



**The Town of Warrenton**  
P.O. Box 341  
Warrenton, VA 20188  
P (540) 347-1101  
F (540) 349-2414

## **Data Consistency Project Reference Index**

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EXPERIENCE



# TOWN OF WARRENTON

TOWN CLERK

21 Main Street  
Warrenton, VA 20186  
(540) 347-1101

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## MEMORANDUM

**TO:** Senior Leadership

**THROUGH:** The Office of the Town Manager.

**FROM:** Mr. Stephen Clough, Town Clerk.

**DATE:** February 8<sup>th</sup>, 2024.

**RE:** Quarterly Report Format and Informational Changes

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**Data consistency project:** The data consistency project is an update to the standard templates for documents used across the Town. This project began in the Fall of 2023 with updates across multiple document types including staff reports and resolutions. This project is designed to facilitate a more consistent way of disseminating information across all forms of Governance within the Town. Examples of documents to be updated are the PowerPoint template, quarterly report template, name plates for meetings, and other commonly used formats. Some document templates will be updated and communicated while others will be completely new. Questions or suggestions regarding this project should be directed to the Town Clerk.

**Quarterly reporting program:** The Quarterly report program is designed to enable data reporting to the Town Council and the Citizens of Warrenton. The program is being refined to allow for the inclusion of these reports in the budgeting process to better communicate the needs and success of the Town on a departmental level.

**Items and data analysis should tie back to Plan Warrenton 2040, the Strategic Plan and the Yearly Strategic Goals laid out at the Strategic Retreat.**

The due date for the Quarterly Reports is laid out in an additional Memo. It is expected that each department will utilize the attached template and format for this report.

The template outlines a few key areas that should be the focus of the report.

- 1) **Department introduction:** A brief overview of the department, essential functions, and duties. (No more than one paragraph.)
- 2) **Commendable Achievements:**
  - a. Work completed and notable achievements in the quarter.
  - b. Training updates, progress made by staff members and individuals.
- 3) **Project Progress:**
  - a. Large scale projects and the impactful items.
- 4) **Charts and information:** Data displayed with analysis. Utilize this as needed to tell the

story.

- a. **Data:** Organize Department data for consistency within the department. Each board, working group, commission should be called out.
  - Annual comparison at the end of calendar year
    - Comparison of previous quarter
    - Compare data that tells the story
  - Use graphs and visual aids to show the story
    - Analysis should be after the graphs presented
      - Tell the story,
        - The facts will back up the story,
          - The data will back up the facts.
      - **Show don't tell.**

Raw data should be added in a separate report as an appendix if needed. Don't crowd the information! The Financial Report, CIP, and Street Maintenance Report should be in the formats that they are already in.

**February-2024 Update:** The reporting dates have been changed as of January 2024 to align with the Fiscal Year, not the Calendar year. Due dates have not changed, but the titling has.

**Attachments:**

- 1) Quarterly Staff Report Template
- 2) Quarterly Staff report list and due dates

# Quarterly Report (insert Department Name) Department



Town Council Meeting Date: November 12, 2024

First Quarter 2025: July, August, September

Please accept this as the quarterly report for the *(insert Department Name)* department

Department introduction:

Commendable Achievements:

Project Progress:

Charts and information:

Data:





# TOWN OF WARRENTON

TOWN CLERK

21 Main Street  
Warrenton, VA 20186  
(540) 347-1101

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## MEMORANDUM

TO: Mr. Frank Cassidy, Interim Town Manager  
FROM: Mr. Stephen Clough, Town Clerk  
RE: Quarterly Report Due Dates and Report List

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### Quarterly Report Due Dates

Quarterly Report Items are due on the same deadline as the Agenda Items are due to the Town Clerk.

#### Quarter One

July, August, September

Reports to Council are due in November.

#### Quarter Two

October, November December

Reports to Council are due in February.

#### Quarter Three

January, February March,

Reports to Council are due in May.

#### Quarter Four

April, May, June

Reports to Council are due in August.

### Current Staff reports

- Finance
- Parks and Recreation
- Police
- Community Development
- Public Works and Utilities
  - CIP
  - Street Maintenance
  - Facilities and Fleet Management
- Human Capital
  - Emergency Management



# TOWN OF WARRENTON

TOWN CLERK

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Warrenton, VA 20186  
(540) 347-1101

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## MEMORANDUM

**TO:** All Staff

**THROUGH:** Senior Leadership, Town Manager

**FROM:** Mr. Stephen Clough, CMC, Town Clerk

**DATE:** November 2023.

**RE:** Data Consistency Project Part Three: Staff Report Template for Boards, Commissions, and Town Council

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This memo is an update to all Staff regarding the update of the Staff Report template to be used across all boards, committees, commissions, and Town Council meetings.

