OPEN MEETING COMPLIANCE BOARD OPINIONS

TOPICAL INDEX

July 1, 1992 through December 31, 2018 (updated through 12 OMCB Opinions 117)

HOW TO USE THIS INDEX: This index groups the Compliance Board's opinions into seven broad topics, each with subtopics. To find a broad topic, go to the list below. The broad topic numbers correspond to the chapter numbers in the <u>Open Meetings Act Manual</u>. For a list of the subtopics, go to the topical index outline.

BROAD TOPICS:

- 1. SCOPE: DOES THE ACT APPLY?
- 2. <u>NOTICE: DID THE PUBLIC BODY GIVE "REASONABLE ADVANCE NOTICE" OF THE MEETING AND MAKE AN AGENDA AVAILABLE?</u>
- 3. ACCESS: WAS THE MEETING CONDUCTED IN THE OPEN?
- 4. PERMISSIBLE CLOSED SESSION DISCUSSIONS: IF THE CLOSED SESSION WAS SUBJECT TO THE ACT, DID THE TOPICS DISCUSSED FALL WITHIN ONE OF THE 15 EXCEPTIONS THAT PERMIT A CLOSED MEETING?
- 5. CONDITIONS FOR CLOSING A MEETING: BEFORE CLOSING A MEETING SUBJECT TO THE ACT, DID THE PUBLIC BODY MAKE THE WRITTEN DISCLOSURES REQUIRED BY THE ACT AND VOTE PUBLICLY TO EXCLUDE THE PUBLIC, IN THE PRESENCE OF A MEMBER DESIGNATED FOR TRAINING?
- 6. MINUTES AND OTHER MEETING DOCUMENTS: DID THE PUBLIC BODY PREPARE AND RETAIN THE MEETING DOCUMENTS REQUIRED BY THE ACT AND, TO THE EXTENT PRACTICABLE, POST ITS MINUTES?
- 7. GUIDANCE; TRAINING: WHAT IS THE ROLE OF COMPLIANCE BOARD OPINIONS, AND WHO MUST TAKE TRAINING?

HOW TO FIND AN OPINION: Go to the main <u>Open Meetings webpage</u>, click on the link for "<u>Opinions</u>," click on the volume listed for that opinion, and scroll through to the page. For opinions issued after this index was updated, go to the most recent volume. The opinions are also searchable.

STATUTORY CITES: Statutory cites in the opinions are now to the General Provisions Article of the Maryland Code. Before October 1, 2014, the Open Meetings Act appeared in the State Government Article.

JUDICIAL OPINIONS: This index does not include opinions issued by the Maryland courts. The reported opinions of Maryland's appellate courts take precedence over Compliance Board opinions, which are advisory. For more information, see the introduction to the Open Meetings Act Manual.

CHANGES IN THE STATUTE: Some of the guidance in these opinions has been made obsolete by amendments to the Open Meetings Act over the years. For example, the General Assembly broadened the definition of "public body" in 2004, *see* 4 *OMCB Opinions* 132 (2005), and 2009, *see* 7 *OMCB Opinions* 64 (2010), and added a particular class of school-board related entities in 2013. The current law is explained in the Open Meetings Act Manual.

TOPIC ONE

1. Scope: Does the Act apply? Sections 3-301 and 3-102, with definitions in § 3-101—a "meeting" of a "public body," unless the Act expressly excludes the "function" being performed.

A. PUBLIC BODY: Section 3-101(h)

1. Generally

Committees required by formally adopted policy	721
Committees appointed by officials subject to Governor's policy direction	764
Fact that entity performs quasi-judicial functions irrelevant to public body status	7186
Library board: covered by Act as well as Education Article provision about meetings	570
Method by which committee was created: parent body should find the history	846 983
Pen Mar Development Corporation: exempt from some, but not all, provisions of the Act	488
Quorum of county delegation, when meeting as party caucus	1062
Receipt of public funds: irrelevant to public body status	196-11 86 197-3 212
Status of entities performing functions belonging to the public body status depends on facts	7195
Subcommittee created by formal instrument	7176
2. Determined to be a public body	
Board of legislatively created corporation, intended by the General Assembly to be a governmental entity	197-3 212
Boundary Study Committee mandated by Local Board of Education policy	721
Committee appointed by Board of County Commissioners	776
Committees comprising residents appointed by resolution of city council	169
Committee created by MOU adopted by council resolution	994
Committee created/required by law or resolution	992 9151

TOPIC/SUBTOPIC	VOL. OPN. PAGE
	1012 1074
Committee required by county executive's regulation	1067
Community panel created by State statute	1298
Development corporation created by city	10117
Panel of Critical Area Commission	5189
Peer Review Group appointed by Transportation Secretary	7118
Private non-profit arts council created by City	113
State Biosolids (Sewage Sludge) Task Force	5182
Subcommittee created by legal instrument	7176
Three-judge panel	7186
Town council members despite their role as heads of departments	326
3. Determined not to be a public body	
Advisory committee appointed by county parks director	303-15 325
Advisory group to county planning board, informally created	4132
Advisory committee appointed by Attorney General	7170
Agency employees, when not members of entity	9302
Baltimore City Criminal Justice Coordinating Council, when MOUs not adopted by resolution	1168
Board of Baltimore Area Convention and Visitors Association	196-14196 3284
Board of directors of private, non-profit hospital	16
City, county, or school board staff members	192-26 298-827 299-237 10101
Committee of Governor's Executive Council	1188
Committee that carries out pre-application review process identified in local law	336
Committee created by a commissioner, acting alone	9103

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Committee not created by executive or person subject to executive's policy direction	9279
County department heads and county commissioners in a county in which commissioners are executive head of county government	193-1050
Environmental Assessment Committee of the Baltimore County Public Schools	484
Individual employee/official/hearing examiner	196-8 175 7186 186 9230 234
Informally created committee appointed by Library President	7105
Informally created committee	7268
Informally created committee consisting of two jurisdictions' officials	25
Informally-created subcommittees comprising only the parent commission's members	1253
Informally created subgroup established by single council member	6155
Information sessions held for State Employees	953
"Management Committee" formed pursuant to memorandum of Agreement (see also 9 OMCB Opinions 94).	5194
Management committee informally established by executive director of the Baltimore Metropolitan Council	617
Maryland Public Secondary Schools Athletic Association (superseded by 2013 amendment to §10-502(h))	443
Municipal officials and individual members of city council	135
Neighborhood association controlled by lot owners	8118
Political party central committee	3278
Procurement panel put together by staff	873
Private group formed by members of the public	873
Private, voluntary association of public officials and others	195-4120
Privately incorporated and controlled entity	9203 9246

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	School committee created by superintendent without school board action	7
	School board committee created only by president	9149
	Student government association at public college	235
	Subcommittee created informally by one member of the public body, if it does not perform the public body's function	7284
	Subcommittees not formally created	194-469 299-1 270 7176 7284
	Subcommittees of Maryland Bicycle and Pedestrian Advisory Committee	6140
	Task force formed by the particular jurisdiction's chief executive officer does not meet definition of public body as defined by 3-101(h)	1258
	University president's committee, without 2 members of public	9314
	Volunteer Fire Department - Formed as a Voluntary Association of Individuals	1265
	Wicomico County Council and county department heads	197-16261
В.	"MEETING": Section 3-101(g), (k)	
	1. Generally	
	Discussion by quorum at every stage of legislative process	9186
	Electronic communications, guidance	9259 1291
	Meeting of quorum of Article 25 Commissioners with cabinet members	7225
	Nearly contemporaneous email communications among a quorum	1267
	Participation by commissioners in party central committee meeting	3278
	Public body's consideration of public business in meeting of entity that is not a public body	192-26 194-9104 195-4120 195-10142 196-3157 196-10183

