



Communicating & Developing Relationships with Elected Officials

October 2, 2026



- Please describe the structure of your local governmental entity and the elected officials for whom the Finance Director/CFO advises.
 - What is the number of commissioners, council members, aldermen, board members, etc., on your elected/appointed body, and how often do they meet?
 - Does your Mayor/Supt/CEO serve as the day-to-day official, or is this role provided by a Director of Schools or Town or City Manager?
 - Do you also serve appointed boards or committees such as an Industrial Board, Public Building Authority, etc.?

- Does your elected body have an annual retreat in which they share their goals, and if so, would you please share the staff's role?

- Do you have an orientation for new elected officials that includes a financial component as they assume their new positions?
 - If so, would you please describe what you accomplish in this effort?
 - Do you find that it has been productive, and what information/goals/results came from these efforts?

- Would you share an example of a time in which you had to explain a complicated financial situation?
 - What steps did you take, and what was the outcome?

- What is your advice for promoting effective communication with elected/appointed officials within your organization?
- Do you have a specific manner that you use to communicate information to your elected officials/board members to keep them informed?