### Data consistency project:

The data consistency project is an update to the standard templates for documents used across the Town. This project began in the Fall of 2023 with updates across multiple document types including staff reports and resolutions. This project is designed to facilitate a more consistent way of disseminating information across all forms of Governance within the Town. Examples of documents to be updated are the PowerPoint template, quarterly report template, name plates for meetings, and other commonly used formats. Some document templates will be updated and communicated while others will be completely new. Questions or suggestions regarding this project should be directed to the Town Clerk.

### Implementation Timeline:

Effective January 1<sup>st</sup>, 2024, the new Staff Report template will be required to be used for all applicable boards, committees, commissions, and Town Council meetings.

### Changes and Updates:

The Following Changes have been made to the Template:

- 1) Eric Gagnon has been added as the new Ward 5 Councilmember.
- 2) The “**Service Level/Policy Impact**” item has been changed to “**Service Level/Collaborative Impact.**”
- 3) An additional Item has been added titled, “**Policy Direction/Warrenton Plan 2040.**”

### Staff Report Template:

The Staff Report Template is available on the O: Drive under the following:

O:\1TOWN MANAGERS OFFICE\Resolutions, Proclamations, Staff Reports & Ordinances

The Staff Report document is the main document to convey information through the meeting agenda items. Staff reports are used in all departments with a common template and can be carried over from the Town Council to the Planning Commission, the Board of Zoning Appeals, and the Architectural Review Board.

This template can be slightly modified to suit the needs of the item being brought forth.

The current direction of the Town Council is to bring items to them for information one month before required action is necessary for an item.

To use this template, focus on the narrative of the item you're bringing forth.

**Tell the story: The facts will back up the story, The Data will back up the facts.**

Items added to the meeting agendas should have the following:

- 1) Staff report
- 2) Supporting documents if necessary
- 3) Presentations if necessary
- 4) Legislation if necessary- Legislation should be included for multiple courses of action. It is the Staff's job to advise the Council, Boards, and Commissions, not to dictate their actions.

If the agenda Item is for information purposes only, the staff recommendation should be: "Receive the information on the report."

If a category does not apply to your particular item the response should be: "N/A."

The new subheading "**Policy Direction/Warrenton Plan 2040**" should include specific tie ins to the Comprehensive Plan, Warrenton 2040 and any Legal or Council policy that has this item coming before the Boards, Commissions, and Town Council.

The newly edited subheading "**Service Level / Policy Impact**" should explain how the agenda item and subsequent staff recommendations would affect other relevant services provided by the Town and the individuals tasked with enforcement of the staff recommendation. It should also explain what collaboration would be necessary with other departments and the impact of such.

**Naming Template:**

Should include the word Staff Report- Agenda item title. For example:

- Staff Report- Item name
- Staff Report- Approval of Minutes
- Staff Report- Department Overview
- Staff Report- SUP 2024-XX





Office of the Town Manager  
Frank Cassidy

**Warrenton Town Council**  
Carter Nevill, Mayor  
Roy Francis, Ward 1  
William Semple, Ward 2  
Larry Kovalik, Ward 3  
Michele O'Halloran, Ward 4  
Eric Gagnon, Ward 5  
Paul Mooney, At Large  
David McGuire, At Large

# **STAFF REPORT**

<b>Council Meeting Date:</b>	The date at which the staff report is to be presented, Updated each meeting.
<b>Agenda Title:</b>	A title that is unique and acknowledges the contents of the specific staff report. This should match with the agenda item title for the meeting.
<b>Requested Action:</b>	A shortened description of the requested action. Maximum 1-2 sentences.
<b>Department / Agency Lead:</b>	Department or agenda responsible for the information in this report.
<b>Staff Lead:</b>	Individual or group of individuals that are presenting the information.

## **EXECUTIVE SUMMARY**

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The executive summary is a brief description of the item going before the council with the focus on the pertinent information and the rationale of bringing the item before the Council/Commission/Board.