TOPIC/SUBTOPIC VOL. OPN. PAGE 2......27 9......94 "Quorum," generally 9...... 307 6......57 Survey of members without convening a quorum: not covered by Act 9......259 Walking quorum exception to quorum requirement 8......56 9...... 186 2. Determined to be a meeting Accidental quorum attending another public body's meeting on matters before 7......92 both 3......78 Announcement, by chairman, at social gathering of planned Process for handling topic Convening of "accidental quorum" to receive briefing 3......30 7...... 85 Convening of "quorum," when number not set by law, as number needed to 9......307 take action Convening of quorum at event initiated and sponsored by the public body to 8......19 discuss public business Convening of quorum of council during course of informally designated 6......155 subgroup meeting 8......8 Convening of quorum of public body at committee meeting 9......83 Convening of quorum for purpose of informal identification of consensus about 3......78 an issue 12......102 Convening of quorum for training focused on public business Convening of quorum with Governor's staff during legislative session 5......28 9......40 Discussion of public by quorum participating in radio show Discussion of means of discerning resident's reaction to annexation proposal 4......168 Future meeting agenda discussion 3......78 1......23 Information-gathering at the earliest stages of policy formulation 1.......93-6......35 1......95-7.....129 1......97-2.....206

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Initial meeting of advisory board	5
Opportunity for a public body's quorum to explore issues as a group and exchange comments and reactions	298-25 1291
Presence of quorum of town council at meeting with library trustees concerning funding request	785
Quorum attending joint entity's meeting on matters before both	1246
Retreat at which matters of public business were discussed	301-10122
Social gathering and chance encounter exception, not applicable when used to discuss public business	7269
Training session focused on particular public body's practices	533
3. Determined not to be a meeting	
Attendance by quorum at another entity's meeting, when members only gave welcoming remarks and less than a quorum remained	776
Attendance at another entity's meeting at which the public body's own business was not considered	303-012.310 7105 1246
Breakfast gathering before an open meeting at which public business was not conducted	3257
Budget retreat called by Mayor at which council members attended	302-14242
Celebratory dinner following swearing in of officials at which public business not considered	593
Chance social encounter not used to discuss public business	7269
Conference in which each board member participated in a separate small group discussion	301-17150
Conversation among quorum limited to personal information or social "small talk"	195-7129 299-545
Dinner attended by quorum, conversation limited to social matters	302-11224 458 7193 7176
Email communications when quorum not present for discussion	1120
Gathering limited to effort at improving interpersonal relations	3274

TOPIC/SUBTOPIC VOL. OPN. PAGE Informal gathering before a meeting or during a break, so long as no discussion 1......94-6.....92 occurs about meeting topics 1......95-6.....127 1......96-3.....157 8......99 In the absence of a quorum, circulation of form requesting agenda items or staff 8......103 actions Lack of evidence that public body met to conduct the business of its wholly 7......282 owned private corporation Members-elect not considered in calculating a quorum 5......93 1......94-8.....101 Quorum not present or convened 1......94-10...107 1......95-10...142 1......151 1......97-4.....218 1......97-12...248 1......97-13...250 2.......99-5......45 2......99-6......49 3......92 3......191 4......51 4......114 5......93 6...... 57 7......21 7...... 176 7...... 186 7...... 193 7...... 269 7......272 7...... 282 8......8 8...... 56 9...... 55 9...... 149 9......234 9......239 10......71 12...... 77 Posting notice of intent to conduct public business by email does not prove 12.....91 that a quorum convened 6......63 Retreat limited to discussion of interpersonal relations and social conversation 6......77 School Board's attendance at County Council meeting for Sole purpose of answering questions

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Separately-held telephone calls not amounting to collective deliberation	7
	Social event with general topical presentation	197-7 227
	Social event at which public business is mentioned only briefly and in passing and is not discussed	298-25 299-1374 299-1680
	Training session limited to general topics	533
C.	ADMINISTRATIVE FUNCTION EXCLUSION: Sections 3-101(b), 3-103(a), 3-104(c) (formerly "executive function")	
	1. Generally	
	2-part test, summarized	542 91
	Applicability to implementation of policy, but not policy formation	1225 1233 1246
	Applicability to implementation of resolution but not policy formation	1012
	Applicability to personnel matters often unclear	9110 9290 1022
	Applicability to school board topics	1159
	Applicability to some budgeting tasks done by some public bodies	1143
	2. Within exclusion, discussion of	
	Acting pursuant to municipal charter, selection of clerk-treasurer	653
	Acting pursuant to statute, appointment of officers	593
	Acting pursuant to statute, appointment of planning board members	657
	Administration of existing leave policy	196-5 166
	Administration of existing expense policy	889
	Administrative and budgetary matters by community college board	428
	Administrative and housekeeping matters re school system	339
	Administrative matters by municipal planning commission	110

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Administrative matters by Wicomico County Council	302-10218
Agreement to dismissal of lawsuit filed against county council, absent any reconsideration of council's prior policy decisions	467
Appointment by county commissioners to fill planning commission vacancy	245
Appointment by school board of interim superintendent	195-5 123
Appointment by town council to fill council vacancy	197-14252 929
Audit report, manner in which it would be released	367
Application of existing law to claims against fund administered by the public body	8115
Attendance of council members at function	7269 889
Briefing to school board by superintendent on contract, solely for informational purposes	6145
Budgetary administration not involving proposal to amend budget	123
Budget preparation and department head meetings by Wicomico County Council	34
Budget preparation, financial oversight, and investment decisions by Pratt Library Finance Committee	301-10 122
Chief Executive Officer's status report on legal staff's progress with forthcoming guidance on charter school applications	12104
Choice of newspaper for legal advertising	196-13 195
Choice of member to oversee publication of notice	1062
Complaint against electrician by regulatory board	192-413
Complaint against licensee by regulatory board	5102
Complaints before regulatory board	1125
Consideration of motion to unseal minutes of closed session	5105
Consideration of ethics complaint by ethics commission	9
Construction of barrier between elementary school grounds and adjacent retail property	353

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Council's discussion about committee assignments	7142 7216
County Commission consideration of penalty in code enforcement matter	12114
Decisions on Specific Field Trip Requests	1213
Department heads' modes of communications with members, if policy issues not involved	89
Dismissal of employee	196-5166 9290
Effect of cuts in state aid to counties	123
Election board's conduct of election and administration of existing regulations	1022
Election of own officers	7101 9180
Evaluation of school superintendent's performance	195-5123 301-18159 1057 10104 1213
Exercise of supervisory authority over town manager's preparation of compensation and benefit plans	224
Existing collective bargaining agreements	4104
Future budget options	264
Hospital management issues when county commissioners have oversight responsibility over hospital	16
Interpersonal relations among commissioners	889
Interview process for filling school board vacancy	4182
Investigation of patient complaints under existing policies	7250
Issuance of check to implement prior decision	978
Management issues under existing program and information briefing on possible future budgetary impacts	3211
Merging of county and city purchasing departments under current law	197-15255
Non-substantive discussion about whether to schedule a meeting on an item already referred to the public body	1267

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Open Meetings Act procedures	533
Operational aspects of compliance with federal law	1159
Overseeing audit staff, to the extent that the discussion involves current operation, not future policy	8107
Oversight of election board performance	21
Payment of bill under current budget	4197
Personnel evaluation	11
Personnel grievance hearing	476
Preliminary budget matters between department heads and County Council	197-16261
Press release about a controversial city event	195-8 133
Press release about employee's resignation	9110
Procedure to regulate public comments by public body's members	197-8 233
Proposed development on border of municipality	313
Relationship between existing sewer connection ordinance and prior sewer maintenance agreement with landowner	326
Remedies for breach of franchise agreement	57
Remedies in enforcing loan agreement	195-7 129
Request for appointment of counsel and payment of fee	4197
Rescheduling meeting in order to give proper notice	1062
Review of current fiscal year's budget numbers	125
Review of line items in existing budget when future policy not discussed	889
Review of "script," when it merely entailed rehearsing procedures already set by law and did not include a discussion of the decision to be made	12104
School board appointment of officers	1237
School board's discussions of internal school system audit	623
School board's review of ethics panel recommendation	5121
Signing documents and letters not requiring decision-making	7225

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Solicitation of advice from colleagues by town council member who had certain administrative responsibilities	221
Specific schools eligible for reconstitution by State Board of Education	301-11 127
Staging of work under existing contract	9151
State Ethics Law training, held by Ethics Commission's director for public body's members	1154
Superintendent briefing to county board of education on matters that did not involve Board policy	769
3. Outside Exclusion, discussion of ¹	
Advice or recommendations to be given pursuant to statute	7250
Amendment to inter-governmental agreement	3218
Article 25 Commissioners' meeting with department heads when topics involve policy or legislation	7225
Briefing of school board on contract matter if board's consent subsequently required	6145
Budget deliberations	9171
Budget recommendations	9234
Changes in law to achieve merger of county and city purchasing departments	197-15 255
Composition of local management board	3182
Contract amendment	195-5 123 11 65
Contract negotiation	4127
County department reorganization or consolidation	6180
Creation of a citizens' committee	7264
Creation of plan, for grant application, with town goals	10134
Department consolidation or reorganization	6180 7216
Developer's proposal to buy property and convert it to low-income housing	299-1680

¹ See also the other "functions" topics; if the activity falls within one of those functions, it is *not* an administrative function. Section 3-101(b)(2).

