 Election of Officers; Terms. The Board of Trustees shall appoint the officers of VA MINT. The officers of VA MINT shall consist of a Chairperson of the Board, a Vice-Chairperson, and a Secretary. The Secretary need not be a member of the Board of Trustees and may be the Administrator. Other officers, including assistant and subordinate officers, may from time to time be elected by the Board of Trustees, and they shall hold office for such terms as the Board of Trustees may prescribe. All officers shall hold office until the next annual meeting of the Board of Trustees and until their successors are elected.

401.2 Removal of Officers; Vacancies. Any officer of VA MINT may be removed summarily with or without cause, at any time, on the vote of three-quarters of the Board of Trustees present at a duly called meeting. Vacancies may be filled by the Board of Trustees.

Section 402. DUTIES.

402.1 Duties, Generally. The officers of VA MINT shall have such duties as generally pertain to their offices, respectively, as well as such powers and duties as are prescribed by law or are hereinafter provided or as from time to time shall be conferred by the Board of Trustees. The Board of Trustees may require any officer to give such bond for the faithful performance of such officer's duties as the Board of Trustees may see fit.

402.2 Duties of the Chairperson.

402.2.1 The Chairperson shall be selected from among the Trustees. Except as otherwise provided in this Agreement or in the resolutions establishing such committees, the Chairperson shall be *ex officio* a member of all Committees of the Board of Trustees. The Chairperson shall preside at all Board meetings.

402.2.2 The Chairperson may sign and execute in the name of VA MINT stock certificates, deeds, mortgages, bonds, contracts, or other instruments except in cases where the signing and the execution thereof shall be expressly delegated by the Board of Trustees or by this Agreement to some other officer or agent of VA MINT or as otherwise required by law. In addition, he/she shall perform all duties incident to the office of the Chairperson and such other duties as from time to time may be assigned to the Chairperson by the Board of Trustees.

402.2.3 In the event of any vacancy in the office of the Chairperson, the Vice-Chairperson shall serve as Chairperson on an interim basis until such vacancy is filled by subsequent action of the Board of Trustees.

402.3 Duties of the Vice-Chairperson. The Vice-Chairperson, if any, shall be selected from among the Trustees and shall have such powers and duties as may from time to time be assigned to the Vice-Chairperson. The Vice-Chairperson will preside at meetings in the absence of the Chairperson.

402.4 Duties of the Secretary.

402.4.1 The Secretary shall act as secretary of all meetings of the Board of Trustees and of the Treasurers and Chief Investment Officers. When requested, the Secretary shall also act as secretary of the meetings of the Committees of the Board of Trustees.

402.4.2 The Secretary shall keep and preserve the minutes of all such meetings in permanent books. The Secretary shall see that all notices required to be given by VA MINT are duly given and served. The Secretary may, at the direction of the Board of Trustees, sign and execute in the name of VA MINT stock certificates, deeds, mortgages, bonds, contracts or other instruments, except in cases where the signing and execution thereof shall be expressly delegated by the Board of Trustees or by this Agreement.

402.4.3 The Secretary shall have custody of all deeds, leases, contracts and other important Trust Fund documents; shall have charge of the books, records and papers of VA MINT relating to its organization and management as a trust; and shall see that all reports, statements and other documents required by law are properly filed.

ARTICLE V

MISCELLANEOUS PROVISIONS

Section 500. APPLICATION.

The provisions of this Article V shall apply generally to matters related to this Agreement.

Section 501. TITLES.

The titles to Parts and Sections of this Agreement are placed herein for convenience of reference only, and the Agreement is not to be construed by reference thereto.

Section 502. SUCCESSORS.

This Agreement shall bind and inure to the benefit of the successors and assigns of the Trustees, the Treasurers and Chief Investment Officers, and the Participating Political Subdivisions.

Section 503. COUNTERPARTS.

503.1 This Agreement may be executed in any number of counterparts, each of which shall be deemed to be an original but all of which together shall constitute but one instrument, which may be sufficiently evidenced by any counterpart.

503.2 Any Participating Political Subdivision that formally applies for participation in this Agreement by its execution of a Trust Joinder Agreement which is accepted by the Trustees shall thereupon become a party to this Agreement and be bound by all of the terms and conditions thereof and said Trust Joinder Agreement shall constitute a counterpart of this Agreement.

**Section 504. AMENDMENT OR TERMINATION OF THIS AGREEMENT;
TERMINATION OF POOLS.**

504.1 Duration. VA MINT shall be perpetual, subject to the termination provisions contained herein.

504.2 Amendment.

504.2.1 This Agreement may be amended in writing at any time by the vote of a Supermajority of the Trustees. Notwithstanding the preceding sentence, this Agreement may not be amended so as to change its purpose as set forth herein or to permit the diversion or application of any funds of VA MINT for any purpose other than those specified herein.

504.2.2 The Board of Trustees, upon adoption of an amendment to this Agreement, shall provide notice by sending a copy of any such amendment to each Treasurer and Chief Investment Officer within 15 days of adoption of such amendment. If a Treasurer or Chief Investment Officer objects to such amendment, the Treasurer or Chief Investment Officer must provide written notice of its objection and intent to terminate its participation in VA MINT by registered mail delivered to the Administrator within ninety (90) days of such notice, and if such notice is given, the amendments shall not apply to such Participating Political Subdivision for a period of 180 days from the date of adoption of such amendments.

504.3 Withdrawal and Termination.

504.3.1 Any Participating Political Subdivision may at any time in its sole discretion withdraw and terminate its interest in this Agreement and any trust created hereby, including VA MINT, by giving written notice from the Participating Political Subdivision's Treasurer or Chief Investment Officer to the Trustees in the manner prescribed by this Section. VA MINT may be terminated in its entirety when all participation interests of all Participating Political Subdivisions have been terminated in their entirety. This Agreement and VA MINT will then be terminated in its entirety pursuant to Virginia law.

504.3.2 In case of a termination of this Agreement, either in whole or in part by a Participating Political Subdivision, the Trustees shall hold, apply, transfer, or distribute the affected assets of VA MINT in accordance with the applicable provisions of this Agreement and as directed by the Treasurer or Chief Investment Officer of each Participating Political Subdivision. Upon any termination, in whole or in part, of this Agreement, the Trustees shall have a right to have their respective accounts settled as provided in this Section 504.

504.3.3 In the case of the complete or partial termination of this Agreement as to one or more Participating Political Subdivisions, the affected assets of VA MINT shall continue to be held pursuant to the direction of the Trustees, for the benefit of the Participating Political Subdivision, until the Trustees, upon recommendation of the Administrator, distribute such assets to a Participating Political Subdivision, or other suitable arrangements for the transfer of such assets have been made. This Agreement shall remain in full effect with respect to each Participating Political Subdivision that does not terminate or withdraw its participation in VA MINT, or whose participation is not terminated by the Trustees. However, if distributions must be made, the Treasurer or Chief Investment Officer of each Participating Political Subdivision shall be responsible for directing the Administrator on how to distribute the beneficial interest of such Participating Political Subdivision. In the absence of such direction, the Administrator may take such steps as it determines reasonable to distribute such Participating Political Subdivision's interest.

504.3.4 A Participating Political Subdivision must provide written notice of its intent to terminate its participation in VA MINT by registered mail signed by the appropriate official of such Participating Political Subdivision and delivered to the Administrator.

504.3.5 Notwithstanding the foregoing, the Trustees shall be required to pay out any assets of VA MINT to Participating Political Subdivisions upon termination of this Agreement or VA MINT, in whole or in part, upon receipt by the Trustees of written certification from the Administrator that all provisions of law with respect to such termination have been complied with. The Administrator shall provide the required written certification to the Trustees within three (3) working days of receiving a written notice of intent to terminate as described above. The Trustees shall rely conclusively on such written certification and shall be under no obligation to investigate or otherwise determine its propriety.

504.3.6 When all of the assets of VA MINT affected by a termination have been applied, transferred or distributed and the accounts of the Trustees have been settled, then the Trustees and Administrator shall be released and discharged from all further accountability or liability respecting VA MINT, or portions thereof, affected by the termination and shall not be responsible in any way for the further disposition of the assets of VA MINT, or portions thereof, affected by the termination or any part thereof so applied, transferred or distributed; provided, however, that the Trustees shall provide full and complete accounting for all assets up through the date of final disposition of all assets held in the Trust.

Section 505. SPENDTHRIFT PROVISIONS; PROHIBITION OF ASSIGNMENT OF INTEREST.

VA MINT shall be exempt from taxation and execution, attachment, garnishment, or any other process. No Participating Political Subdivision or other person with a beneficial interest in any part of VA MINT may commute, anticipate, encumber, alienate or assign the beneficial interests or any interest of a Participating Political Subdivision in VA MINT, and no payments of

interest or principal shall be in any way subject to any person's debts, contracts or engagements, nor to any judicial process to levy upon or attach the interest or principal for payment of those debts, contracts, or engagements.

Section 506. VIRGINIA FREEDOM OF INFORMATION ACT.

506.1 The Administrator shall give the public notice of the date, time, and location of any meeting of the Board of Trustees in the manner and as necessary to comply with the Virginia Freedom of Information Act (Va. Code §§ 2.2-3700 *et seq.*). The Secretary or its designee shall keep all minutes of all meetings, proceedings and acts of the Trustees, but such minutes need not be verbatim. Copies of all minutes of the meetings of the Board of Trustees shall be sent by the Secretary or its designee to each member of the Board of Trustees.

506.2 All meetings of the Board of Trustees shall be open to the public, except as provided in § 2.2-3711 of the Virginia Code. No meeting shall be conducted through telephonic, video, electronic or other communication means where the members are not physically assembled to discuss or transact public business, except as provided in §§ 2.2-3708.2 or 2.2-3708.3 of the Virginia Code.

Section 507. JURISDICTION.

This Agreement shall be interpreted, construed and enforced, and the trust or trusts created hereby shall be administered, in accordance with the laws of the United States and of the Commonwealth of Virginia, excluding Virginia's law governing the conflict of laws.

Section 508. SITUS OF THE TRUST.

The situs of the trust or trusts created hereby is the Commonwealth of Virginia. All questions pertaining to its validity, construction, and administration shall be determined in accordance with the laws of the Commonwealth of Virginia.

Section 509. CONSTRUCTION.

Whenever any words are used in this Agreement in the masculine gender, they shall be construed as though they were also used in the feminine or neuter gender in all situations where they would so apply and whenever any words are used in this Agreement in the singular form, they shall be construed as though they were also used in the plural form in all situations where they would so apply, and whenever any words are used in this Agreement in the plural form, they shall be construed as though they were also in the singular form in all situations where they would so apply.

Section 510. CONFLICT.

In resolving any conflict among provisions of this Agreement and in resolving any other uncertainty as to the meaning or intention of any provision of the Agreement, the interpretation that (i) causes VA MINT to be exempt from tax under Code Sections 115 and 501(a), and (ii) causes VA MINT to comply with all applicable requirements of law shall prevail over any different interpretation.

Section 511. NO GUARANTEES.

Neither the Administrator nor the Trustees guarantee VA MINT from loss or depreciation or for the payment of any amount which may become due to any person under this Agreement.

Section 512. PARTIES BOUND; NO THIRD-PARTY RIGHTS.

This Agreement and the Trust Joinder Agreements, when properly executed and accepted as provided hereunder, shall be binding only upon the parties hereto, *i.e.*, the Board of Trustees, the Administrator and the Participating Political Subdivisions. Neither the establishment of the Trust nor any modification thereof, nor the creation of any fund or account shall be construed as giving to any person any legal or equitable right against the Trustees, or any officer or employee thereof, except as may otherwise be provided in this Agreement. Under no circumstances shall the term of employment of any Employee be modified or in any way affected by this Agreement.

Section 513. NECESSARY PARTIES TO DISPUTES.

Necessary parties to any accounting, litigation or other proceedings relating to this Agreement shall include only the Trustees and the Administrator. The settlement or judgment in any such case in which the Trustees are duly served or cited shall be binding upon all Participating Political Subdivisions and upon all persons claiming by, through or under them.

Section 514. SEVERABILITY.

If any provision of this Agreement shall be held by a court of competent jurisdiction to be invalid or unenforceable, the remaining provisions of the Agreement shall continue to be fully effective. If any provision of the Agreement is held to violate the Code or to be illegal or invalid for any other reason, that provision shall be deemed to be null and void, but the invalidation of that provision shall not otherwise affect the trust created by this Agreement.

[SIGNATURE PAGES FOLLOWS]

IN WITNESS WHEREOF, the Chief Investment Officer has caused this Trust Agreement to be executed this 4th day of December, 2024.

CHIEF INVESTMENT OFFICER OF

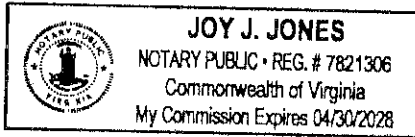
City of Danville, VIRGINIA

Michael L Adkins

Michael L. Adkins

ATTEST:

Joy J Jones



IN WITNESS WHEREOF, the Treasurer has caused this Trust Agreement to be executed
this 3 day of December, 2024

TREASURER OF

Henry County, VIRGINIA

Scott B. Gindstaff

Scott B. Gindstaff

ATTEST:

Debbie Lutt

EXHIBIT A

**TRUST JOINDER AGREEMENT
FOR PARTICIPATING POLITICAL SUBDIVISIONS
VIRGINIA MUNICIPAL INVESTMENT TRUST**

THIS TRUST JOINDER AGREEMENT is made by and between the Treasurer/Chief Investment Officer of the _____, Virginia (herein referred to as the “Treasurer/Chief Investment Officer”), the _____, Virginia (herein referred to as the “Participating Political Subdivision”), and the Board of Trustees (herein collectively referred to as the “Trustees”) of the Virginia Municipal Investment Trust (herein referred to as “VA MINT”).

WITNESSETH:

WHEREAS, the governing body of the Participating Political Subdivision desires to participate in a trust for the purpose of investing monies belonging to or within its control, other than sinking funds, in investments authorized under Section 2.2-4501 of the Virginia Code; and

WHEREAS, the governing body of the Participating Political Subdivision has adopted an ordinance and/or resolution (a certified copy of which is attached hereto as Exhibit A) to authorize, or has otherwise taken action required by law or rule to authorize and approve, participation in VA MINT and has designated the Treasurer/Chief Investment Officer to serve as the trustee of the Participating Political Subdivision with respect to VA MINT and to determine what funds under the Treasurer’s/Chief Investment Officer’s control shall be invested in VA MINT, and has authorized the Treasurer/Chief Investment Officer to enter into this Trust Joinder Agreement; and

WHEREAS, VA MINT, in accordance with the terms of the Virginia Municipal Investment Trust Fund Agreement (the “Agreement”), provides administrative, custodial and investment services to the Participating Political Subdivisions in VA MINT; and

WHEREAS, the Treasurer/Chief Investment Officer, upon the authorization of the governing body of _____, Virginia, desires to submit this Trust Joinder Agreement to the Trustees to enable _____, Virginia, to become a Participating Political Subdivision in VA MINT and a party to the Agreement.

NOW, THEREFORE, in consideration of the mutual covenants and agreements flowing to each of the parties hereto, it is agreed as follows:

1. Pursuant to the Board of Trustees’ acceptance of this Trust Joinder Agreement, the _____, Virginia, is a Participating Political Subdivision in VA MINT, as provided in the Agreement, and the Treasurer/Chief Investment Officer is authorized to enter into this Trust Joinder Agreement, and to represent and vote the beneficial interest of _____, Virginia, in VA MINT in accordance with the Agreement.

2. Capitalized terms not otherwise defined in this Trust Joinder Agreement have the meaning given to them under the Agreement.

3. The Treasurer/Chief Investment Officer shall cause appropriations designated by the Participating Political Subdivision for deposit in VA MINT to be deposited into a depository designated by the Trustees.

4. The Treasurer/Chief Investment Officer shall timely remit, or timely approve the remittance of, administrative fees as may be due and payable by the Participating Political Subdivision under the Agreement into a depository designated by the Trustees.

5. The Participating Political Subdivision shall have no right, title or interest in or to any specific assets of VA MINT, but shall have an undivided beneficial interest in VA MINT; however, there shall be a specific accounting of assets allocable to the Participating Political Subdivision.

6. The Treasurer/Chief Investment Officer shall provide to the Administrator designated by the Trustees all relevant information reasonably requested by the Administrator for the administration of the Participating Political Subdivision's investment, and shall promptly update all such information. The Treasurer/Chief Investment Officer shall certify said information to be correct to the best of his/her knowledge, and the Trustees and the Administrator shall have the right to rely on the accuracy of said information in performing their contractual responsibilities.

7. VA MINT shall provide administrative, custodial and investment services to the Participating Political Subdivision in accordance with the Agreement.

8. The Trustees and the Administrator, in accordance with the Agreement and the policies and procedures established by the Trustees, shall periodically report Trust activities to the Participating Political Subdivision on a timely basis.

9. The Treasurer/Chief Investment Officer and the Participating Political Subdivision agree to abide by and be bound by the terms, duties, rights and obligations as set forth in the Agreement, as may be amended by the Trustees, which is attached hereto and is made a part of this Trust Joinder Agreement.

10. The Treasurer/Chief Investment Officer, in fulfillment of his/her duties as the trustee of the Participating Political Subdivision, retains the services of the Investment Manager or Managers selected by the Trustees pursuant to the Agreement.

11. The term of this Trust Joinder Agreement shall be indefinite. The Treasurer/Chief Investment Officer may terminate this Trust Joinder Agreement on behalf of the Participating Political Subdivision by giving notice in writing to the Trustees. Termination shall be governed by the provisions of the Agreement.

