

# PNA TRANSPARENCY TOOLKIT

## Introduction

Thank you for using the PNA Transparency Toolkit. This toolkit is designed to help you perform basic reviews of local government agencies to gauge their compliance with timely and complete meeting minutes, as well as agendas. We encourage you to include local government(s) such as school districts, cities, counties, townships, and municipalities.

In this toolkit, you will evaluate minutes and agendas from your local government(s). There are four rubrics included — one for requesting the minutes, one for requesting agendas, one for evaluating minutes, and one for evaluating agendas. Each is set up with a series of “YES” or “NO” questions.

The grading portion includes a step-by-step grading guide and scale to help you determine the correct grade.

Please begin your reviews as soon as possible, so that all participating members can publish their results during Sunshine Week, March 13-19, 2016. We estimate that the process could take about 4 weeks. To begin, the checklist below provides recommendations on how to begin your evaluation.

## CHECKLIST

- |                                                                                           |                                                                                         |
|-------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| <input type="checkbox"/> Define the region                                                | <input type="checkbox"/> Use editable PDF to create report card graphic for publication |
| <input type="checkbox"/> Determine which local government(s) to evaluate                  | <input type="checkbox"/> Generate the story                                             |
| <input type="checkbox"/> Assign a reporter to the project                                 | <input type="checkbox"/> Publish the story                                              |
| <input type="checkbox"/> Create a timeline                                                | <input type="checkbox"/> Send to PNA at communications@pa-news.org                      |
| <input type="checkbox"/> Make a list of target office websites, including entity contacts | <input type="checkbox"/> Promote on social media with #transPArency and #OpenGovPA      |
| <input type="checkbox"/> Print out a rubric for each entity being evaluated               | <input type="checkbox"/> _____                                                          |
| <input type="checkbox"/> Answer the questions on the rubrics                              | <input type="checkbox"/> _____                                                          |
| <input type="checkbox"/> Complete the report card                                         | <input type="checkbox"/> _____                                                          |
| <input type="checkbox"/> Assign grades based on grading scale                             |                                                                                         |



# PNA TRANSPARENCY TOOLKIT

## Rubric

### REQUESTING THE MINUTES

This rubric is for minutes, and its intent is to gauge timely access to agency minutes. Make sure to request minutes that should already be prepared, giving an agency a reasonable amount of time to create minutes if requesting minutes from a recent meeting. Every "YES" response is worth five points, and every "NO" response is worth zero points, except as noted.

#### SECTION A.

#### MINUTES

1. Are meeting minutes available online?	YES (5)	NO (0)
2. Is there a link to the minutes on the homepage, or are they easily found or accessible from the homepage?	YES (5)	NO (0)

**You must answer questions 1 & 2. If you answered "YES" to either of these questions, stop here, calculate your points, and go to the next page. If you answered "NO" to both of these questions, make an informal request for the minutes by phone or email, and move to Section B, below. The maximum points possible after this section are 10/10.**

After your informal request:

#### SECTION B.

3. Did someone return your call or email within one to two business days?	YES (5)	NO (0)
4. Did you receive the minutes in less than five days?	YES (5)	NO (0)

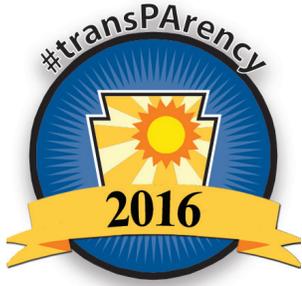
**If you answered "YES" to either of these questions, stop here, calculate your points, and go to the next page. If you answered "NO" to both of these questions, file a written Right to Know request by email or in person, and move to Section C below. The maximum points possible after this section are 10/20.**

After filing a written RTK request:

#### SECTION C.

6. Did you receive the minutes within five business days of your request?	YES (5)	NO (0)
7. Was an extension requested?	YES (0)	NO (5)

**Calculate your points and continue to the next page.  
If you have reached this section, the maximum possible points are 10/30.**



# PNA TRANSPARENCY TOOLKIT

## Rubric

### EVALUATING THE MINUTES

Review each agency's minutes to answer the questions below. Every "YES" response is worth 5 points, and every "NO" response is worth 0 points.