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Discussion with potential contractor	4168
Effect of annexation agreement on proposed zoning ordinance	4127
Election board's formulation of policies and recommendations	1022
Franchise reassignment	57
Hiring lobbyist to oppose legislation in General Assembly before adopting resolution to take that position	7131
Issuance of quitclaim deed	635
Law enforcement matter beyond public body's jurisdiction	542
Lease of real property to another entity	7208 7245
Licensing matters	7250
Matters falling within advisory and quasi-legislative functions	91
Mission of library	301-10122
Municipal governance – general topics	302-12227
Municipal governance issues in wake of charter amendment	302-11224
Pay adjustment process	576
Personnel matters within jurisdiction of another public body	4188
Petition drive within special tax district	194-796
Placement of monument, when not addressed by existing policy	1031
Policy about attendees' desire to address public body	1113
Preliminary aspects of policy and contractual matters	428
Procedures for school board's recommendation to Governor about board vacancy	4163
Proposed City budget amendments	983
Receipt of information on land-use matters; briefing on matters as initial step in policy formation	7225
Recommendations on use of gaming funds	1074
Regulations or policies	9180
Resigning school superintendent's waiver of part of salary	301-18159

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Review of staff's proposed budget by library board committee	1227
	Selection of contractor	1067
	Setting standards for regulated entities	7250
	Town council's position on General Assembly bill to authorize county tax	412
	Transportation issues not administered by public body	560
D.	ADVISORY FUNCTION: Section 3-101(c)	
	Authority of group derived from department head, not from law or Governor:	560
	Budget recommendations	9234
	Discussion of recommendations to make pursuant to regulation	7250
	Formulation of recommendations under delegation by parent public body	91 992
	Recommendations on use of gaming funds	1074
	Recommendations to be made pursuant to statute	1298
E.	JUDICIAL FUNCTION: Sections 3-101(e), 3-103(a) (no opinions)	
F.	LEGISLATIVE FUNCTION: Sections 3-101(f)	
	1. Within function, discussion of	
	Briefing about proposed city ordinance	193-635
	County council's position on General Assembly bill to authorize county tax	412
	Positions on legislation	7186
	2. Outside function, discussion of	
	Making an appointment, rather than approval of a proposed appointment	195-5 123
	Town council's position on General Assembly bill to authorize county tax	412
G.	LICENSING AND PERMITTING MATTERS: Section 3-103(b)	
	Regulatory body's conduct of occupational licensing examination	113
	Regulatory body's certification of program	7250

H. MATTERS NOT FALLING WITHIN A DEFINED FUNCTION Activity by public body that falls within none of the defined functions: covered 1......94-7......96 1......94-10...107 by the Act 1......95-2.....113 5...... 60 QUASI-JUDICIAL FUNCTION: Sections 3-101(i), 3-103(a) 1. Within the function 3......260 Animal control commission proceeding to determine dangerousness of dog Animal control commission proceeding on ordinance violations 7......89 7......186 Appellate role of city council in dispute over referendum petition 2......1 8......115 Determination subject to certain judicial review provisions Personnel grievance hearing, if subject to certain judicial review provisions 4......76 2. Outside the function 4......104 Report on amount and allocation of reserve funds, not involving budget amendment Individual actions of presiding officer: not covered by the Act 2......70 Licensing/permitting matters, subject to the Act 9.....296 12......93 J. QUASI-LEGISLATIVE FUNCTION: Sections 3-101(j) 9......171 **Budget deliberations** Budget review by county legislative body 1.......93-8......44 1......97-2.....206 1......95-5 123 Discussion of employment contract 10.....57 11......12 12......28 Franchise reassignment 5......7 5.....200 9......1 Process as well as the act of approving, disapproving or amending a budget Review of staff's proposed budget by library board committee 1......97-7.....227

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Selection of contractor	1067
	Step in process of adopting contract	1165
K.	ZONING MATTERS: Section 3-103(b)	
	Permissible use of mobile homes on certain lots	3182
	Planning	110
	TOPIC TWO	
2.	Notice and agendas: Did the public body give "reasonable advance not meeting and make an agenda available? Sections 3-102(c), 3-303	ice" of the
A.	NOTICE REQUIREMENT, GENERALLY	
	Act does not require public bodies to announce orally that they expect to hold a closed session during their next meeting	12117
	Adequacy of notice of meeting held after blizzard	1135
	Failure to give notice of meeting that will be closed after vote to close	1174 1225
	Failure to provide notice: violation	301-596 5
	New notice for re-convened meeting when re-convening occurred almost immediately after adjournment	1120
	Notice of cancelled meeting: may be omitted if notice of meeting had not been given originally	301-19164

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Notice required in advance of conference call: dependent on whether quorum could be anticipated or in fact occurred	617
	Notice required of scheduled meeting even if quorum does not in fact convene	303-13314 51 721
	Notice required for parent body and committee when quorum of parent attends committee meeting	876
	Notice required despite fact that media has learned of the meeting	8137
	Notice required when only open portion of meeting will be vote to close	1057 1174 1288
	Public body's duty to post notice not altered by notice requirements applicable to land use applicants	9175
	Requirement not violated by agenda that did not mislead public	1083
	Standing notice, use of	9256
	Timeliness of website notice for new date for meeting canceled because of weather emergency	1095
	Website notice, advice for public bodies that meet irregularly	1093
	Website notice, generally	10
	Website notice, use of calendar function	1095
В.	CONTENT	
	Agenda: not required (Note: The law has changed. See Topic 2F and GP § 3-302.1)	192-516 194-469 195-1110 298-931 299-752 302-2173 303-4264 303-10303 4168 5

TOPIC/SUBTOPIC VOL. OPN. PAGE 9...... 232 10...... 83 3......8 Anticipated closed session: should be included 9......57 12.....41 8......76 Announcement of tentative date: insufficient when public is given no means of confirming it Announcement of tentative date on website: sufficient when public is told when 9......206 to check for confirmation 9......206 Asking public to indicate interest in attending so arrangements can be made, permissible 5......165 Closed session not anticipated until shortly before meeting: failure to reflect in notice not violation 3......197 Explanation of why meeting is expected to be closed: not required 5...... 105 8......76 Failure to provide public notice of method of publication 8......89 Notice of closed meeting must specify that the vote to close will be held in open session 12......28 12......33 8......89 Notice must specify location of meeting 10......115 Notice not required to specify topic of closed session 12......19 Notice of closed session must invite public to observe the vote to close 9......1 Notice of "executive" or "closed" session deficient for meeting closed under § 3-305; notice must invite public to observe the vote to close 8......89 8...... 150 8......182 9......180 9.....243 10......35 11......12 11......22 11......52 11......72 11......74 9......103 Notice suggesting that event involves less than a quorum of the members insufficient when quorum could be expected 4......51 Omission of name of public body and place of meeting: violation

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Omission of time or place of meeting or both: violation	4
	Omission of date, time, place in website posting	8111
	One-time publication of schedule of anticipated meeting times, if coupled with posted notice of each meeting: permitted	169
	Prince George's County Council: role as district council need not be specified	231
	Revision of prior meeting notice to reflect closed session: not required when need not anticipated until shortly before meeting	3297 9141
	Variation from published agenda: not a violation	5117
C.	FORMAT	
	Absent special circumstances, written notice required	742
D.	METHOD	
	1. In General	
	Absent special circumstances, written notice required	742
	Best feasible notice required for emergency meetings	846
	Several methods advisable when method permitted by Act is likely ineffective for public body's interested public	9206 1022
	2. Practices permitted	
	Announcement of future meeting at open meeting attended by press when reasonable	193-533 428 4155
	Announcement at public meeting, with written notice to press	3188
	Failure to post in newsletter when newsletter not published and other methods were used	7259
	Information provided to public via generally distributed newsletter and posted agenda	3197
	Multiple channels of distribution	3264 9146
	Newspaper advertisement and public posting	301-14 143

