



# COMMONWEALTH of VIRGINIA

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Superintendent of Public Instruction

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January 13, 2016

Division of Legislative Automated Systems (DLAS)  
910 Capitol Square  
General Assembly Building, Suite 660  
Richmond, VA 23219

ATTN: Legislative Documents and Reports Processing

To Whom It May Concern:

Pursuant to Section 22.1-97, *Code of Virginia*, I am pleased to transmit the 2015 Required Local Effort and Required Local Match report prepared by the Department of Education. The title of this report is "Actual Fiscal Year 2015 Required Local Effort and Required Local Match; Certification of Budgeted Fiscal Year 2016 Required Local Effort and Required Local Match."

If you have questions or require additional information relative to this transmittal, please contact me or Edward Lanza, budget director, at (804) 225-2025.

Sincerely,

A handwritten signature in black ink, appearing to read "Steven R. Staples", with a long horizontal flourish extending to the right.

Steven R. Staples

SRS:cle

Enclosure

c: The Honorable Anne Holton

## **DLAS Document Summary**

### **DLAS Document Summary**

Actual Fiscal Year 2015 Required Local Effort and Required Local Match; Certification of Budgeted Fiscal Year 2016 Required Local Effort and Required Local Match

#### **Author**

Department of Education

#### **Enabling Authority**

Section 22.1-97, *Code of Virginia*

#### **Preface**

Section 22.1-97, *Code of Virginia*, directs the Superintendent of Public Instruction to provide a report annually to the House Committees on Appropriations and Education and the Senate Committees on Finance and Education and Health on the degree to which each school division has met, failed to meet, or surpassed its required local expenditure in support of the Standards of Quality (SOQ).

Department of Education budget staff prepared the report based on Annual School Report Financial Section (ASRFIN) data submitted by school divisions for fiscal year 2015, and certifications of budgeted local expenditures submitted by school divisions for fiscal year 2016.

#### **Executive Summary**

Pursuant to the requirements of Section 22.1-97, *Code of Virginia*, the Department of Education collected data from school divisions on the actual local funding effort in support of the Standards of Quality for fiscal year 2015, through the 2014-2015 Annual School Report Financial Section (ASRFIN). School divisions were also required to certify that local funds were at the required level in support of the Standards of Quality for fiscal year 2016.

This report provides the results of calculations made to ensure that each school division has expended sufficient local funds to support its required local effort. The purpose of required local effort is to ensure that each school division has sufficient local operational expenditures to support its local share of the cost of the Standards of Quality. Fiscal year 2015 calculations are based on actual local operational expenditures. All reporting school divisions met required local effort in fiscal year 2015.

Chapter 665, 2015 Virginia Acts of Assembly, requires divisions to certify “that sufficient local funds have been budgeted to meet all state required local effort and required local match amounts.” All school divisions certified that they have budgeted local operational funds sufficient to meet budgeted required local effort for fiscal year 2016. School divisions whose local appropriations for fiscal year 2016 are only slightly in excess of the amount required to maintain local effort for the Standards of Quality have been advised to review their average daily membership on a monthly basis during the fiscal year to ensure sufficient local appropriations are available based on current enrollment levels.

Pursuant to Item 139, Paragraph B.10, Chapter 665, 2015 Virginia Acts of Assembly, for fiscal year 2015, the Department of Education collected data on actual local expenditures for Incentive and Lottery programs that have a required local match. In fiscal year 2015, school divisions were required to report on local expenditures to support the actual required local match for each of the applicable accounts: At Risk; Virginia Preschool Initiative; K-3 Primary Class Size Reduction; Math/Reading Instructional Specialist Initiative; and Early Reading Specialist Initiative. All reporting school divisions certified actual local operational expenditures sufficient to meet required local match for the programs in which they elected to participate in fiscal year 2015.

For fiscal year 2016, all school divisions have submitted the required information to certify their budgeted required local match for Incentive and Lottery accounts (i.e., At-Risk, Virginia Preschool Initiative, K-3 Primary Class Size Reduction, Compensation Supplement, Math/Reading Instructional Specialist Initiative, and Early Reading Specialists Initiative). All school divisions certified that they have budgeted local operational funds sufficient to meet budgeted required local match for all Incentive and Lottery-funded accounts in which they have elected to participate in fiscal year 2016.

# Table of Contents

---

## **Actual Required Local Effort (RLE) for SOQ**

Summary..... Page 4

Fiscal Year 2015..... Page 5

## **Budgeted Required Local Effort (RLE) for SOQ**

Summary..... Page 9

Fiscal Year 2016..... Page 10

## **Actual Required Local Match (RLM) for Incentive and Lottery Accounts**

Summary..... Page 14

Fiscal Year 2015..... Page 15

## **Budgeted Required Local Match (RLM) for Lottery Accounts**

Summary..... Page 19

Fiscal Year 2016..... Page 20

## **School Division Participation in Programs with Local Match Requirements**

Fiscal Year 2016..... Page 24

## **Appendix A**

Legislative mandate directing this report..... Page 25

## **Appendix B**

Legislative mandate directing RLE and RLM data collection..... Page 26

## Summary

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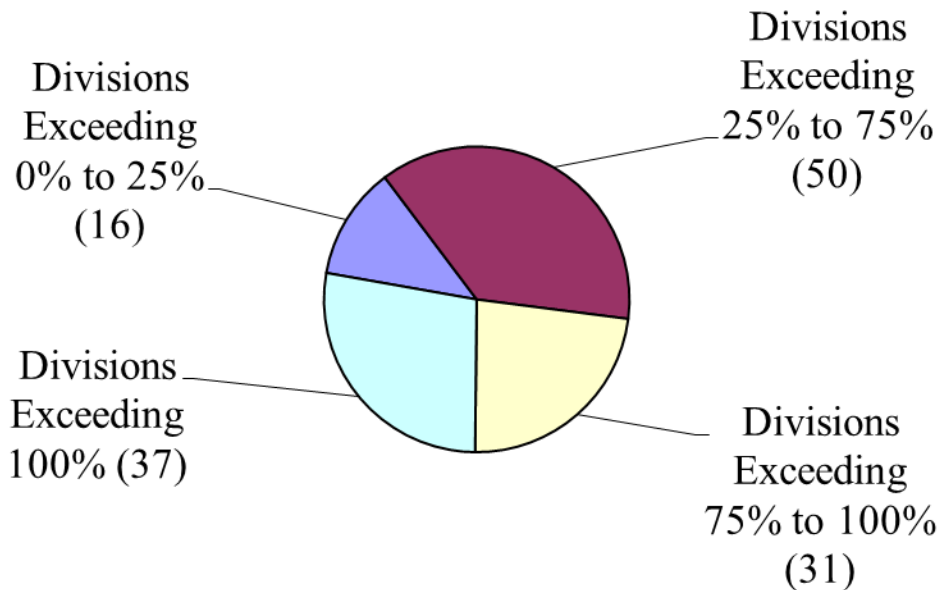
### Actual Required Local Effort for the Standards of Quality

*Fiscal Year 2015*

All reporting school divisions exceeded required local effort for fiscal year 2015. The range of local support in excess of the required amount is:

- Low – Patrick – 6.99% in excess of the required amount
- High – West Point – 283.97% in excess of the required amount
- The average local operational expenditure in excess of the required level for FY 2015: 77.83%

### Distribution - Percent of FY15 Actual Local Expenditures for Operations Above Required Local Effort for SOQ



**FY 2015 Actual Required Local Effort (RLE) for the Standards of Quality  
Compared to Actual Local Expenditures for Operations**

RLE Based on Chapter 665, 2015 Virginia Acts of Assembly , and  
Final March 31, 2015, Average Daily Membership (ADM)

