

Town Council Agenda

SHEPHERDSTOWN TOWN COUNCIL MEETING AGENDA

Wednesday, July 8, 2026 – 6:30 p.m.

Town Hall – 104 North King Street

or Join By Zoom

<https://us06web.zoom.us/j/86067120451?pwd=fWNLscmYpiOmof8Pknlig4oZKNXa8i.1>

Meeting ID: 860 6712 0451

Passcode: 818383

Revised July 6, 2026 – New Business, Item 8. c. “Town Magistrate” has been removed.

1. Call to Order

2. Attendance

3. Approval of Minutes

- a. Special Town Council Minutes of June 8 and Regular Town Council Minutes of June 10

4. Public Comment Period

- a. [Registered speakers / public comment item]

5. Public Hearings

- a. Second Reading of Planned Unit Development Ordinance Amendment and Replacement
(continued)

6. Mayor’s Report and Proclamations

7. Ongoing Business

- a. Market House Plaza Pilot/Demonstration - Update
- b. Flower Bed Maintenance – Update
- c. Shepherdstown Elementary School Property – Update
- d. Artistic Benches -- Update

8. New Business

- a. Special Events Request - Vote
 - i. Indivisible Event – July 17
- b. Volunteer Applications - Vote
 - i. Shepherdstown Planning Commission
 - ii. Age Friendly Shepherdstown

- c. Resolution in support of Petition Requesting the State to Complete the Path to Morgan Grove Park
- d. Development of Ordinance on Accessory Dwelling Units -- Discussion
- e. Water Department FY27 Budget – Discussion
- f. Sanitation Department FY27 Budget – Discussion
- g. Donations to the Town – Discussion/Vote
 - i. Marker in Rumsey Park (Historic Shepherdstown - Doug Perks)
- h. Town Applications for Grants – Status
- i. Planning Town Council Orientation and Retreat - Discussion

8. Town Staff / Department Reports

- a. Department Reports
- b. Town Financial Status
- c. Approval of Town Expenditures

9. Reports by Committees, Commissions, and Boards

Draft and/or approved meeting minutes

- a. Age Friendly Shepherdstown
- b. Finance Committee
- c. Grants Committee
- d. Historic Landmarks Committee
- e. Parks and Recreation Committee
- f. Personnel Committee
- g. Public Works Committee
- h. Tree Commission
- i. Water Board and Sanitary Board

10. Adjournment

Town Council Meeting Minutes

DRAFT
SHEPHERDSTOWN SPECIAL TOWN COUNCIL MEETING MINUTES

June 8, 2026 – 6:30 p.m.

Town Hall – 104 North King Street and via Zoom

1. Call to Order The meeting was called to order at 6:30 p.m.

2. Attendance

- a. **Members Present** James Gatz (J Gatz), Marty Amerikaner (M Amerikaner), Marcy Bartlett (M Bartlett), Linus Bicker (L Bicker), Shannon Thomas (S Thomas), Carrie Blessing (C Blessing) (ZOOM)
- b. **Staff Present** Amy Boyd (A Boyd), Gino Sisco (G Sisco), Hunter Wetzel (H Wetzel)
- c. **Visitors Present:** [First Name, Last Name (First Initial Last Name)] *Visitors that will be providing information to the meeting.*

3. Public Comment None

4. Canvassing and Declaring the Results of the June 2 Shepherdstown Municipal Election

- a. The mayor thanked the poll workers and staff for their work on the election.
- b. It was reported by Recorder Marty Amerikaner that there were no spoiled, absentee, challenged, provisional, or mail-in ballots, and that all ballots cast were counted.
- c. The following vote totals were reported: James Gatz, Mayor – 114; Harriet Pearson, Recorder – 117; Ashley Sanders, Town Council – 94; Jim Auxer, Town Council – 86; Marcy Bartlett, Town Council – 111; Joey Yates, Town Council – 96; Cheryl Roberts, Town Council – 111. Total voters: 131. Registered voters: approximately 806.
- d. Motion made by Marcy Bartlett to declare the voting totals as the official results of the June 2, 2026, Shepherdstown Municipal Election. Seconded by Linus Bicker. Motion passed unanimously.

5. Setting the Recount Request Bond Amount

- a. Motion made by Shannon Thomas to set the recount request bond at \$100.
- b. Seconded by Marcy Bartlett. Motion passed unanimously.

6. Real Estate Matters

- a. Motion made by Marcy Bartlett to enter Executive Session pursuant to West Virginia Code § 6-9A-4 to discuss real estate matters. Seconded by Marty Amerikaner. Motion passed unanimously.
- b. Council entered Executive Session and later returned to open session.

- c. Following the Executive Session, a motion was made by Shannon Thomas to approve the resolution to authorize the mayor to enter into a purchase agreement on behalf of the Town to purchase the Shepherdstown Elementary School property. Seconded by Marcy Bartlett. Motion passed unanimously.

7. Mayor's Report

- a. The Mayor reported that the bond financing briefing scheduled for the following day would be postponed.
- b. Council was informed that the finance discussion with the Water Board was scheduled for June 11, 2026.

- 8. Adjourn:** Motion made by Marcy Bartlett to adjourn meeting at 7:12 p.m. Seconded by Linus Bicker. Motion passed unanimously.

DRAFT

DRAFT: SHEPHERDSTOWN TOWN COUNCIL MEETING MINUTES

June 10, 2026 – 6:30pm

Town Hall – 104 North King Street and Zoom

1. Call to Order - Meeting called to order at 6:35 p.m.

2. Attendance

- a. **Members Present:** James Gatz (J Gatz), Marcy Bartlett (M Bartlett), Marty Amerikaner (M Amerikaner), Shannon Thomas (S Thomas), Cheryl Roberts (C Roberts) and Carrie Blessing (C Blessing).
- b. **Staff Present:** Amy Boyd (A Boyd), Gino Sisco (G Sisco), Maged Kirollos (M Kirollos), Woody Coe (W Coe) , Karl Musser (K Musser), Mike King (M King), Hunter Wetzel (H Wetzel).
- c. **Visitors Present:** List of those who signed in is available from Town Clerk

3. Approval of Minutes

- a. Special Town Council Minutes of April 21, 2026
 - i. Motion to approve April 21, 2026, Special Town Council minutes. The motion made by M Amerikaner was seconded by M Bartlett and approved unanimously.
- b. Regular Town Council Minutes of May 13, 2026
 - i. A correction was requested to reflect that proposed edits were substantive changes rather than wording-only changes. Motion to approve May 13, 2026, Regular Town Council minutes approved unanimously (motion by M. Amerikaner, second by M. Bartlett) after correction to p.2 requested by M. Bartlett was accepted.
- c. Special Town Council Meeting of June 8, 2026
 - i. The June 8, 2026, minutes were not yet available.
- d. Amendment to April 8, 2026, Minutes
 - i. M Amerikaner moved and C. Roberts seconded motion to amend the previously approved April 8 minutes concerning the Market House Plaza 90-day pilot item to accurately record the full motion that was made by S. Thomas. The corrected minutes should say that “after extensive discussion, S Thomas moved and M Bartlett seconded a motion to accept L Bicker’s 90-day timeline with inclusion of the HLC and to proceed with the pilot, with or without the grant”. The motion to amend the April 8 minutes was approved unanimously.