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Notice via cable television if public is informed and if a written version is available	196-5 166
Notice to press and others at open session of intention to hold unanticipated closed session	302-15 245
Notice via some legally sufficient method sometimes valid even if it differs from routine method (Note : See sub-topic#3 below)	69 7237
Notice via state agency's press release	298-827
Notice by task force affiliated with State agency via agency's website calendar	615
Notice to newspaper that is the primary source for reporting on government activities in community	632
Obscure location of notice on website not a violation when other method used	7259
Omitting notice of meeting cancellation when meeting is cancelled because quorum fails to attend	3188
Omitting notice to reporters if another means of notice was used	197-9 237
Oral announcement of legislative committee's immediate meeting during last few days of General Assembly session	4147 742
Posting in a single location if public is told of the practice	192-310 193-430 298-518 299-1784
Posting outside of town hall	6196
Proper written notice adequate despite misinformation allegedly provided by staff member to one member of public	5117
Public body has discretion in selecting appropriate media outlet	6164
Public body that had previously provided notice via website did not incur new obligations under 2007 legislation	641
Posting on website	8150
3. Practices in violation	
Embedding committee agenda within parent body meeting notice is insufficient as the committee's notice	1285
Failure to deliver notice to news media	48
Failure to notify public of canceled meeting	196-11 186

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Failure to provide notice of "continued" meeting	5184
Failure to provide written notice when meeting not scheduled under exigent circumstances	876
Failure to give notice, or, if given, to retain copy for one year	8188
Failure to retain copy for one year	689
"Informed verbal" notice	4140
No notice given by committee	7274
Notice to public body members only	392 4178
Notice provided to only those requesting notice	718
Notice only to persons on a notification list	7
Omission of notice from web calendar when other meetings posted there	1201 1228
Omission of notice from web calendar when public body posts its regular meetings there and does not direct the public to a separate posting	1241
Oral announcement at parent body's meeting insufficient	876
Posting in a location not described previously to public	488
Posting in town hall insufficient when public body usually supplemented that method with others	7237
Posting on office door inside office building insufficient when public was las notified of the method 8 years ago	t 8111
Posting at town office when regular meeting date changed to earlier date	7237
Public to be given reliable and predictable way of providing meeting notice and cancellations	12108
Staff's clerical error resulting in failure to post notice	193-844
Sudden change from usual methods	7237 1178
Use of website alone when meeting called on short notice	9110 9125

E. TIMING

1. Generally

One-day notice not permissible when public body knows earlier of the need to meet	876
Original and revised notices must be timely	358
Posting of agenda, not a reason to delay giving notice	9256
Prompt scheduling of meeting does not excuse failure to provide notice	196-10183
Public must be informed when time of meeting is changed	252 7237
Scheduling of meeting on short notice requires best public notice feasible under the circumstances	193-738 298-311 299-339 7259 792 7237
2. Practices permitted	
Deciding that meeting is needed on short notice	451 5139
Late notice to news media when other forms of notice given earlier	358
Meeting continued following night - announced during prior day's session and posted next day	5139
Notice advertised two business days in advance of meeting if promptly provided on scheduling of meeting	583
Notice given soon after scheduling of meeting for next day	412
Notice of Tuesday meeting posted on preceding Friday	499
Notice of Wednesday meeting posted on preceding Friday	218
Notice provided 5-10 days before meeting, absent any evidence suggesting intentional delay	6
Notice to press and others at open session of intention to hold unanticipated closed session	302-15 245

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Oral announcement of legislative committee's immediate meeting during last few days of General Assembly session	4147
	Same-day notice of urgently called meeting	196-11186 542 61
	Posting notice 6 days before meeting, coupled with announcement at prior meeting	647
	3. Practices in violation	
	Failure to give timely public notice	46 9273 101
	Failure to update standing notice on website	109
	Providing notice only 24 hours before meeting if public body had known of relevant statutory deadline requiring action	5139
	Website notice 1-2 days in advance, absent emergency and other methods	9
F.	AGENDA REQUIREMENT	
	1. Generally	
	Failure to post closed-meeting agenda, no violation	1178
	No violation of availability requirement	1125
	Public body may alter agenda	11
	2. Timeliness	
	Under the circumstances, 4-5 days timely	1118
	3. Contents	
	Broad agenda topic, "Superintendent Search," Sufficient	1277
	Failure to include expectation of vote to close (Violation)	1293
	No requirement for public bodies to post meeting agenda online	12108
	Posted agenda to include all known topics to be discussed (Violation)	12108

TOPIC THREE

3. Access: Was the meeting conducted in the open? Sections 3-102, 3-301, 3-303, 3-304, 3-305(d)

A. GENERALLY

В.

Accommodation of people with disabilities	197-9237 197-11245 302-13233
Entire discussion of open session matter, from beginning to end, must be in open session	194-573 196-4162
Exclusion of public, violation	8
Manner in which a public body makes decisions at an open session: outside the Act	116
No violation when alleged discussion of policy matters did not occur	895
Open meeting must be conducted in a manner that, as a practical matter, does not exclude public	194-692 196-4162 6127
Overflow space, use of	1040
Parking: public body generally not required to provide	9296
Public comment, not required by Act	9232
Reasonableness of measures to provide access, depends on circumstances	1135
Reopening meeting following erroneous closing required good-faith effort to notify public and press of changed situation	3115
Violated by excluding public	8137 1012 1074
Meeting about "budgetary concerns" to be open unless Act expressly provides otherwise	91
PRACTICES PERMITTED	
Asking public to indicate attendance so that space can be arranged	9296

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Brief delay in permitting access by camera crew	196-8 175
	Ceasing discussion immediately of newly raised topic that is not permitted to be discussed in closed session	195-3 117
	Choice of conference room for meeting	3118
	Denying public access to document distributed to members at meeting	278 9206
	Disallowing/limiting public comment	197-7227 4140 884 9146 9232 1277
	For conference call meeting, enabling the public to listen by speaker phone	8111
	Holding a meeting at a restaurant, without charge	8111
	Holding closed session in another room	957
	Open meeting in conference room after closed session	197-6224
	Open meeting in conference room prior to open session in regular meeting room	550
	Overflow space, permissible with audio, when needed	1040
	Posting of notice that legislative committee is holding a voting session	4147
	Regulating location of cameras set up in hearing rooms	5154
	Rescheduling meeting to larger site	4155
	Routine security requirements; building's sign-in rules	9296 1018
C.	PRACTICES IN VIOLATION	
	Access by invitation only	749
	Charging admission	819
	Conducting discussion after announcing adjournment of open session	196-4162 196-9178 514 576
	Conducting discussion during announced recess	463 9283

	Conducting discussion in advance of scheduled meeting	5
	Discussing matters, in a closed session, beyond those identified in advance	61 929 9180
	Discussing policy in meeting closed for administrative function	1125
	Excluding reporters from meeting open to the public	267 9290
	Meeting in a room off-limits to the general public	4147
	Meeting at location not opened to the public	8188
	Meeting without notice to general public	4
	Prohibiting audiotaping of discussion by advisory group	560
	Prohibiting videotaping by individual not affiliated with the news media	522
	Prohibiting videotaping of audience at meeting	195-9 137
	Prohibiting videotaping even if public body makes transcript of meeting available	3356
	Session of county council held without notice and in an unusual meeting place	144
	TOPIC FOUR	
4.	Permissible closed session discussions: If the closed session was subject the topics discussed fall within one of the 15 exceptions that permit a cl Section 3- 305(a). See also topic #5.	
A.	PERSONNEL: SECTION 3-305(B)(1)	
	1. Within exception, discussion of	
	Alleged mishandling of funds by employee	542
	Appointment of town treasurer	303-11 307
	Candidates for appointments to board	8 120
	Compensation for five individuals, related to facts specific to each	438