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2015 Required Local Effort</b>	<b>FY 2015 Actual Local Expenditures for Operations</b>	<b>FY 2015 Actual Local Expenditures for Operations Above RLE</b>	<b>Percent of FY 2015 Actual Local Expenditures for Operations Above RLE</b>
001	ACCOMACK	12,515,876	16,127,137	3,611,261	28.85%
002	ALBEMARLE	52,339,980	114,688,522	62,348,542	119.12%
003	ALLEGHANY	3,735,089	8,539,544	4,804,455	128.63%
004	AMELIA	3,737,996	4,598,570	860,574	23.02%
005	AMHERST	7,978,570	13,441,483	5,462,913	68.47%
006	APPOMATTOX	4,285,114	5,303,697	1,018,583	23.77%
007	ARLINGTON	130,615,640	355,353,119	224,737,479	172.06%
008	AUGUSTA	20,954,053	39,444,343	18,490,290	88.24%
009	BATH	3,345,395	7,535,987	4,190,592	125.26%
010	BEDFORD	18,006,441	29,212,571	11,206,130	62.23%
011	BLAND	1,770,174	2,465,007	694,833	39.25%
012	BOTETOURT	10,740,820	23,231,404	12,490,584	116.29%
013	BRUNSWICK	3,849,048	4,389,850	540,802	14.05%
014	BUCHANAN	7,318,546	14,837,201	7,518,655	102.73%
015	BUCKINGHAM	4,636,296	6,053,767	1,417,471	30.57%
016	CAMPBELL	12,590,468	25,959,140	13,368,672	106.18%
017	CAROLINE	8,770,317	11,937,478	3,167,161	36.11%
018	CARROLL	6,358,932	12,477,082	6,118,150	96.21%
019	CHARLES CITY	2,277,695	4,262,066	1,984,371	87.12%
020	CHARLOTTE	3,284,255	3,767,070	482,815	14.70%
021	CHESTERFIELD	122,925,348	217,814,071	94,888,723	77.19%
022	CLARKE	6,470,682	11,462,074	4,991,392	77.14%
023	CRAIG	1,403,246	2,161,576	758,330	54.04%
024	CULPEPER	16,417,408	27,831,717	11,414,309	69.53%
025	CUMBERLAND	2,365,280	3,566,017	1,200,737	50.77%
026	DICKENSON	4,055,474	6,454,456	2,398,982	59.15%
027	DINWIDDIE	8,102,534	12,448,383	4,345,849	53.64%
028	ESSEX	4,014,791	6,289,066	2,274,275	56.65%
029	FAIRFAX	827,359,677	1,788,223,108	960,863,431	116.14%
030	FAUQUIER	40,380,915	82,121,435	41,740,520	103.37%
031	FLOYD	4,506,903	5,806,351	1,299,448	28.83%
032	FLUVANNA	8,338,483	14,058,662	5,720,179	68.60%
033	FRANKLIN	18,626,605	29,807,247	11,180,642	60.03%
034	FREDERICK	30,075,662	66,609,902	36,534,240	121.47%
035	GILES	4,642,169	6,805,323	2,163,154	46.60%
036	GLOUCESTER	11,436,118	22,960,401	11,524,283	100.77%
037	GOOCHLAND	11,905,754	19,455,361	7,549,607	63.41%
038	GRAYSON	4,430,885	5,726,852	1,295,967	29.25%
039	GREENE	7,054,708	11,410,687	4,355,979	61.75%
040	GREENSVILLE	2,030,232	2,797,923	767,691	37.81%
041	HALIFAX	10,949,254	12,932,117	1,982,863	18.11%
042	HANOVER	44,979,472	72,300,361	27,320,889	60.74%

**FY 2015 Actual Required Local Effort (RLE) for the Standards of Quality  
Compared to Actual Local Expenditures for Operations**

RLE Based on Chapter 665, 2015 Virginia Acts of Assembly , and  
Final March 31, 2015, Average Daily Membership (ADM)

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2015 Required Local Effort</b>	<b>FY 2015 Actual Local Expenditures for Operations</b>	<b>FY 2015 Actual Local Expenditures for Operations Above RLE</b>	<b>Percent of FY 2015 Actual Local Expenditures for Operations Above RLE</b>
043	HENRICO	121,192,776	227,376,742	106,183,966	87.62%
044	HENRY	10,452,395	12,750,235	2,297,840	21.98%
045	HIGHLAND	1,652,649	1,995,994	343,345	20.78%
046	ISLE OF WIGHT	14,205,156	23,611,792	9,406,636	66.22%
047	JAMES CITY	36,571,306	70,174,227	33,602,921	91.88%
048	KING GEORGE	9,817,107	13,644,515	3,827,408	38.99%
049	KING QUEEN	2,649,245	3,478,081	828,836	31.29%
050	KING WILLIAM	4,636,415	8,058,417	3,422,002	73.81%
051	LANCASTER	5,824,927	9,879,476	4,054,549	69.61%
052	LEE	FY15 Data Resubmission Pending			
053	LOUDOUN	265,163,791	632,534,547	367,370,756	138.54%
054	LOUISA	16,894,107	30,994,889	14,100,782	83.47%
055	LUNENBURG	2,654,296	2,932,354	278,058	10.48%
056	MADISON	5,067,739	9,213,570	4,145,831	81.81%
057	MATHEWS	4,280,818	6,496,160	2,215,342	51.75%
058	MECKLENBURG	10,506,907	13,514,234	3,007,327	28.62%
059	MIDDLESEX	6,008,488	8,092,013	2,083,525	34.68%
060	MONTGOMERY	22,965,211	43,179,598	20,214,387	88.02%
062	NELSON	7,194,554	14,174,700	6,980,146	97.02%
063	NEW KENT	7,640,807	12,611,885	4,971,078	65.06%
065	NORTHAMPTON	5,480,206	7,326,317	1,846,111	33.69%
066	NORTHUMBERLAND	6,685,397	10,369,590	3,684,193	55.11%
067	NOTTOWAY	3,585,724	4,057,061	471,337	13.14%
068	ORANGE	10,897,376	17,980,213	7,082,837	65.00%
069	PAGE	6,178,700	10,134,544	3,955,844	64.02%
070	PATRICK	5,355,906	5,730,158	374,252	6.99%
071	PITTSYLVANIA	14,430,516	16,684,587	2,254,071	15.62%
072	POWHATAN	10,015,607	20,318,527	10,302,920	102.87%
073	PRINCE EDWARD	4,310,865	7,672,387	3,361,522	77.98%
074	PRINCE GEORGE	9,928,016	11,016,917	1,088,901	10.97%
075	PRINCE WILLIAM	204,114,476	399,641,676	195,527,200	95.79%
077	PULASKI	8,641,028	13,287,060	4,646,032	53.77%
078	RAPPAHANNOCK	4,817,295	8,373,165	3,555,870	73.81%
079	RICHMOND	2,883,785	5,116,469	2,232,684	77.42%
080	ROANOKE	32,012,032	58,919,779	26,907,747	84.06%
081	ROCKBRIDGE	8,537,960	13,732,918	5,194,958	60.85%
082	ROCKINGHAM	24,690,183	55,097,702	30,407,519	123.16%
083	RUSSELL	6,523,614	7,114,249	590,635	9.05%
084	SCOTT	4,918,652	5,431,156	512,504	10.42%
085	SHENANDOAH	13,000,689	24,743,656	11,742,967	90.33%
086	SMYTH	6,556,153	9,159,521	2,603,368	39.71%
087	SOUTHAMPTON	4,915,639	9,163,533	4,247,894	86.42%

**FY 2015 Actual Required Local Effort (RLE) for the Standards of Quality  
Compared to Actual Local Expenditures for Operations**

RLE Based on Chapter 665, 2015 Virginia Acts of Assembly , and  
Final March 31, 2015, Average Daily Membership (ADM)