[SIGNATURE PAGE FOLLOWS]

IN WITNESS WHEREOF, the Treasurer/Chief Investment Officer has caused this Trust Joinder Agreement to be executed this _____ day of _____, 20____.

**TREASURER/CHIEF INVESTMENT
OFFICER OF**

_____, **VIRGINIA**

ATTEST:

* * * *

ACCEPTANCE:

**VIRGINIA MUNICIPAL INVESTMENT
TRUST**

By: _____

HUMAN RESOURCES PROGRAM UPDATE- February 2026

Training & Compliance

- Facilitated in-person training for 145 staff.
- Continuing our HR file audit, we have audited 92% of our workforce's HR files.
- Survey launched to collect data on training sessions, initially on THEROPS, but expanding to include all in-person training sessions before the end of FY2026.

Employee Engagement

- Employee engagement survey results shared with all staff.
- Several members of the team participated in employee engagement events (assembling candy grams, assembling birthday cake kits for the Food Bank).
- Had 100% participation for employee exit interviews for the month.
- Continued to work with UMW on our leadership assessment project for our leadership development planning.

Recruitment Notes

- Onboarded ten new Hopestarters.
- Facilitated three internal moves.

Benefit Notes

- HR continues to work with our broker towards our open enrollment season by evaluating current and new vendors.



Office of Human Resources

600 Jackson Street ▪ Fredericksburg, VA 22401 ▪ 540-373-3223

RappahannockAreaCSB.org

MEMORANDUM

To: Joe Wickens, Executive Director

From: Derrick Mestler, Human Resources Director

Date: March 6, 2026

Re: Summary – February 2026 Applicant and Recruitment Update

For February 2026, RACSB received 174 applications.

Of the applications received, 50 applicants cited the RACSB applicant portal as their recruitment source, 14 cited employee referrals, and 110 cited various job boards.

As of the end of February, 38 positions — 24 full-time and 14 part-time — were actively being recruited for.

A summary is attached, indicating the number of external applicants hired, the number of internal applicants promoted, and the total number of applicants who applied for positions in February 2026.

RECRUITMENT ACTIVITY REPORT FY 2026

<u>MONTHLY RECRUITMENT</u>	<u>JULY</u>	<u>AUGUST</u>	<u>SEPTEMBER</u>	<u>OCTOBER</u>	<u>NOVEMBER</u>	<u>DECEMBER</u>	<u>JANUARY</u>	<u>FEBRUARY</u>	<u>MARCH</u>	<u>APRIL</u>	<u>MAY</u>	<u>JUNE</u>	<u>TOTAL YTD</u>
External Applicants Hired:													
Part-time	0	1	1	3	3	4	5	5					22
Full-time	4	3	7	6	3	2	3	4					32
PRN	0	0	0	0	0	2	6	1					9
Sub Total External Applicants Hired	4	4	8	9	6	8	14	10	0	0	0		63
Internal Applicants Moved:													
Part-time to Full-time	0	0	0	1	2	2	0	1					6
PRN As Needed to Full-Time	0	0	0	0	0	2	0	0					2
Promotions	2	4	4	2	0	1	0	1					14
Lateral Transfers	3	9	5	2	1	0	2	1					23
Full-time to Part-time	0	0	0	1	0	0	0	0					1
Full-time to PRN	0	0	0	0	0	1	1	0					2
Sub Total Internal Applicant Moves	5	13	9	6	3	6	3	3	0	0	0		48

APPLICANT DATA REPORT
RACSB FY 2026

APPLICANT DATA	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26
Female	212	319	425	262	515	233	279	132				
Male	37	72	101	98	159	69	65	31				
Not Supplied	75	129	175	114	188	110	32	11				
Total	324	520	701	474	862	412	376	174				
ETHNICITY												
White	85	106	164	102	210	102	116	65				
African American	118	195	263	198	243	136	153	66				
Hispanic	7	25	22	17	54	14	24	17				
Asian	5	11	10	3	95	10	5	3				
American Indian	2	2	2	2	2	3	3	0				
Native Hawaiian	3	0	1	2	3	0	0	0				
Two or More Races	92	126	212	138	227	119	43	12				
Not Supplied	12	55	27	12	28	28	32	11				
RECRUITMENT SOURCE												
RACSB Website	35	80	91	51	96	58	43	50				
Employee Referrals	12	20	19	21	21	15	29	14				
Indeed.com	232	387	504	363	649	293	248	72				
Social Media					8	1	1	0				
Other -	34	23	70	27	67	30	30	24				
Zip Recruiter	11	10	17	12	29	15	25	14				
Job Fair	0	0	0	0	0	0	0	0				
Total # of Applicants	324	520	701	474	870	412	376	174	0	0	0	0

Vacancy List

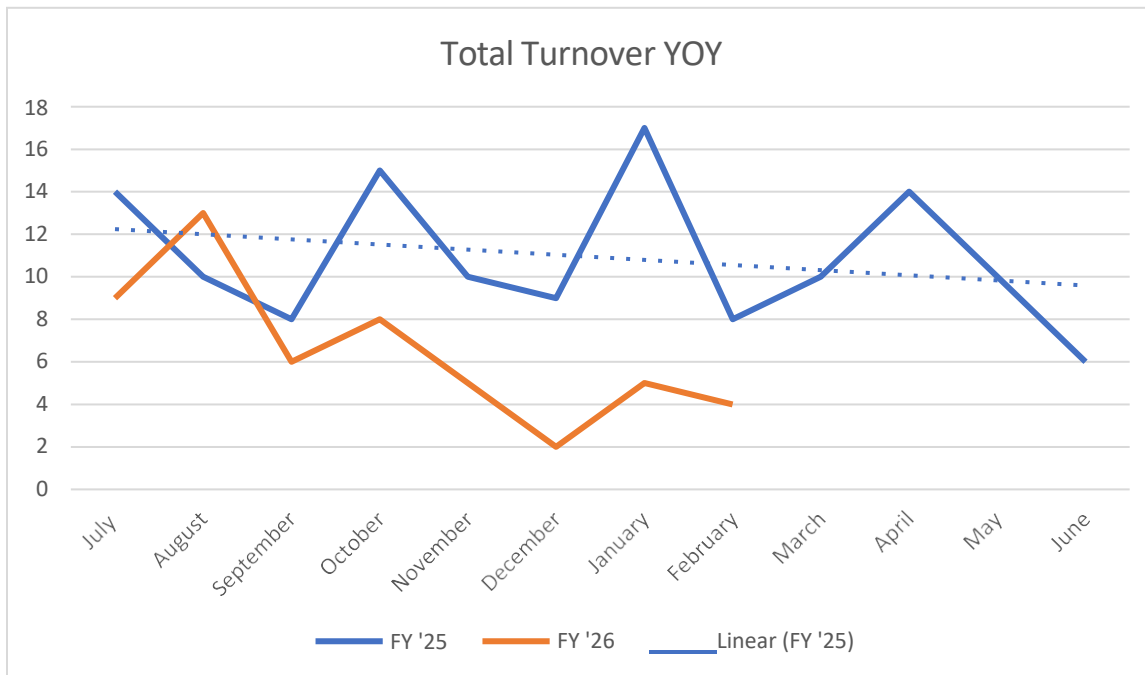
2/23/2026								
Actively Recruiting to Hire								
Original Date Listed	Days Open	Original Listing #	Pos Number	Job Title	RU	Division	FT	PT
2/10/2026	13	1702250	55	MAINTENANCE TECHNICIAN	1100	Admin	1	
11/19/2025	96	1645889	552	SPECIAL EDUCATOR, PEID	3910	PEID	1	
2/19/2026	4	1708929	81	THERAPIST, CHILD & ADOLESCENT	2220	Clinical	1	
2/5/2026	18	1699629	650	THERAPIST, MOBILE OBOT	4261	Clinical	1	
2/5/2026	18	1699652	650	CERTIFIED SUBSTANCE ABUSE COUNSELOR, MOBILE OBOT	4261	Clinical	1	
2/26/2025	362	1546204	571	PSYCHIATRIC NURSE PRACTITIONER, OBOT	4261	Clinical	1	
8/5/2025	202	1651285	58	ASSISTANT COORDINATOR - EMERGENCY SERVICES	2000	CIS	1	
7/29/2025	209	1558524	65	ES THERAPIST, CO-MOBILE RESPONSE	2000	CIS	1	
9/24/2025	152	1601851	71	EMERGENCY SERVICES THERAPIST	2070	CIS	1	
9/2/2025	174	1584974	74	EMERGENCY SERVICES THERAPIST - CHILD & ADOLESCENT	2070	CIS	1	
2/5/2026	18	1699231	206	NURSE, RN - CRISIS STABILIZATION	2770	CIS		1
2/5/2026	18	1699222	207	NURSE, RN - CRISIS STABILIZATION	2770	CIS		1
1/6/2026	48	1679507	N/A	PRN NURSE, RN - CRISIS STABILIZATION	2770	CIS		1
1/13/2026	41	1684251	192	MH NURSE, LPN - CRISIS STABILIZATION	2770	CIS	1	
11/26/2025	89	1651271	195	MH RESIDENTIAL SPECIALIST - CRISIS STABILIZATION	2770	CIS	1	
8/18/2025	189	1574615	67	EMERGENCY SERVICES THERAPIST	4000	CIS	1	
2/10/2026	13	1702247	652	LEAD LPN - ICF/IID	3793	CSS	1	
2/9/2026	14	1701961	232	COORDINATOR, DEVELOPMENTAL SERVICES SUPPORT COORDINATION	3300	CSS	1	
1/30/2026	24	1695506	240	DEVELOPMENTAL SERVICES SUPPORT COORDINATOR - STAFFORD	3300	CSS	1	
1/15/2026	39	1686410	648	DEVELOPMENTAL SERVICES SUPPORT COORDINATOR - SPOTSYLVANIA	3300	CSS	1	
1/15/2026	39	1686420	649	DEVELOPMENTAL SERVICES INTAKE SUPPORT COORDINATOR	3300	CSS	1	
12/29/2025	56	1675059	619	COMMUNITY OUTREACH CASE MANAGER	5980	CSS	1	
9/9/2025	167	1590165	283	DIRECT SUPPORT PROFESSIONAL - DAY SUPPORT - CAROLINE	3651	CSS		1
1/13/2026	41	1684288	635	DIRECT SUPPORT PROFESSIONAL - DAY SUPPORT KING GEORGE	3653	CSS		1
1/23/2026	31	1643704	626	DIRECT SUPPORT PROFESSIONAL - DAY SUPPORT KING GEORGE	3653	CSS		1
1/23/2026	31	1690946	301	DIRECT SUPPORT PROFESSIONAL - DAY SUPPORT SPOTSYLVANIA	3654	CSS		1
2/9/2026	14	1701954	641	DIRECT SUPPORT PROFESSIONAL - DAY SUPPORT ICF	3656	CSS		1
2/9/2026	14	1701950	651	DIRECT SUPPORT PROFESSIONAL - SPECIALIZED SERVICES	3658	CSS		1
1/5/2026	49	1677407	386	DIRECT SUPPORT PROFESSIONAL - LEELAND	3772	CSS	1	
1/13/2026	41	1684275	400	GROUP HOME MANAGER - STONEWALL	3773	CSS	1	
11/19/2025	96	1645885	398	DIRECT SUPPORT PROFESSIONAL - STONEWALL	3773	CSS		1
12/3/2025	82	1654941	407	DIRECT SUPPORT PROFESSIONAL - DEVON	3774	CSS		1
12/5/2025	80	1662440	441	DIRECT SUPPORT PROFESSIONAL - NEW HOPE	3778	CSS		1
1/20/2026	34	1585000	492	DIRECT SUPPORT PROFESSIONAL - CHURCHILL	3791	CSS		1
2/9/2026	14	1701942	498	DIRECT SUPPORT PROFESSIONAL - ROSS	3792	CSS	1	
1/5/2026	49	1677421	515	DIRECT SUPPORT PROFESSIONAL - LUCAS ICF	3793	CSS	1	
2/19/2026	4	1708884	528	DIRECT SUPPORT PROFESSIONAL - MYERS RESPITE	3793	CSS	1	
12/16/2025	69	1619813	531	DIRECT SUPPORT PROFESSIONAL - MYERS RESPITE	3794	CSS		1
Avg days open	71.32						24	14
Total Positions in Recruitment							38	
Budgeted Vacant				Job Title	RU	Division	FT	PT
			276	INFANT/CHILD SUPPORT COORDINATOR	3500	PE-ID	1	
			302	DIRECT SUPPORT PROFESSIONAL - KINGS HIGHWAY	3652	CSS		1
			433	DIRECT SUPPORT PROFESSIONAL - IGO	3777	CSS		1
			452	DIRECT SUPPORT PROFESSIONAL - BELMONT	3781	CSS	1	
			456	DIRECT SUPPORT PROFESSIONAL - BELMONT	3781	CSS		1
			482	DIRECT SUPPORT PROFESSIONAL - GALVESTON	3790	CSS		1
			500	DIRECT SUPPORT PROFESSIONAL - ROSS ICF	3792	CSS	1	
			508	NURSE MANAGER - LUCAS ICF	3793	CSS	1	
			638	OUTPATIENT THERAPIST - FREDERICKSBURG CLINIC	2200	Clinical		1
			620	PSYCHIATRIC NURSE PRACTITIONER	2201	Clinical	1	
Total Budgeted vacant							5	5
Total Budgeted vacant							10	

Office of Human Resources
 600 Jackson Street ▪ Fredericksburg, VA 22401 ▪ 540-373-3223
 RappahannockAreaCSB.org

MEMORANDUM

To: Joe Wickens, Executive Director
 From: Derrick Mestler, Human Resources Director
 Date: March 6, 2026
 Re: Summary – Turnover Report – February 2026

Human Resources processed four (4) employee separations in February 2026; all four (4) were voluntary.



RACSB Turnover FY '25

<u>Employees</u>	<u>Jul-24</u>	<u>Aug-24</u>	<u>Sep-24</u>	<u>Oct-24</u>	<u>Nov-24</u>	<u>Dec-24</u>	<u>Jan-25</u>	<u>Feb-25</u>	<u>Mar-25</u>	<u>Apr-25</u>	<u>May-25</u>	<u>Jun-25</u>
Average Headcount	572	573	587	586	570	571	579	585	583	576	560	561
Monthly Terminations*	14	10	8	15	10	9	17	8	10	14	10	6
Turnover by Month	2.45%	1.75%	1.36%	2.56%	1.75%	1.58%	2.94%	1.37%	1.72%	2.43%	1.79%	1.07%
Cumulative Turnover YTD	2.45%	4.19%	5.54%	8.11%	9.87%	11.45%	14.39%	15.75%	17.46%	19.89%	21.68%	22.77%
Average % Turnover per Month YTD	2.45%	2.10%	1.85%	2.03%	1.97%	1.91%	2.06%	1.97%	1.94%	1.99%	1.97%	1.90%

*Monthly Terminations, FT, PT, PRN, Do Not Include Interns/Volunteers

RACSB Turnover FY '26

<u>Employees</u>	<u>Jul-25</u>	<u>Aug-25</u>	<u>Sep-25</u>	<u>Oct-25</u>	<u>Nov-25</u>	<u>Dec-25</u>	<u>Jan-26</u>	<u>Feb-26</u>	<u>Mar-26</u>	<u>Apr-26</u>	<u>May-26</u>	<u>Jun-26</u>
Average Headcount	558	553	550	548	552	550	555	561				
Monthly Terminations*	9	13	6	8	5	2	5	4				
Turnover by Month	1.61%	2.35%	1.09%	1.46%	0.91%	0.36%	0.90%	0.71%				
Cumulative Turnover YTD	1.43%	3.96%	5.06%	6.52%	7.42%	7.79%	8.69%	9.40%				
Average % Turnover per Month YTD	1.43%	1.98%	2.17%	1.63%	1.48%	1.30%	1.24%	1.17%				

*Monthly Terminations, FT, PT, PRN, Do Not Include Interns/Volunteers

RACSB MONTHLY TURNOVER REPORT
Feb-26

<u>ORGANIZATIONAL UNIT</u>	<u>NUMBER OF TERMS</u>	<u>VOLUNTARY</u>	<u>INVOLUNTARY</u>	<u>EXPLANATION</u>
Administrative				
		1		Relocation - other opportunity
<i>Unit Totals</i>	1	1	0	
Clinical Services				
<i>Unit Totals</i>	0	0	0	
Community Support Services		1		Unsatisfactory schedule
		1		Other opportunity
		1		Unknown
<i>Unit Totals</i>	3	3	0	
Crisis Intervention Services				
<i>Unit Totals</i>	0	0	0	
Prevention & Early Intervention Services				
<i>Unit Totals</i>	0	0	0	
Grand Totals for the Month	4	4	0	

Total Average Number of Employees	561
Retention Rate	99.29%
Turnover Rate	0.71%

Total Separations	4
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Office of Human Resources

600 Jackson Street ▪ Fredericksburg, VA 22401 ▪ 540-373-3223

RappahannockAreaCSB.org

MEMORANDUM

To: Joe Wickens, Executive Director
From: Derrick Mestler, Human Resources Director
Date: March 6, 2026
Re: FY26 Employee Engagement Survey Results

RACSB held an employee engagement survey in December 2025, inviting all HopeStarters to participate, and achieved a 59% participation rate. The survey had seven focus areas, each with five questions and an open comment section. The Executive Leadership Team reviewed the survey data, which included over 700 individual comments, and identified three organization-wide priorities for this year. These are focused on improving the HopeStarter experience and strengthening retention.