TOPIC/SUBTOPIC

VOL. OPN. PAGE

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Creation of new position linked to a specific employee	173
Employment contract of particular individual	1248 1277
Evaluation of legal counsel's performance	7125
Discussion/appointment of specific individuals	2
Hiring of/contract for specific individual	194-573 8150 9167 1057 1112
Interviewing prospective lobbyist	7131
Job description and employment status of town manager	11
Job status of particular employees under other entity's jurisdiction	4188
Legal services proposal	7125
Licensing of specific employee	173
Offer to job applicant	3171
Performance of County Attorney	7125
Performance of contractor's individual employees, only if public body may terminate the individual's employment	9132
Raises and promotions for specific employees	173
Review of city manager's performance	6104
School superintendent's change of duties	195-5 123
School superintendent's contract	3264 1277
Selection of recipients of honorary degrees	8166
Severance benefits for specific employees	749
Status of specific county employees if transferred to city	193-1153

TOPIC/SUBTOPIC VOL. OPN. PAGE 2. Outside exception, discussion of Attendance at a reception and meeting 1......73 Budgetary impact of rising gas prices 5......42 9......57 Charter amendment to address mayoral powers Closing land use file to further submissions 10......77 6......92 Department audit 7......225 Department responsibilities Discussions of county department consolidation, severance packages, layoff 6......180 timing, and alternative options 7......49 Elimination of county agency Elimination of position 7......216 1......73 Fringe benefits for a class of employees Hiring classes of employees 3......67 7......125 Job description not involving particular employee Liquor service at an official dinner 1......73 Merging two purchasing departments 1......97-15 ... 255 3......335 New position and pay increases for categories of employees Outsourcing municipal/county services 6......104 7......49 1......73 Pay adjustment policy 12.....69 Personnel policies Policy issues related to a town newsletter 2.......99-4......43 Policies or actions affecting classes of employees 8......86 11......32 Procurement of call forwarding service (check) 1.......73 5......42 Proposed annexation Reclassification of employees not involving information on specific employee 7......131 1......73 Retention policy

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Sheriff's appointees to sheriff's advisory committee not involving discussion of individual county employees	712
	Spaces at police academy	194-573
	Staffing needs, generally	9132
	Vendor's performance of services contract	9132
В.	PRIVATE INFORMATION ABOUT INDIVIDUALS: Section 3-305(b)(2)	
	Applicable only to confidential personal information	8
	Personal history of candidates for public honor	971
C.	PROPERTY ACQUISITION: Section 3-305(b)(3)	
	1. Within exception, discussion of:	
	Acquisition of agricultural easement	7225
	Acquisition of property from public entity	7274
	Acquisition of property for school	7274 1215
	Possible acquisition of property for public parking	280
	Possible acquisition of property by lease, for public use	510 9160
	Public purpose aspects of acquisition	5172
	School board re-acquisition of site	7274
	2. Outside exception, discussion of:	
	Use of property owned by the public body	7208 929
	Other matters	1185
	Obtaining counsel's advice on granting an easement on school property	1244
	Transfer, sale, or lease of real property to another entity	6

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
		1210 1246
	Property acquisition if public body lacks power to acquire property under discussion	197-8 233
	Sale of vehicles and acquisition of new ones	173
D.	PROPOSAL FOR BUSINESS RELOCATION: Section 3-305(b)(4)	
	1. Within exception	
	Business proposals to relocate, when confidentiality needed	946
	Consideration of sale of land within county-owned business park	572
	Discussion of collateral matters expected to be addressed in evaluating business proposal	6192
	Discussion of financial incentives for specific business entity	7148
	Discussion of negotiation with business considering location in the county	899
	Discussion of retention of business in the County	7225
	Lease of governmental controlled property to private entity	586
	Proposal by business entity to move from one site to another in state	128 299-1680
	2. Outside Exception	
	Discussion of already-public facts about a known site	915
	Discussion of zoning change	7148
	Discussion of legislation	7148 915
	Public university's relocated facility: outside exception	256
E.	INVESTMENT OF PUBLIC FUNDS: Section 3-305(b)(5)	
	Briefing on building project	1159
	Preliminary discussion of possible project for Revenue Authority support: no opinion possible	4114
	Discussion of corporate governance of corporation owned by public body, beyond scope	7195

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Discussion of donation to another entity, beyond scope	7195
F.	MARKETING OF PUBLIC SECURITIES: Section 3-305(b)(6)	
	Legislation on taxing district boundaries: outside the exception	915
	Discussion of project proposed for funding: outside the exception	104
G.	LEGAL ADVICE: Section 3-305(b)(7)	
	1. Generally	
	Bona fide expectation of need for legal advice justifies use of exception even if discussion obviates need for advice	5172
	Applicable when counsel is also member of staff so long as legal advice was given	81
	Applicable to public body's receipt of advice but not to deliberations on policy matters	838 1098
	Existence of attorney-client privilege not a prerequisite to reliance on exception	533
	Initiation by counsel where public body aware of general subject matters, permissible	6127
	Limits, generally	9186 101
	2. Within exception	
	Advice effectively determining public body's decisions	196-6169 196-7172
	Advice on advertisement on municipality's buses	5146
	Advice on compliance with charter	983
	Advice on councilman authority regarding committee assignments	7142
	Advice on employment law regarding terminations	749
	Advice on employment law applicable to personnel policies	9243
	Advice on individual compliance with ethics law	11
	Advice on lease/lack of a lease	4

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Advice on Pending Litigation	1205
Advice on public body's response to ethics commission inquiry	9156
Contract extension	5177
Discussion with lawyers and lobbyists about advancing position already adopted publicly	9127 9165
Discussion with in-house counsel about advice of counsel not present at the session	758
Discussion with counsel regarding potential settlement of claims	302-13233 736 842 88
Discussion with lawyer with whom the public body has formed an attorney-client relationship	8
Elimination of agency – consulting counsel regarding employment law matters	749
Fact that issue discussed with counsel earlier or lack of litigation not determinative	677 6127
Lease provisions	4161
Legal consequences of providing quitclaim deed	635
Legal options for implementing already-made decision	978
Legal options for collecting already-authorized fee	944
Legal ramifications relating to negotiations with developer	5130
Liability and related issues arising from possible agreement between town and private school over use of town park	3293
Participation by non-lawyer who supplies information pertinent to counsel's formulation of legal advice	11
Possible cancellation of contract	3345
Presentation/Advice on compliance with open government laws	4 58 4 114 8 137
Zoning board's discussion with counsel about hearing requirements in a controversial matter	197-6224

3. Outside exception Action on whether to accept submission in land use matter 10......57 3......16 Discussion not attended by counsel 8...... 86 9...... 167 12......46 Instructions to counsel on how to proceed in negotiations with 5......135 developer on public body's behalf Policy deliberation or any other aspect of legislative process 1......95-11...145 9...... 156 11...... 38 Proposing or ratifying a charter or charter amendment` 12.....69 Pursuing the outsourcing of municipal services 6......104 Report from non-lawyer about counsel's advice; counsel must be present 1.......93-6......35 1......73 1......94-7......96 1......95-2.....113 7......148 Request to counsel to draft legislation Substantive decisions by public body as to content of contract 6......127 Topics beyond rendering of legal advice 1......1 1......53 1......95-2.....113 1......95-11...145 1......96-6.....169 1......97-1.....201 3......16 6...... 151 7......95 12......69 Topic with incidental legal ramifications 1.......53 H. PENDING OR POTENTIAL LITIGATION: Section 3-305(b)(8) 1. Within exception Effect of adoption of legislative findings on litigation 3......61 8......42 Discussion about status of settlement negotiations 8......8 Discussion of contract for litigation services in connection with lawsuit