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2015 Required Local Effort</b>	<b>FY 2015 Actual Local Expenditures for Operations</b>	<b>FY 2015 Actual Local Expenditures for Operations Above RLE</b>	<b>Percent of FY 2015 Actual Local Expenditures for Operations Above RLE</b>
088	SPOTSYLVANIA	51,630,208	98,168,093	46,537,885	90.14%
089	STAFFORD	55,670,716	104,239,921	48,569,205	87.24%
090	SURRY	5,194,018	11,714,165	6,520,147	125.53%
091	SUSSEX	2,954,226	8,173,171	5,218,945	176.66%
092	TAZEWELL	10,535,040	13,691,495	3,156,455	29.96%
093	WARREN	12,196,149	21,187,911	8,991,762	73.73%
094	WASHINGTON	16,239,773	28,835,735	12,595,962	77.56%
095	WESTMORELAND	5,966,004	7,122,322	1,156,318	19.38%
096	WISE	8,982,547	15,155,941	6,173,394	68.73%
097	WYTHE	7,996,147	12,187,765	4,191,618	52.42%
098	YORK	30,582,231	53,769,892	23,187,661	75.82%
101	ALEXANDRIA	73,646,657	193,174,909	119,528,252	162.30%
102	BRISTOL	4,217,858	5,800,840	1,582,982	37.53%
103	BUENA VISTA	1,175,787	2,186,562	1,010,775	85.97%
104	CHARLOTTESVILLE	17,500,957	44,059,875	26,558,918	151.76%
106	COLONIAL HEIGHTS	7,508,969	19,180,413	11,671,444	155.43%
107	COVINGTON	1,724,896	4,287,574	2,562,678	148.57%
108	DANVILLE	9,968,857	15,431,204	5,462,347	54.79%
109	FALLS CHURCH	12,580,449	37,234,792	24,654,343	195.97%
110	FREDERICKSBURG	13,616,031	26,042,607	12,426,576	91.26%
111	GALAX	2,337,495	3,191,142	853,647	36.52%
112	HAMPTON	34,735,414	73,091,339	38,355,925	110.42%
113	HARRISONBURG	13,774,962	29,013,953	15,238,991	110.63%
114	HOPEWELL	5,760,029	10,131,150	4,371,121	75.89%
115	LYNCHBURG	18,769,234	36,525,952	17,756,718	94.61%
116	MARTINSVILLE	3,101,539	6,249,041	3,147,502	101.48%
117	NEWPORT NEWS	49,554,402	103,197,624	53,643,222	108.25%
118	NORFOLK	56,091,095	113,876,045	57,784,950	103.02%
119	NORTON	1,655,486	1,774,568	119,082	7.19%
120	PETERSBURG	6,166,143	11,468,933	5,302,790	86.00%
121	PORTSMOUTH	22,954,727	51,288,673	28,333,946	123.43%
122	RADFORD	2,653,844	4,706,651	2,052,807	77.35%
123	RICHMOND CITY	71,610,118	131,504,605	59,894,487	83.64%
124	ROANOKE CITY	28,917,592	71,077,054	42,159,462	145.79%
126	STAUNTON	5,957,060	10,791,000	4,833,940	81.15%
127	SUFFOLK	28,807,547	47,469,572	18,662,025	64.78%
128	VIRGINIA BEACH	161,336,687	356,375,286	195,038,599	120.89%
130	WAYNESBORO	6,141,772	12,953,041	6,811,269	110.90%
131	WILLIAMSBURG	4,668,873	7,242,362	2,573,489	55.12%
132	WINCHESTER	11,485,838	27,646,719	16,160,881	140.70%
134	FAIRFAX CITY	17,614,678	35,757,313	18,142,635	103.00%
135	FRANKLIN CITY	2,257,880	5,405,440	3,147,560	139.40%



**FY 2015 Actual Required Local Effort (RLE) for the Standards of Quality  
Compared to Actual Local Expenditures for Operations**

RLE Based on Chapter 665, 2015 Virginia Acts of Assembly , and  
Final March 31, 2015, Average Daily Membership (ADM)

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2015 Required Local Effort</b>	<b>FY 2015 Actual Local Expenditures for Operations</b>	<b>FY 2015 Actual Local Expenditures for Operations Above RLE</b>	<b>Percent of FY 2015 Actual Local Expenditures for Operations Above RLE</b>
136	CHESAPEAKE	87,472,349	179,507,860	92,035,511	105.22%
137	LEXINGTON	1,887,766	2,966,511	1,078,745	57.14%
138	EMPORIA	1,690,101	2,523,405	833,304	49.30%
139	SALEM	8,351,440	18,309,017	9,957,577	119.23%
142	POQUOSON	4,767,692	9,456,931	4,689,239	98.35%
143	MANASSAS	17,875,966	46,150,952	28,274,986	158.17%
144	MANASSAS PARK	5,937,909	11,522,472	5,584,563	94.05%
202	COLONIAL BEACH	1,455,866	2,098,893	643,027	44.17%
207	WEST POINT	1,230,346	4,724,108	3,493,762	283.97%

## Summary

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### **Budgeted Required Local Effort for the Standards of Quality**

*Fiscal Year 2016*

All school divisions certified that sufficient local funds have been budgeted to meet all required local effort amounts for SOQ programs in fiscal year 2016.

**FY 2016 Budgeted Required Local Effort (RLE) for the Standards of Quality**

RLE Based on Chapter 665, 2015 Virginia Acts of Assembly, and  
Projected March 31, 2016, Average Daily Membership (ADM)

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2016 Budgeted Required Local Effort</b>	<b>Has the Division Certified to Budgeting Local Funds Sufficient to Meet the FY 2016 Required Local Effort</b>
001	ACCOMACK	12,555,664	YES
002	ALBEMARLE	53,067,381	YES
003	ALLEGHANY	3,462,183	YES
004	AMELIA	3,770,256	YES
005	AMHERST	7,838,753	YES
006	APPOMATTOX	4,176,657	YES
007	ARLINGTON	136,378,355	YES
008	AUGUSTA	20,199,231	YES
009	BATH	3,178,845	YES
010	BEDFORD	17,083,141	YES
011	BLAND	1,707,361	YES
012	BOTETOURT	10,672,046	YES
013	BRUNSWICK	3,717,459	YES
014	BUCHANAN	7,023,875	YES
015	BUCKINGHAM	4,436,082	YES
016	CAMPBELL	12,048,235	YES
017	CAROLINE	8,758,116	YES
018	CARROLL	6,020,776	YES
019	CHARLES CITY	2,195,411	YES
020	CHARLOTTE	3,187,163	YES
021	CHESTERFIELD	124,456,663	YES
022	CLARKE	6,412,362	YES
023	CRAIG	1,295,091	YES
024	CULPEPER	16,475,822	YES
025	CUMBERLAND	2,365,197	YES
026	DICKENSON	4,047,627	YES
027	DINWIDDIE	7,969,823	YES
028	ESSEX	3,995,469	YES
029	FAIRFAX	829,932,282	YES
030	FAUQUIER	39,972,027	YES
031	FLOYD	4,356,374	YES
032	FLUVANNA	8,162,983	YES
033	FRANKLIN	18,595,278	YES
034	FREDERICK	29,899,231	YES
035	GILES	4,521,542	YES
036	GLOUCESTER	11,145,445	YES
037	GOOCHLAND	11,702,704	YES
038	GRAYSON	3,884,497	YES
039	GREENE	7,198,798	YES
040	GREENSVILLE	1,950,076	YES
041	HALIFAX	10,927,667	YES
042	HANOVER	44,048,101	YES
043	HENRICO	121,488,161	YES

**FY 2016 Budgeted Required Local Effort (RLE) for the Standards of Quality**

RLE Based on Chapter 665, 2015 Virginia Acts of Assembly, and  
Projected March 31, 2016, Average Daily Membership (ADM)