1. Increase Leadership Communication & Transparency

What you told us:

You want clearer communication about decisions, priorities, and direction, and more opportunities to ask questions.

What we're doing:

We will work to provide clearer updates on organizational priorities and to create more opportunities for two-way dialogue with Executive Leadership.

2. Strengthen Consistency Across the Agency

What you told us:

Your experience can vary depending on your supervisor. You want consistent communication, feedback, and support across teams.

What we're doing:

We are reviewing where there might be variation in policy and procedure interpretation between programs and resetting expectations across the agency. We are conducting a leadership development assessment to inform leadership training that strengthens leadership skills.

3. Evaluate Total Rewards (Comp. & Benefits), Well-being & Sustainable Work Practices

What you told us:

Our leave structure could use an update. Bring back merit and COLA increases, and workloads are increasing.

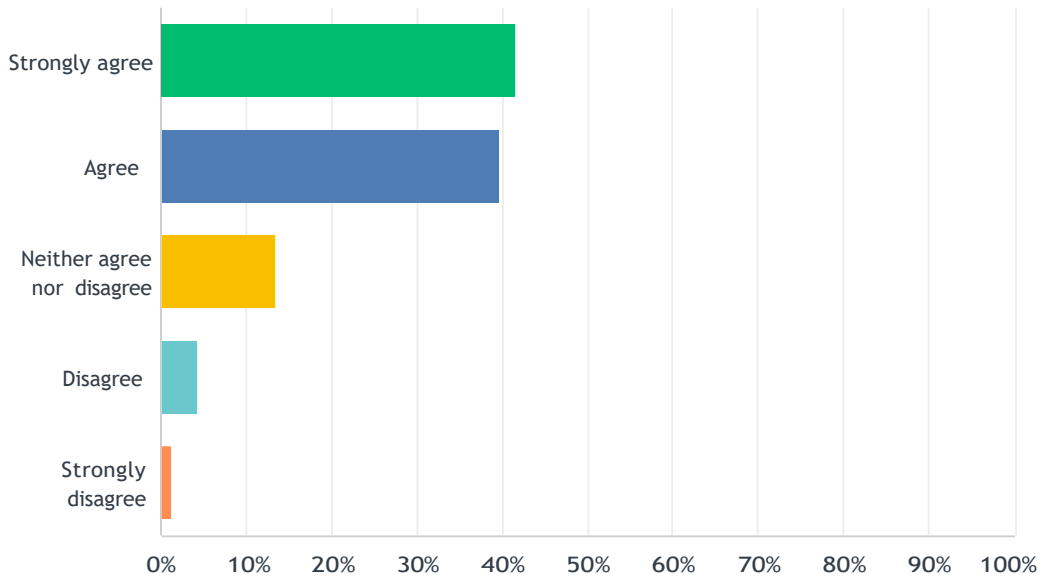
What we're doing:

Evaluating different leave structures. As we enter into budget season, merit, COLA increases, and workloads are top of mind. An evaluation of workflow redundancies will soon kick off, with the goal of removing processes, forms, policies, etc. that create unnecessary extra work.

Attached to this memo is a copy of the survey and the results and the individual comments.

Q2 Leadership at RACSB acts with honesty and integrity.

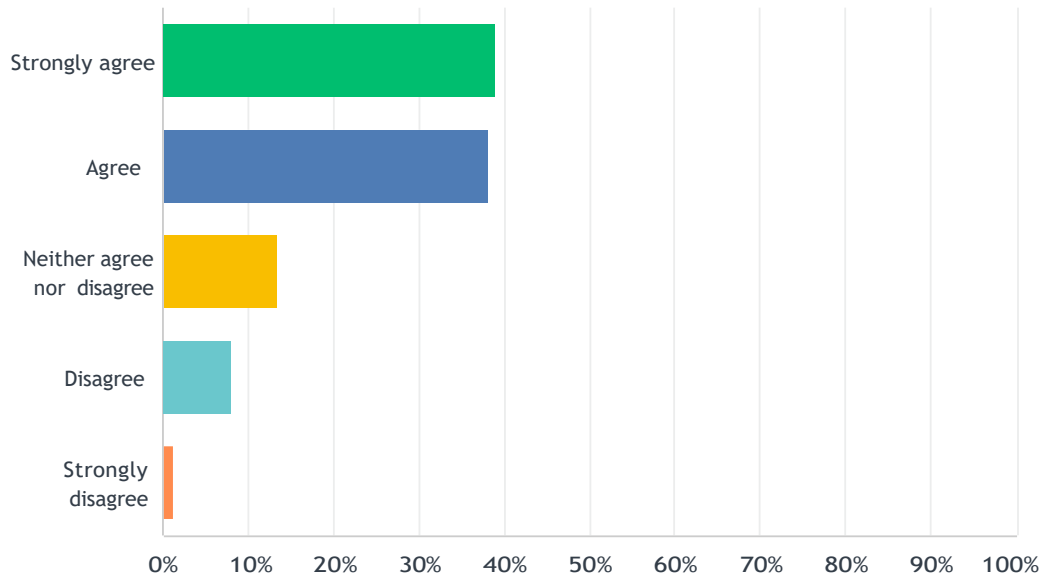
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	41.49%	139
Agree	39.70%	133
Neither agree nor disagree	13.43%	45
Disagree	4.18%	14
Strongly disagree	1.19%	4
TOTAL		335

Q3 Leadership is transparent about RACSB's goals and challenges.

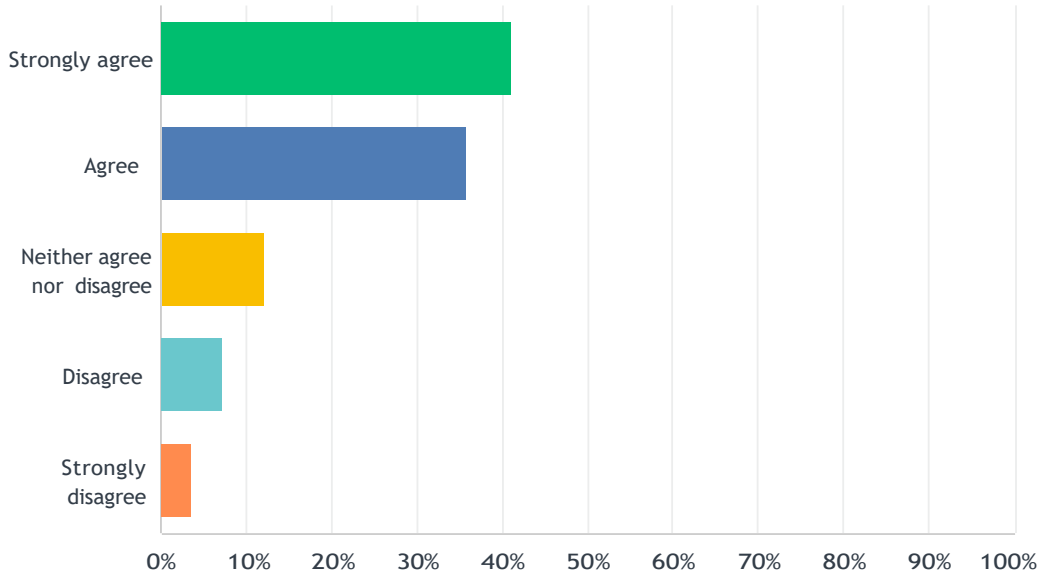
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	39.10%	131
Agree	38.21%	128
Neither agree nor disagree	13.43%	45
Disagree	8.06%	27
Strongly disagree	1.19%	4
TOTAL		335

Q4 I feel comfortable approaching leadership with questions and/or concerns.

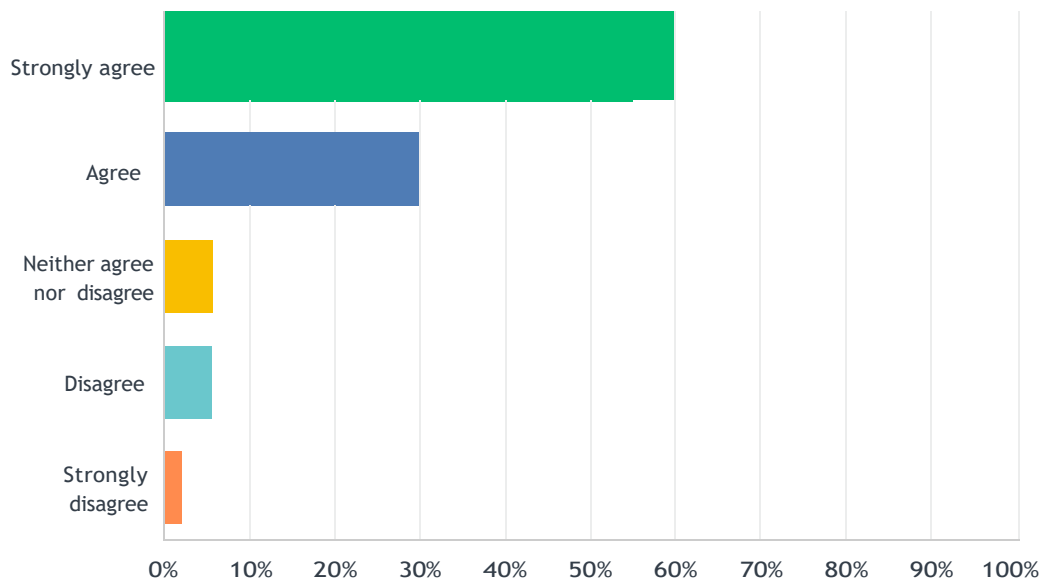
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	41.19%	138
Agree	35.82%	120
Neither agree nor disagree	12.24%	41
Disagree	7.16%	24
Strongly disagree	3.58%	12
TOTAL		335

Q5 My direct supervisor communicates expectations and feedback clearly.

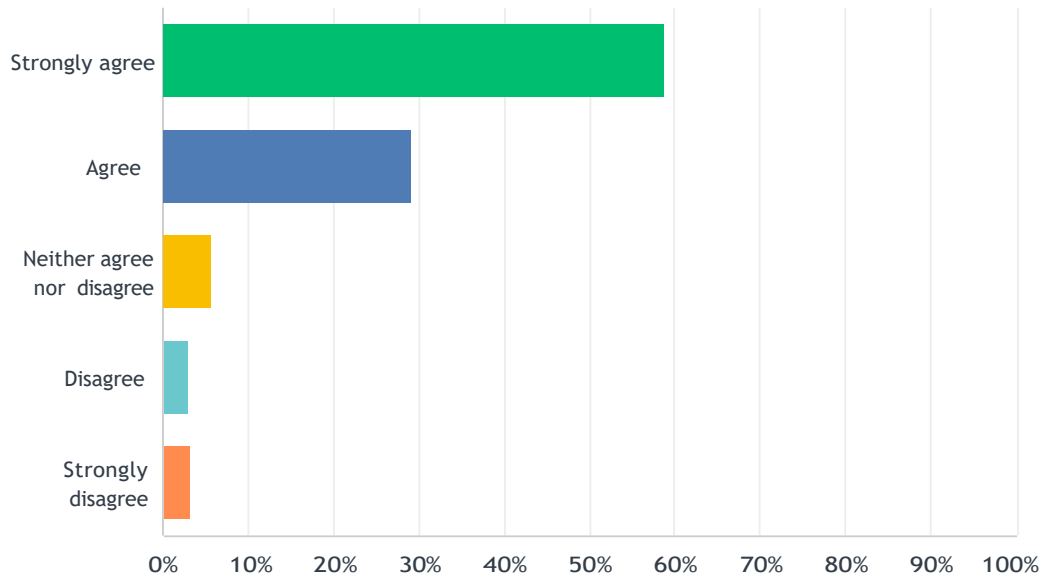
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	55.22%	185
Agree	30.75%	103
Neither agree nor disagree	5.97%	20
Disagree	5.67%	19
Strongly disagree	2.39%	8
TOTAL		335

Q6 I feel valued and respected by my direct supervisor.

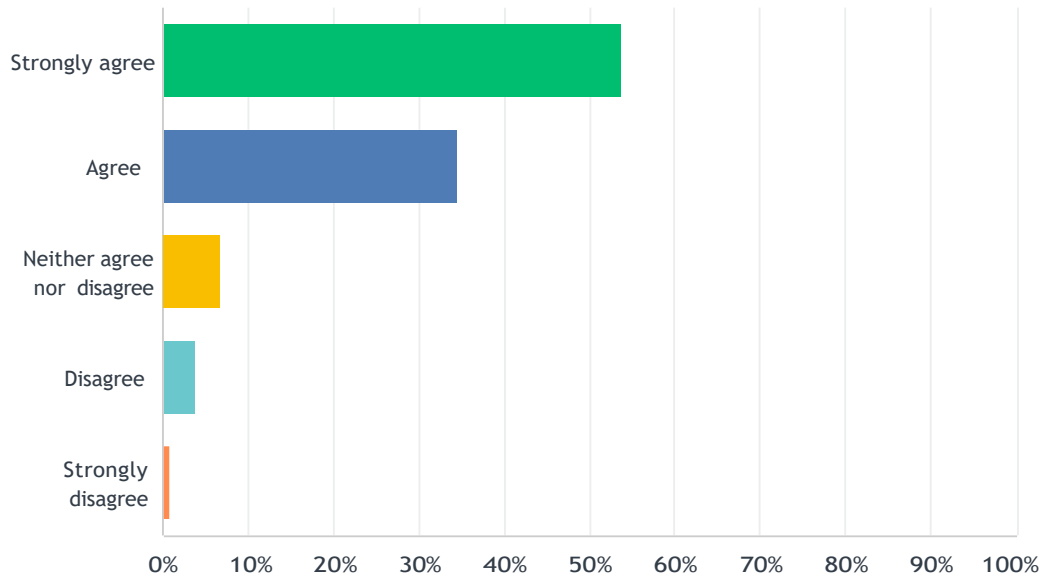
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	58.81%	197
Agree	29.25%	98
Neither agree nor disagree	5.67%	19
Disagree	2.99%	10
Strongly disagree	3.28%	11
TOTAL		335

Q8 I feel included and accepted as part of my team.

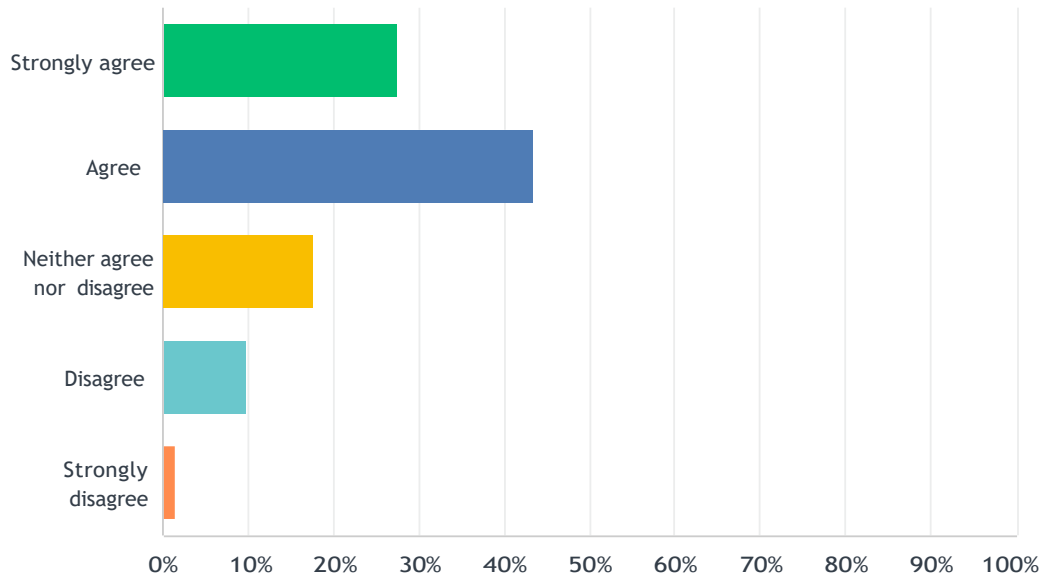
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	53.73%	180
Agree	34.63%	116
Neither agree nor disagree	6.87%	23
Disagree	3.88%	13
Strongly disagree	0.90%	3
TOTAL		335

Q9 Collaboration across programs is effective in achieving our goals.

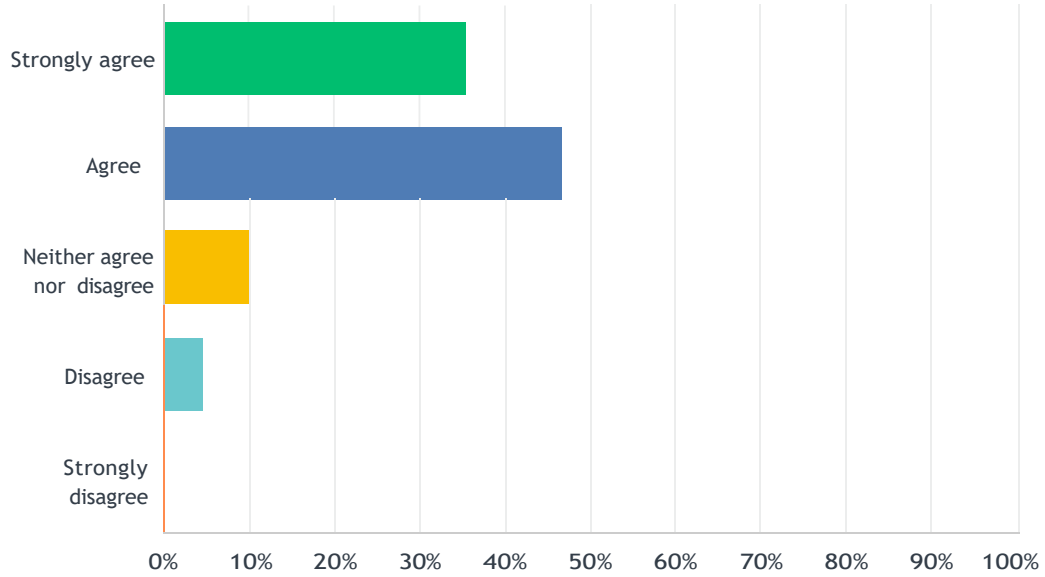
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	27.46%	92
Agree	43.58%	146
Neither agree nor disagree	17.61%	59
Disagree	9.85%	33
Strongly disagree	1.49%	5
TOTAL		335

Q10 I feel safe and respected when sharing new ideas, opinions, or concerns, even if they differ from others.