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Discussion of settlement possibility	88
	Discussion of potential lawsuit	8137 944 978 999
	Discussion with counsel and lobbyists about possible litigation to advance position already taken publicly	9127 9165
	Discussion with counsel re potential litigation arising from contract change	9110
	Hearing requirements in a controversial zoning matter	197-6224
	Litigation and delegation of settlement authority, in combination with §10-508(a)(7)	736
	Pending or potential litigation even if counsel is not present	173
	Pending or potential litigation, including settlement options, whether public body would be plaintiff or defendant	156
	2. Outside exception	
	Citizen complaint to federal agency	302-13233
	Exception not applicable unless cited on closing statement	1098
	Litigation not yet a concrete possibility	193-738 197-9237
	Request to counsel to draft legislation	7148
	Underlying policy issue not directly related to litigation	156
	Collateral issue not directly related to litigation	795
I.	COLLECTIVE BARGAINING: Section 3-305(b)(9)	
	1. Within exception	
	Discussion between county commissioners and school board about funds available for potential contract	302-15 245
	Discussion of collective bargaining negotiations when public body had statutory duty to review any agreement before the negotiating public party executed it	835
	Discussion of pay topic that fell within collective bargaining agreement	1159 1213

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Discussion regarding whether to reopen negotiations	758
	Negotiations with union	7125
	Proposed ratification of collective bargaining agreement	971
	2. Outside Exception	
	Discussion of existing collective bargaining agreements	4104
	Discussion of whether to recognize a particular union or employee representative	7112
	Negotiations with school bus contractors	1252
J.	PUBLIC SECURITY: Section 3-305(b)(10)	
	1. Within exception, discussion of	
	Discussion of location of 911 center involving security issues	7225
	2. Outside exception, discussion of	
	Discussion of sheriff's appointees to advisory board not related to emergency plans or deployment of police	7112
	Procedures for handling petty cash	173
	Use of property owned by public body	7208
K.	EXAMINATIONS: Section 3-305(b)(11)	
	Discussion of electrician's examination, as part of process for obtaining a certificate of registration: within exception	113
L.	CRIMINAL INVESTIGATION: Section 3-305(b)(12)	
	Discussion of investigation in which public body has no role:	350 542
Μ.	OTHER LAW: Section 3-305(b)(13)	
	Discussion of confidential financial information	8137
	Discussion of minutes sealed under the Open Meetings Act	9160
	Medical records laws	7250
	Preserving attorney-client privilege	173
	Public Information Act	1293

TOPIC/SUBTOPIC VOL. OPN. PAGE

N. PROCUREMENT: Section 3-305(b)(14)

1.	Within	exception,	discussion	of
----	--------	------------	------------	----

Advantages / disadvantages of RFP for audit services	5177
Discussion directly related to a competitive procurement process	1260
Naming rights, when done in competitive procurement process	971
Oral presentations by offers	71
Procurement matter after bid opening but pre-award, when adverse effect of disclosure found	863
Presentations by potential vendors	71
Proposals to provide legal services	7125 999
Sole source contract or contract modification only to the extent intertwined with a competitive procurement that would be adversely impacted by disclosure of the discussion	88 9110
Strategy for project to be put out to bid	173
Vote to select particular developer	5126
2. Outside exception, discussion of	
Contracts not involving competitive process	9160
Disposition of public property without competitive process: outside exception	4
Monetary offers to well owners	3233
Negotiation strategy not involving competitive bidding or proposals	197-8 233
Membership in athletic conference	8137
Procurement procedures, generally	9160
Sole-source contracts, change orders, task orders	9132

O. CYBERSECURITY: Section 3-305(b)(15) (No Opinions Yet)

- 1. Within exception, discussion of
- 2. Outside exception, discussion of

TOPIC/SUBTOPIC VOL. OPN. PAGE

TOPIC FIVE

5. Conditions for closing a meeting: Before closing a meeting subject to the Act, did the public body make the written disclosures required by the Act and vote publicly to exclude the public, in the presence of a member designated for training? Section 3-305(d).

A. CLOSED SESSIONS

1. Generally

After-the-fact addition of reasons for closed session: violation	5
Citing multiple applicable exceptions, permissible	1178
Closed-session procedures, summarized (Note : See § 3-213, eff. 7/1/17, for current law)	7
Conditions for closing meetings now set forth in § 3-213 as well as § 3-305	1154
Conducting closed session in separate room: permissible if public could observe the vote to close	5105
Discretion as to those in attendance: held by the public body, if exercised with some apparent basis	6171
Discussion must fall within the cited exception	11
Final action in closed session: whether permitted by Act	173 9110
Impromptu hallway meeting: subject to all procedural requirements	120
Written statement should reflect the elements of the exception claimed	863
Oral presentation at next open session about prior closed session: not required	3340
Section 3-305(d) procedures not applicable to session not subject to the Act	9206
Vote to select developer: permitted under the circumstances	526
2. Practices in violation	
Citing non-existent exceptions	929
Discussing, in closed session, topics not disclosed on written statement	946 957

TOPIC/SUBTOPIC VOL. OPN. PAGE 9......167 11......22 11.....59 11......74 Discussing, in closed session, topics not within any exception 9......29 11.....59 3......24 Failure to comply with Section 3-305(d) 3......50 3......115 5......70 5...... 136 6...... 114 7...... 186 7...... 274 8...... 137 9...... 195 10...... 126 3.......345 Invoking exception not linked to anticipated discussion 3. Presence of member with training or else use of Compliance Checklist B. CLOSED SESSION VOTE: Section 3-305(d)(1),(2). 1. Generally 3......209 Motion to close session: must be made by member of public body 9......57 Oral announcement of topics not to disguise the intended topics 12.....69 Procedures for objection to closed session Vote to close must be held at the session to be closed 3......4 11...... 12 Vote to close must be held in open session 1......96-12...191 1......97-1 201 1......97-4.....218 2......74 8......1 8...... 86 9...... 141 12.....117 2. Practices permitted

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Vote at same meeting, shortly before closed session	303-4264 7148 1172
	Open session in smaller room	5105
	If record reflects members present and any dissenting, voice vote permitted	623
	Vote at same meeting, shortly before closed session	6127 7148
	Vote to close on the basis of a pre-prepared statement if still accurate	91
	Vote during session open to the public not rendered invalid by fact no member of the public present	69
	3. Practices in violation	
	Failure to vote	302-2173 303-11307 7186 1219
	Failure to vote publicly to close	8
	Failure to record vote	7112
	Passive assent without documentation	5189
	Permitted if individual votes are recorded	3197
	Vote at one meeting to close the next	194-573 195-8133 5160 5177 5
	Voting without knowing the topics to be discussed	946
C.	WRITTEN STATEMENT	
	1. Generally	
	Agenda not a substitute unless complete and adopted as closing statement	1122

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Failure to prepare written statement before closing the meeting	7225 915 929
Failure to provide information required by Act	7
Failure to read aloud contents of written closing statement (no violation)	12
Must be accurate and disclose all topics; Must be informative	9
Must reflect exceptions/topics cited in oral motion to close	9132
Must only note the exceptions the public body expects to apply	1293
Notice of Objection to the Closing – After objection to closed meeting, failure to provide written statement to the Open Meetings Act Compliance Board	12108
Posting on website not required (but see § 3-306(e)(eff.10/1/2016)	5165 12117
Practices in violation	81
Preparation before, not in, closed session	835 7112 7250 111
Reason for closing to be specified when not apparent from the topic discussed	895
Request for copies for prior meetings	730
Request for copies governed by Public Information Act	730
Summary of closed session should meet elements of the exception claimed as basis for closing	8182
Use of meeting agenda: insufficient unless adopted at time of closing and completed with required items	104
Use of model form recommended, but not required	8166

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Statement to be completed by presiding officer or ratified by presiding officer before closed session; pre-prepared statements, generally	7
Topic description to establish applicability of claimed exception	7225
2. Practices permitted	
Failure to post on Internet	5165
Identifying topic but not discussing it in meeting	193-947
Inclusion of statement in agenda, if adopted (check)	446
Omitting identity of anticipated participants	193-947
Omitting identity of appointee	6127
Omitting identity of third party proposing action under discussion	572
Omitting specification of "reason for closing" when clear from other parts of statement	4188
Preserving confidential information	192-516 193-223 197-10242 104
Reliance on written statement prepared by staff in advance if accurate at time of closure	677
Statements providing purpose of closed session, statutory, authority and description of topics to be discussed	6121
Topic of discussion described briefly	5165
Topic of discussion described in a single phrase rather than a series of items	4188
3. Practices in violation	
Altering statement during closed session	5105
Failure to cite correct basis for the closing	7245 1269
Failure to include information required by Act	6