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2016 Budgeted Required Local Effort</b>	<b>Has the Division Certified to Budgeting Local Funds Sufficient to Meet the FY 2016 Required Local Effort</b>
044	HENRY	10,458,116	YES
045	HIGHLAND	1,603,794	YES
046	ISLE OF WIGHT	14,387,972	YES
047	JAMES CITY	37,190,174	YES
048	KING GEORGE	9,931,567	YES
049	KING QUEEN	2,797,379	YES
050	KING WILLIAM	4,528,774	YES
051	LANCASTER	5,126,258	YES
052	LEE	4,352,811	YES
053	LOUDOUN	272,822,787	YES
054	LOUISA	17,033,562	YES
055	LUNENBURG	2,773,652	YES
056	MADISON	4,905,159	YES
057	MATHEWS	4,219,354	YES
058	MECKLENBURG	10,201,231	YES
059	MIDDLESEX	6,301,252	YES
060	MONTGOMERY	22,457,407	YES
062	NELSON	6,888,107	YES
063	NEW KENT	7,724,305	YES
065	NORTHAMPTON	5,266,745	YES
066	NORTHUMBERLAND	6,550,512	YES
067	NOTTOWAY	3,543,511	YES
068	ORANGE	11,164,073	YES
069	PAGE	6,046,687	YES
070	PATRICK	5,575,907	YES
071	PITTSYLVANIA	14,170,372	YES
072	POWHATAN	9,972,863	YES
073	PRINCE EDWARD	4,137,986	YES
074	PRINCE GEORGE	9,912,146	YES
075	PRINCE WILLIAM	204,278,179	YES
077	PULASKI	8,560,366	YES
078	RAPPAHANNOCK	4,624,882	YES
079	RICHMOND	2,864,532	YES
080	ROANOKE	31,784,578	YES
081	ROCKBRIDGE	8,492,118	YES
082	ROCKINGHAM	24,374,708	YES
083	RUSSELL	6,388,063	YES
084	SCOTT	4,812,174	YES
085	SHENANDOAH	12,940,903	YES
086	SMYTH	6,340,153	YES
087	SOUTHAMPTON	4,737,015	YES
088	SPOTSYLVANIA	51,227,772	YES
089	STAFFORD	55,528,339	YES

**FY 2016 Budgeted Required Local Effort (RLE) for the Standards of Quality**

RLE Based on Chapter 665, 2015 Virginia Acts of Assembly, and  
Projected March 31, 2016, Average Daily Membership (ADM)

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2016 Budgeted Required Local Effort</b>	<b>Has the Division Certified to Budgeting Local Funds Sufficient to Meet the FY 2016 Required Local Effort</b>
090	SURRY	4,792,266	YES
091	SUSSEX	2,909,459	YES
092	TAZEWELL	10,184,585	YES
093	WARREN	11,667,994	YES
094	WASHINGTON	15,882,786	YES
095	WESTMORELAND	6,081,269	YES
096	WISE	8,835,775	YES
097	WYTHE	7,914,529	YES
098	YORK	30,516,219	YES
101	ALEXANDRIA	75,702,398	YES
102	BRISTOL	4,077,979	YES
103	BUENA VISTA	1,147,544	YES
104	CHARLOTTESVILLE	17,406,480	YES
106	COLONIAL HEIGHTS	7,731,996	YES
107	COVINGTON	1,768,539	YES
108	DANVILLE	9,904,554	YES
109	FALLS CHURCH	12,708,572	YES
110	FREDERICKSBURG	13,751,255	YES
111	GALAX	2,422,618	YES
112	HAMPTON	33,888,438	YES
113	HARRISONBURG	14,258,137	YES
114	HOPEWELL	5,782,570	YES
115	LYNCHBURG	18,719,987	YES
116	MARTINSVILLE	3,240,285	YES
117	NEWPORT NEWS	49,181,441	YES
118	NORFOLK	56,023,295	YES
119	NORTON	1,596,796	YES
120	PETERSBURG	5,955,035	YES
121	PORTSMOUTH	22,924,207	YES
122	RADFORD	2,738,459	YES
123	RICHMOND CITY	72,682,635	YES
124	ROANOKE CITY	29,022,785	YES
126	STAUNTON	6,032,151	YES
127	SUFFOLK	28,419,802	YES
128	VIRGINIA BEACH	158,870,279	YES
130	WAYNESBORO	6,168,012	YES
131	WILLIAMSBURG	4,510,294	YES
132	WINCHESTER	11,487,703	YES
134	FAIRFAX CITY	17,755,155	YES
135	FRANKLIN CITY	2,119,585	YES
136	CHESAPEAKE	86,370,330	YES
137	LEXINGTON	1,735,771	YES
138	EMPORIA	1,689,096	YES

**FY 2016 Budgeted Required Local Effort (RLE) for the Standards of Quality**

RLE Based on Chapter 665, 2015 Virginia Acts of Assembly, and  
Projected March 31, 2016, Average Daily Membership (ADM)

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2016 Budgeted Required Local Effort</b>	<b>Has the Division Certified to Budgeting Local Funds Sufficient to Meet the FY 2016 Required Local Effort</b>
139	SALEM	8,397,102	YES
142	POQUOSON	4,683,970	YES
143	MANASSAS	18,168,280	YES
144	MANASSAS PARK	6,203,599	YES
202	COLONIAL BEACH	1,300,585	YES
207	WEST POINT	1,238,551	YES

## Summary

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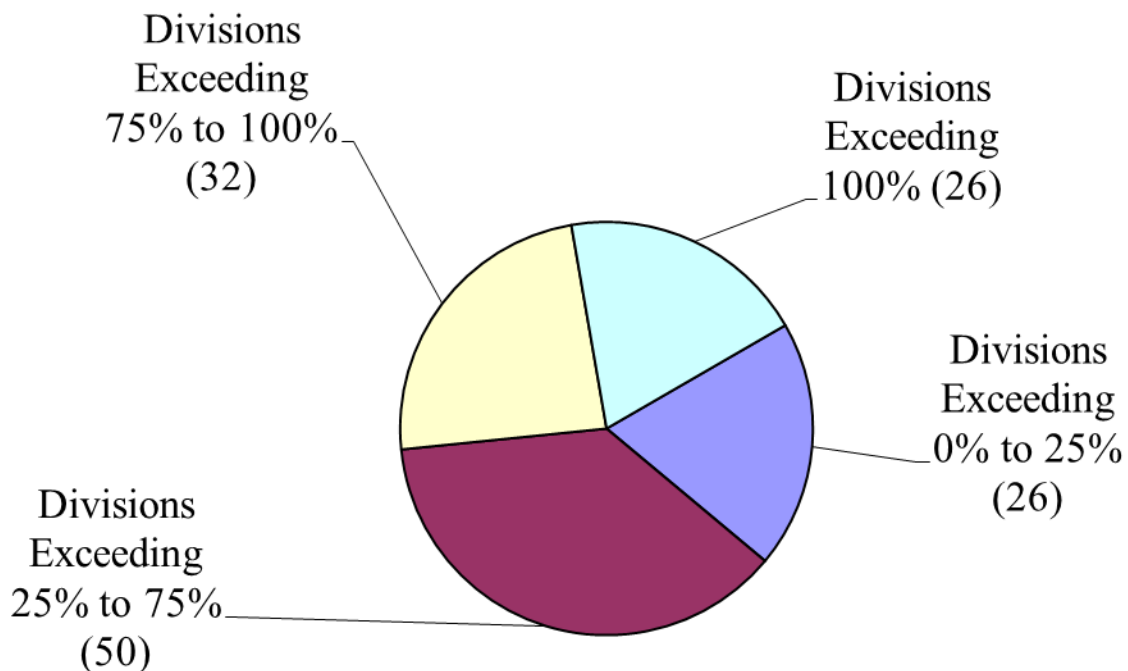
### Actual Required Local Match for Incentive and Lottery Accounts

*Fiscal Year 2015*

All reporting school divisions met required local match for all Incentive and Lottery accounts in which they elected to participate in fiscal year 2015. The funds used to meet required local match are actual local operational expenditures that are above those used to meet required local effort on the Standards of Quality. The range of actual local support in excess of the required amounts for local effort and local match is:

- Low – Lunenburg – 0.00%
- High – West Point – 281.98%
- The average actual local operational expenditure in excess of the required level for fiscal year 2015: 68.74%

### Distribution - Percent of FY15 Actual Local Expenditures for Operations Above Required Local Effort and Required Local Match



**FY 2015 Actual Required Local Match (RLM) for Incentive and Lottery Accounts Compared to Actual Local Expenditures for Operations Above Required Local Effort (RLE)**

RLM Based on Chapter 665, 2015 Virginia Acts of Assembly,  
Final March 31, 2015, Average Daily Membership (ADM), and Actual Participation Data

Div. Num.	Division Name	FY 2015 Required Local Match	FY 2015 Actual Local Expenditures for Operations Above RLE	FY 2015 Actual Local Expenditures for Operations Above RLE and RLM	Percent of FY 2015 Actual Local Expenditures for Operations Above RLE and RLM
001	ACCOMACK	1,316,651	3,958,756	2,642,105	19.10%
002	ALBEMARLE	1,173,853	62,348,542	61,174,689	114.32%
003	ALLEGHANY	219,496	4,861,153	4,641,657	117.37%
004	AMELIA	270,420	944,670	674,250	16.82%
005	AMHERST	565,225	5,600,247	5,035,022	58.93%
006	APPOMATTOX	341,790	1,031,264	689,474	14.90%
007	ARLINGTON	4,369,436	229,749,652	225,380,216	166.97%
008	AUGUSTA	1,253,217	19,396,863	18,143,646	81.70%
009	BATH	118,320	4,276,720	4,158,400	120.06%
010	BEDFORD	837,068	11,456,231	10,619,163	56.35%
011	BLAND	65,113	711,278	646,165	35.21%
012	BOTETOURT	147,554	12,576,919	12,429,365	114.15%
013	BRUNSWICK	543,028	776,266	233,238	5.31%
014	BUCHANAN	673,865	7,699,566	7,025,701	87.90%
015	BUCKINGHAM	601,685	1,716,717	1,115,032	21.29%
016	CAMPBELL	955,043	13,724,422	12,769,379	94.27%
017	CAROLINE	648,718	3,194,940	2,546,222	27.03%
018	CARROLL	594,924	6,260,217	5,665,293	81.47%
019	CHARLES CITY	132,274	2,034,471	1,902,197	78.93%
020	CHARLOTTE	277,709	663,966	386,257	10.84%
021	CHESTERFIELD	3,463,433	96,035,123	92,571,690	73.24%
022	CLARKE	52,632	5,045,076	4,992,444	76.53%
023	CRAIG	45,197	758,330	713,133	49.23%
024	CULPEPER	1,044,339	11,728,134	10,683,795	61.18%
025	CUMBERLAND	300,737	1,289,672	988,935	37.09%
026	DICKENSON	321,011	2,480,422	2,159,411	49.34%
027	DINWIDDIE	575,865	4,382,436	3,806,571	43.86%
028	ESSEX	466,085	2,345,130	1,879,045	41.93%
029	FAIRFAX	15,548,197	979,030,893	963,482,696	114.30%
030	FAUQUIER	350,266	41,740,520	41,390,254	101.62%
031	FLOYD	280,106	1,383,218	1,103,112	23.04%
032	FLUVANNA	174,325	6,106,784	5,932,459	69.69%
033	FRANKLIN	1,595,516	11,908,685	10,313,169	51.00%
034	FREDERICK	878,853	36,534,240	35,655,387	115.19%
035	GILES	234,291	2,302,739	2,068,448	42.42%
036	GLOUCESTER	477,125	11,627,068	11,149,943	93.59%
037	GOOCHLAND	172,192	7,549,607	7,377,415	61.08%
038	GRAYSON	299,623	1,366,870	1,067,247	22.56%
039	GREENE	294,640	4,399,004	4,104,364	55.85%
040	GREENSVILLE	294,037	1,012,086	718,049	30.89%
041	HALIFAX	1,108,306	2,173,639	1,065,333	8.84%
042	HANOVER	439,136	27,439,782	27,000,646	59.45%
043	HENRICO	6,007,814	107,132,964	101,125,150	79.50%



**FY 2015 Actual Required Local Match (RLM) for Incentive and Lottery Accounts Compared to Actual Local Expenditures for Operations Above Required Local Effort (RLE)**

RLM Based on Chapter 665, 2015 Virginia Acts of Assembly,  
Final March 31, 2015, Average Daily Membership (ADM), and Actual Participation Data

Div. Num.	Division Name	FY 2015 Required Local Match	FY 2015 Actual Local Expenditures for Operations Above RLE	FY 2015 Actual Local Expenditures for Operations Above RLE and RLM	Percent of FY 2015 Actual Local Expenditures for Operations Above RLE and RLM
044	HENRY	1,403,779	2,841,539	1,437,760	12.13%
045	HIGHLAND	68,252	363,985	295,733	17.18%
046	ISLE OF WIGHT	581,136	9,628,394	9,047,258	61.19%
047	JAMES CITY	1,105,299	33,881,921	32,776,622	86.99%
048	KING GEORGE	198,603	3,827,408	3,628,805	36.23%
049	KING QUEEN	335,420	924,830	589,410	19.75%
050	KING WILLIAM	216,175	3,436,068	3,219,893	66.35%
051	LANCASTER	668,776	4,471,685	3,802,909	58.56%
052	LEE	FY15 Data Resubmission Pending			
053	LOUDOUN	1,841,080	369,940,701	368,099,621	137.86%
054	LOUISA	1,102,605	14,280,216	13,177,611	73.22%
055	LUNENBURG	322,988	323,073	85	0.00%
056	MADISON	261,191	4,274,872	4,013,681	75.32%
057	MATHEWS	121,657	2,215,342	2,093,685	47.56%
058	MECKLENBURG	1,043,384	3,094,317	2,050,933	17.76%
059	MIDDLESEX	278,153	2,083,525	1,805,372	28.72%
060	MONTGOMERY	1,194,261	20,378,308	19,184,047	79.41%
062	NELSON	465,716	7,120,417	6,654,701	86.87%
063	NEW KENT	36,362	4,971,078	4,934,716	64.28%
065	NORTHAMPTON	920,150	2,152,571	1,232,421	19.26%
066	NORTHUMBERLAND	467,062	3,792,384	3,325,322	46.49%
067	NOTTOWAY	422,282	787,627	365,345	9.12%
068	ORANGE	623,546	7,483,029	6,859,483	59.54%
069	PAGE	536,135	4,262,506	3,726,371	55.49%
070	PATRICK	443,923	446,327	2,404	0.04%
071	PITTSYLVANIA	1,270,279	2,466,162	1,195,883	7.62%
072	POWHATAN	72,328	10,338,539	10,266,211	101.77%
073	PRINCE EDWARD	640,563	3,450,213	2,809,650	56.74%
074	PRINCE GEORGE	415,189	1,244,570	829,381	8.02%
075	PRINCE WILLIAM	7,324,370	198,721,784	191,397,414	90.52%
077	PULASKI	647,217	4,816,754	4,169,537	44.89%
078	RAPPAHANNOCK	170,232	3,610,914	3,440,682	68.99%
079	RICHMOND	187,422	2,235,758	2,048,336	66.69%
080	ROANOKE	741,221	26,907,795	26,166,574	79.89%
081	ROCKBRIDGE	463,342	5,249,391	4,786,049	53.17%
082	ROCKINGHAM	1,472,955	30,947,091	29,474,136	112.66%
083	RUSSELL	594,872	623,984	29,112	0.41%
084	SCOTT	290,126	521,525	231,399	4.44%
085	SHENANDOAH	899,823	11,742,967	10,843,144	78.01%
086	SMYTH	594,077	2,762,708	2,168,631	30.33%
087	SOUTHAMPTON	381,976	4,385,244	4,003,268	75.57%
088	SPOTSYLVANIA	1,444,823	46,914,172	45,469,349	85.67%
089	STAFFORD	804,063	53,580,393	52,776,330	93.45%