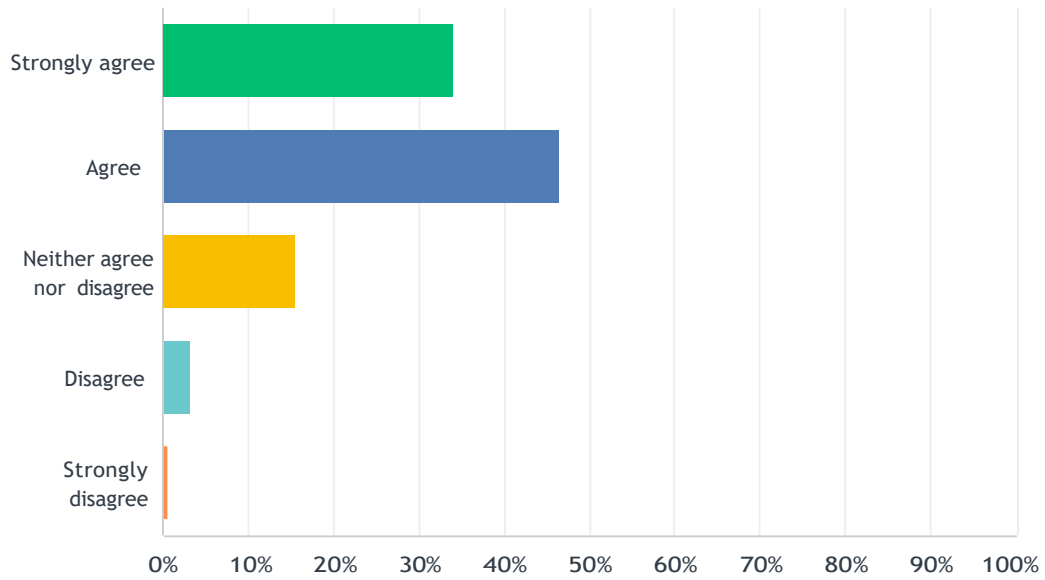
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	35.52%	119
Agree	46.87%	157
Neither agree nor disagree	10.75%	36
Disagree	4.78%	16
Strongly disagree	2.09%	7
TOTAL		335

Q11 RACSB promotes a safe and healthy workplace.

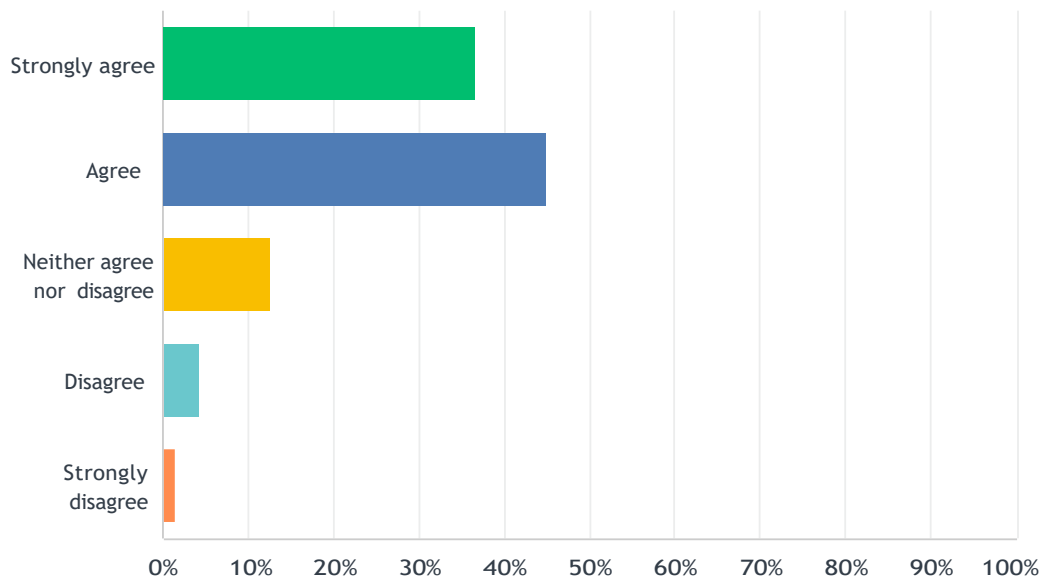
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	34.03%	114
Agree	46.57%	156
Neither agree nor disagree	15.52%	52
Disagree	3.28%	11
Strongly disagree	0.60%	2
TOTAL		335

Q12 My physical work environment allows me to do my job well.

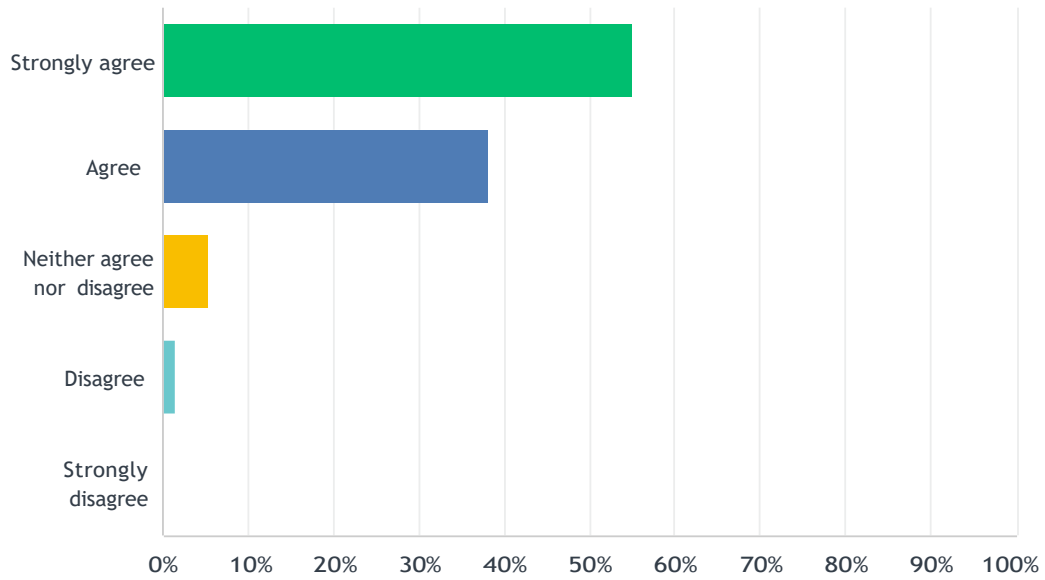
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	36.72%	123
Agree	45.07%	151
Neither agree nor disagree	12.54%	42
Disagree	4.18%	14
Strongly disagree	1.49%	5
TOTAL		335

Q14 I enjoy the work I do each day.

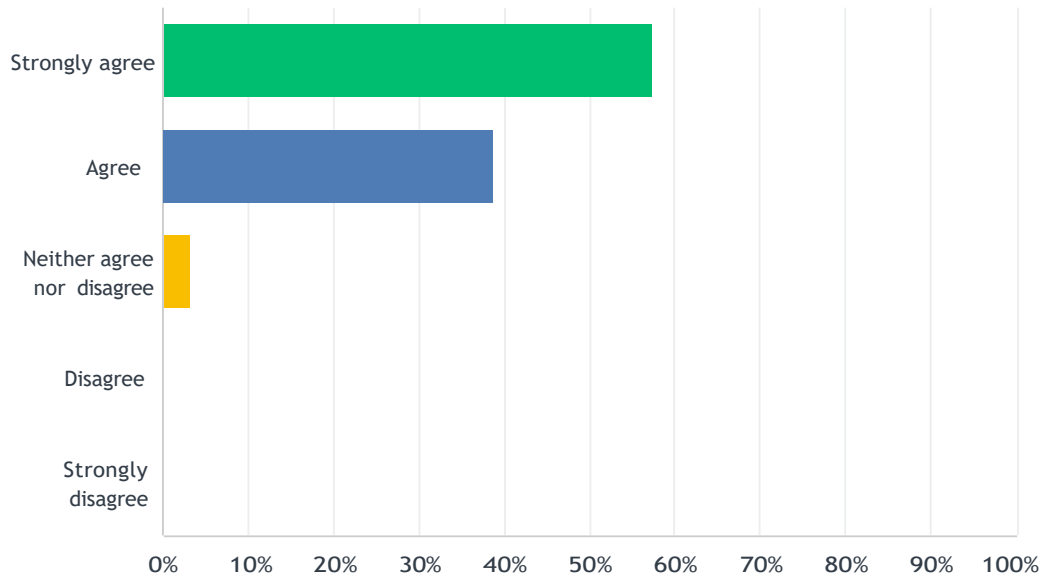
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	54.93%	184
Agree	38.21%	128
Neither agree nor disagree	5.37%	18
Disagree	1.49%	5
Strongly disagree	0.00%	0
TOTAL		335

Q15 I understand how my work contributes to RACSB's success.

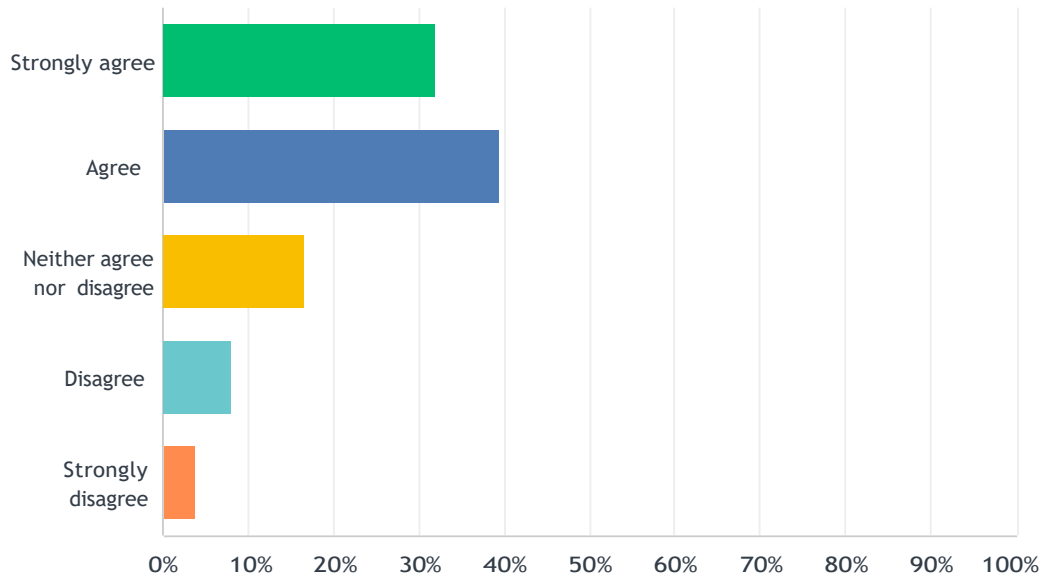
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	57.31%	192
Agree	38.81%	130
Neither agree nor disagree	3.28%	11
Disagree	0.30%	1
Strongly disagree	0.30%	1
TOTAL		335

Q16 I receive adequate recognition for a job well done.

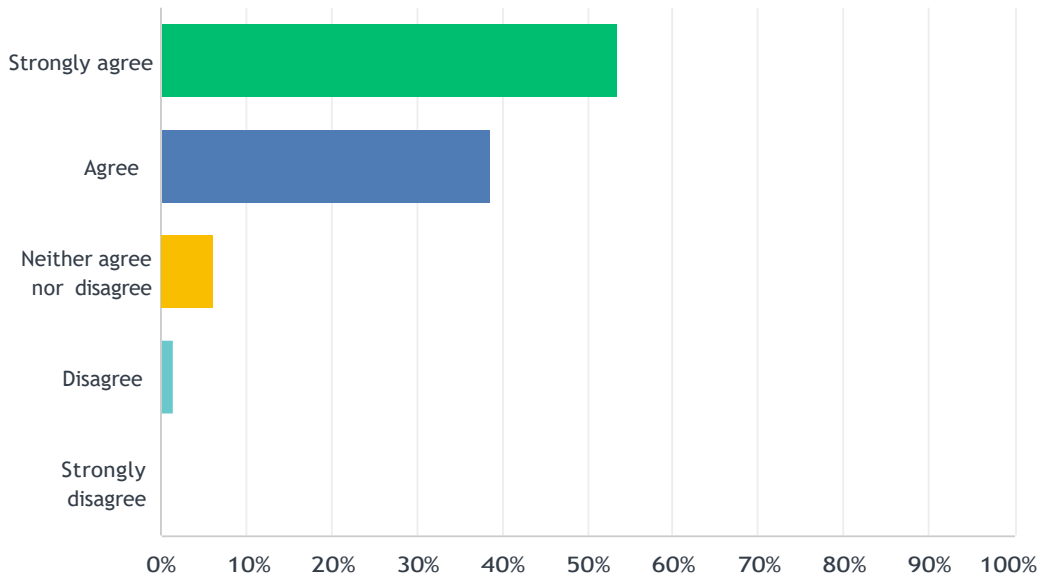
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	31.94%	107
Agree	39.40%	132
Neither agree nor disagree	16.72%	56
Disagree	8.06%	27
Strongly disagree	3.88%	13
TOTAL		335

Q17 My work gives me a sense of personal accomplishment.

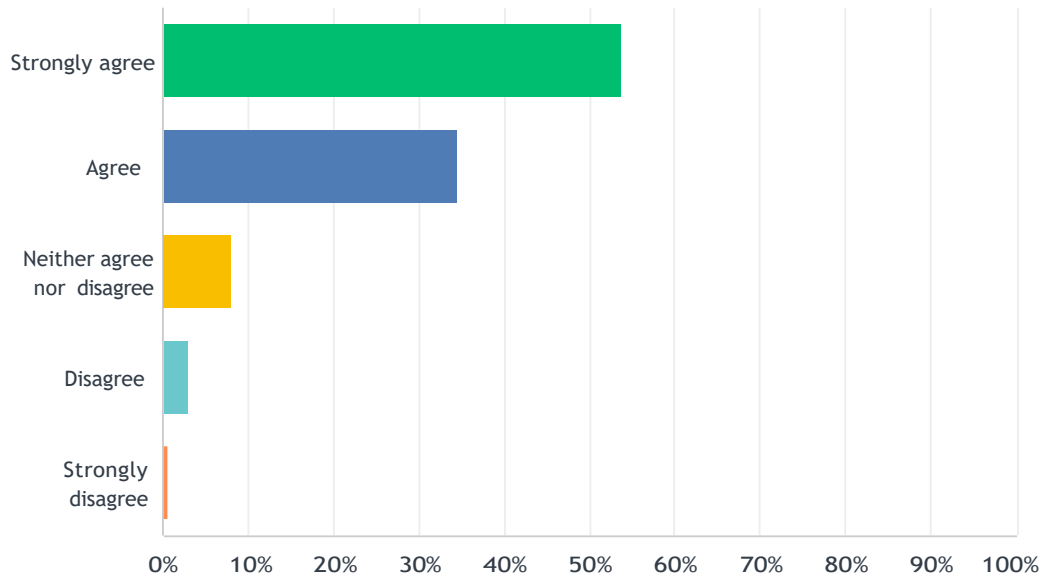
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	53.43%	179
Agree	38.51%	129
Neither agree nor disagree	6.27%	21
Disagree	1.49%	5
Strongly disagree	0.30%	1
TOTAL		335

Q18 I feel motivated to give my best effort at work.

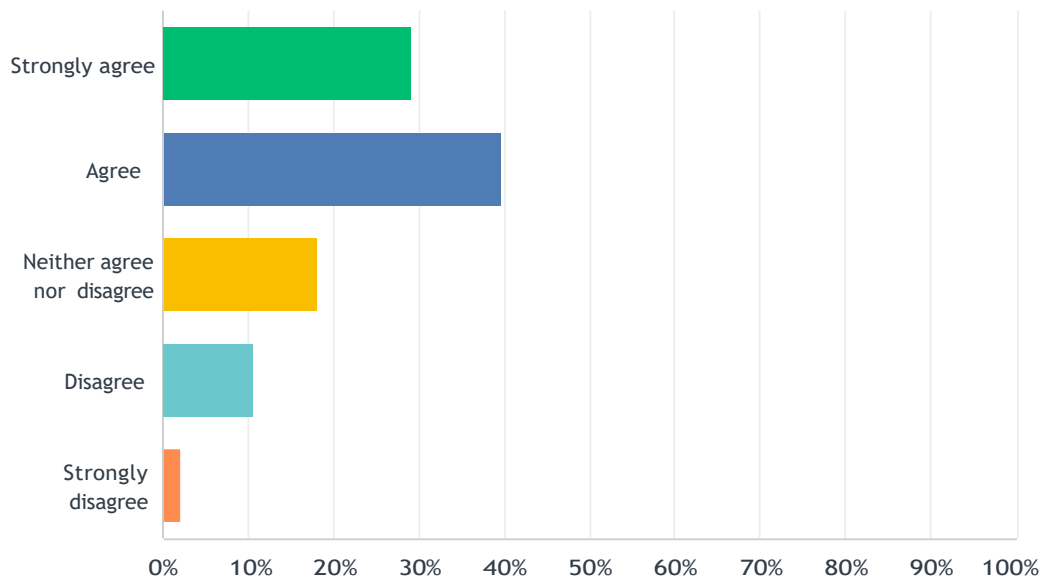
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	53.73%	180
Agree	34.63%	116
Neither agree nor disagree	8.06%	27
Disagree	2.99%	10
Strongly disagree	0.60%	2
TOTAL		335

Q20 I have a clear understanding of potential career paths within RACSB.