4. Public Comment

- a. Maria Allen, owner of Maria's Taqueria spoke on behalf of several business owners and residents regarding the Market House Plaza proposal.
 - i. Concerns included emergency access, delivery truck access, traffic circulation, parking loss, handicap parking, lack of a traffic study, and the need for more input from business owners, residents, West Virginia DOH, emergency responders, and commercial drivers before commencing any pilot. Alternatives suggested included removable bollards for events, non-permanent community features, shade structures, and a micro-park or garden limited to the width of the Market House.
- Residents thanked Council for its service and acknowledged the work involved in public service and the transition to a new Council term.

5. Public Hearing

- a. Second Reading of Planned Unit Development Ordinance Amendment
 - i. Council opened the public hearing for the second reading of the Planned Unit Development ordinance amendment.
 - ii. M Bartlett raised four proposed edits for further review: creating or identifying a public list of adopted town policies; revising open-space requirements to focus on natural open space; making traffic impact analysis a required submission unless waived; and clarifying Planning Commission authority and Town Council review in the PUD process.
 - iii. C Blessing requested that affordable-housing language in the review criteria be strengthened so that affordable housing is not merely discretionary for certain residential developments.
 - iv. Council agreed to seek clarification from the consultant and further review the identified issues before continuing the second reading at a future meeting.

6. Mayoral Proclamations

- a. J Gatz presented proclamations of appreciation recognizing Dr. Mary J.C. Hendricks for her service as President of Shepherd University;
- b. Brian and Darlene Truman for their work organizing the July 4 parade;
- c. and M Amerikaner, L Bicker, S Thomas, and C Blessing for their service to the Town Council and the Shepherdstown community.
- d. J Gatz also thanked all residents serving on boards, commissions, and committees.

7. Ongoing Business

- a. Certification of June 2 Municipal Election Results
 - i. Town Recorder M Amerikaner reported that in the June 2 town election there were no spoiled, challenged, provisional, or mail-in ballots. Council

completed the required canvass had been completed, and the 48-hour period for a recount had passed with no recount request received.

- ii. Motion made by S Thomas and seconded by C Roberts to certify the June 2 Municipal Election results was approved unanimously.

b. Winning Design – Town Welcome Banner – Announcement/Discussion

- i. S Thomas announced that Danielle Corsetto's design was selected for the new town welcome banners.
- ii. The Town previously approved 24 of the winning banners; printing is expected to take approximately three weeks, with installation anticipated after CATF.
- iii. Rena Barrender received an honorable mention for her submitted design, and Council discussed finding a way to display or recognize it.

c. Market House Plaza – Update

- i. J Gatz reported that public input from blue cards and other sources is being compiled.
- ii. The Town is continuing discussions about a traffic study, now expected to include German, High, Washington, and Princess Streets.
- iii. Council clarified that the previously discussed 90-day planning period would include due diligence and public input before any 90-day trial.

d. Flower Bed Maintenance – Update

- i. J Gatz reported that an RFP was completed and that the Town has received a proposal related to flower beds on German Street and King Street.

e. Real Estate Matters: no discussion

8. New Business

a. Equipment Purchase (Trash Truck) – Discussion

- i. J Gatz reported that the Town's trash truck has recurring repair issues and that staff are exploring the purchase of a replacement truck estimated at approximately \$250,000. No action was taken; the item will be reviewed by staff and by the Public Works and Finance Committees before being brought back to Council.

b. Briefing on Water Line Replacement / Streetscape Planning – Discussion

- i. W Coe briefed Council on the lead service line replacement project. A 2024 inventory identified 422 galvanized lines that must be replaced by 2037. The estimated cost for service line replacement is approximately \$7.3 million, with about 49% expected from a state grant and the remaining 51% through a low-interest loan.

- ii. Staff are exploring coordination with streetscape planning, including sidewalks, lighting, utility work, drainage, and possible other infrastructure improvements while streets are open.
 - iii. Council and members of the public asked questions about disruption to businesses, timing, customer-owned service lines, sidewalk restoration, tree impacts, Town Run and drainage, state permitting, and whether work could be phased street-by-street to reduce disruption.
- c. Town Council Priorities for Grant Funding – this item was deferred.
- d. Town Council Committee Structure – Discussion
 - i. M Amerikaner and M Bartlett reported that they are working on a draft document to clarify committee structure and processes, including shared document spaces, terms for committee members, chair selection, ad hoc committees, and the roles of Council members and residents.
 - ii. M Amerikaner also suggested that Council consider having the mayor serve as an ad hoc member of committees rather than chairing or serving as a voting member on multiple committees unless State Code requires something different for a particular committee or commission. No discussion or vote was taken.
- e. Age Friendly Shepherdstown 2026 Action Plan – Discussion
 - i. Draft of 2026 Age Friendly Shepherdstown Action Plan presented by Linda Spatig, Chair of the Age Friendly Shepherdstown committee. The plan builds on the prior action plan, updates background and demographic information, carries forward five existing themes, and adds a sixth theme related to health and medical services.
 - ii. The themes include communication, non-vehicular mobility and safety, public transportation, mixed-income and accessible housing, green spaces, and health/medical services. The plan is aligned with the 2025 Comprehensive Plan.
 - iii. C. Roberts moved and M Amerikaner seconded the motion to approve the Age Friendly Shepherdstown 2026 Action Plan. Motion was approved unanimously. Mayor Gatz will provide a letter for inclusion in the final document indicating Town Council approval.
- f. Volunteer Applications
 - i. Age Friendly Shepherdstown: Motion Made by S Thomas and seconded by M Amerikaner to approve Lois Spreen as a member of the Age Friendly Shepherdstown Committee. Motion approved unanimously.