TOPIC/SUBTOPIC VOL. OPN. PAGE 12......13 12......35 12.....41 12......52 12......62 12......108 12.....117 Failure to prepare written statement 1......97-5 220 3......8 3......173 3......233 3......307 5...... 86 5...... 98 5...... 139 7...... 186 7...... 112 7......250 8...... 86 8...... 137 8...... 150 9......99 9...... 110 9...... 141 10...... 77 11...... 54 12......19 12......55 12.....85 7......112 Failure to record a vote Failure to timely disclose/provide to public on request 5......184 9......46 Omitting reason for closing 3.......136 4......46 9...... 110 11...... 47 11...... 78 12......88 Omitting specific statutory cite 5......149 7......36 12.....69 Omitting topic to be discussed 1......1 4......38 7......49 TOPIC/SUBTOPIC VOL. OPN. PAGE 10......4 10...... 35 10...... 46 10...... 57 10...... 85 10...... 98 11...... 85 Omitting topics that were then improperly discussed in closed session 7......131 10......85 1......13 Oral discussion of basis for closing session, later recorded in minutes 1......16 Preparing written statement during or after closed session 3......4 3......01-16...147 7...... 112 7...... 225 7......250 8...... 38 9...... 57 12......55 Uninformative boilerplate/mere repetition of statutory authority 1......23 1......96-12...191 1......97-10...242 1......97-11...245 5...... 149 5...... 160 7...... 36 7...... 131 7......245 3......101 3......335 4......114 4...... 142 4...... 161 5......14 5...... 33 5...... 149 5...... 160 6......77 7...... 112 7......245 8......99 9...... 180 12......28 12.....41 12.....69 12......93 TOPIC/SUBTOPIC VOL. OPN. PAGE

D. POST-SESSION SUMMARY OF SESSION (see subject #6)

TOPIC SIX

6. Minutes and other meeting documents: Did the public body prepare and retain the meeting documents required by the Act and, to the extent practicable, post its minutes? Sections 3-302(d), 3-306, 3-104

A.	COPY OF NOTICE: Section 3-302(d) (See subject #2)	
	Not required: continuing to post cancellation notice on website past the date of the canceled meeting	9151
	Requirement met when screenshot can be recovered	9175
	Failure to retain copy of website notice	1093
В.	MINUTES: Section 3-306	
	1. Generally	
	Accuracy	6145 9268
	Administrative session summary to list persons present	9206
	Adoption within Reasonable Time Considering Special Circumstances	1280
	Approval of minutes to be prompt	7264
	Audio/video: written minutes required when system fails	9256
	Draft minutes not "minutes" until adopted	784
	Failure to keep	7274 992
	Individual member of public body not required by § 3-306 to make copy of minutes available for inspection	1157
	Level of detail required	6
	Method by which minutes are prepared, adopted, or amended, within public body's discretion	194-263 971 9146 12112

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Methods for public bodies that meet rarely	1093
Minutes to be prepared "as soon as practicable"	8
Minutes to be adopted for joint meeting with another public body	1022
Minutes to be adopted for public body's final meeting	101
Minutes to be available to members of public, including those participating in litigation against public body	842
Need not include documents reviewed by the public body at the meeting	8122 971
Not required to reflect events which were not discussed or acted on in meeting	88
Request for minutes made in person: not a Public Information Act request	811
Posting on public body's website, not required (Note : See GP § 3-306(e) for current law).	303-18340 6187 6203 7225 7240 9199 9
Posting on website required, to the extent practicable	1283 1293
Preparation following all meetings, required	4
Preparation following session without quorum, not required	51
Preparation via alternative method required when unusual circumstances preclude preparation through customary means	424
Preparation "as soon as practicable"	299-1887 6161 6

TOPIC/SUBTOPIC VOL. OPN. PAGE 12......62 12......83 Public body that meets only periodically responsible for ensuring minutes 6......164 available within reasonable time 7......30 Request for copies as opposed to inspection, governed by PIA rather than OMA 9......218 Recorded votes: when taken, minutes to reflect how each member voted 7......237 7......10 Responsibility for preparation: ultimately the public body's 8......63 Redaction generally not permitted 9......226 Review by counsel, not violation 9......71 Use of terms that the public can understand 12......33 4......74 Tape recordings not required but if made, must be retained for at least one year (**Note**: See GP § 3-306(d), eff. 10/1/16) 8......46 Transmission by e-mail not required 7......274 Violation by committee Voting, minutes to disclose how each member votes when a recorded vote is 7......237 required 8......173 When prompt adoption of minutes is impracticable through no fault of the public body, public body should provide meeting information in another 8......180 form or adopt by different method 8...... 176 When impracticability relates to one item, public body may promptly adopt 9......259 minutes that note the missing item, and amend later 2. Practices permitted 6......47 Atypical, brief delay in availability of minutes attributable to unusual workload Delay in approval of closed session minutes 4......1 7......8 7......237 Disclosing minutes of a meeting closed to discuss a specific personnel matter 2......16 7......225 Posting on website not required

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Preparing in time for the public body's next regularly scheduled meeting	195-3 117 9 110 11 25
Preparation time beyond 10 days after meeting	385 7237 9230
Preparation time of five weeks	3340
Recorded votes, to be included	9206
Taking a reasonable amount of time to review draft minutes for accuracy and approve them	298-311 299-1887
Producing handwritten minutes	7121
Prohibiting inspection of draft, unapproved minutes	211
Relatively brief delays in preparing minutes, attributable to staffing constraints	299-1992 101
3. Practices in violation (see also topics C and D, below)	
Failure to approve minutes of closed sessions	5105 1147
Failure to approve minutes without undue delay	301-596 4
Failure to post minutes online as soon as practicable	1157
Failure to prepare for open meeting held only for purposes of voting to meet in closed session	1228
Failure to prepare for meeting limited to procedural matters only	550

1	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	Failure to prepare minutes	5
	Failure to prepare written minutes when recording equipment malfunctioned	795
	Failure to produce	6
	Failure to review and approve minutes	300-3
	Failure to timely disclose	5184
	Lag time of nearly 4 months in approving minutes	685
	Lag time of 7 months in approving minutes	780
	Requiring member of public to submit written request for open session minutes	385 514
	Redaction	764
	Treating minutes request made in person as a Public Information Act request	827 9218
C.	CONTENTS OF MINUTES OF OPEN SESSIONS (see also topic D)	
	1. Practices permitted	
	Brief description of required elements	446
	Omitting confidential information from summary of topics discussed and actions taken at closed session	195-1110 298-518

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Transcript disclosure as minutes	196-4162 7118 7186
Transcript not required	6110
2. Practices in violation	
Action and votes taken, failure to include	301-19164
Administrative function disclosure, no detail beyond "administrative matters"	, 696
Boilerplate reference to statutory exception in summary of closed session	7208
Dissenting votes, failure to include	196-2155
Failure to include in open session minutes the actions that were taken in closed session but should have been taken in open session	7148
Failure to include vote to close	1293
Failure to identify persons present	7225
Final written report of a committee not a substitute	7118
Inadequate description of closed session topic	7112
Information about topics discussed, failure to include	195-1 110 298-5 18
Item of business conducted, failure to include	194-263
Required elements, failure to include	38 301-596 302-13233
Tape recording disclosure in lieu of minutes	287
3. Compliance Checklist (no opinions yet)	
D. IN OPEN SESSION MINUTES, SUMMARY OF PRIOR CLOSED SES	SION
1. Generally	
Disclosure of topics not discussed advisable when the meeting was closed in part to discuss them	8
Failure to provide information required by Act	8

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Meeting recessed for closed session under administrative function exclusion – required disclosures	6
Minutes to contain meaningful summary of prior closed session	7
Must describe items considered in enough detail to convey the issue discussed	81
Must include the three items specified by the Act	81 1112
Oral summary on meeting video insufficient when official minutes are the written minutes	1147
Oral summary on meeting video sufficient when official minutes are video recording	1228
Preparation and adoption within reasonable time required	8111
Preserving the confidentiality that justified the closed session	1205
Summary may be provided in minutes of that day's open session, if public knows where to look	9180 9226
Summary not required to list topics that the public body did not reach	1159
Summary required for administrative function meeting held during recess of open session	1269
Summary not required for administrative function meeting held separately, not during recess of open session	9160
Summary of closed-session actions to be provided in minutes of next open session	7
Summary should be in plain language that the public can understand	9132
Summary should meet elements of the exception claimed as a basis for closing	8182 8137
Summary to be incorporated by reference into minutes if kept as separate document	1035
Timeliness of adoption	7264
Written summary alone insufficient if video minutes are the public body's "minutes"	1244