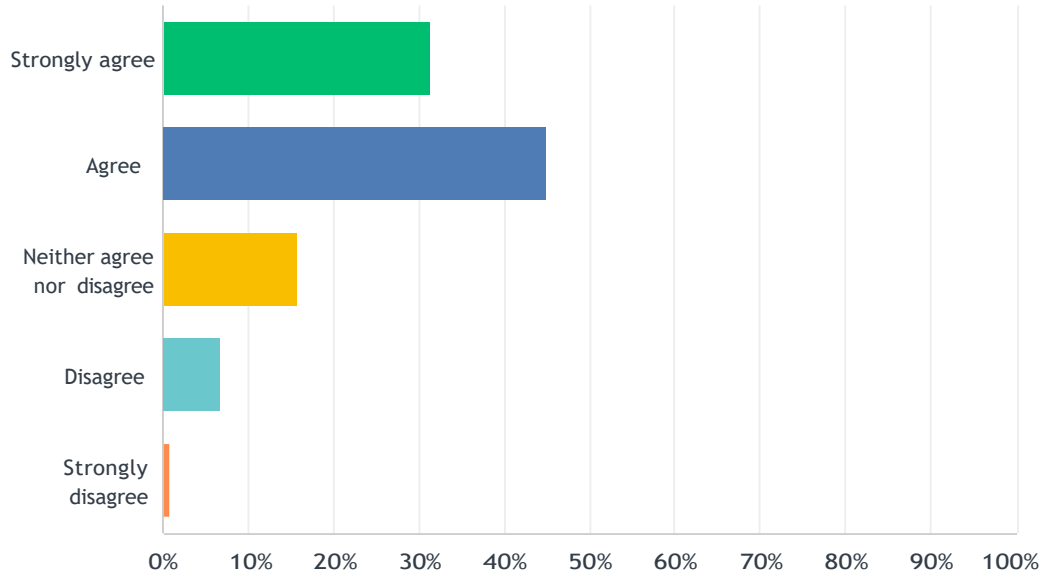
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	29.25%	98
Agree	39.70%	133
Neither agree nor disagree	18.21%	61
Disagree	10.75%	36
Strongly disagree	2.09%	7
TOTAL		335

Q21 I have access to the resources and training I need to grow and develop professionally.

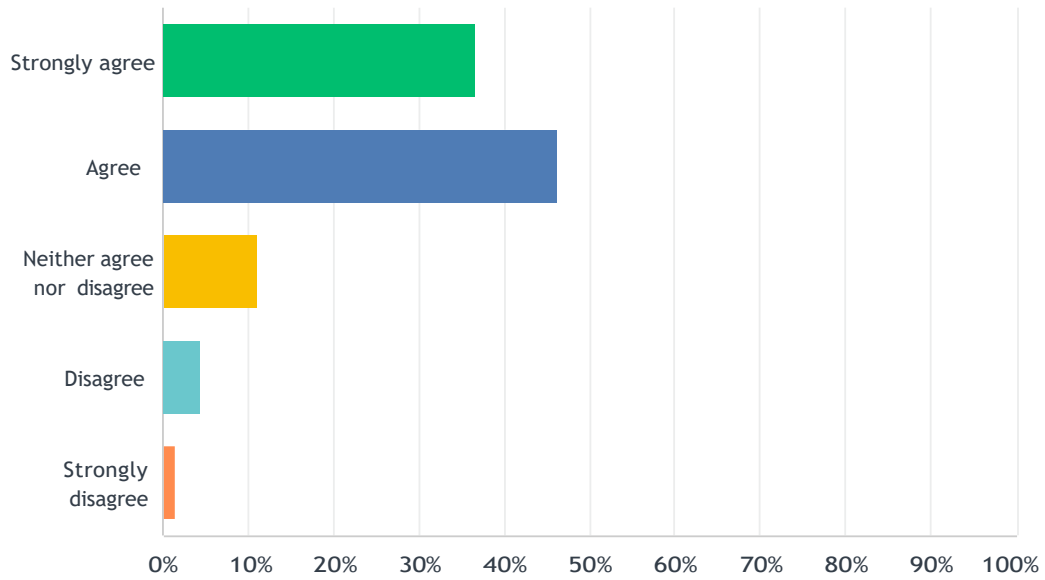
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	31.34%	105
Agree	45.07%	151
Neither agree nor disagree	15.82%	53
Disagree	6.87%	23
Strongly disagree	0.90%	3
TOTAL		335

Q22 I receive constructive feedback that helps me grow professionally.

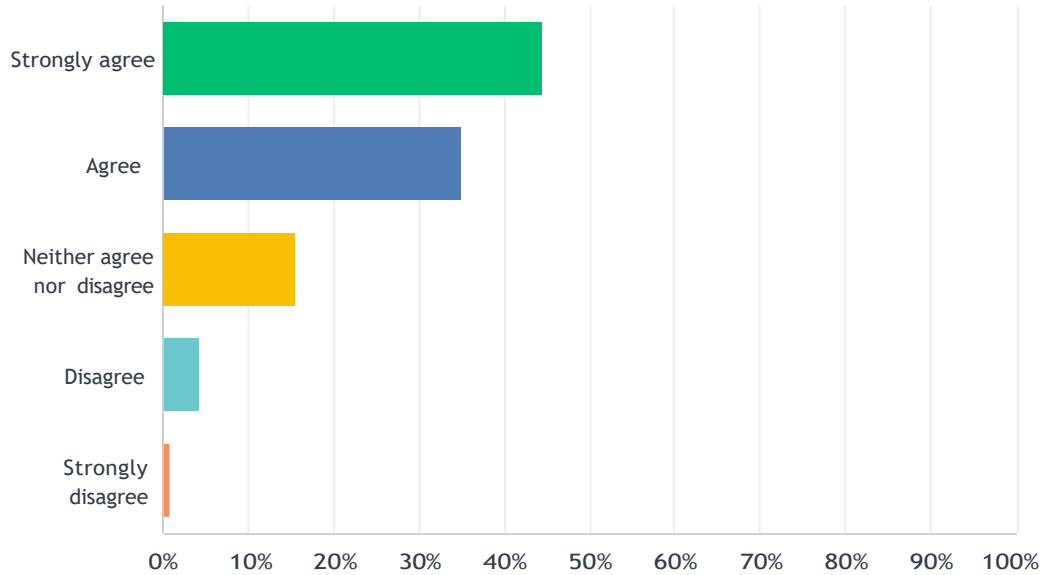
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	36.72%	123
Agree	46.27%	155
Neither agree nor disagree	11.04%	37
Disagree	4.48%	15
Strongly disagree	1.49%	5
TOTAL		335

Q23 My direct supervisor encourages me to pursue growth and learning opportunities.

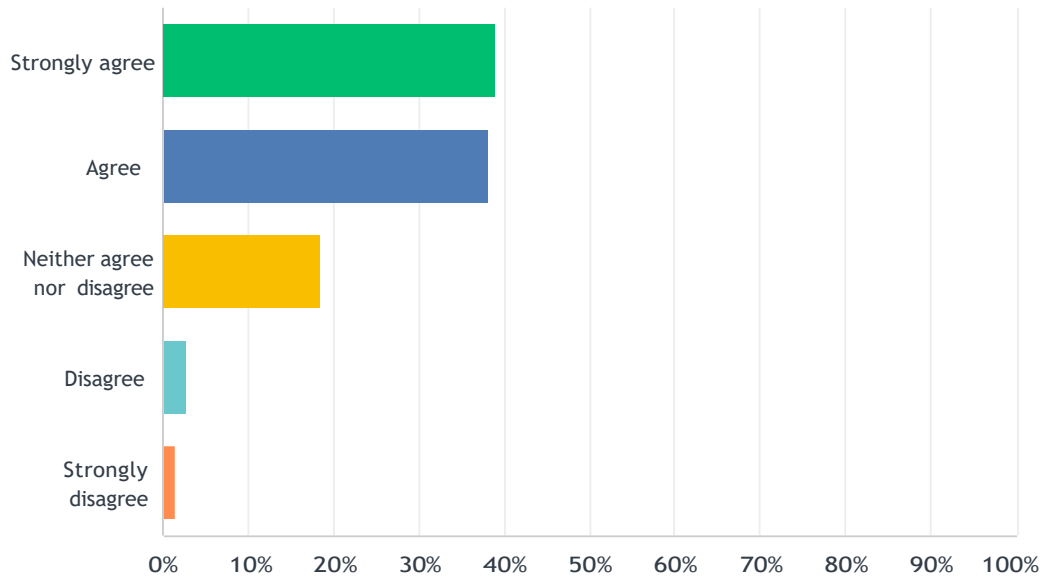
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	44.48%	149
Agree	34.93%	117
Neither agree nor disagree	15.52%	52
Disagree	4.18%	14
Strongly disagree	0.90%	3
TOTAL		335

Q24 I see a long-term future for my career within RACSB.

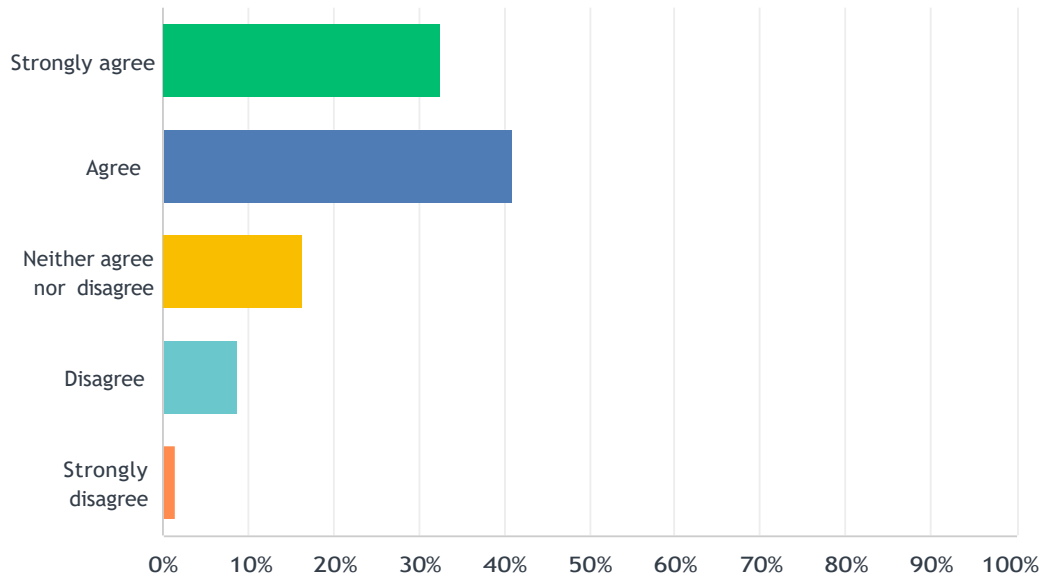
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	39.10%	131
Agree	38.21%	128
Neither agree nor disagree	18.51%	62
Disagree	2.69%	9
Strongly disagree	1.49%	5
TOTAL		335

Q26 I am fairly compensated for the work I do.

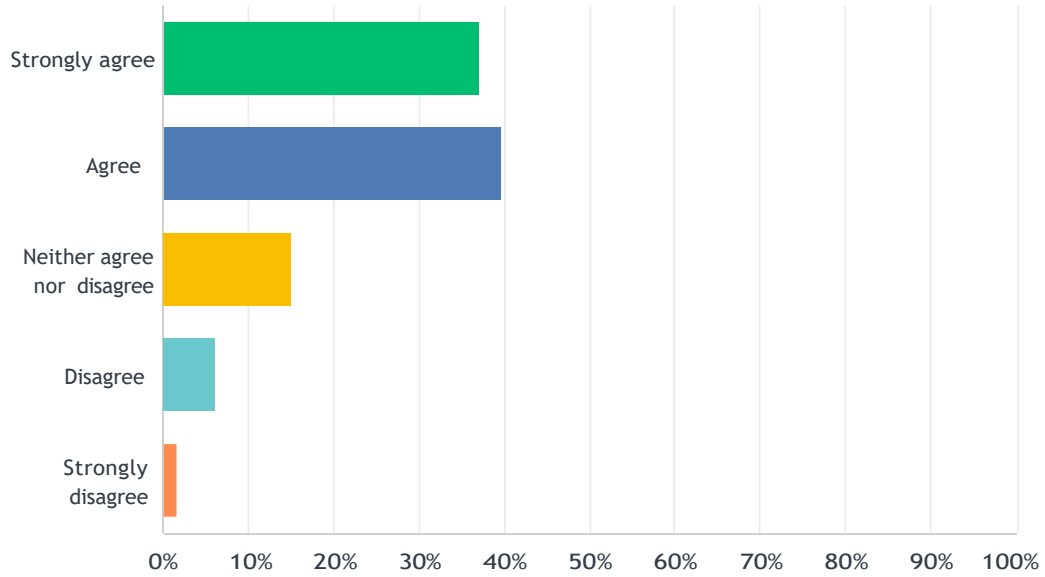
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	32.54%	109
Agree	40.90%	137
Neither agree nor disagree	16.42%	55
Disagree	8.66%	29
Strongly disagree	1.49%	5
TOTAL		335

Q27 My pay is competitive compared to similar jobs in other similar organizations.

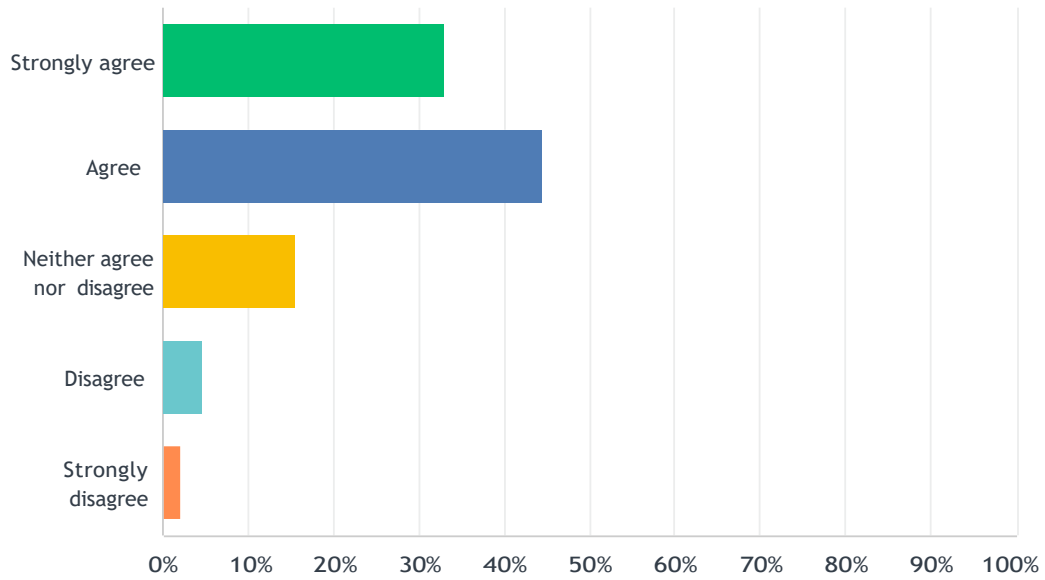
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	37.01%	124
Agree	39.70%	133
Neither agree nor disagree	15.22%	51
Disagree	6.27%	21
Strongly disagree	1.79%	6
TOTAL		335

Q28 RACSB benefits meet my needs and those of my family.

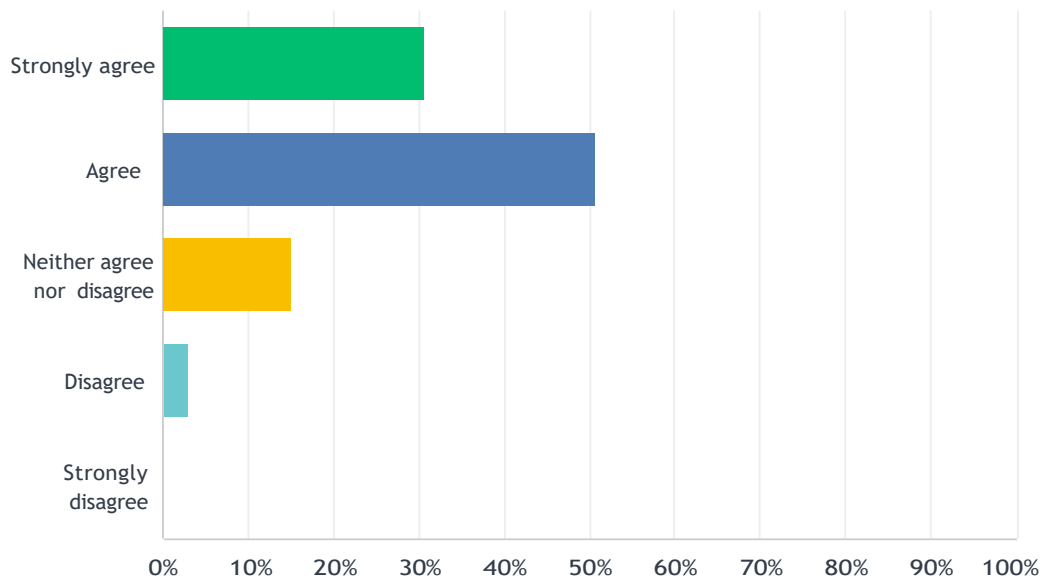
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	33.13%	111
Agree	44.48%	149
Neither agree nor disagree	15.52%	52
Disagree	4.78%	16
Strongly disagree	2.09%	7
TOTAL		335

Q29 I have a clear understanding of all the benefits offered by RACSB.