- ii. The Planning Commission application listed on the agenda was not ready for action.
- g. Shepherdstown Community Grant Applications
 - i. Roving Peregrine Theatre Company:
 - 1. J Quigley presented a request for \$1,250 to support the fall season, including rights for “Gutenberg! The Musical!” Council discussed the company’s nonprofit status, community partnerships, and funding. Request had been reviewed by Finance Committee, which recommended approval. Motion made by M Bartlett and seconded by S Thomas to approve the \$1,250 grant request. Motion approved unanimously.
 - ii. Rose Hill Cemetery:
 - 1. A Reese presented a \$2,000 request for tree removal and maintenance to support clearing invasive growth and preparing for ground-penetrating radar work to identify unmarked burials. The Finance Committee had reviewed the request and recommended approval. Motion made by C Roberts and seconded by Marty Amerikaner to approve the \$2,000 grant request. Motion was approved unanimously.
 - iii. 2026 Contemporary American Theater Festival:
 - 1. Amy Wretchford, CATF Managing Director, presented a \$25,000 request for a joint CATF/Shepherdstown digital marketing campaign, a user-generated content campaign, and box office support at the Welcome Center.
 - 2. Council discussed the economic benefit of CATF and related community activities.
 - 3. Request had been reviewed by Finance Committee, and recommended approval of the request. Motion made by S Thomas and seconded by C Roberts to approve the \$25,000 grant request. The motion was approved unanimously.
- h. Donations to the Town
 - i. Council discussed a potential donation of an interpretive sign for Rumsey Park from Doug Perks and Keith Alexander. The item did not make the packet and will be placed on a future agenda, along with information concerning the proposed replacement James Rumsey monument marker.
- i. Town Applications for Grants – Status/Discussion

- i. Council learned of a submitted Safe Streets and Roads for All federal grant application for a comprehensive traffic safety plan covering all modes of transportation. The application amount was discussed as approximately \$400,000; the Town has not yet received notice of award.
 - ii. Council also learned of a submitted application to the Mills Group for pro bono services related to studying reuse options for the tobacco warehouse near the riverfront. Council note that prior studies or materials may be useful if the Town is selected.
 - iii. Council announced that the Chesapeake Bay Trust awarded the Town grant funding for the community compost program, including household compost bins and larger transfer bins. The amount was discussed as approximately \$4,000 to \$5,000.
- j. Special Events Request – Slonaker/Hamilton Wedding at Rumsey Monument
 - i. S Hamilton requested approval to use Rumsey Park for a small wedding ceremony on Monday, June 29, for approximately one and a half hours. S Thomas moved and M Bartlett seconded motion to approve; motion passed unanimously.
 - ii. S Hamilton also reported receiving fraudulent emails using a fake Shepherdstown-related address and requesting a \$2,750 wire payment to process the event request. Council acknowledged the scam concern and discussed the need to be aware of public information being harvested for fraudulent invoices.

9. Town Staff/Department Reports

- a. Department Reports
 - i. Police Department:
 - 1. The department reported a normal month for May, including 430 calls for service, assistance with two threatening calls outside Town limits, and traffic enforcement comprising approximately 25% of the department workload with more than 100 traffic stops.
 - ii. Town Financial Status
 - 1. Finance staff reported that, through April 2026, total revenues were approximately \$2.4 million against a \$2.3 million budget, and total expenses were approximately \$2.1 million against a \$2.3 million budget.
 - 2. The Town is in a strong financial position with an approximate \$365,000 surplus. Council discussed hotel/motel tax timing, under-budget revenue categories, City Hall expense structure, and supplemental property tax timing.

iii. Approval of Town Expenditures

1. Council reviewed expenditures. Questions included whether year-to-date totals could be provided for large vendors and clarification was requested of naming for Shepherdstown Welcome Center versus Experience Shepherdstown. Motion made by M Amerikaner to approve town expenditures. The motion was seconded by M Bartlett and approved unanimously.

10. Reports by Committees, Commissions, and Boards

a. Parks and Recreation Committee

- i. C Roberts reported that the regular parks are operating appropriately.
- ii. Rumsey Park improvements include gravel for two parking spaces, a pad for a bike rack, receipt of the bike rack, removal of forsythia, topsoil and seeding in cleared areas, and installation of a water source.
- iii. Parks and Recreation is also working on replacement interpretive panels for James Rumsey Park and future bridge history panels.

b. Age Friendly Shepherdstown

- i. M Amerikaner noted no additional report beyond the earlier action plan discussion and acknowledged Lois Spreen's upcoming leadership role with Age Friendly Shepherdstown.

c. Grants Committee

- i. No separate report was given beyond the earlier grant application and grant-status discussions.

d. Water Board and Sanitary Board

- i. M Bartlett reported that water and sewer operations continue to run smoothly.
- ii. PFAS testing for biosolids is underway, budget discussions are continuing, a follow-up meeting will address the budget and possibly the capital improvement plan, the Water Board will begin work on updating the water tariff, the Consumer Confidence Report has been posted, and emergency and hazardous chemical inventory forms are being prepared.

11. Adjourn Motion to adjourn made by M Amerikaner. The Motion was seconded by M Bartlett and approved unanimously. The meeting adjourned at 9:32 p.m.

Public Hearings

Second Reading of Planned Unit Development Ordinance Amendment

TO: Town Council Members

FROM: James Gatz

DATE: July 6, 2026

SUBJECT: Background on Planned Unit Development Ordinance (Repeal and Replace)

Our July 8 agenda include the continuation of the "second reading" of the proposed ordinance to repeal and replace the Town's "Planned Unit Development" ordinance. See below for background information on the proposed ordinance and actions taken to date. We may choose to postpone a vote if folks need more time to review and discuss this item.

Background

- The Town hired Urban Design Ventures (UDV) in Fall 2025 to assist staff in addressing Planning/Zoning and Historic Landmarks issues. Our point of contact at UDV is Christopher Fletcher who is a former Planning Director for the City of Morgantown, WV.
- In early 2026, Town Council tasked UDV with reviewing and proposing needed revisions to the Planned Unit Development ordinance, and Christopher Fletcher met with the Planning Commission and Town Council to review the needs in February 2026. He later submitted a draft revised ordinance.
- In keeping with Town Ordinances, the Planning Commission reviewed the draft and voted to provide non-binding edits to Town Council on April 20. UDV reviewed and incorporated the suggested edits into the working draft.
- The Town Council held its first hearing on the draft on May 13 and voted to move forward with its review/consideration of the draft. At that time, Marcy Bartlett verbally discussed amendments she was considering.
- The Town Council held the first "second" hearing of the draft on June 10. At that time, Marcy Bartlett submitted four proposed amendments in written format and Carrie Jane Blessing submitted a comment, without a formal amendment. (See the attached document, "Amendments Proposed at June Town Council Meeting.") The Council debated the amendments and the comments. The Council opted to share the amendments with UDV for its input and suggestions.

