

WORKING SUMMARY

FOIA-BERKLEY-2026-07-09-001: Berkley Group Costs and Ordinance Update Records

Prepared for	Transparency for New Kent - Board / Director Review
Prepared by	Mike Joyce / Working Draft
Date	August 4, 2026
Status	Working Summary - For Share Drive Review / Not Published
Record folder	FOIA Requests and Responses -> 01 Berkeley Group Costs -> FOIA-BERKLEY-2026-07-09-001_Berkley_Group_Costs

BLUF

Bottom line up front: This FOIA record shows that Mike Joyce requested records about money approved, invoiced, and paid to The Berkley Group. The County clarified that The Berkley Group was not the consultant for the Comprehensive Plan process and was instead hired for the County's Subdivision and Zoning Ordinance update. The County then provided records including the RFP, procurement forms, agreement/proposal materials, work order, purchase orders, invoices, project summary, and postcard-mailer records. The main purchase order reviewed for The Berkley Group shows a total approved amount of \$236,250.00 for consulting services for ordinance updates. The invoice set available in the Share Drive for February through June 2026 totals \$43,580.88 based on the invoice balance-due amounts reviewed. A separate Bank of America purchase order for postcard mailings related to advertising the zoning and subdivision update project shows \$5,420.40.

Important Scope Clarification

- The original request used the phrase "Comprehensive Plan process."
- The County responded that it did not possess records responsive to that wording because The Berkley Group was not the Comprehensive Plan consultant.
- The County clarified that The Berkley Group was hired to update the County's Subdivision and Zoning Ordinance.
- Mike Joyce corrected the request the same day and asked for the records related to The Berkley Group's work on the Subdivision and Zoning Ordinance update.
- This summary should not claim that The Berkley Group was the Comprehensive Plan consultant. The clean wording is: Subdivision and Zoning Ordinance update.

FOIA Email Timeline

Date / Event	Summary
July 9, 2026 - 6:17 AM	Mike Joyce submitted a Virginia FOIA request to Rodney Hathaway asking for records showing the total amount approved, invoiced, and paid to date to The Berkley Group, including costs tied to surveys, canvassing, focus groups, small-group sessions, public workshops, and other community outreach or engagement activities.
July 9, 2026 - 8:23 AM	Rodney Hathaway confirmed receipt and stated that New Kent County did not possess records responsive to the

	request as written because The Berkley Group was not the Comprehensive Plan consultant. He stated that The Berkley Group had been hired to update the County's Subdivision and Zoning Ordinance.
July 9, 2026 - 3:01 PM	Mike Joyce corrected the request and asked for records related to The Berkley Group's work on the County's Subdivision and Zoning Ordinance update.
July 13, 2026	Rodney Hathaway acknowledged the corrected request under the Virginia Freedom of Information Act.
July 14, 2026	Rodney Hathaway provided responsive documents by email.

Documents in the County Response Folder

The Share Drive response folder contains these responsive files from the County response:

- ProjectSummary.pdf
- RFP25_2104CD_ComprehensiveZoningandSubUpdate.pdf
- ProcurementFormPostCardMailers.pdf
- Minuteman Press_May 11 2026_PO20260489.pdf
- BerkleyProcurementForm.pdf
- BerkleyGroupWorkorder1.pdf
- BerkleyGroupPurchaseOrderVendorCopy.pdf
- BerkleyGroupPurchaseOrderCountyCopy.pdf
- BerkleyGroupProposal.pdf
- BerkleyGroupAgreement.pdf
- Berkley Group_February 2026_PO20260364.pdf
- Berkley Group_March 2026_PO20260364.pdf
- Berkley Group_April 2026_PO20260364.pdf
- Berkley Group_May 2026_20260364.pdf
- Berkley Group_June 2026_PO20260364.pdf
- BankofAmericaPurchaseOrderCountyCopy.pdf
- BankofAmerica_MinuteMan_PurchaseOrder.pdf

What the Records Show

1. The project was for zoning and subdivision ordinance updates.

- The RFP is titled "Comprehensive Zoning & Subdivision Ordinance Update."

- The RFP says New Kent County Community Development was seeking qualified firms to provide planning services in support of comprehensive zoning and subdivision ordinance updates.
- The RFP describes the County's need to clarify, simplify, reorganize, and update its development ordinances, including compliance with state statutes, best practices, public participation, and development-process improvements.