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Written statement prepared before closing meeting and subsequent disclosure in minutes: 2 distinct requirements	5165
Omission of functions of each non-member attendee	863
2. Practices permitted	
Preserving the confidentiality that justified the closed session	192-516 194-573 195-1110 104
Protecting identity of business considering relocation	260
Not specifying vote to adjourn	8137
Not listing how each member voted on action taken in closed session	8137
Not disclosing names of individual personnel discussed in meeting closed for that purpose	8182
Not disclosing real property discussed in meeting closed to discuss the acquisition of that property	8182
3. Practices in violation	
Changing justification for closed session	5177
Failure to adopt summary as part of minutes	9160 1288
Failure to cite authority for closing a session or to list the topic of discussion and the persons present	194-263 1246
Failure to identify attendees or provide other required information	194-367 302-15245 6

TOPIC/SUBTOPIC VOL. OPN. PAGE 12......55 Failure to identify certain attendees involved in business location discussion 5......86 even by generic description 7......148 Failure to disclose actions improperly taken in closed session Failure to include description of any action taken during closed session 4......38 1......73 Failure to include specific statutory authority for closing a session 6......23 7...... 36 3......3-20 ... 352 Failure to prepare minutes of closed sessions or disclose summary about closed sessions 5...... 98 12.....5 Failure to provide information required by the Act 12......93 Failure to report required information as single item 6......127 Failure to include any summary of closed session 8......86 9......151 12......85 12......108 12.....114 Substituting "final report" that does not report on meeting on timely basis 7......118 3......173 Inadequate description/information 4......76 4......114 5...... 139 5...... 165 5...... 189 6......96 6...... 171 7...... 5 7......8 7...... 112 7...... 115 7...... 125 7...... 140 7......208 8......9999 11...... 85 12.....01 12......09 12.....41

	TOPIC/SUBTOPIC	VOL. OPN. PAGE
		1244 1293
	Reusing written statement prepared prior to closing session	3202
E.	CLOSED-SESSION MINUTES: Section 3-306(c)	
	Access to sealed minutes by individual member of public body in public body's discretion	5105
	Closed session minutes to contain meaningful information	7245
	Belated adoption of closed session minutes not a substantial violation, as public is not entitled to inspect them	8176
	Failure to adopt: violation	9127 9156
	Methods of adopting, generally	9160
	Sealing and unsealing	7195
	Written closing statement made before closed session: not a substitute	9127
	TOPIC SEVEN	
7.	Guidance; training: What is the role of Compliance Board opinions, a training? Sections 3-204 through 211; 3-213	and who must take
A.	GENERALLY	
	Minutes of closed sessions considered by public body as sealed – obligation to treat as confidential	6192 944
	Request for penalty, not within Board's authority	81
	Way in which minutes are posted online: outside Board's purview	9226
	Written statement for closing a meeting to be provided to Board when member of the public objects immediately to closed session	946
B.	COMPLAINT	
	Complainants are encouraged to focus on concerns regarding public bodies' current practices or recent conduct	1237
	Complaints to be based on good-faith belief, after reasonable inquiry into the facts, that Act was violated	301-14 143 8

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Dismissal when allegations, taken as true, do not state violation of Act/do not involve public body	8
	1224
Complaint must identify public body	6171
Complaint procedure most effective when invoked for actual interference with the right to observe the conduct of public business	1280 1283
Complaint process not to be used to induce public body to give special treatment to PIA request	9218
Complaint should be limited to requirements of the Act	6
Complaint process should not be used by same complainant for conduct the Compliance Board has already addressed	9304
Limitations period/laches not applicable to complaints to Board	33-20352 9199
Neither party possesses burden of proof	677
Process not to be used for hypothetical and speculative allegations	1223 1233
Public body no longer in existence: complaint dismissed (Note : See § 3-206(cfor current law)	4111
Sufficient detail if public body can identify meeting and conduct	669 674
C. LIMITS OF BOARD'S AUTHORITY	
Act does not govern access to records not required under the Act	657
Authority not affected by pending circuit court action	9186
No authority to address complaint that a certain constituency was not represented on committee or given notice of contemplated action	7274
No authority to address public body's decision on public comment	8170
No authority to address member's disclosure of information about closed session	299-1477 7142
No authority to declare violation "cured" in subsequent meetings	9199

_	TOPIC/SUBTOPIC	VOL. OPN. PAGE
	No authority to dismiss complaint as untimely or stale	9199
	No authority to enforce the Act:	195-2113 197-1201 7142
	No authority to interpret judicial review provision:	4186
	No authority to interpret quorum provision of municipal charter	46
	No authority to compel production of document	842
	No authority to address Public Information Act requests	7284
	No authority to order public body to suspend action pending resolution of complaint	10101
	Open Meetings Act issues only Public body's distribution of opinions to members not governed by Act	299-1477 301-14143 301-15145 5
	(Note:See § 3-211 for current law) Public access to recordings of meetings governed by Public Information Act, rather than Open Meetings Act	
_		
D.	OPINIONS	
	Alleged violations of other laws: not addressed	298-11 298-621 298-931 299-649
	Disputes of fact: not resolved	1 94-1 56 1 94-8 101 2 99-4 43 2 99-13 74 2 99-16 80 3 01-12

TOPIC/SUBTOPIC VOL. OPN. PAGE 8...... 122 9...... 156 9...... 186 9...... 271 Inability to gather and resolve facts regarding whether private corporation 7......195 owned by public body is de facto public body 9......246 12......39 Inability to resolve complaint about long-past events when it is unclear what actually happened Insufficient information about nature of meetings: no opinion issued 3......140 9......239 9...... 273 10...... 128 12.....5 12......13 12......102 9......171 Insufficient information, but 2 inferences plausible: both addressed 9......132 No need to consider applicability of exceptions that the public body did not cite before it met in closed session 9......186 No need to consider applicability of exceptions when meeting was not closed properly; none apply in that event 9......195 No need to address practices earlier than those on which the Compliance Board 10......95 has already given guidance 12......5 Opinion deferred pending resolution of circuit court action 7......89 Public body's summary of discussion at closed session: presumed accurate 4......104 absent evidence to the contrary Reconsideration of prior opinion – standards 3......255 7......92 8......71 10......80 7......195 Inability to gather and determine the facts needed to resolve complaint E. RESPONSE TO COMPLAINT 9......307 Adequate responses, general standards for Exception not cited by public body in written statement before closed 1......53 session: may not asserted later as justification 1......73

_	TOPIC/SUBTOPIC	VOL. OPN. PAGE
		194-796 4104
	Public body's response that does not provide information on the statutory criteria at issue: inadequate	88
	Conflicting inferences: cannot be resolved	8166
	Failure to provide requested materials: violation	303-20352 514
	Failure to respond: violation	300-11 4186 51 764 9273 1074
	Failure to respond in a timely manner: violation	6203
	Response found not to be misleading: no violation found	9132
	Response required of each complained-of public body	8166
F.	ANNOUNCEMENT/ACKNOWLEGMENT OF VIOLATION	
	Announcement sufficient; advisable to record in minutes	9132 12112
	Announcement may be accompanied by statement of disagreement	1172
	Deadline not extended by reconsideration request	1080
	Failure to announce, violation	10
	Failure to sign opinion, violation	101 10110
G.	TRAINING REQUIREMENT (see also Topics 5(A)(3) and 6(C)(3))	
	1. Designation of trainee	
	Designation of new trainee advisable when former designee no longer a member, officer, or employee	9195
	Designation of trainee by board chair, permissible	9304
	Designation not required before newly-created public body meets	9268

TOPIC/SUBTOPIC	VOL. OPN. PAGE
Designee still serving public body, no violation	1077
Failure to designate trainee, violation	1074
Substantial compliance, training completed by designee not yet identified to the Board (Note: change in law on designation)	9234
2. Training	
Compliance established by certificates	1147
Must be taken in form specified by Act	9218

[End of index]