- I sent the proposed amendments to Christopher Fletcher who responded with his reactions and suggestions. (See the attached document. “Chris Fletcher Shepherdstown PUD Revisions Clarifications.”) I also talked with Chris about his suggestions.
- The Town Council’s next step will be to review and vote on each proposed amendment; entertain any additional amendments proposed by the current members; and, when ready, vote on the overall proposed repeal and replacement ordinance.

1. Statute Section Number: 9-7A01

Clean Version Page Number: Page 1, A-6.

Rationale for the proposed change: It is unclear what adopted Town policies are in place.

Brief description of the proposed change: I make a motion to make a listing of the adopted policies, to place and keep updated the listing on the Town website, and to add the listing link within the updated PUD.

2. Statute Section Number: 9-7A04

Clean Version Page Number: Page 5, E1(b).

Rationale for the proposed change: Rather than set a minimum on Improved Open Space of at least 25%, we should set a maximum on Improved Open Space or better yet set the minimum on Natural Open Space of xx%.

Brief description of the proposed change: I make a motion to replace the following text “At least twenty-five percent (25%) of the total permanent open space shall be of the Improved Open Space type.” with “At least 50% of the total permanent Open Space shall be of the Natural Open Space type.”

3. Statute Section Number: 9-7A05

Clean Version Page Numbers: Page 9, C7 and C9 .

Rationale for the proposed change: What is the intent of this item? C7 enables the Planning Commission to authorize the PUD development plan independently rather than what C9 requires. That is, the Planning Commission to make a favorable or unfavorable recommendation to Town Council. In C7, what defines “...environmentally sensitive features on the site...” and “...is expected to be complex...” and “... there are other important planning implications involved ...” that would override Town Council review and approval.

Brief description of the proposed change: I make a motion to replace the C7 text “the Planning Commission may reserve the authority to review and approve the PUD Development Plan.” with “The Planning Commission will work closely with the Town Council to identify what environmentally sensitive features on the site, complexity, and other important planning implications involved that may warrant having the Planning

Commission authorize the PUD development plan rather than make a favorable/unfavorable recommendation to Town Council.”

4. Statute Section Number: 9-7A06

Clean Version Page Number: Page 19, B3(f).

Rationale for the proposed change: The Traffic Impact Analysis is critical for many projects and getting more so with the build-up of traffic flowing through our streets recently. Rather than having to request it, make it mandatory and allow for a waiver not to provide it if the developers can prove it is not needed.

Brief description of the proposed change: I make a motion to replace the following text “If requested by the Mayor and/or Zoning Officer or by the Planning Commission, a study of the traffic impact caused by the proposed Planned Unit Development and/or any measures proposed to mitigate that impact.” with “A study of the traffic impact caused by the proposed Planned Unit Development and/or any measures proposed to mitigate that impact is required.”

5. Comment on Section 9-7A07, part G; pp 21-22 Also referenced: 2025 Corporation of Shepherdstown Comprehensive Plan: Goal 1, Subcategory 1D/EC 12; p 24.

The introductory language of Section 9-7A07 instructs reviewing bodies only to “consider as many of the following principles as may be relevant”:

Section 9-7A07 Review Criteria In consideration of a Planned Unit Development Outline Plan, the Mayor and/or Zoning Officer in his/her report to the Planning Commission, the Planning Commission in their recommendation to Town Council, and the Town Council in its decision, shall consider as many of the following principles as may be relevant to the specific proposal:

Through the language as currently presented in this ordinance, criterion G becomes a discretionary consideration. Relevance determined at will by the reviewing bodies. Referring back to the Comprehensive Plan (passed in July 2025 after 1100 hours of work by many parties, across many meetings), EC12 reads as follows:

EC12: Incentivize Affordable Housing Development – Explore strategies that include revising the Town’s zoning ordinances to enable density bonuses for housing developments in town and in the GMB that set aside a minimum threshold of dwelling units to be made available at price points that are affordable for working families and the creative community.

As written, the Second Reading does not provide any requirement to satisfy any of the criteria. I ask that the revised language in Section 9-7A07 be strengthened to reflect the Goals put forward by the Comprehensive Plan such that for any PUD application involving residential use, Criterion G shall constitute a mandatory finding.

What the mandatory minimum requirement is will have to be determined and appropriate with the help of staff, but should reflect a clear and strong commitment to EC 12 of the Comprehensive Plan, a clear and strong commitment to make housing “*available at price points that are affordable for working families and the creative community*”.

June 16, 2026

To: Honorable James Gatz, Mayor, Shepherdstown

From: Christopher M. Fletcher, FAICP
Urban Design Ventures, LLC

RE: Planned Unit Development (PUD) Ordinance Repeal/Replacement
Town Council Request for Clarification

Mayor Gatz:

Please accept this memorandum addressing matters raised by members of the Shepherdstown Town Council concerning the PUD Ordinance repeal/replacement that recently passed First Reading.

1. Statute Section Number: 9-7A01 [Page 1, A-6] – Purpose of the PUD Ordinance

A-6 Ensure developments are consistent with the Comprehensive Plan and adopted Town policies.

The reference to "adopted Town policies" is included to ensure the PUD Ordinance remains relevant as the Town adopts additional plans, policies, and strategic initiatives in the future. While the Comprehensive Plan provides the primary policy framework today, the Town may later adopt documents such as parks and recreation plans, transportation plans, housing strategies, economic development plans, downtown revitalization plans, design guidelines, or sustainability policies. Including this language allows the Town to consider those officially adopted policies during PUD review without having to amend the PUD Ordinance each time a new policy document is adopted. If no such policies exist, the provision simply defaults to the Comprehensive Plan as the primary basis for review.

This language is intended to be forward-looking and allows future Town-adopted plans and policies to guide PUD decisions without requiring repeated amendments to the PUD Ordinance.

2. Statute Section Number: 9-7A04 [Page 5, E1(b)] – Permanent Open Space Designation

E-1-b At least twenty-five percent (25%) of the total permanent open space shall be of the Improved Open Space type.

Requiring at least 25% of the permanent open space to be Improved Open Space ensures that every PUD provides a meaningful amount of usable space for residents, such as parks, playgrounds, plazas, trails, greens, community gardens, or gathering areas. While Natural Open Space is important for protecting environmental features and preserving scenic character, it is not always readily accessible or usable for recreation. A minimum Improved Open Space requirement guarantees that residents receive tangible community benefits from the open space provided within the development.

By contrast, requiring at least 50% of the open space to be Natural Open Space can be overly restrictive, particularly on sites that lack significant environmental features or where the community's needs would be better served by active recreational amenities. The 25% Improved Open Space standard allows developers to balance environmental preservation with recreation, community gathering, and neighborhood amenities while still providing flexibility to preserve natural areas where appropriate.