## **BACKGROUND**

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Background information is the history of the item and reference materials to support the topic. Timelines, previous actions, reference materials, and ancillary information are all appropriate for this area. The elongated and in-depth basis for the staff recommendation. The reasoning may be legal, social, scientific, fiscal, medical, and/or justified by other means not explicitly mentioned. Explain in a manner that is easy to understand for those unfamiliar with this topic, the relationship between the issue presented, the staff recommendation, and the justification.

## **STAFF RECOMMENDATION**

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Staff recommendations should include the course of action that the Council may take without being binding. Staff can recommend, but the policy direction and actions of the Council/Commission/Board remain their own decision.

## **Service Level/Collaborative Impact**

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Explain how the agenda item and subsequent staff recommendations would affect other relevant services provided by the Town and the individuals tasked with enforcement of the staff recommendation. Explain what collaboration would be necessary with other departments and the impact of such.

## **Policy Direction/Warrenton Plan 2040**

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A required tie in of the item to the Warrenton Plan 2040 and the policy direction that required this item to be brought before the Council.

## **Fiscal Impact**

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Explains what monetary impact the staff recommendation would have on various parties involved in the resolution. This includes from where funding is sourced, the total costs incurred, revenue generated, and/or other fiscal impacts not mentioned.

## **Legal Impact**

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A section required for certain staff recommendations that explains the legal course of action necessary for implementation and/or legal necessity to act on this topic.

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## **ATTACHMENTS**

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1. Optional attachments allow for potential citations, reports, and other means of intellectual support that led the author to their conclusion and recommendation.
- 2.
- 3.



# TOWN OF WARRENTON

TOWN CLERK

21 Main Street  
Warrenton, VA 20186  
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## MEMORANDUM

**TO:** All Staff

**THROUGH:** Senior Leadership, Town Manager

**FROM:** Mr. Stephen Clough, CMC, Town Clerk

**DATE:** May 15<sup>th</sup>, 2024.

**RE:** Update: Resolution, Ordinance, and Proclamation Numbering System

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This memo is an update to all Staff regarding the enactment of a Resolution, Ordinance, and Proclamation Numbering System to be used across all boards, committees, commissions, and Town Council meetings.

**Implementation Timeline:**

Effective May 15<sup>th</sup>, 2024, the Resolution, Ordinance, and Proclamation Numbering System will be enacted by the Town Clerk on all signed Resolutions, Ordinances, and Proclamations. Resolution and Proclamation numbers will not be assigned until they are adopted by the Town Council. Ordinance Numbers will be assigned before consideration by the Council.

**Resolution, Ordinance, and Proclamation Numbering System:**

The numbering system is being modified for the start of 2024. Resolutions, and Proclamations, will all have new numbering items for internal and external tracking. An index and copy of each piece of legislation will be added to the Munidocs site for tracking and transparency.

**Ordinance Numbering System:**

Ordinances will be numbered according to the Town Code with the Year and progression number for the ordinance.

**(Ordinance)-(Year)- (Ordinance Number)**

**Naming Convention:**

The naming convention will have an abbreviation of the type of legislation being signed, the year, the month adopted, and an assigned number based on the number of pieces of legislation passed before in that meeting.

**(Type of Legislation)- (last two digits of the year)-(month)- (resolution number)**

**Examples:**

- RES-24-09-09, RES-24-10-03
- PRO-24-02-14, PRO-24-03-01
- Ordinance 2024-01, Ordinance 2024-02.



Office of the Town Manager  
Frank Cassidy

## Warrenton Town Council

Carter Nevill, Mayor  
Roy Francis, Ward 1  
William Semple, Ward 2  
Larry Kovalik, Ward 3  
Michele O'Halloran, Ward 4  
Eric Gagnon, Ward 5  
Paul Mooney, At Large  
David McGuire, At Large

# STAFF REPORT

**Council Meeting Date:**

**Agenda Title:**

**Requested Action:**

**Department / Agency Lead:**

**Staff Lead:**

## EXECUTIVE SUMMARY

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## BACKGROUND

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## STAFF RECOMMENDATION

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## Service Level/Collaborative Impact

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## Policy Direction/Warrenton Plan 2040

---

## Fiscal Impact

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## Legal Impact

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## **ATTACHMENTS**

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- 1.
- 2.
- 3.