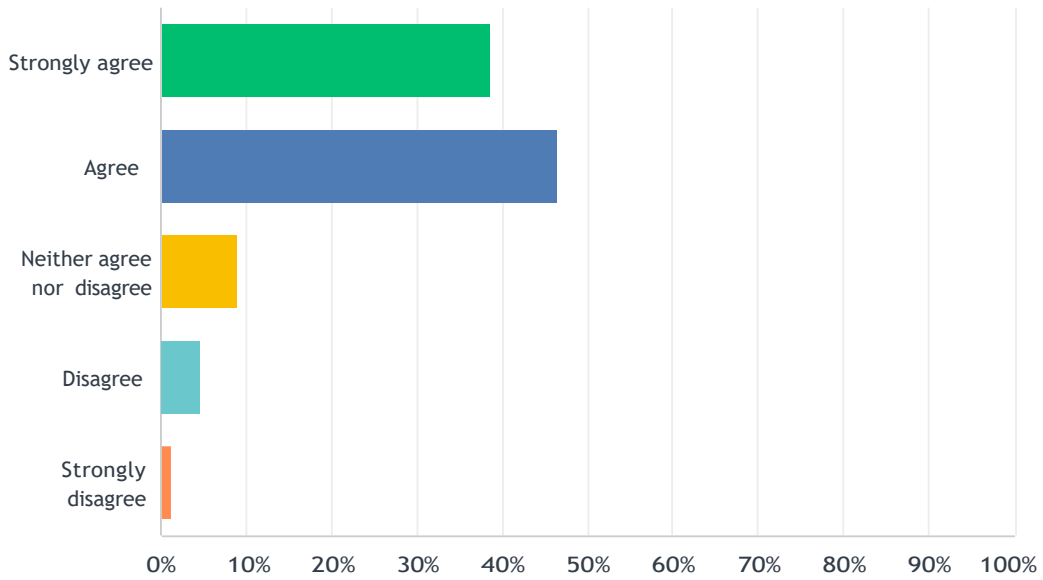
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	30.75%	103
Agree	50.75%	170
Neither agree nor disagree	15.22%	51
Disagree	2.99%	10
Strongly disagree	0.30%	1
TOTAL		335

Q30 RACSB provides adequate paid time off and leave benefits.

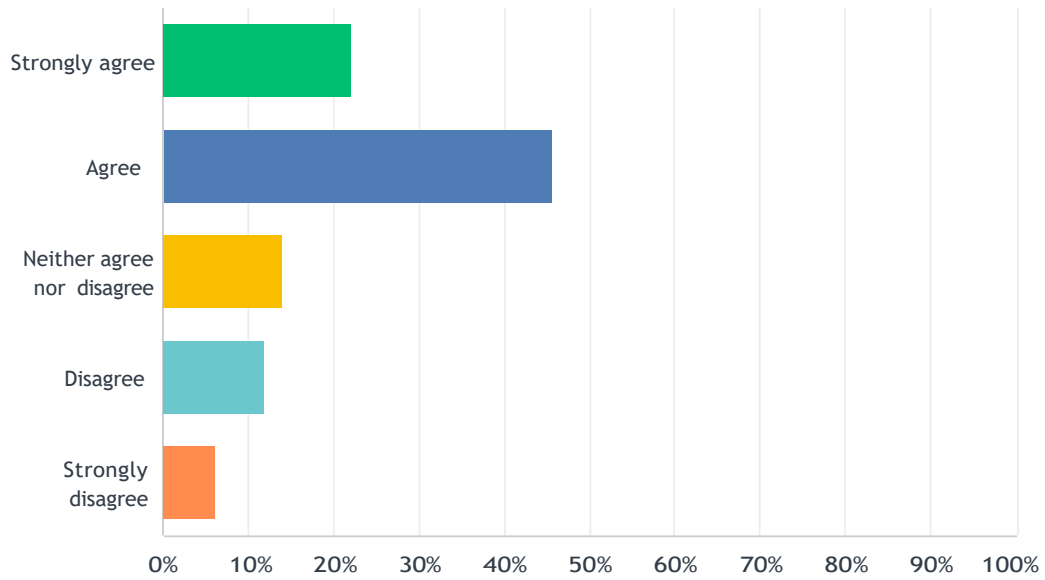
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	38.51%	129
Agree	46.57%	156
Neither agree nor disagree	8.96%	30
Disagree	4.78%	16
Strongly disagree	1.19%	4
TOTAL		335

Q32 My workload is reasonable for the time I have available.

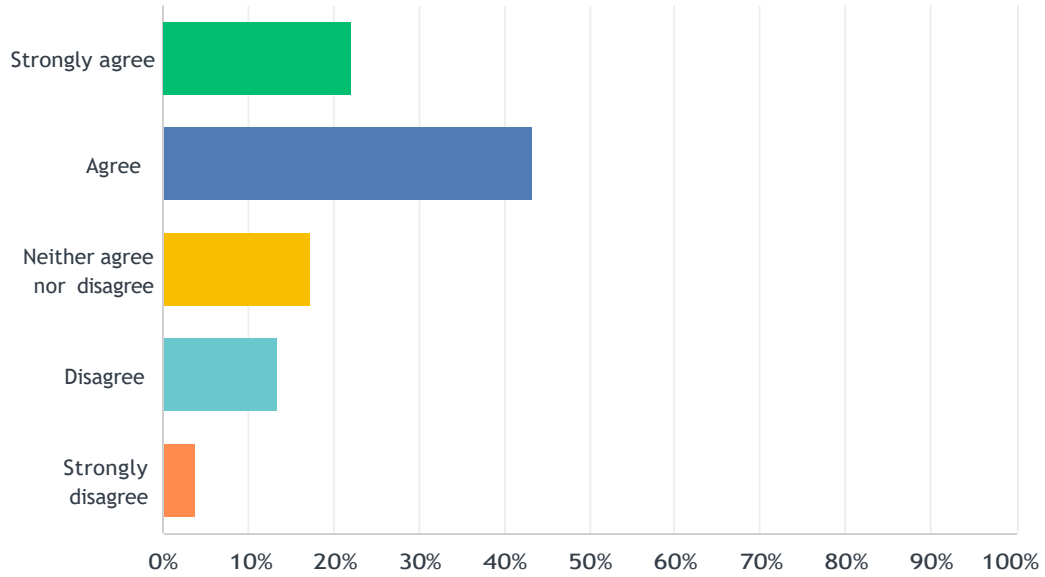
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	22.09%	74
Agree	45.67%	153
Neither agree nor disagree	14.03%	47
Disagree	11.94%	40
Strongly disagree	6.27%	21
TOTAL		335

Q33 I am able to maintain a healthy balance between work and personal life.

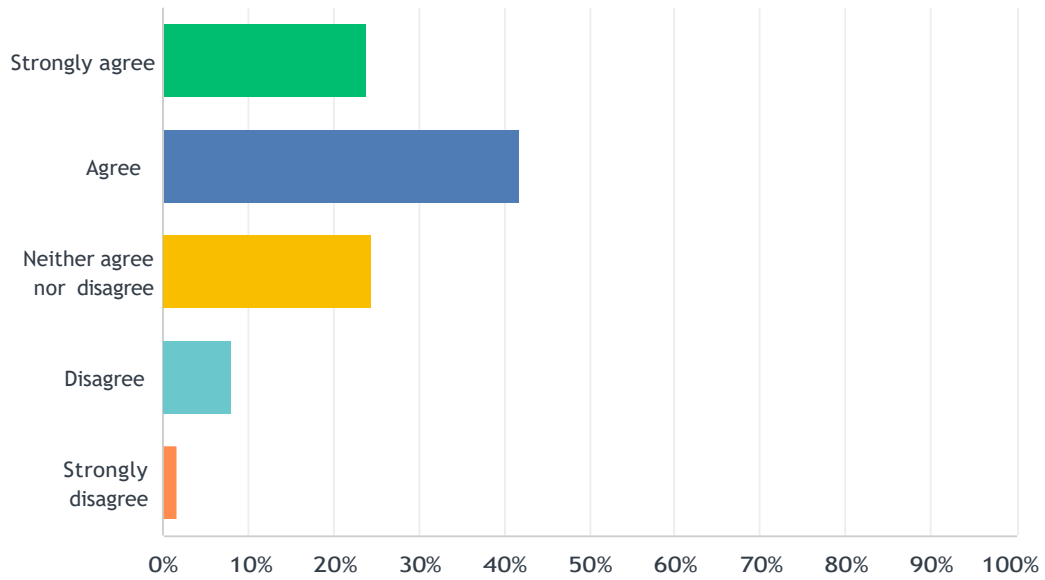
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	22.09%	74
Agree	43.28%	145
Neither agree nor disagree	17.31%	58
Disagree	13.43%	45
Strongly disagree	3.88%	13
TOTAL		335

Q34 RACSB supports employee well-being and mental health.

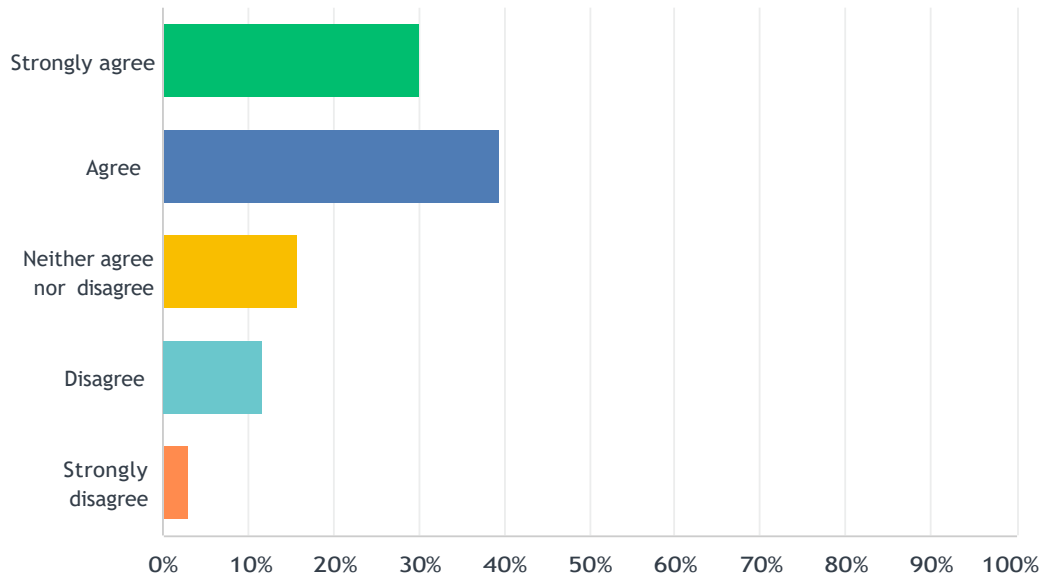
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	23.88%	80
Agree	41.79%	140
Neither agree nor disagree	24.48%	82
Disagree	8.06%	27
Strongly disagree	1.79%	6
TOTAL		335

Q35 I feel comfortable taking time off when needed.

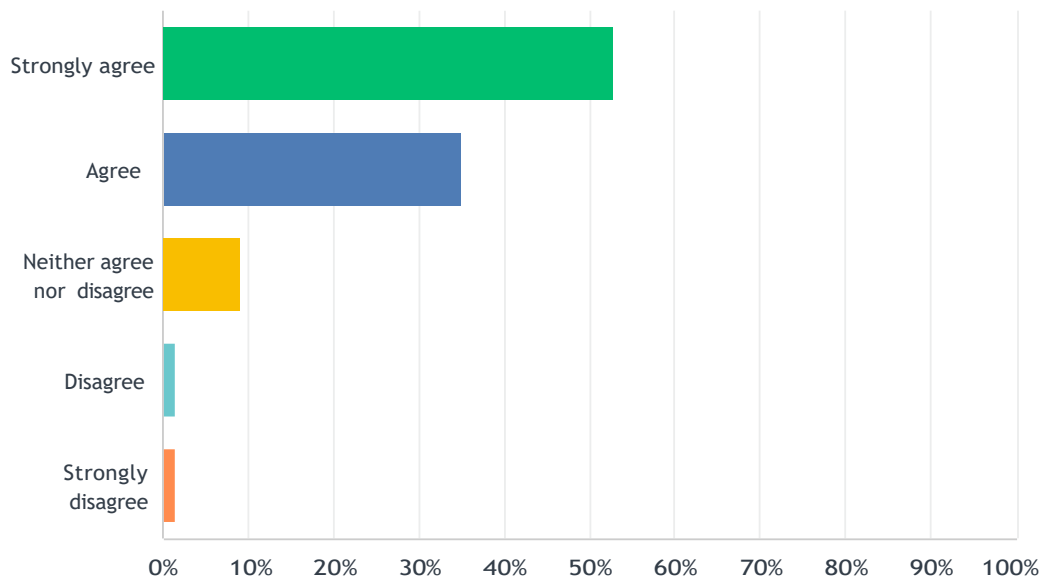
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	30.15%	101
Agree	39.40%	132
Neither agree nor disagree	15.82%	53
Disagree	11.64%	39
Strongly disagree	2.99%	10
TOTAL		335

Q36 My direct supervisor genuinely cares about my well-being.

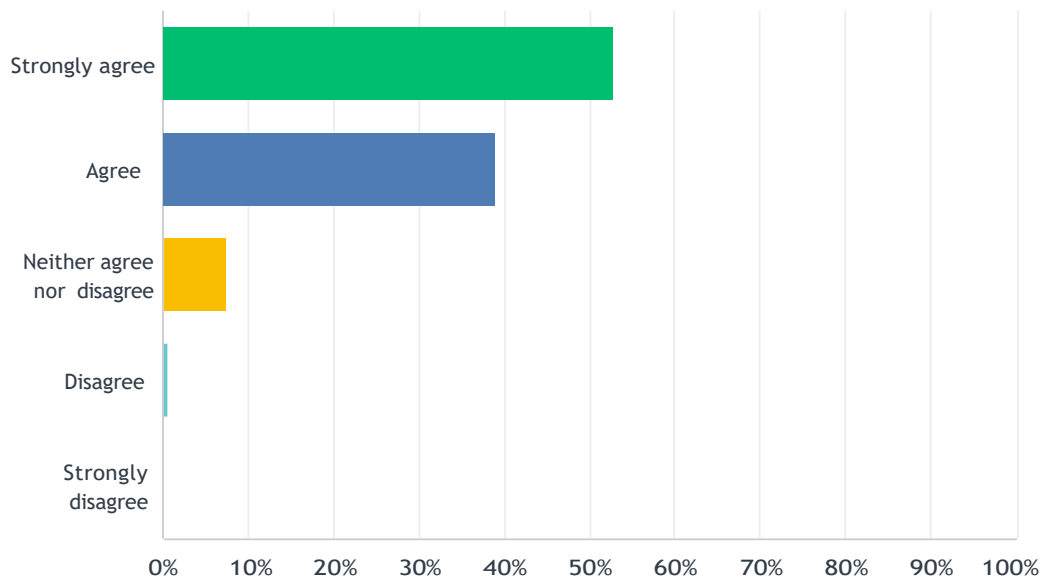
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	52.84%	177
Agree	34.93%	117
Neither agree nor disagree	9.25%	31
Disagree	1.49%	5
Strongly disagree	1.49%	5
TOTAL		335

Q38 I am proud to work for RACSB.

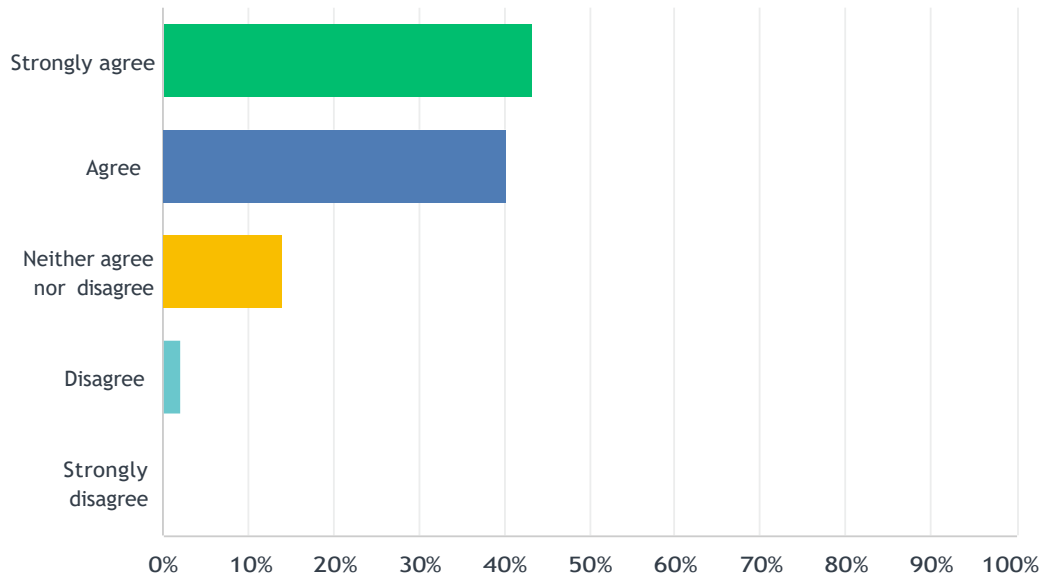
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	52.84%	177
Agree	39.10%	131
Neither agree nor disagree	7.46%	25
Disagree	0.60%	2
Strongly disagree	0.00%	0
TOTAL		335

Q39 I would recommend RACSB as a great place to work.