3. Statute Section Number: 9-7A05 [Page 9, C7 and C9] – Review and Approval of PUD Development Plans

B-7 Where there are environmentally sensitive features on the site or the PUD Development Plan is expected to be complex, or there are other important planning implications involved, the Planning Commission may reserve the authority to review and approve the PUD Development Plan. And, where the Planning Commission recommends denial of a PUD Outline Plan and the Town Council approves the PUD Outline Plan, the Planning Commission shall review the PUD Development Plan.

B-9 Upon completion of its review, the Planning Commission shall forward the Outline Plan and PUD Application to the Town Council with 1) a favorable recommendation, or 2) an unfavorable recommendation.

PUD Development Plan review and approval is an administrative function and responsibility delegated to the Mayor and/or Zoning Officer unless:

- a. The Planning Commission retains review and approval authority at the time it reviews and recommends PUD Outline Plan approval to Town Council due to “complexity” or “important planning implications”; or,
- b. Town Council approves a PUD Outline Plan that the Planning Commission recommended against.

This first provision allows the Planning Commission to retain PUD Development Plan review/approval if a project contains environmentally sensitive areas, involves a particularly complex design, or raises significant planning issues. This provides an additional level of public review and oversight for projects that may have greater impact on the community.

The second provision requires the Planning Commission to review the PUD Development Plan when the Planning Commission recommended denial of the initial Outline Plan, but Town Council approves it anyway. In those cases, the Planning Commission remains involved in reviewing the project's detailed design and implementation to help ensure it complies with the ordinance and addresses planning concerns identified during the Outline Plan review phase.

In short, these provisions allow more scrutiny of complex or sensitive projects and ensures the Planning Commission remains involved when it has significant concerns about a PUD Outline Plan that was ultimately approved by Town Council.

4. Statute Section Number: 9-7A06 [Page 19, B3(f)] – Traffic Impact Analysis

B-3-(f) Traffic Impact Analysis. If requested by the Mayor and/or Zoning Officer or by the Planning Commission, a study of the traffic impact caused by the proposed Planned Unit Development and/or any measures proposed to mitigate that impact. Such study shall be conducted by a traffic or transportation engineer licensed in the State of West Virginia.

Requiring a Traffic Impact Study (TIS) for every PUD application can create unnecessary costs, delays, and administrative burdens for projects that are unlikely to generate significant traffic. PUDs can vary greatly in size and intensity, ranging from small residential neighborhoods to large mixed-use developments. Many smaller projects may have minimal impacts on the transportation network and do not warrant the expense of a detailed traffic study.

Instead, the PUD Ordinance should allow the Town to require a Traffic Impact Study when a proposed PUD is expected to generate a substantial increase in traffic, affect roadway operations or safety, create concerns at nearby intersections, or otherwise have the potential to adversely impact the transportation system. This approach ensures that traffic analysis is conducted when it is needed while avoiding unnecessary costs for developments with limited traffic impacts.

A threshold-based approach also allows the Town to focus resources on projects that present legitimate transportation concerns rather than treating all PUDs the same regardless of their scale or impact. The following floor amendment is offered for consideration to establish a reasonable threshold for the Town of Shepherdstown.

~~Traffic Impact Analysis. If requested by the Mayor and/or Zoning Officer or by the Planning Commission, a study of the traffic impact caused by the proposed Planned Unit Development and/or any measures proposed to mitigate that impact. A traffic impact study shall be required for any PUD that is projected to generate 100 or more vehicle trips during the peak hour of the roadway providing access to the PUD or when the Planning Commission determines that the proposed PUD may adversely affect the safe and efficient operation of the transportation network. Such study shall be conducted by a traffic or transportation engineer licensed in the State of West Virginia, shall be based on the standards set forth for same in West Virginia Division of Highways Directive 106-2, as amended, and address any measures proposed to mitigate impact. Traffic counts utilized for the study shall be conducted during a representative academic semester when Shepherd University is in session and shall not be collected during semester breaks, holidays, or other periods of significantly reduced campus activity.~~

5. Statute Section Number: 9-7A07 [Page 21, G] – Affordable Housing

G. The extent to which the proposed plan meaningfully advances the Town's affordable housing objectives through the provision of income-restricted units, integration of affordable units throughout the site, long-term enforceability of affordability restrictions, and proportionality between requested regulatory flexibility and public benefit.

This review criterion is included to ensure that when a developer requests the additional flexibility available through the PUD process, such as modified development standards, increased density, or alternative design approaches, the Town receives a meaningful public benefit in return.

Incentivizing affordable housing development is identified as a community need and a goal in Shepherdstown's current Comprehensive Plan:

EC12: Incentivize Affordable Housing Development – Explore strategies that include revising the Town's zoning ordinances to enable density bonuses for housing developments in town and in the GMB that set aside a minimum threshold of dwelling units to be made available at price points that are affordable for working families and the creative community.

The proposed PUD Ordinance repeal/replacement is the first affordable housing public policy statement considered for inclusion in Title 9 Planning and Zoning. This criterion, as currently stated, allows the Town to consider whether a proposed PUD contributes toward addressing that need.

The criterion does not automatically require affordable housing in every PUD. Rather, it provides a framework for evaluating the quality and effectiveness of any affordable housing proposed as part of the development. It encourages affordable units to be integrated throughout the development rather than concentrated in one area, helps ensure affordability commitments remain in place over time, and allows decision-makers to consider whether the public benefits offered are proportional to the regulatory flexibility being requested.

Including this criterion helps the Town balance private development benefits with community objectives and provides a clear basis for considering affordable housing during the PUD review process.

A minimum standard is not included because PUDs are intended to be flexible and tailored to individual sites. A fixed PUD requirement could discourage investment or make some projects infeasible, while a review criterion allows the Town to consider affordable housing as one of several potential public benefits and evaluate each proposal on its merits.

The following floor amendment is offered for consideration that avoids creating a de facto mandate, but provides, as a review criterion, greater context to “affordability” where a formal Town-wide affordable housing policy has not yet been adopted.

G. The extent to which the proposed plan meaningfully advances the Town's affordable housing objectives, including through the provision of income-restricted units affordable to households earning 80 percent or less of Area Median Income, integration of affordable units throughout the site, long-term enforceability of affordability restrictions, and proportionality between requested regulatory flexibility and public benefit.

If the Town seeks to require, for example, at least 10 percent of residential PUDs containing 25 or more dwelling units, it is generally a better practice to state that requirement directly in the ordinance standards rather than embedding it within a discretionary review criterion. This makes the requirement clearer and more legally defensible.