**FY 2015 Actual Required Local Match (RLM) for Incentive and Lottery Accounts Compared to Actual Local Expenditures for Operations Above Required Local Effort (RLE)**

RLM Based on Chapter 665, 2015 Virginia Acts of Assembly,  
Final March 31, 2015, Average Daily Membership (ADM), and Actual Participation Data

Div. Num.	Division Name	FY 2015 Required Local Match	FY 2015 Actual Local Expenditures for Operations Above RLE	FY 2015 Actual Local Expenditures for Operations Above RLE and RLM	Percent of FY 2015 Actual Local Expenditures for Operations Above RLE and RLM
090	SURRY	438,768	6,691,421	6,252,653	111.00%
091	SUSSEX	380,556	5,221,268	4,840,712	145.16%
092	TAZEWELL	830,433	3,209,421	2,378,988	20.93%
093	WARREN	561,157	9,025,874	8,464,717	66.35%
094	WASHINGTON	1,134,144	12,848,036	11,713,892	67.42%
095	WESTMORELAND	611,892	1,290,306	678,414	10.31%
096	WISE	953,349	6,539,490	5,586,141	56.22%
097	WYTHE	612,387	4,406,202	3,793,815	44.07%
098	YORK	248,291	23,432,137	23,183,846	75.20%
101	ALEXANDRIA	5,111,724	120,622,443	115,510,719	146.66%
102	BRISTOL	511,251	1,672,075	1,160,824	24.55%
103	BUENA VISTA	64,166	1,068,890	1,004,724	81.03%
104	CHARLOTTESVILLE	1,896,939	27,745,658	25,848,719	133.26%
106	COLONIAL HEIGHTS	262,509	11,725,526	11,463,017	147.50%
107	COVINGTON	201,869	2,807,534	2,605,665	135.24%
108	DANVILLE	1,907,203	6,195,467	4,288,264	36.11%
109	FALLS CHURCH	38,532	24,821,721	24,783,189	196.40%
110	FREDERICKSBURG	1,111,863	13,103,095	11,991,232	81.42%
111	GALAX	282,982	907,817	624,835	23.84%
112	HAMPTON	3,632,921	39,900,815	36,267,894	94.53%
113	HARRISONBURG	1,966,797	15,895,295	13,928,498	88.48%
114	HOPEWELL	953,975	4,943,276	3,989,301	59.42%
115	LYNCHBURG	2,457,040	18,520,498	16,063,458	75.68%
116	MARTINSVILLE	494,682	3,629,083	3,134,401	87.16%
117	NEWPORT NEWS	6,202,452	55,167,391	48,964,939	87.82%
118	NORFOLK	9,216,054	62,150,884	52,934,830	81.06%
119	NORTON	122,292	155,938	33,646	1.89%
120	PETERSBURG	1,252,453	5,672,191	4,419,738	59.58%
121	PORTSMOUTH	3,231,219	29,095,907	25,864,688	98.77%
122	RADFORD	152,847	2,060,029	1,907,182	67.95%
123	RICHMOND CITY	11,300,479	64,390,581	53,090,102	64.03%
124	ROANOKE CITY	4,866,529	43,141,073	38,274,544	113.29%
126	STAUNTON	674,181	5,256,229	4,582,048	69.10%
127	SUFFOLK	2,302,958	19,682,049	17,379,091	55.86%
128	VIRGINIA BEACH	6,215,553	196,838,204	190,622,651	113.77%
130	WAYNESBORO	775,802	7,378,344	6,602,542	95.45%
131	WILLIAMSBURG	179,748	3,746,626	3,566,878	73.56%
132	WINCHESTER	1,071,292	16,220,493	15,149,201	120.64%
134	FAIRFAX CITY	114,940	18,142,635	18,027,695	101.68%
135	FRANKLIN CITY	435,209	3,274,836	2,839,627	105.44%
136	CHESAPEAKE	3,368,936	92,703,475	89,334,539	98.34%
137	LEXINGTON	7,140	1,078,745	1,071,605	56.55%
138	EMPORIA	245,316	833,304	587,988	30.38%

**FY 2015 Actual Required Local Match (RLM) for Incentive and Lottery Accounts Compared to Actual Local Expenditures for Operations Above Required Local Effort (RLE)**

RLM Based on Chapter 665, 2015 Virginia Acts of Assembly,  
Final March 31, 2015, Average Daily Membership (ADM), and Actual Participation Data

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2015 Required Local Match</b>	<b>FY 2015 Actual Local Expenditures for Operations Above RLE</b>	<b>FY 2015 Actual Local Expenditures for Operations Above RLE and RLM</b>	<b>Percent of FY 2015 Actual Local Expenditures for Operations Above RLE and RLM</b>
139	SALEM	209,807	10,137,809	9,928,002	115.96%
142	POQUOSON	12,425	4,696,091	4,683,666	97.98%
143	MANASSAS	1,518,359	28,698,753	27,180,394	140.15%
144	MANASSAS PARK	458,513	5,682,861	5,224,348	81.68%
202	COLONIAL BEACH	66,919	643,027	576,108	37.83%
207	WEST POINT	8,106	3,500,262	3,492,156	281.98%

## Summary

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### **Budgeted Required Local Match for Incentive and Lottery Accounts**

*Fiscal Year 2016*

All school divisions certified that sufficient local funds have been budgeted to meet all required local match amounts for all Incentive and Lottery accounts in which they elected to participate in fiscal year 2016. The funds used to meet required local match are budgeted local operational expenditures that are above those used to meet required local effort on the Standards of Quality.

**FY 2016 Budgeted Required Local Match (RLM)  
for Incentive and Lottery-funded Programs**

RLM Based on Chapter 665, 2015 Virginia Acts of Assembly,  
Projected March 31, 2016, Average Daily Membership (ADM), and Virginia Preschool Initiative  
Participation

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2016 Budgeted Required Local Match</b>	<b>Has the Division Certified to Budgeting Local Funds Sufficient to Meet the FY 2016 Required Local Match</b>
001	ACCOMACK	1,936,209	YES
002	ALBEMARLE	2,109,838	YES
003	ALLEGHANY	245,692	YES
004	AMELIA	320,014	YES
005	AMHERST	592,916	YES
006	APPOMATTOX	351,551	YES
007	ARLINGTON	5,611,746	YES
008	AUGUSTA	1,351,787	YES
009	BATH	135,308	YES
010	BEDFORD	1,058,863	YES
011	BLAND	73,664	YES
012	BOTETOURT	255,425	YES
013	BRUNSWICK	544,553	YES
014	BUCHANAN	720,511	YES
015	BUCKINGHAM	615,705	YES
016	CAMPBELL	967,211	YES
017	CAROLINE	819,359	YES
018	CARROLL	603,468	YES
019	CHARLES CITY	177,482	YES
020	CHARLOTTE	314,236	YES
021	CHESTERFIELD	6,103,977	YES
022	CLARKE	99,856	YES
023	CRAIG	80,145	YES
024	CULPEPER	1,144,838	YES
025	CUMBERLAND	297,799	YES
026	DICKENSON	360,875	YES
027	DINWIDDIE	733,400	YES
028	ESSEX	492,853	YES
029	FAIRFAX	28,965,687	YES
030	FAUQUIER	757,152	YES
031	FLOYD	294,386	YES
032	FLUVANNA	225,517	YES
033	FRANKLIN	1,729,750	YES
034	FREDERICK	1,572,475	YES
035	GILES	263,258	YES
036	GLOUCESTER	594,345	YES
037	GOOCHLAND	307,106	YES
038	GRAYSON	294,408	YES
039	GREENE	355,525	YES
040	GREENSVILLE	277,729	YES
041	HALIFAX	1,174,897	YES
042	HANOVER	803,475	YES
043	HENRICO	8,387,706	YES
044	HENRY	1,559,467	YES