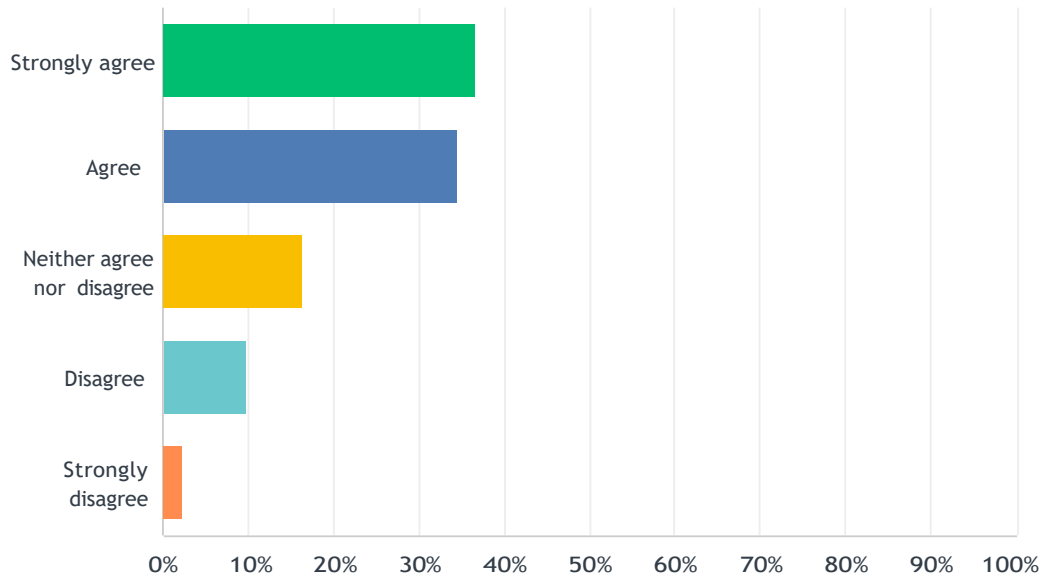
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	43.28%	145
Agree	40.30%	135
Neither agree nor disagree	14.03%	47
Disagree	2.09%	7
Strongly disagree	0.30%	1
TOTAL		335

Q40 I rarely think about looking for a job at another organization.

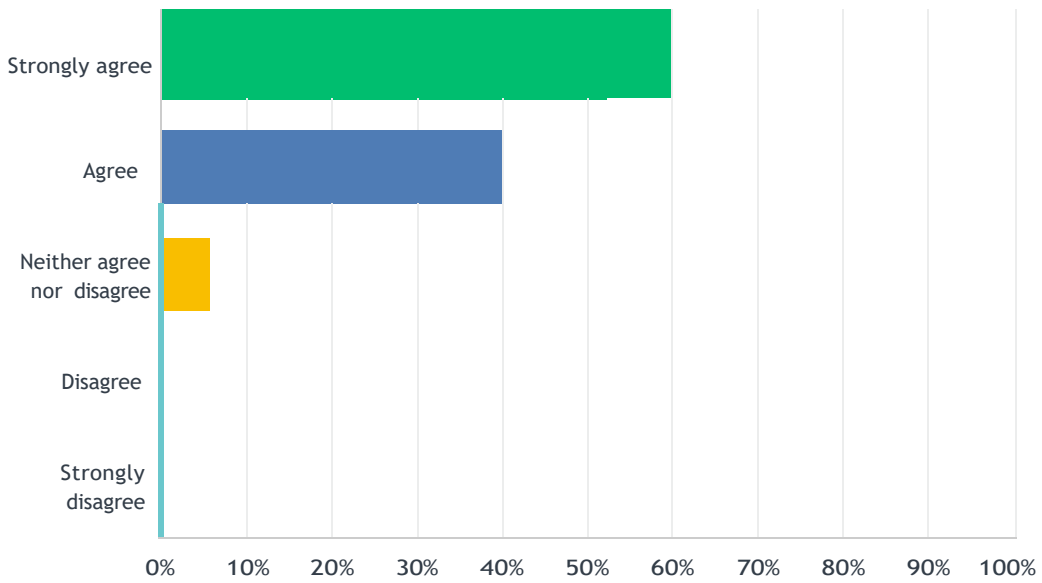
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	36.72%	123
Agree	34.63%	116
Neither agree nor disagree	16.42%	55
Disagree	9.85%	33
Strongly disagree	2.39%	8
TOTAL		335

Q41 I feel committed to the RACSB mission and goals.

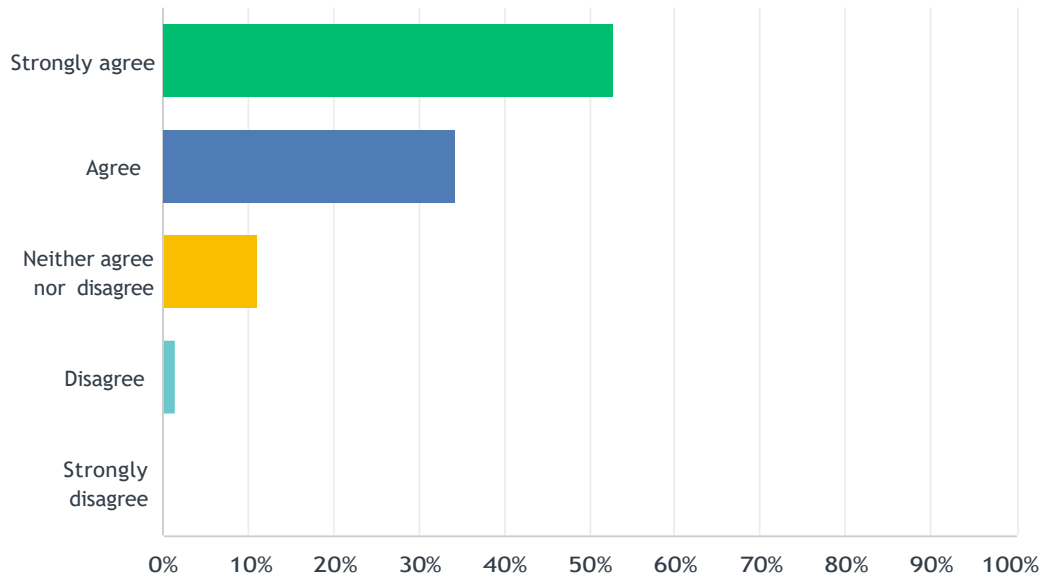
Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	52.54%	176
Agree	40.60%	136
Neither agree nor disagree	5.97%	20
Disagree	0.90%	3
Strongly disagree	0.00%	0
TOTAL		335

Q42 I am willing to put in extra effort to help RACSB succeed.

Answered: 335 Skipped: 0



ANSWER CHOICES	RESPONSES	
Strongly agree	52.84%	177
Agree	34.33%	115
Neither agree nor disagree	11.04%	37
Disagree	1.49%	5
Strongly disagree	0.30%	1
TOTAL		335

RACSB DEPUTY EXECUTIVE DIRECTOR REPORT
February 2026 Monthly Updates

Opportunities for Partnership/Input:

- Provided three presentations at the Open Minds Program Management Institute in Clearwater, Florida.
- Reviewed bills and participated in VACSB Clearinghouse Committee which meets weekly during the General Assembly session.
- Completed a meeting and demonstration with ClinicallyAI
- Ongoing participation weekly on the VACSB CCBHC Steering Committee with the engagement with National Council for Mental Wellbeing.
- Attended the VACSB Finance Director Retreat at Valley Community Services Board.
- Ongoing participation in the FY26 HL7 Expansion workgroup. Using the work of the VACSB DMC Data Mapping Workgroup to work to streamline some of the ad-hoc reporting into the expansion effort.
- Met with Altruix and Impruvon to review proposed option for electronic Medication Administration Records.
- Attended the DBHDS Provider Issues Resolution Workgroup Sub-Committee on System Functioning in preparation for the larger group quarterly meeting in March.

Enterprise Data Warehouse (EDW) and HL7 Expansion Workgroup

DBHDS staff and CSB staff continue to meet at least weekly about the EDW and upcoming annual HL7 Expansion cycle. Rappahannock Area Community Services Board continues to be the lead Netsmart Community Services Board, for those that use MyAvatar. We successfully went live on June 30, 2025. We are excited by the launch of the data quality dashboard which gives us unprecedented access to data quality errors for swift and efficient resolution. RACSB staff serve as chair of the DMC Data Mapping workgroup charged with mapping out the data requirements from DBHDS which CSBs have to complete. The workgroup is partnering with the HL7 Expansion workgroup to incorporate requirements into the new EDW system to reduce duplicate ad-hoc reporting. These groups have combined meetings and efforts as we focus on finalizing specifications for the annual HL7 expansion project for this year. Finalized specifications have been released and shared with vendors. We are meeting every week with Netsmart to track both the expansion as well as the optimization of state reporting.

DBHDS Performance Dashboards

These remain unavailable due to the transition to the new EDW. RACSB participated in a small group of beta testers for these dashboards. It was our recommendation that more work is needed prior to publication of the dashboards for official use. RACSB staff were selected to view and test the new ID/DD Dashboards. We were able to identify an error in our data transmission and correct. These dashboards are further along than the behavioral health dashboards and should be available shortly.

ZOOM License Transition

When COVID-19 hit, RACSB was able to quickly acquire 90 HIPAA compliant Zoom licenses to support virtual service provision. We have maintained them in the following years. Microsoft TEAMS now is able to offer HIPAA compliant virtual meetings using our existing Microsoft subscriptions. As a result, we will transition most virtual sessions to TEAMS and reduce the number of Zoom licenses paid for by the agency.

Information Technology Department Data		
Number of IT Tickets Completed	Zoom Meetings	Total Zoom Participants
February 2026- 987	1,747	3,860

To: Joe Wickens, Executive Director

From: Brandie Williams, Deputy Executive Director

Re: Legislative Updates and Priorities

Date: March 6, 2026

The Rappahannock Area Community Services Board (RACSB) is committed to advocacy to improve performance, quality, and demonstrate the value of services. We recognize the impact that legislative activity at the federal, state, and local level impact the services we offer to the community. This report will provide specific information on current legislative or regulatory topics which impact RACSB.

Please see the following attachments for review:

- VNPP Update on Virginia Budget
- VACSB Legislative Update

VNPP Quick Take on the Committee Reports!

Topic	House Committee	Senate Committee	Conference Committee
Rates – DOJ Rate Request	No change from the introduced budget [291 JJJJJ]	Provides \$81,7M to fund the services per the rate study as required by DOJ	We'll need to see the language
Rates- Other Services	None	Increase in Personal Care, Respite & Companion Rates by \$44.3M in the second year.	
Mobile Crisis Services – limited to 4 hours per incident	No change from the introduced budget [291 KKKKK]	Not included	NA
Community Stabilization	Funding partially restored to be an option until June 30, 2028 or until all receiving the service can be transferred [291 10h]	Not included	Priority!
56 hour “soft-cap” on personal care in DD Waivers	No change from the introduced budget [291 MMMMM]	No change from the introduced budget [291 MMMMM]	NA
Restoration of EVV requirement for “live-in” care givers	No change from the introduced budget [291 NNNNN]	No change from the introduced budget [291 NNNNN]	NA
BH Redesign	Accepted our language on delay, overlap of services and a report due in November 2026 [291 14h]	Language included to delay until July 1, 2027 – but no details yet	We'll need to see the language
Designated Support Staff In Acute Care Settings	Not included	Not included	NA
Lifting ICF Cap	Not included	Not included	NA
ABA Issues	Accepted our language to allow a provisional Dx for children 5 or younger [291 8h]	Not included	Priority!
Music Therapy	Not included	Not included	NA
Marcus Alert Funding	“Fully Funded” - \$15.6M [301 1h]	Funded, but less than requested in the first year	Will Support VACSB



Virginia Association Of
Community Services Boards, Inc.
Making a Difference Together

VACSB Legislative Update

March 4, 2026

This update is published weekly during the General Assembly Session. If you have questions or need information, please contact Heather Orrock at horrock@vacsb.org.

(804) 330-3141

VACSB CLEARINGHOUSE BILL DESIGNATION

DESIGNATION

Actively Support

Support

Monitor

Oppose

Actively Oppose

ACTION

Advocacy by VACSB Reps

Published Statement

Online Tracking

Published Statement

Advocacy by VACSB Reps

Bill	Catchline	Chief Patron	Committee	Last Action	Position	Date
HB1	Minimum wage; increases incrementally to \$15.00 per hour by January 1, 2028.	Ward	Finance and Appropriations	(S) Passed by for the day (Voice Vote)	Monitor - Same as SB1	03/03/2026
HB5	Employment; paid sick leave, civil penalties.	Convirs-Fowler	Finance and Appropriations	(S) Passed by for the day (Voice Vote)	Monitor - Similar to SB199	03/03/2026
HB32	Problem Gambling Treatment and Support Advisory Committee; appointment of additional members.	Krizek	Education and Health	(S) Rereferred from Education and Health to Rehabilitation and Social Services (13-Y 0-N)	Monitor	02/19/2026
HB37	Developmental disability waivers; financial eligibility standards, sunset repeal.	Shin	Finance and Appropriations	(S) Reported from Finance and Appropriations (15-Y 0-N)	Actively Support	03/04/2026
HB43	Suicide; abolishes common-law crime, delayed effective date, report.	Simon		(S) Signed by President	Support	03/02/2026
HB66	Federal benefit programs; DMS & DSS shall study technology systems used to administer.	Feggans	Rehabilitation and Social Services	(S) Reported from Rehabilitation and Social Services and rereferred to Finance and Appropriations (15-Y 0-N)	Monitor	02/20/2026
HB178	Public schools; student support services, memoranda of understanding, report, effective clause.	Anthony	Finance and Appropriations	(S) Reported from Finance and Appropriations (15-Y 0-N)	Monitor - Similar to SB190	03/04/2026
HB209	Peer recovery specialists; VDH & DOC to develop guidelines for hiring.	Price		(S) Passed Senate (40-Y 0-N 0-A)	Monitor - Similar to SB608	03/03/2026
HB225	Marcus Alert Evaluation Task Force; created.	Hope		(S) Signed by President	Monitor - Same as SB514	02/26/2026

HB231	Autism Advisory Council; name change, membership, staffing, powers and duties.	Cohen	Rules	(S) Reported from S-Rules committee with substitute and rereferred to Finance and Appropriations (14 Y 0 N)	Oppose - Position moved from Support to Oppose as a result of the S-Rules committee substitute. Related bill SB280	03/02/2026
HB245	Jurisdiction of district courts in felony cases; specialty dockets, Behavioral Health Docket Act.	Watts		(S) Signed by President	Monitor	03/02/2026
HB246	Mental illness, neurocognitive disorder, etc.; affirmative defense or reduced penalty.	Watts	Courts of Justice	(S) Reported from Courts of Justice with amendments and rereferred to Finance and Appropriations (9-Y 5-N)	Support	02/23/2026
HB247	Deferred dispos. in criminal case; persons with autism, intellectual, or developmental disabilities.	Watts		(H) Bill text as passed House and Senate (HB247ER)	Support - Same as SB416	03/04/2026
HB248	Interjurisdictional law-enforcement agreements; development of behavioral health co-response teams.	Watts		(S) Signed by President	Support - Similar to SB317	03/02/2026
HB257	Comprehensive plan; social determinants of health.	Simonds		(S) Passed by for the day Block Vote (Voice Vote)	Monitor	03/03/2026
HB298	Public elementary or secondary school students; evidence-based restorative disciplinary practices.	McQuinn	Education and Health	(S) Senate subcommittee offered	Monitor	02/26/2026