However, from a planning and legal standpoint, a minimum affordable housing requirement is generally more appropriate as a separate, town-wide housing policy or inclusionary zoning provision rather than being limited only to PUDs. Disadvantages of mandating a minimum affordable housing set-aside only in the PUD regulations include:

- Only affects projects that choose the PUD process.
- Developers may avoid the PUD process altogether to avoid the requirement.
- Produces fewer affordable units over time.
- Can create inequities where similar projects are treated differently depending on whether they are PUDs

Thank you for the opportunity to clarify and offer potential solutions to the matters raised by members of Town Council.

Warmest Regards,

A handwritten signature in blue ink that reads "Christopher M. Fletcher". The signature is written in a cursive, flowing style.

Christopher M. Fletcher, FAICP
Director of Planning + Visioning

AN ORDINANCE REPEALING AND REPLACING CHAPTER 7A OF TITLE 9 OF THE CODE OF SHEPHERDSTOWN FOR PLANNED UNIT DEVELOPMENT (PUD)

THE SHEPHERDSTOWN TOWN COUNCIL ORDAINS:

Chapter 7A of Title 9 of the Code of Shepherdstown is hereby repealed and replaced with a revised, updated ordinance entitled Planned Unit Development (PUD), to read as follows:

CHAPTER 7A PLANNED UNIT DEVELOPMENT (PUD)

Section 9-7A01 Purpose and Intent

A. The purpose of this Planned Unit Development (PUD) ordinance is to:

1. Encourage innovative and flexible land development that promotes efficient use of land and infrastructure;
2. Facilitate high-quality design, coordinated development, and mixed-use opportunities;
3. Preserve natural, scenic, historic, and environmental resources;
4. Promote compatible land uses and improved site planning;
5. Allow flexibility from conventional zoning standards in exchange for superior design, public amenities, and community benefits; and
6. Ensure developments are consistent with the Comprehensive Plan and adopted Town policies.
7. Establish criteria for the review and evaluation of proposed Planned Unit Developments.

B. The intent of this Planned Unit Development (PUD) ordinance is to offer one or more of the following advantages:

1. Apply the design principles of new urbanism, neo-traditionalism, and other emerging smart growth principles, village-scale urban form and development patterns, and best management practices to ensure a healthy, sustainable, and economically vibrant community, using Shepherdstown as a physical model;
2. Promote development patterns that maximize compatibility of differing adjacent land uses to avoid the necessity of extensive buffering;

3. Enhance the appearance of neighborhoods by conserving areas of open space, special natural beauty, historic resources, steep slopes, ecological importance, flood prone areas, and natural green spaces where appropriate, while understanding that land within Shepherdstown is best suited for densities and development patterns compatible with small town urbanism;
4. Encourage good village-scale contextual design and mitigate congestion on streets;
5. Promote architecture that is compatible with the Shepherdstown's community vernacular, and/or the surroundings;
6. Promote appropriate small town densities that encourage economical and socially feasible multimodal transportation, including walking, bicycling, and transit beyond private vehicles; and
7. Promote and protect the environmental integrity of the site and its surroundings by providing suitable design responses to the specific environmental constraints of the site and surrounding area.

Section 9-7A02 Definitions

The following terms are defined for the purpose of interpreting, administering, and enforcing Title 9, Chapter 7A Planned Unit Development (PUD).

- A. Applicant, PUD: The legal or equitable owner(s) or authorized agent proposed for PUD designation.
- B. Tract of Land: A single parcel or two or more contiguous parcels of land assembled for the purpose of development as a Planned Unit Development (PUD) and under single or unified ownership or control at the time of application.
- C. Planned Unit Development (PUD): A zoning classification enacted by Ordinance for an area under single or unified ownership or control for which land use and development are advanced as a single entity according to approved PUD planning documents that allows flexibility from standard zoning requirements. The PUD regulatory instruments include the approved Outline Plan and the Development Plan that generally consist of:
 1. A map showing the development area and all proposed improvements to the development area;
 2. Text that sets forth the permitted uses and development standards to be met; and,
 3. Exhibits setting forth any aspects of the Outline Plan and Development Plan not

fully described in the map and text.

The map, text, and exhibits constitute the PUD planning documents and identify the development, uses, standards, and regulations for the Planned Unit Development area in lieu of the regulations for the underlying district.

- D. Outline Plan: A generalized plan illustrating the overall design, layout, development standards, land uses, density, circulation, and open space.
- E. Development Plan: A detailed plan specifying exact development, phasing, and improvements.
- F. Permanent Improved Open Space: Functional and accessible open space usable for passive and/or active recreation such as, but not limited to parks, playgrounds, swimming pools, ball fields, plazas, courtyards, landscaped green spaces, trails and greenways, and other areas that are created or modified human activity. Such open space shall not include schools, community centers, or other similar areas.
- G. Permanent Natural Open Space: Meaningful areas of natural vegetation, water bodies, or other landforms that are left undisturbed.
- H. Development Standards: Regulations that govern the physical design, layout, intensity, and performance of development on a site, including but not limited to lot size, setbacks, building height, lot coverage, density, open space, landscaping, parking, access, signage, buffering, and other dimensional or design requirements applicable within the PUD.
- I. Underlying District: The zoning classification for property prior to the establishment of Planned Unit Development (PUD) District for same.
- J. Undisturbed Land: Land within a proposed PUD area that is in its natural state and has not been subject to grading, excavation, filling, clearing, compaction, construction activity, or other human alteration, except for minimal selective clearing or utility installation. Examples of undisturbed land include, but are not limited to undisturbed woodlands, wetlands, floodplains, stream buffers; areas of intact native vegetation not previously altered by development.
- K. Historic Resources:
 - 1. Identified as property, building, structure, and/or object that is individually designated as a local historic landmark;
 - 2. Located within a Town adopted historic district or historic district listed in the National Register of Historic Places;

3. Listed on or eligible for listing on the National Register of Historic Places; or,
4. Identified as a property, building, structure, and/or object contributing to a Town adopted historic district or historic district listed in the National Register of Historic Places.

Section 9-7A03 Applicability

- A. The Planned Unit Development (PUD) process shall be voluntary and initiated by the property owner(s) or authorized applicant.
- B. This Planned Unit Development (PUD) Ordinance may apply to:
 1. Lands already within the municipal boundaries of the Corporation of Shepherdstown, unless expressly prohibited by the Planning and Zoning Ordinance; and, processed
 2. Lands newly annexed into the Corporation of Shepherdstown.
- C. For newly annexed lands:
 1. Property may be classified as a Planned Unit Development (PUD) District concurrent with or subsequent to annexation approval.
 2. No property may be classified as a Planned Unit Development (PUD) District concurrent with annexation approval unless an Outline Plan has been approved.
 3. Property classified as PUD District after annexation approval shall follow the procedures set forth herein for lands already within the municipal boundaries of the Corporation of Shepherdstown
 4. Approval of a PUD for annexed lands shall constitute the establishment of zoning for the property following annexation and shall supersede any interim zoning classification.
 5. The underlying zoning district of a Planned Unit Development (PUD) District shall be the R-1 District unless otherwise classified in the approved Outline Plan.
- D. Land use and development within a Planned Unit Development (PUD) District may be permitted only through and pursuant to the approved PUD Outline Plan and PUD Development Plan.