2. The Berkley Group work order describes a large scope of work.

- Work Order 1 is titled "Zoning Ordinance and Subdivision Ordinance Update."
- The work order includes investigation, development, and adoption phases.
- The investigation phase includes staff input, kickoff, document review/diagnostic report, focus groups, public workshops, public pop-ups, community survey, engagement summary, county tour, joint kickoff with Planning Commission and Board of Supervisors, and project branding / website development.
- The development phase includes drafting, graphics, staff review, joint work sessions, and meeting materials.
- The adoption phase includes an open house, additional public review, public hearings, final ordinance deliverables, and supporting documents such as SOPs, checklists, or application forms.

3. The main purchase order reviewed shows \$236,250.00.

- Purchase Order 20260364 is for Berkley Group LLC.
- The description is "Consulting Services for Ordinance Updates" and "Comprehensive Zoning and Subdivision Ordinance Update/Rewrite."
- The PO total shown is \$236,250.00.
- The department/location shown is Community Development.

4. The invoice set reviewed shows at least \$43,580.88 invoiced through June 2026.

The following invoice totals were read from the invoice PDFs in the Share Drive. These should receive a second human review before public posting.

Month	Invoice No.	Invoice Date	Amount / Balance Due	Source File
February 2026	Invoice 2026-067	03/05/2026	\$1,318.75	Berkley Group_February 2026_PO20260364.pdf
March 2026	Invoice 2026-109	04/01/2026	\$4,050.00	Berkley Group_March 2026_PO20260364.pdf
April 2026	Invoice 2026-258	05/05/2026	\$4,764.78	Berkley Group_April 2026_PO20260364.pdf
May 2026	Invoice 2026-369	06/02/2026	\$17,868.18	Berkley Group_May 2026_20260364.pdf
June 2026	Invoice 2026-458	07/07/2026	\$15,579.17	Berkley Group_June 2026_PO20260364.pdf
Total reviewed			\$43,580.88	Calculated from the invoice amounts above

5. A separate postcard-mailer purchase order shows \$5,420.40.

- Purchase Order 20260489 is to Bank of America NA and references EDDM postcard mailings.
- The description states: "EDDM postcard mailings to advertise zoning and subdivision update project."
- The PO total shown is \$5,420.40.
- This appears separate from the Berkley Group purchase order, but it is related to advertising the zoning and subdivision update project.

Public Outreach / Engagement Items Identified

The work order and invoices identify several public-outreach or engagement-related line items. This section is useful for the public website because it explains what outreach work was included in the ordinance-update scope.

Item	Description	Amount Shown	Source
A04	Focus Groups (up to 4)	\$4,900.00	Work order / invoice schedule
A05	Public Workshops (up to 1 in-person and 1 virtual)	\$5,475.00	Work order / invoice schedule
A06	Public Pop-Ups (up to 2)	\$6,600.00	Work order / invoice schedule
A07	Community Survey (online and hard copy)	\$3,300.00	Work order / invoice schedule
A08	Engagement Summary	\$3,100.00	Work order / invoice schedule
A10	Project Branding and Website Development	\$14,100.00	Work order / invoice schedule
C2	Public Open House (up to 1)	\$3,400.00	Work order / invoice schedule
PO 20260489	EDDM postcard mailings to advertise zoning and subdivision update project	\$5,420.40	Bank of America purchase order

Plain-English Public Summary Draft

Draft language for website or director review:

This FOIA response includes records related to The Berkley Group's work for New Kent County on the Subdivision and Zoning Ordinance update. The County first clarified that The Berkley Group was not the Comprehensive Plan consultant. After the request was corrected, the County provided responsive records including the RFP, procurement records, agreement/proposal materials, work order, purchase orders, invoices, project summary, and postcard-mailing records. The records show a Berkley Group purchase order totaling \$236,250.00 for ordinance-update consulting services. The invoice records reviewed from February through June 2026 total \$43,580.88. A separate purchase order for EDDM postcard mailings to advertise the zoning and subdivision update project totals \$5,420.40.

Questions Raised by the Record

- What total amount has been approved, invoiced, and paid to date for the Subdivision and Zoning Ordinance update?
- How much of the \$236,250.00 purchase order has been paid so far, and how much remains open?

- Which invoice line items were tied to focus groups, workshops, public pop-ups, community survey work, engagement summaries, project branding, project website development, and open-house activities?
- How were focus group participants selected, and were those lists or selection criteria documented?
- What public input was collected through workshops, pop-ups, surveys, and open houses, and where is that input stored?
- How will the public-input records be reflected in future ordinance decisions?
- What materials were mailed to the public under the EDDM postcard mailing purchase order, and where are the final mailer copies?
- Which records should be published first so citizens can understand the scope, cost, and public-input process without being overwhelmed?

Working Summary Review Note

This document is a working summary for Share Drive review. It is not a final public website post and should remain subject to director review before any public-facing publication decision.