**If you did not receive minutes, circle "NO" for all questions and score accordingly.**

### MINUTES

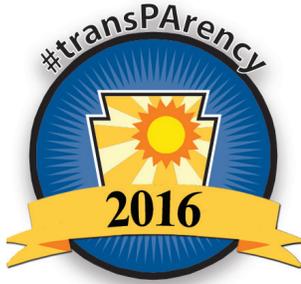
Did the minutes include the date?	YES (5)	NO (0)
Did the minutes include the time of the meeting?	YES (5)	NO (0)
Did the minutes include the location of the meeting?	YES (5)	NO (0)
Did the minutes include the names of members present?	YES (5)	NO (0)
Did the minutes include a summary of all official actions?	YES (5)	NO (0)
Did the minutes include a record of the votes, including names of any abstainers or dissenters?	YES (5)	NO (0)
Did the minutes include the names of any citizens who provided comment?*	YES (5)	NO (0)
Did the minutes include a brief summary of any citizens who provided comment?*	YES (5)	NO (0)

\*If the comment summary lists "None" or "No comments provided," etc., mark the response as "YES," as the agency still provided time for comment and noted that nobody spoke. Because nobody spoke, the brief summary would be "None."

**If you came to this page after SECTION A, the maximum points possible after this page are 50/50.**

**If you came to this page after SECTION B, the maximum points possible after this page are 50/60.**

**If you came to this page after SECTION C, the maximum points possible after this page are 50/70.**



# PNA TRANSPARENCY TOOLKIT

## Rubric

### REQUESTING AN AGENDA

This rubric is for agendas, and its intent is to measure the accessibility of agendas prior to a meeting.

You should begin this process about ten days before the meeting, to give time for an informal response, and also for the five business days permitted under the Right to Know Law if a written request is necessary. It's possible that an agency will not have prepared its agenda ten days prior to the meeting, so this timeline is not hard and fast. If an agency is making a good faith attempt to encourage public participation, however, an agenda should be prepared and publicly shared more than a few days in advance of the meeting.

#### **SECTION A.**

#### **AGENDAS\***

	YES	NO
1. Is the agenda available online?	(5)	(0)
2. Is there a link to the agenda on the homepage, or is it easily found or accessible from the homepage?	(5)	(0)

**You must answer questions 1 & 2. If you answered "YES" to either of these questions, stop here, calculate your points, and go to the next page. If you answered "NO" to both of these questions, make an informal request for records by phone or email, and move to Section B, below. The maximum points possible after this section are 10/10.**

After your informal request:

#### **SECTION B.**

	YES	NO
3. Did someone return your call or email within 1-2 business days?	(5)	(0)
4. Did you receive the agenda in advance of the meeting?	(5)	(0)

**If you answered "YES" to either of these questions, stop here, calculate your points, and go to the next page. If you answered "NO" to both of these questions, file a written Right to Know request by email or in person, and move to Section C below. The maximum points possible after this section are 10/20.**

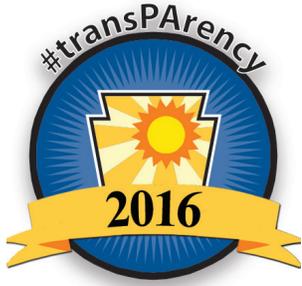
After filing a written RTK request:

#### **SECTION C.**

	YES	NO
6. Did you receive the agenda within five business days?	(5)	(0)
7. Was an extension requested?	(0)	(5)
8. Did you receive the agenda in advance of the meeting?	(5)	(0)

**Calculate your points and continue to the next page.  
If you have reached this section, the maximum possible points are 15/35.**

\*Although the Sunshine Act does not expressly require agendas, it does require agencies to provide the public with a meaningful opportunity to comment on matters that are or may be before the agency. Providing agendas in advance of a meeting is the easiest, most efficient, way to satisfy this requirement.



# PNA TRANSPARENCY TOOLKIT

## Rubric

### EVALUATING THE AGENDAS

Answer the questions below while examining the agenda. Every “YES” response is worth 10 points, and every “NO” response is worth 0 points.