Section 9-7A04 Requirements for Planned Unit Development

- A. The area designated in the Planned Unit Development map must be a tract of land at least two (2) acres in size and under single ownership or control. Single control of property under multiple ownership may be accomplished through the use of enforceable covenants, development agreements, and/or commitments which run concurrent with the Planned Unit Development.
- B. The Outline Plan shall indicate the permitted land uses, development standards, locations of improvements, and other applicable specifications of the Planning and Zoning Ordinance which shall govern the Planned Unit Development. If the Outline Plan is silent on a particular land use development standard or other specification of the Planning and Zoning Ordinance, the standard of the underlying district or the applicable regulations shall apply.
- C. The location of Planned Unit Developments shall be designated on the Official Zoning Map and adopted pursuant to rules and regulations governing amendments of the Planning and Zoning Ordinance.
- D. The Planned Unit Development must comply with all required improvements, construction standards, design standards, and all other engineering standards adopted and enforced by the Corporation of Shepherdstown, and any other pertinent regulations, except where specifically varied through the provisions of the Planning and Zoning Ordinance.
- E. Designation and Conveyance or Ownership of Permanent Open Space.
 - 1. Designation.
 - (a) Within all Planned Unit Developments, a minimum of thirty percent (30%) of the proposed PUD area shall be designated as permanent open space.
 - (b) At least twenty-five percent (25%) of the total permanent open space shall be of the Improved Open Space type.
 - (c) To the greatest extent practicable, permanent open space within a PUD shall be preserved as natural open space consisting of existing environmental features such as woodlands, wetlands, floodplains, steep slopes, riparian corridors, native vegetation, and other undisturbed lands. The applicant shall demonstrate during PUD Outline Plan review that site design, lot layout, building placement, and infrastructure locations have been arranged to prioritize the preservation of contiguous undisturbed natural areas before the designation of improved open space. Where

natural features are limited or preservation is constrained by site conditions, the applicant shall provide justification acceptable to the Town.

- (d) Creation of a graded and surfaced walking trails through areas of Natural Open Space shall constitute disturbance of the area and calculated as Improved Open Space in the amount of the length of the walking trail multiplied by its width.
 - (e) PUDs adjoining existing or planned parks or trails shall provide direct pedestrian and bicycle connections.
 - (f) Schools, community centers, club houses, museums, etc. shall not be calculated as permanent open space.
 - (g) Stormwater detention areas shall not be calculated as permanent open space unless designed as an amenity such as, but not limited to rain gardens, ponds with trails, etc.
- 2. Proximity. In the case of mixed-use Planned Unit Developments, permanent open space shall be allocated to the property in proportion to the uses assigned to the Planned Unit Development and shall be located in reasonable proximity to those uses. Provided, however, the permanent open space need not be located in proximity to the use in the case of preservation of existing features.
 - 3. Proportion. If the Outline Plan provides for the Planned Unit Development to be constructed in phases, open space must be provided for each phase of the Planned Unit Development in proportion to that phase.
 - 4. Conveyance. Permanent open space shall be conveyed in or owned by one of the following forms:
 - (a) To a municipal or public corporation; or
 - (b) To a nonprofit corporation or entity established for the purpose of benefiting the owners and tenants of the Planned Unit Development or, where appropriate and where approved by the Town Council, adjacent property owners, or both. All conveyances hereunder shall be structured to ensure that the grantee has the obligation and the right to effect maintenance and improvement of the common open space; and that such duty of maintenance and improvement is enforced by the owners and tenants of the Planned Unit Development and, where applicable, by adjacent property owners; or

- (c) To owners other than those specified in Subsections (a) and (b) above, and subject to restrictive covenants describing and guaranteeing the open space and its maintenance and improvement, running with the land for the benefit of residents of the Planned Unit Development or adjacent property owners, or both.
- F. Uses permitted in a Planned Unit Development may be any use that is found in the Planning and Zoning Ordinance in any district, subject to the PUD Outline Plan's schedule of permitted uses approved by the Town Council.
- G. For purposes of determining overall project size, two or more parcels of land owned by the applicant that are wholly or partially separated by a public street or other right of way may be considered contiguous and thus may be counted in fulfilling the minimum acreage requirement, provided that the use and development of the property is incorporated into, and is an integral part of the project plans; and provided that there is no other property not owned by the applicant separating the parcels in question. Where there is uncertainty in determining a parcel's qualification to be included in the PUD, the Planning Commission shall resolve the issue and make a determination as to the project boundaries, after considering the advice of the Mayor and/or Zoning Officer and the request by the applicant.

Section 9-7A05 Procedure for Approval of Planned Unit Development

- A. Introduction. Applications shall be accompanied by all plans and documents required by Sections 9-7A05. A three-step application process shall be used. The steps in the process are:
 - 1. Pre-application Conference;
 - 2. Outline Plan Approval; and
 - 3. Development Plan Approval.
- B. Pre-application Conference. Prior to filing a formal application for approval of a Planned Unit Development, the applicant shall schedule a pre-application conference with the Mayor and/or Zoning Officer. The purposes of the pre-application conference shall be to:
 - 1. Allow the applicant to present a general concept and to discuss characteristics of the development concept in relation to adopted Town plans and policies.
 - 2. Allow the Mayor and/or Zoning Officer to inform the applicant of pertinent policies, standards, ordinance requirements, materials, and procedures for the Planned Unit Development as well as identify and discuss potential site and off-site constraints.