**WHEREAS, bold,  
including  
comma**

No acronyms in  
the **RE:** line; all  
CAPS and bold

October 11, 2022  
Town Council  
Regular Meeting  
Res. No. **From Clerk**

**A RESOLUTION AUTHORIZING THE TOWN MANAGER TO SIGN AN AMENDMENT OF THE TRI-PARTY WATER AND SEWER AGREEMENT TO PROVIDE SEWER AND WATER TO GPIN'S 6995-23-0001-000 AND 6995-23-3305-000 SUBJECT TO CONDITIONS**

**1 Space**

**WHEREAS,** Warrenton, VA (Hereinafter "the Town") is a municipal corporation located within the County of Fauquier; and { semi-colon with **and** }

**1 Space**

**WHEREAS,** the Town in its proprietary capacity owns and operates water & sewer utility systems within the municipality and in certain cases outside of the corporate limits when applications for the privilege of same have been granted pursuant to Article 17 of the Town Code; and { semi-colon with **and** }

**1 Space**

**WHEREAS,** Fauquier County (Hereinafter "the County") is a political subdivision of the Commonwealth of Virginia which does not operate any sewer or water facilities in its own capacity; and { semi-colon with **and** }

**1 Space**

**WHEREAS,** the Fauquier County Water & Sanitation Authority ("WSA") is an authority created and organized to provide sewer and water service with Fauquier County and, which operates under the Virginia Water & Waste Authorities Act, Chapter 51, of Title 15.2 of the Code of Virginia, 1950, as amended, hereinafter referred to as "the Virginia Code,"; and { semi-colon with **and** }

**1 Space**

**WHEREAS,** the Morgan Companies (the "Applicant") seek to develop certain properties identified as GPIN's 6995-23-0001-000 and 6995-23-3305-000 (the "Property"), located within Fauquier County but outside the Town limits, which can only happen if the Town, the County, and WSA amend the Tri-Party Agreement to allow the Town to provide public water and public wastewater services to the Property; and { semi-colon with **and** }

**1 Space**

**WHEREAS,** a memorandum prepared by Timmons Group, dated September 23, 2022, indicates the Applicant's proposed development on the Property will need approximately 12,000 gallons per day (gpd) of water for the grocery store, retail shops, coffee shop, convenience store with gas pumps, and fast-food eating establishment; and { semi-colon with **and** }

**1 Space**

**WHEREAS,** the Town is in the process of having the Water and Sewer System Growth and Capacity Evaluation study updated which will estimate the current and buildout water demands and sewer flows for areas where the Town has prior service commitments; and { semi-colon with **and** }

**1 Space**

**WHEREAS,** the Town's commitment to provide water and sewer service to this project is contingent on if the water and Sewer System Growth and Capacity Evaluation indicates that sufficient capacities exist in both the water and sewer systems; and { semi-colon with **and** }

**1 Space**

**NOW, THEREFORE, BE IT RESOLVED** that the Warrenton Town Council Hereby is Authorizing the Town manager to sign an amendment of the Tri- Party Water and Sewer Agreement to provide sewer and water to GPIN'S 6995-23-0001-000 and 6995-23-3305-000 subject to conditions; { semi-colon with **no and** }

**1 Space**

**BE IT FURTHER RESOLVED** if the study shows that the Town has the excess capacity to provide public water and public sewer to the subject parcels, to provide public water and public sewer service to the subject parcels under the conditions that a.) the proposed uses, and square footages of each as indicated on the memorandum prepared by the Timmons Group, are approved by the

Wording in blue  
is always the  
same –  
remainder of  
the paragraph  
should match  
the title

County; b.) public water service and sewage discharge shall be limited to 12,000 gpd on average within any thirty (30) day period on an as-needed and as-available based, and c.) the applicant shall diligently pursue all necessary approvals and begin construction within five (5) years from the date of October 11, 2022; { semi-colon with no and }

1 Space

**BE IT FURTHER RESOLVED** that the Town of Warrenton Town Council conditionally agrees to provide the requested public water and sewer service to the subject parcels if the Tri-Party Agreement shall require reconsideration if the average usage exceeds 12,000 gpd within any 30-day period or if the owner of the parcel(s) decides to change the use of any building that would increase the need for public water and treatment of sewage discharge; { semi-colon with no and }

1 Space

**BE IT FURTHER RESOLVED** that the Town of Warrenton Town Council will consider the subject Property as part of the Boundary Line Adjustment discussion; { semi-colon with no and }