**If you did not receive an agenda, circle “NO” for all questions and score accordingly.**

### AGENDAS

Does the agenda contain a brief description of items to be discussed at the meeting? For example, is it more than a skeleton agenda, e.g. “call to order,” “old business,” “new business?”

YES  
(10)

NO  
(0)

Does the agenda include time for a public comment period?

YES  
(10)

NO  
(0)

Are there copies of the agenda available at the meeting?

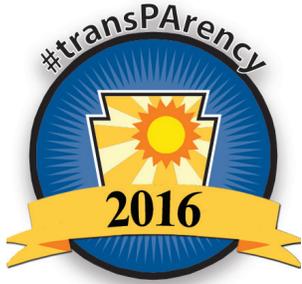
YES  
(10)

NO  
(0)

**If you came to this page after SECTION A, the maximum points possible after this section are 40/40.**

**If you came to this page after SECTION B, the maximum points possible after this page are 40/50.**

**If you came to this page after SECTION C, the maximum points possible after this page are 45/65.**



# PNA TRANSPARENCY TOOLKIT

## Report Card

Now that the minutes and agendas have been evaluated, it's time to create the Report Card. A customizable PDF report card will be made available for your use. Follow the instructions below and calculate your percentage score/grade.

### MINUTES

**I. If you answered "YES" to any of the questions in SECTION A, total your score below and calculate the percentage score. If you answered "NO" to both questions in SECTION A, move to Section II, below.**

Total points from SECTION A in "Requesting the Minutes" \_\_\_\_\_

Total points from "Evaluating the Minutes" \_\_\_\_\_

**TOTAL** \_\_\_\_\_/50

**Percentage Score** \_\_\_\_\_

**II. If you answered "YES" to any of the questions in SECTION B, total your score below and calculate the percentage score. If you answered "NO" to both questions in SECTION B, move to Section III below.**

Total points from SECTION B in "Requesting the Minutes" \_\_\_\_\_

Total points from "Evaluating the Minutes" \_\_\_\_\_

**TOTAL** \_\_\_\_\_/60

**Percentage Score** \_\_\_\_\_

**III. If you answered "YES" to any of the questions in SECTION C, total your score below and calculate the percentage score.**

Total points from SECTION C in "Requesting the Minutes" \_\_\_\_\_

Total points from "Evaluating the Minutes" \_\_\_\_\_

**TOTAL** \_\_\_\_\_/70

**Percentage Score** \_\_\_\_\_

### GRADING SCALE

100-90%	<b>A</b>	69-60%	<b>D</b>
89-80%	<b>B</b>	59-0%	<b>F</b>
79-70%	<b>C</b>		



# PNA TRANSPARENCY TOOLKIT

## Report Card

### AGENDAS

**I. If you answered "YES" to any of the questions in SECTION A, total your score below and calculate the percentage score. If you answered "NO" to both questions in SECTION A, move to Section II, below.**

Total points from SECTION A in "Requesting an Agenda" \_\_\_\_\_

Total points from "Evaluating the Agendas" \_\_\_\_\_

**TOTAL** \_\_\_\_\_ /40

**Percentage Score** \_\_\_\_\_

**II. If you answered "YES" to any of the questions in SECTION B, total your score below and calculate the percentage score. If you answered "NO" to both questions in SECTION B, move to Section III below.**

Total points from SECTION B in "Requesting an Agenda" \_\_\_\_\_

Total points from "Evaluating the Agendas" \_\_\_\_\_

**TOTAL** \_\_\_\_\_ /50

**Percentage Score** \_\_\_\_\_

**III. If you answered "YES" to any of the questions in SECTION C, total your score below and calculate the percentage score.**

Total points from SECTION C in "Requesting an Agenda" \_\_\_\_\_

Total points from "Evaluating the Agendas" \_\_\_\_\_

**TOTAL** \_\_\_\_\_ /65

**Percentage Score** \_\_\_\_\_

### GRADING SCALE

100-90%	<b>A</b>	69-60%	<b>D</b>
89-80%	<b>B</b>	59-0%	<b>F</b>
79-70%	<b>C</b>		