HB308	Va. ABC Authority; permitting of retail tobacco product retailers, etc.	Hope	Finance and Appropriations	(S) Reported from Finance and Appropriations with substitute (15-Y 0-N)	Actively Support - Similar to SB620	03/04/2026
HB309	Hospitals; temporary detention for testing, observation, or treatment.	Hope		(S) Passed by for the day Block Vote (Voice Vote)	Monitor	03/03/2026
HB355	Public school students in grades six through 12; annual mental health screening.	Gardner		(S) Passed Senate with substitute (21 Y 19 N 0 A)	Monitor	03/02/2026
HB453	Comprehensive mental health, substance abuse, & developmt. disability crisis services; written plan.	Willett		(S) Passed Senate (40-Y 0-N 0-A)	Monitor - Same as SB513	03/03/2026
HB481	Prior authorization; requiring physician review for denial.	Hope	Commerce and Labor	(S) Committee substitute printed 26108765D-S1	Monitor	03/03/2026
HB548	Uniform Health Care Decisions Act; civil penalty.	Hope	Courts of Justice	(S) Senate committee offered	Pending	03/02/2026
HB577	Social work; applicants for licensure, criminal background check.	Glass	Courts of Justice	(S) Committee substitute printed 26108952D-S1	Monitor	03/03/2026
HB632	Kinship foster care; barrier crime waiver, report.	Callsen		(H) Bill text as passed House and Senate (HB632ER)	Support - Similar to SB305. Related bill HB1060	03/03/2026
HB642	Cannabis control; establishes framework for creation of retail marijuana market, penalties, report.	Krizek		(S) Passed by for the day (Voice Vote)	Monitor - Same as SB542	03/03/2026
HB652	Parental prenatal & postnatal substance use; work group to evaluate Commonwealth's response to use.	Hayes		(S) Passed Senate (40-Y 0-N 0-A)	Monitor - Similar to SB133. Related bills SB36 and HB283.	03/03/2026

HB656	Mental health and substance abuse disorders; network adequacy standards, comparative analyses.	Willett	Education and Health	(S) Reported from S-Education and Health committee with substitute and rereferred to Finance and Appropriations (15 Y 0 N)	Support - Same as SB524. Was listed as Monitor, moved to Support on 2/4	03/03/2026
HB681	Retired law-enforcement officers; emergency and temporary detention admissions.	Hayes		(S) Passed Senate (40-Y 0-N 0-A)	Monitor - Similar to SB75 and SB395	03/03/2026
HB712	Office-based buprenorphine treatment; Board of Medicine to amend regulations.	Wachsmann		(S) Signed by President	Support - Similar to SB641	02/26/2026
HB896	Substantial Risk Order Training Program; established, report.	Sullivan	Finance and Appropriations	(S) Reported from Finance and Appropriations with substitute (10-Y 5-N)	Monitor - Related bills HB901 and SB495	03/04/2026
HB901	Substantial risk orders; eligible petitioners, court jurisdiction, constr. possession of firearms.	Sullivan		(S) Signed by President	Monitor - Related bill HB896	03/02/2026
HB931	Recovery residences; regulations.	Simon	Finance and Appropriations	(S) Reported from Finance and Appropriations with substitute (15-Y 0-N)	Monitor - Similar to SB270	03/04/2026
HB944	Workplace violence; policy required for certain employers, civil penalty, delayed effective date.	Clark	Commerce and Labor	(S) Referred to Committee on Commerce and Labor	Monitor	02/18/2026
HB976	Person in temporary detention process; alternative transportation provider.	Price		(S) Passed Senate (40-Y 0-N 0-A)	Monitor	03/03/2026

HB996	Postsecondary Education Rehabilitation Transition Program; plan for expansion of Program.	Seibold		(S) Signed by President	Monitor	02/26/2026
HB1014	Incapacitated persons; finding of lack of capacity to understand act of voting.	Tran		(S) Passed by for the day (Voice Vote)	Support - Similar to SB34	03/03/2026
HB1060	Foster and adoptive homes; barrier crimes, exceptions.	Callsen		(S) Signed by President	Monitor - Related bills HB632 and SB305	02/26/2026
HB1097	Driver communication improvement program; drivers diagnosed with autism spectrum disorder, etc.	Laufer		(S) Signed by President	Support - Related bills HB517 (died, would have expanded the program) and SB309 (requires driver education programs to include information about the program)	02/26/2026
HB1147	Medicine and Nursing, Boards of; continuing education, bias reduction training.	Hayes		(S) Signed by President	Monitor - Similar to SB22	03/02/2026
HB1207	Paid family & med. leave insurance program; definitions, notice requirements, civil action, report.	Sewell	Finance and Appropriations	(S) Committee substitute printed 26109116D-S2	Monitor - Similar to SB2	03/04/2026
HB1229	Public schools; use of seclusion and restraint, report.	Scott, P.A.	Education and Health	(S) Assigned Education sub: Public Education	Monitor	02/26/2026
HB1282	Licensed substance abuse treatment practitioners; licensure by endorsement, etc.	Cole, J.G.	Education and Health	(S) Assigned Education sub: Health Professions	Monitor	02/27/2026

HB1292	Temporary detention; certified evaluators, sunset extended.	Price		(S) Passed Senate (40-Y 0-N 0-A)	Actively Oppose - Same as SB735	03/03/2026
HB1304	Individuals receiving services in a hospital, training center, etc.; right to send and receive mail.	Ware	Finance and Appropriations	(S) Rereferred to Finance and Appropriations	Monitor - Similar to SB580	03/02/2026
HB1318	Hospitals; emergency department physicians.	Willett		(S) Passed Senate (40-Y 0-N 0-A)	Monitor - Same as SB738	03/02/2026
HB1357	Nursing facilities; comprehensive study of quality of care, etc., and operational practices.	McQuinn	Rehabilitation and Social Services	(S) Reported from Rehabilitation and Social Services and rereferred to Finance and Appropriations (15-Y 0-N)	Monitor	02/20/2026
HB1370	Service providers; regulations for providers to individuals with developmental disabilities.	Mehta	Education and Health	(S) Rereferred from Education and Health to Rehabilitation and Social Services (14-Y 0-N)	Monitor - Related bill HB1380	02/19/2026
HB1405	Social services, local dept. of social services allowed to pay reasonable funeral expense.	McClure		(S) Signed by President	Actively Support	02/26/2026
HB1411	Defendant; evidence of mental condition admissible.	Schmidt	Courts of Justice	(S) Referred to Committee for S-Courts of Justice	Monitor	02/20/2026
HB1414	Children; certain injuries to be reported by physicians, etc., penalties for failure to report.	McQuinn	Courts of Justice	(S) Reported from S-Courts of Justice committee with substitute and rereferred to Finance and Appropriations (15 Y 0 N)	Monitor	03/03/2026

HB1489	Hospitals; reports of threats or acts of violence against health care providers.	Tran		(S) Passed Senate (40-Y 0-N 0-A)	Monitor	03/02/2026
HB1523	Certified violence prevention professional; requirements for certification.	McGuire	Education and Health	(S) Senate subcommittee offered	Monitor	03/03/2026
HJ25	Non-Apparent Disabilities Awareness Wk; designating 3rd full week of Oct 2026 & each succeeding yr.	Price		(S) Agreed to by Senate Block Vote (Voice Vote)	Support	03/03/2026
SB1	Minimum wage; increases incrementally to \$15.00 per hour by January 1, 2028.	Lucas		(S) Bill text as passed Senate and House (SB1ER)	Monitor - Same as HB1	03/04/2026
SB2	Paid family and medical leave insurance program; definitions, notice requirements, civil action.	Boysko	Labor and Commerce	(H) Committee substitute printed 26109083D-H1	Monitor - Similar to HB1207	03/03/2026
SB18	Children; adjudication of delinquency.	Locke		(H) Read second time	Monitor	03/03/2026
SB22	Medicine and Nursing, Boards of; continuing education, bias reduction training.	Locke		(S) Signed by President	Monitor - Similar to HB1147	02/26/2026
SB34	Incapacitated persons; finding lack of capacity to understand voting, court makes specific finding.	Favola		(H) Read second time	Support - Similar to HB1014	03/03/2026
SB35	Juvenile & domestic relations district courts; delinquent juv., mental health/disability evaluation.	Favola	Courts of Justice	(H) Reported from Courts of Justice and referred to Appropriations (22-Y 0-N)	Monitor	03/02/2026
SB75	Emergency and temporary detention transportation; alternative transportation providers, etc.	Lucas		(S) Signed by President	Monitor - SB395 was incorporated on 1/23. Similar to HB681	03/02/2026
SB171	Minors admitted to inpatient treatment; copies provided to public elementary and secondary schools.	Favola	Education	(H) Committee substitute printed 26108179D-H1	Monitor	03/04/2026

SB190	Certified student support agencies; DOE to assess impact of developing program for students.	Williams Graves	Education	(H) Committee substitute printed 26108810D-H1	Monitor - Similar to HB178	03/04/2026
SB198	Individuals with developmental or intellectual disabilities; admissibility of statements.	Favola	Courts of Justice	(H) Reported from Courts of Justice with amendment(s) and referred to Appropriations (15-Y 7-N)	Monitor	03/02/2026
SB199	Employment; paid sick leave, civil penalties.	Favola		(H) Passed House with substitute (63-Y 35-N 0-A)	Monitor	03/03/2026
SB270	Recovery residences; regulations.	VanValkenburg		(H) House requested conference committee	Monitor - Similar to HB931	03/04/2026
SB280	Autism Advisory Council; repeals council, advisory Board established, report, sunset.	Aird	Rules	(H) Subcommittee recommends reporting with substitute (5-Y 0-N)	Support - Position moved from Oppose to Support as a result of the H-RUL Studies Subcommittee substitute. Related to HB231	03/02/2026
SB305	Kinship foster care; barrier crime waiver, report.	Pekarsky		(S) Bill text as passed Senate and House (SB305ER)	Support - Similar to HB632. Related bill HB1060	03/04/2026

SB309	Driver education programs; voluntary initiatives for drivers with autism spectrum disorder.	Pekarsky		(H) Passed House (97-Y 0-N 0-A)	Support - Related bills HB517 (expands program) and HB1097 (edu. for LEOs and EMS about program)	03/03/2026
SB317	Interjurisdictional law-enforcement agreements; development of behavioral health co-response teams.	Perry		(S) Signed by President	Support - Similar to HB248	02/18/2026
SB335	Mental illness, neurocognitive disorder, etc.; affirmative defense or reduced penalty.	Boysko		(S) Signed by President	Support - Similar to HB246	02/24/2026
SB416	Deferred dispos. in criminal case; persons with autism, intellectual, or developmental disabilities.	Boysko		(S) Fiscal Impact Statement from Department of Planning and Budget (SB416)	Support - Same as HB247	03/02/2026
SB421	Pharmacist; remote verification and counseling in opioid treatment programs.	Favola		(S) Bill text as passed Senate and House (SB421ER)	Actively Support	03/04/2026
SB495	Substantial risk orders; eligible petitioners, court jurisdiction, constr. possession of firearms.	Deeds		(S) Signed by President	Monitor - Related bills HB901 and HB896	02/27/2026
SB513	Comprehensive mental health, substance abuse, & developmt. disability crisis services; written plan.	Deeds		(S) Signed by President	Monitor - Same at HB453	02/27/2026
SB514	Marcus Alert Evaluation Task Force; created.	Deeds		(S) Signed by President	Monitor - Same as HB225	02/27/2026
SB524	Mental health & substance abuse disorders; network adequacy standards, comparative analyses, report.	Deeds		(H) House requested conference committee	Support - Same as HB656. Was listed as Monitor, moved to Support on 2/4	03/04/2026

SB528	Misdemeanor proceedings; competency treatment.	Stanley		(H) Committee substitute agreed to	Support - Same as HB1105	03/04/2026
SB542	Cannabis control; establishes framework for creation of retail marijuana market, penalties, report.	Aird		(H) Read second time	Monitor - Same as HB642 (Incorporates SB826)	03/03/2026
SB580	Individuals receiving services in a hospital, training center, etc.; right to send and receive mail.	Peake		(S) Bill text as passed Senate and House (SB580ER)	Monitor - Similar to HB1304	03/04/2026
SB608	Peer recovery specialists; VDH & DOC to develop guidelines for hiring.	Pillion		(S) Signed by President	Support - Similar to HB209	02/26/2026
SB620	Va. ABC Authority; permitting of retail tobacco product retailers, etc.	Ebbin	Appropriations	(H) Reported from Appropriations (21-Y 1-N)	Actively Support - Similar to HB308	03/02/2026
SB637	Virginia Human Rights Act; definition of "employer."	Ebbin	Labor and Commerce	(H) Committee substitute printed 26108737D-H1	Monitor	03/03/2026
SB641	Office-based buprenorphine treatment; Board of Medicine to amend regulations.	Pillion		(S) Signed by President	Support - Similar to HB712	03/02/2026
SB699	Virginia Freedom of Information Act; public bodies to post meeting agendas.	Ebbin		(H) Passed House (98-Y 0-N 0-A)	Monitor	03/03/2026
SB735	Temporary detention; certified evaluators, sunset extended.	Diggs		(S) Bill text as passed Senate and House (SB735ER)	Actively Oppose - Same as HB1292	03/04/2026
SB738	Hospitals; emergency department physicians.	Jordan		(S) Bill text as passed Senate and House (SB738ER)	Monitor - Same as HB1318	03/04/2026

Dead Bills

Bill	Catchline	Chief Patron	Committee	Last Action	Position	Date
HB159	Va. Freedom of Information Act; proceedings for enforcement, petition for mandamus or injunction.	Simon	General Laws and Technology	(S) Continued to next session in General Laws and Technology (13-Y 1-N)	FYI	02/25/2026
HB707	State government; transaction of public business, prohibited website domains.	Hayes	General Laws and Technology	(S) Continued to next session in General Laws and Technology (15-Y 0-N)	Monitor	02/25/2026
HB852	Indigent defendant; abolition of fees, legal representation, jury trial costs, report.	Cousins	Courts of Justice	(S) Continued to next session in Finance and Appropriations (14-Y 0-N)	FYI	03/03/2026
HB882	Innovative Internship Fund and Program; eligibility of local government employers & matching funds.	Sullivan	Finance and Appropriations	(S) Stricken at request of Patron in Finance and Appropriations (15-Y 0-N)	Support	03/03/2026
HB1495	Medicaid; oversight of services facilitation for consumer directed services.	Tran	Education and Health	(S) Continued to next session in Finance and Appropriations (15-Y 0-N)	Support	03/04/2026
SB21	DJJ; transfer of responsibility to Secretary of Health and Human Resources.	Locke	Rules	(H) Subcommittee recommends continuing to (Voice Vote)	FYI - Similar to HB1293	03/02/2026

SB56	FOIA; procedure for responding to requests, charges, posting of notice of rights & responsibilities.	Roem	General Laws	(H) Subcommittee recommends laying on the table (10-Y 0-N)	FYI	02/24/2026
SB210	Positive behavior support facilitators; scope of practice, supervision, and qualifications.	DeSteph	Health and Human Services	(H) Subcommittee recommends continuing to (Voice Vote)	Support	02/26/2026
SB269	Mental health service providers; definitions, use of artificial intelligence system civil penalty.	Favola	Communications, Technology and Innovation	(H) Continued to next session in Communications, Technology and Innovation (Voice Vote)	Monitor - Similar to HB668	03/02/2026
SB603	School boards; policies relating to volunteer student life counseling and support services.	Reeves	Education	(H) Subcommittee recommends laying on the table (7-Y 3-N)	FYI	03/03/2026
SB689	Oral threat to kill or to do bodily harm; employees of local or state dept. of social serv. penalty.	Mulchi	Courts of Justice	(H) Continued to next session in Courts of Justice (Voice Vote)	Monitor - Similar to HB1159	03/02/2026

To: Joe Wickens, Executive Director

From: Brandie Williams, Deputy Executive Director

Re: Award for STEP-VA Enhancement funds

Date: March 6, 2026

In January 2026, DBHDS Office of Adult Community Behavioral Health Services announced a new funding opportunity for Community Services Boards and Behavioral Health Authorities. Boards were able to submit proposals for how the funds can be used to enhance or improve implementation of the components of STEP-VA. The funding offered is one-time funding which cannot be used for existing salaries, bonuses, vehicles, construction, or meals. One of the proposed prioritized uses of the funds was for improvements and enhancements to technology or other innovative solutions to increase client access to services and reduce staff administrative burden.

The Rappahannock Area Community Services Board applied for \$475,440 to implement the STEPVA Access through Technology Project which would simultaneously address all the steps of STEPVA to ensure expanded access to needed services through the use of technological interventions. This project centers around leveraging one-time funding investment in technological innovations to provide ongoing reduction in clinician administrative burden and ensure quality care and documentation. The strategy and outcomes of this project align with all four of RACSB's identified strategic priorities.

DBHDS notified RACSB of a partial-award of \$221,352 to implement Bells AI Scribe and Bells AI Quality Coach. Funding covers implementation costs, one year of subscription to the services, and 15% indirect funding.

To: Joe Wickens, Executive Director

From: Brandie Williams, Deputy Executive Director

Re: Rappahannock Area Community Services Board Comprehensive Behavioral Health Care Clinic and Crisis Receiving Center Project Application- Congressionally Directed Spending/Community Project Funding

Date: March 9, 2026

The Rappahannock Area Community Services Board has applied for the RACSB Comprehensive Behavioral Health Care and Crisis Receiving Center Construction Project for the FY2027 Congressionally Directed Spending Community Project Funding through the joint application process for Senator Kaine and Senator Warner. Further, the RACSB has submitted the first step in the application process for House of Representatives Community Project Funding through Representative Eugene Vindman's office. RACSB has applied for funding in the amount of \$12,000,000 through each of the two opportunities.

These applications were submitted under the Labor, Health and Human Services, Education, and Related Agencies appropriations under the Department of Health and Human Services, Health Resources and Services Administration, Program Management account. This project request specifically meets the committee's eligibility under the Health Facilities Construction and Equipment criteria. Funding will be used to cover architectural, engineering, and construction costs related to the renovation of the new, trauma-sensitive, public behavioral health clinic and crisis receiving center. The project requests funding only for allowable construction and capital equipment purposes and does not exceed the established \$15 million funding limit.

At the time of this report, our application has received letters of support from over 28 elected officials, local boards of supervisors, law enforcement departments, and other key community partners.