<b>FY 2016 Budgeted Required Local Match (RLM)</b> <b>for Incentive and Lottery-funded Programs</b> RLM Based on Chapter 665, 2015 Virginia Acts of Assembly, Projected March 31, 2016, Average Daily Membership (ADM), and Virginia Preschool Initiative Participation			
Div. Num.	Division Name	FY 2016 Budgeted Required Local Match	Has the Division Certified to Budgeting Local Funds Sufficient to Meet the FY 2016 Required Local Match
045	HIGHLAND	81,309	YES
046	ISLE OF WIGHT	818,006	YES
047	JAMES CITY	1,439,244	YES
048	KING GEORGE	415,308	YES
049	KING QUEEN	370,430	YES
050	KING WILLIAM	240,705	YES
051	LANCASTER	645,142	YES
052	LEE	408,745	YES
053	LOUDOUN	5,287,252	YES
054	LOUISA	1,376,331	YES
055	LUNENBURG	345,455	YES
056	MADISON	289,032	YES
057	MATHEWS	166,651	YES
058	MECKLENBURG	1,159,870	YES
059	MIDDLESEX	418,059	YES
060	MONTGOMERY	1,365,651	YES
062	NELSON	499,155	YES
063	NEW KENT	164,669	YES
065	NORTHAMPTON	860,221	YES
066	NORTHUMBERLAND	555,487	YES
067	NOTTOWAY	457,004	YES
068	ORANGE	742,524	YES
069	PAGE	616,609	YES
070	PATRICK	500,437	YES
071	PITTSYLVANIA	1,342,288	YES
072	POWHATAN	140,718	YES
073	PRINCE EDWARD	651,955	YES
074	PRINCE GEORGE	530,633	YES
075	PRINCE WILLIAM	12,525,422	YES
077	PULASKI	707,178	YES
078	RAPPAHANNOCK	187,356	YES
079	RICHMOND	281,272	YES
080	ROANOKE	941,549	YES
081	ROCKBRIDGE	545,998	YES
082	ROCKINGHAM	1,658,240	YES
083	RUSSELL	612,126	YES
084	SCOTT	367,989	YES
085	SHENANDOAH	1,039,092	YES
086	SMYTH	617,147	YES
087	SOUTHAMPTON	383,625	YES
088	SPOTSYLVANIA	2,250,821	YES
089	STAFFORD	1,486,403	YES
090	SURRY	448,654	YES
091	SUSSEX	395,881	YES

**FY 2016 Budgeted Required Local Match (RLM)  
for Incentive and Lottery-funded Programs**

RLM Based on Chapter 665, 2015 Virginia Acts of Assembly,  
Projected March 31, 2016, Average Daily Membership (ADM), and Virginia Preschool Initiative  
Participation

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2016 Budgeted Required Local Match</b>	<b>Has the Division Certified to Budgeting Local Funds Sufficient to Meet the FY 2016 Required Local Match</b>
092	TAZEWELL	845,221	YES
093	WARREN	775,988	YES
094	WASHINGTON	1,261,779	YES
095	WESTMORELAND	712,093	YES
096	WISE	982,752	YES
097	WYTHE	667,892	YES
098	YORK	531,054	YES
101	ALEXANDRIA	7,325,079	YES
102	BRISTOL	582,499	YES
103	BUENA VISTA	112,230	YES
104	CHARLOTTESVILLE	2,070,417	YES
106	COLONIAL HEIGHTS	468,439	YES
107	COVINGTON	212,900	YES
108	DANVILLE	1,949,500	YES
109	FALLS CHURCH	117,479	YES
110	FREDERICKSBURG	1,255,852	YES
111	GALAX	378,854	YES
112	HAMPTON	3,859,087	YES
113	HARRISONBURG	2,171,031	YES
114	HOPEWELL	1,026,228	YES
115	LYNCHBURG	2,741,863	YES
116	MARTINSVILLE	545,747	YES
117	NEWPORT NEWS	6,582,138	YES
118	NORFOLK	10,350,148	YES
119	NORTON	144,077	YES
120	PETERSBURG	1,339,600	YES
121	PORTSMOUTH	3,517,478	YES
122	RADFORD	187,778	YES
123	RICHMOND CITY	14,503,808	YES
124	ROANOKE CITY	4,961,102	YES
126	STAUNTON	764,637	YES
127	SUFFOLK	2,551,863	YES
128	VIRGINIA BEACH	8,219,980	YES
130	WAYNESBORO	833,414	YES
131	WILLIAMSBURG	195,432	YES
132	WINCHESTER	1,447,307	YES
134	FAIRFAX CITY	368,239	YES
135	FRANKLIN CITY	430,652	YES
136	CHESAPEAKE	4,582,013	YES
137	LEXINGTON	18,748	YES
138	EMPORIA	256,748	YES
139	SALEM	367,155	YES
142	POQUOSON	65,466	YES
143	MANASSAS	1,934,251	YES

**FY 2016 Budgeted Required Local Match (RLM)  
for Incentive and Lottery-funded Programs**

RLM Based on Chapter 665, 2015 Virginia Acts of Assembly,  
Projected March 31, 2016, Average Daily Membership (ADM), and Virginia Preschool Initiative  
Participation

<b>Div. Num.</b>	<b>Division Name</b>	<b>FY 2016 Budgeted Required Local Match</b>	<b>Has the Division Certified to Budgeting Local Funds Sufficient to Meet the FY 2016 Required Local Match</b>
144	MANASSAS PARK	626,337	YES
202	COLONIAL BEACH	79,922	YES
207	WEST POINT	19,747	YES



**School Division Participation in Optional Programs with Local Match Requirements**  
*Fiscal Year 2016*

Pursuant to Item 136, Paragraph B.10, Chapter 665, 2015 Virginia Acts of Assembly, for fiscal year 2016, the Department of Education collected data on budgeted required local match for applicable Incentive and Lottery-funded accounts that require a local match.

As part of this data collection, school divisions also certified participation in certain Incentive and Lottery-funded accounts, as applicable. All school divisions have submitted completed reports and have certified their participation status for fiscal year 2016.

School divisions, if eligible for funding, either opted in or opted out of participating in the optional programs that have a required local match. If sufficient local operating expenditures were not available to meet local match requirements, then local school divisions requested additional local appropriation from the governing body prior to receiving state funds in fiscal year 2016.

The following information details by account the school division participation in Incentive and Lottery-funded accounts in fiscal year 2016:

	<b>Number of Divisions Opting In</b>	<b>Number of Divisions That Must Request Additional Local Appropriation</b>	<b>Number of Divisions Not Eligible for Funding</b>	<b>Number of Divisions Opting Out</b>
<b>At Risk</b>	135	0	0	0
<b>Virginia Preschool Initiative (VPI)</b>	120	0	0	15
<b>Early Reading Specialists Initiative</b>	25	0	0	110
<b>K-3 Primary Class Size Reduction</b>	127	0	0	8
<b>Math/Reading Instructional Specialist Initiative</b>	19	0	0	116
<b>Compensation Supplement</b>	133	0	0	2

# Appendix A

## Legislative Mandate for the Reporting Requirement

*Code of Virginia*

### **§ 22.1-97. Calculation and reporting of required local expenditures; procedure if locality fails to appropriate sufficient educational funds.**

A. The Department of Education shall collect annually the data necessary to make calculations and reports required by this subsection.

At the beginning of each school year, the Department shall make calculations to ensure that each school division has appropriated sufficient funds to support its estimated required local expenditure for providing an educational program meeting the prescribed Standards of Quality, required by Article VIII of the Constitution of Virginia and Chapter 13.2 (§ 22.1-253.13:1 et seq.) of this title. At the conclusion of the school year, the Department shall make calculations to verify whether the locality has provided the required expenditure, based on average daily membership as of March 31 of the relevant school year.

The Department shall report annually to the House Committees on Education and Appropriations and the Senate Committees on Finance and Education and Health the results of such calculations and the degree to which each school division has met, failed to meet, or surpassed its required expenditure.