1 Space

**BE IT FURTHER RESOLVED** that the Town of Warrenton Town Council reserves the right to restrict certain uses from operation on the subject parcels which will be identified during the Town's review of the Comprehensive Plan Amendment, Rezoning and Special Exception applications; { semi-colon with no and }

1 Space

**BE IT FURTHER RESOLVED** that the applicant shall be responsible for obtaining approval to amend the Tri-Party Agreement from the County and WSA to allow the Property to be serviced with water and sewer by the Town of Warrenton; { semi-colon with no and }

1 Space

**BE IT FURTHER RESOLVED** that the Town Manager and Town Attorney may take all appropriate, reasonable and necessary steps to effect and execute said agreement to amend the Tri-Party Agreement within the limitations set out in the recitals above; { semi-colon with no and }

1 Space

**BE IT FURTHER RESOLVED** that the Town reserves the right to charge a premium for any water usage over the maximum gallon per day limit in an amount intended to match the greater of (a) additional capital expenses anticipated to accrue as a result of the excess water usage or (b) such amount as will effectively deter excess usage. { always end with a period }

1 Space

ATTACHMENT: Memorandum of Understanding

1 Space

ATTACHMENT:  
In Caps

Votes:

Ayes:

Nays:

Absent from Vote:

Absent from Meeting:

1 Space

For Information:

Community Development Director,  
Town Attorney

**Bold Text**  
←

"For Information:" is bold  
Department or Agency  
No names or phone numbers are listed

"Attest:" line is always at the bottom of the last page "

ATTEST: \_\_\_\_\_  
Town Recorder



# TOWN OF WARRENTON

TOWN CLERK

21 Main Street  
Warrenton, VA 20186  
(540) 347-1101

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## MEMORANDUM

**TO:** All Staff

**THROUGH:** Senior Leadership, Town Manager

**FROM:** Mr. Stephen Clough, CMC, Town Clerk

**DATE:** November 2023.

**RE:** Data Consistency Project Part One: PowerPoint Template for Boards, Commissions, and Town Council

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This memo is an update to all Staff regarding the enactment of a standard PowerPoint template to be used across all boards, committees, commissions, and Town Council meetings.

**Data consistency project:** The data consistency project is an update to the standard templates for documents used across the Town. This project began in the Fall of 2023 with updates across multiple document types including staff reports and resolutions. This project is designed too facilitate a more consistent way of disseminating information across all forms of Governance within the Town. Examples of documents to be updated are the PowerPoint template, quarterly report template, name plates for meetings, and other commonly used formats. Some document templates will be updated and communicated while others will be completely new. Questions or suggestions regarding this project should be directed to the Town Clerk.

**Implementation Timeline:** Please being to utilize the new template immediately. The expectation is that the new standard is in place to be mandatory by January 1<sup>st</sup>, 2024.

**PowerPoint Template:**

- 1) The PowerPoint template is available on the O: Drive under the folder PowerPoints for Mtgs; it is titled "00 Town of Warrenton PowerPoint Template".
- 2) There are four slide colors with instructions on how to apply the template. You will need to update the first slide with the title or topic of your presentation, then choose one of the four color combinations to use as the background for your presentation. Once you have decided which color background to use, delete the other color combinations.
- 3) There should be only one background color throughout your presentation. You will also need to update the footer of the presentation with the title or topic.

**Naming Template:** should include the date of your meeting, the board, and the agenda item topic. For example,

- 10.14.23\_PC\_Clerk Report



- 10.14.23\_BZA\_Finance Report
- 10.14.23\_ARB\_Zoning Report
- 10.14.23\_TC\_Town Manager Report



## TOPIC/AGENDA ITEM

Town Council Regular Meeting  
October 10<sup>th</sup>, 2023

# HOW TO USE THIS TEMPLATE

- Pick ONE of the four background colors and Text color combinations to use for each presentation and delete the rest.
- Use the Lato Font
- Do not use transitions
- Do not set to auto progress to the next slide.
- Start and end with the Title slide updated to your presentation and date

# HOW TO USE THIS TEMPLATE

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- Use the Lato Font
- Do not use transitions
- Do not set to auto progress to the next slide.
- Start and end with the Title slide updated to your presentation and date



An aerial photograph of a town street, showing a mix of residential and commercial buildings, trees, and parked cars. The word "Questions?" is overlaid in the center in a bold, dark blue font. The image has a thin black border.

**Questions?**