The Joint Legislative Audit and Review Commission shall report annually to the House Committees on Education and Appropriations and the Senate Committees on Finance and Education and Health the state expenditure provided each locality for an educational program meeting the Standards of Quality.

The Department and the Joint Legislative Audit and Review Commission shall coordinate to ensure that their respective reports are based upon comparable data and are delivered together, or as closely following one another as practicable, to the appropriate standing committees.

B. Whenever such calculations indicate that the governing body of a county, city or town fails or refuses to appropriate funds sufficient to provide that portion of the cost apportioned to such county, city or town by law for maintaining an educational program meeting the Standards of Quality, the Board of Education shall notify the Attorney General of such failure or refusal in writing signed by the president of the Board. Upon receipt of such notification, it shall be the duty of the Attorney General to file in the circuit court for the county, city or town a petition for a writ of mandamus directing and requiring such governing body to make forthwith such appropriation as is required by law.

The petition shall be in the name of the Board of Education, and the governing body shall be made a party defendant thereto. The court may, in its discretion, cause such other officers or persons to be made parties defendant as it may deem proper. The court may make such order as may be appropriate respecting the employment and compensation of an attorney or attorneys for any party defendant not otherwise represented by counsel. The petition shall be given first priority on the docket of such court and shall be heard expeditiously in accordance with the procedures prescribed in Article 2 (§ 8.01-644 et seq.) of Chapter 25 of Title 8.01 and the writ of mandamus shall be awarded or denied according to the law and facts of the case and with or without costs, as the court may determine. The order of the court shall be final upon entry. Any appeal therefrom shall be heard and disposed of promptly by the Supreme Court next after habeas corpus cases already on the docket.

# Appendix B

## Legislative Mandate Directing the Required Local Effort and Required Local Match Data Collection

*Chapter 665, 2015 Virginia Acts of Assembly*

### **Item 136, Paragraphs A.5 and A.6:**

5. "Required Local Expenditure for the Standards of Quality" - The locality's share based on the composite index of local ability-to-pay of the cost required by all the Standards of Quality minus its estimated revenues from the state sales and use tax dedicated to public education and those sales tax revenues transferred to the general fund from the Public Education Standards of Quality/Local Real Estate Property Tax Relief Fund and appropriated in this Item, both of which are returned on the basis of the latest yearly estimate of school age population provided by the Weldon Cooper Center for Public Service, as specified in this Item, collected by the Department of Education and distributed to school divisions in the fiscal year in which the school year begins.

6. "Required Local Match" - The locality's required share of program cost based on the composite index of local ability-to-pay for all Lottery and Incentive programs, where required, in which the school division has elected to participate in a fiscal year.

### **Item 136, Paragraphs B.8 - B.11:**

8.a.1) Pursuant to § 22.1-97, Code of Virginia, the Department of Education is required to make calculations at the start of the school year to ensure that school divisions have appropriated adequate funds to support their estimated required local expenditure for the corresponding state fiscal year. In an effort to reduce the administrative burden on school divisions resulting from state data collections, such as the one needed to make the aforementioned calculations, the requirements of § 22.1-97, Code of Virginia, pertaining to the adequacy of estimated required local expenditures, shall be satisfied by signed certification by each division superintendent at the beginning of each school year that sufficient local funds have been budgeted to meet all state required local effort and required local match amounts. This provision shall only apply to calculations required of the Department of Education related to estimated required local expenditures and shall not pertain to the calculations associated with actual required local expenditures after the close of the school year.

2) The Department of Education shall also make calculations after the close of the school year to verify that the required local effort level, based on actual March 31 Average Daily Membership, was met. Pursuant to § 22.1-97, Code of Virginia, the Department of Education shall report annually, no later than the first day of the General Assembly session, to the House Committees on Education and Appropriations and the Senate Committees on Finance and Education and Health, the results of such calculations made after the close of the school year and the degree to which each school division has met, failed to meet, or surpassed its required local expenditure. The Department of Education shall specify the calculations to determine if a school division has expended its required local expenditure for the Standards of Quality. This calculation may include but is not limited to the following calculations:

b. The total expenditures for operation, defined as total expenditures less all capital outlays, expenditures for debt service, facilities, non-regular day school programs (such as adult education, preschool, and non-local education programs), and any transfers to regional programs will be calculated.

c. The following state funds will be deducted from the amount calculated in paragraph a. above: revenues from the state sales and use tax (returned on the basis of the latest yearly estimate of school age population provided by the Weldon Cooper Center for Public Service, as specified in this Item) for sales in the fiscal year in which the school year begins; total receipts from state funds (except state funds for non-regular day school programs and state funds used for capital or debt service purposes); and the state share of any balances carried forward from the previous fiscal year. Any qualifying state funds that remain unspent at the end of the fiscal year will be added to the amount calculated in paragraph a. above.

d. Federal funds, and any federal funds carried forward from the previous fiscal year, will also be deducted from the amount calculated in paragraph a above. Any federal funds that remain unspent at the end of the fiscal year and any capital expenditures paid from federal funds will be added to the amount calculated in paragraph a. above.

e. Tuition receipts, receipts from payments from other cities or counties, and fund transfers will also be deducted from the amount calculated in paragraph a, then

f. The final amount calculated as described above must be equal to or greater than the required local expenditure defined in paragraph A. 5.

g. The Department of Education shall collect the data necessary to perform the calculations of required local expenditure as required by this section.

h. A locality whose expenditure in fact exceeds the required amount from local funds may not reduce its expenditures unless it first complies with all of the Standards of Quality.

9.a. Any required local matching funds which a locality, as of the end of a school year, has not expended, pursuant to this Item, for the Standards of Quality shall be paid by the locality into the general fund of the state treasury. Such payments shall be made not later than the end of the school year following that in which the under expenditure occurs.

b. Whenever the Department of Education has recovered funds as defined in the preceding paragraph a, the Secretary of Education is authorized to repay to the locality affected by that action, seventy-five percent (75%) of those funds upon his determination that:

1) The local school board agrees to include the funds in its June 30 ending balance for the year following that in which the under expenditure occurs;

2) The local governing body agrees to reappropriate the funds as a supplemental appropriation to the approved budget for the second year following that in which the under expenditure occurs, in an appropriate category as requested by the local school board, for the direct benefit of the students;

3) The local school board agrees to expend these funds, over and above the funds required to meet the required local expenditure for the second year following that in which the under expenditure occurs, for a special project, the details of which must be furnished to the Department of Education for review and approval;

4) The local school board agrees to submit quarterly reports to the Department of Education on the use of funds provided through this project award; and

5) The local governing body and the local school board agree that the project award will be cancelled and the funds withdrawn if the above conditions have not been met as of June 30 of the second year following that in which the under expenditure occurs.

c. There is hereby appropriated, for the purposes of the foregoing repayment, a sum sufficient, not to exceed 75 percent of the funds deposited in the general fund pursuant to the preceding paragraph a.

10. The Department of Education shall specify the manner for collecting the required information and the method for determining if a school division has expended the local funds required to support the actual local match based on all Lottery and Incentive programs in which the school division has elected to participate. Unless specifically stated otherwise in this Item, school divisions electing to participate in any Lottery or Incentive program that requires a local funding match in order to receive state funding, shall certify to the Department of Education its intent to participate in each program by July 1 each fiscal year in a manner prescribed by the Department of Education. As part of this certification process, each division superintendent must also certify that adequate local funds have been appropriated, above the required local effort for the Standards of Quality, to support the projected required local match based on the Lottery and Incentive programs in which the school division has elected to participate.

11. Any sum of local matching funds for Lottery and Incentive program which a locality has not expended as of the end of a fiscal year in support of the required local match pursuant to this Item shall be paid by the locality into the general fund of the state treasury unless the carryover of those unspent funds is specifically permitted by other provisions of this act. Such payments shall be made no later than the end of the school year following that in which the under expenditure occurred.