3. The pre-application conference is intended only for the above purposes. Any discussion, comment, guidance, recommendation, interpretation, or indication of support expressed by Town officials, staff, consultants, or representatives during a PUD pre-application meeting shall be advisory only and shall not be binding upon the Corporation of Shepherdstown or the applicant. No statement made at such meeting shall constitute a formal decision, approval, or commitment regarding the PUD application. All determinations shall be made only upon formal submission, review, and action in accordance with the PUD procedures and standards set forth herein.
- C. Procedure for PUD Outline Plan Approval. Based upon the pre-application conference, the applicant must then develop and submit an Outline Plan for the proposed Planned Unit Development.
1. The Outline Plan and application for the Planned Unit Development shall be filed with the Mayor and/or Zoning Officer.
 2. Within fifteen (15) calendar days of submission, the Mayor and/or Zoning Officer shall determine in writing whether the PUD Outline Plan and Application are complete.
 - (a) If the PUD Outline Plan and Application are incomplete, the applicant shall be notified in writing of deficiencies.
 - (b) The official administrative review period shall not commence until the PUD Outline Plan and Application are determined to be complete.
 3. The period of official administrative review by the Mayor and/or Zoning Officer shall not exceed thirty (30) calendar days; provided the applicant may consent in writing to an extension of the review period.
 4. Where during official administrative review the Mayor and/or Zoning Officer determines that a PUD Outline Plan and Application include, may include, or may affect historic resources, the applicant shall be advised in writing that the PUD Development Plan and Application shall be referred to the Historic Landmarks Commission for review and, if applicable, certificate of appropriateness approval.
 5. The Outline Plan and PUD application and the results of the official administrative review shall then be forwarded to the Planning Commission for its consideration, public hearing and recommendations, together with the Mayor and/or Zoning Officer's report, such other documents as may be pertinent to the Planned Unit Development.

6. The Planning Commission shall hold a public hearing. A notice of time and place of such public hearing shall be published in a paper of general circulation in the area at least once, at least fifteen (15) calendar days prior to the date set for the hearing. Such notice shall contain the address or location of the property for which the Planned Unit Development is being sought
7. Where there are environmentally sensitive features on the site or the PUD Development Plan is expected to be complex, or there are other important planning implications involved, the Planning Commission may reserve the authority to review and approve the PUD Development Plan. And, where the Planning Commission recommends denial of a PUD Outline Plan and the Town Council approves the PUD Outline Plan, the Planning Commission shall review the PUD Development Plan.
8. The Planning Commission shall complete its review and render a decision on the PUD Outline Plan and Application within forty-five (45) calendar days of its public hearing, unless an extension of time is granted by the applicant.
9. Upon completion of its review, the Planning Commission shall forward the Outline Plan and PUD Application to the Town Council with 1) a favorable recommendation, or 2) an unfavorable recommendation.
10. The Town Council shall vote on the ordinance enacting the Outline Plan and PUD designation within forty-five (45) calendar days after Planning Commission action, unless an extension of time is granted by the applicant. The Town Council may enact or reject the PUD ordinance.
11. Outline Plan Revisions During Review. The Mayor and/or Zoning Officer; the Planning Commission; or the Town Council may permit submission of revised plans during their respective reviews. Acceptance of revised materials may restart the respective review periods upon written consent of the applicant.
12. Estimated Cumulative PUD Outline Plan Review Timeline. Figure 9-7A06-1 illustrates the estimated cumulative timeline for PUD Outline Plan review and decision points. The table is provided for reference only and shall not be considered regulatory. Review timelines provided herein are dependent upon the reasonable scheduling of public meetings and shall be adjusted to reflect regularly scheduled Planning Commission and Town Council meetings, requisite public notice, and changes in meeting dates.

PUD Outline Plan Phase	Duration	Estimated Cumulative Timeline	Description
Outline Plan Submission			
Phase 1 – Initiation	15 days	Days 1–15	Application completeness review and determination.
Phase 2 – Administrative Review	30 days	Days 16–45	Official administrative review.
Phase 3 – Public Hearing Notice	15 days	Days 46–60	Planning Commission Public Hearing advance notice.
Phase 4 – Planning Commission	45 days	Days 61–105	Planning Commission recommendation.
Phase 5 – Town Council	45 days	Days 106–150	Town Council decision on PUD Ordinance.

Figure 9-7A06-1 – PUD Outline Plan Estimated Cumulative Time

D. Effect of PUD Outline Plan Approval:

1. When an Outline Plan and PUD Ordinance has been enacted by the Town Council, the Outline Plan shall become effective and the Zoning Map shall be amended to designate the site as a Planned Unit Development (PUD).
2. Upon such amendment of the Zoning Map, the use and development of the site shall be governed by the PUD Outline Plan, subject to approval of the PUD Development Plan.
3. No permit of any kind within the PUD area shall be issued until the PUD Development Plan has been approved.

E. Procedure for PUD Development Plan Approval.

1. Purpose of PUD Development Plan. The purpose of the Development Plan is to designate the controls for development of the Planned Unit Development. The PUD Development Plan shall show the exact location of each building and improvement to be constructed and a designation of the specific internal use or range of uses for

each building.

2. Time Limit for Submission of PUD Development Plan. The PUD Development Plan shall be submitted to the Mayor and/or Zoning Officer not more than eighteen (18) months following Town Council approval of the Outline Plan and PUD ordinance; or, in the case of property classified as a Planned Unit Development (PUD) District concurrent with annexation, eighteen (18) months following the annexation effective date.
3. The PUD Outline and Development Plans may be submitted as a single plan if all requirements of Section 9-7A05 are satisfied. The PUD Development Plan may be submitted and approved in phases, with each phase representing a portion of the PUD Outline Plan, at the discretion of the Planning Commission. The time limit for submitting each phase for approval may be set forth in the PUD Outline Plan, in which case that schedule shall control the timing of development, rather than the time period contained in this paragraph. The Planning Commission may extend the time for application for approval of the PUD Development Plan and/or phases of the PUD Development Plan for good cause, consistent with the purposes of the Planning and Zoning Ordinance.
4. Expiration of Time Limit to Submit PUD Development Plan. The original PUD applicant(s) or current developer of the Planned Unit Development may request a time extension by submitting a written request to the Mayor and/or Zoning Officer at least sixty (60) days before the PUD Development Plan submission deadline. The Planning Commission shall have the authority to approve or deny the request for good cause. If the deadline expires without an approved extension, the Planning Commission shall initiate action to amend the Zoning Map to rescind the PUD District designation. The Mayor and/or Zoning Officer shall notify the applicant(s) or developer in writing at least thirty (30) days prior to the Planning Commission's public hearing.
5. Relationship of PUD Development and PUD Outline Plan. The PUD Development Plan shall conform to the PUD Outline Plan as approved.
6. The applicant must have the PUD Development Plan or phase plan approved prior to issuance of any project permit within the PUD District or related phase.
7. PUD Development Plan Submission. The Development Plan or phase plan and supporting data shall be filed with the Mayor and/or Zoning Officer.
 - (a) Within fifteen (15) calendar days of submission, the Mayor and/or Zoning Officer shall determine in writing whether the PUD Development Plan or

phase plan is complete.

- (1) If the PUD Development Plan or phase plan is incomplete, the applicant shall be notified in writing of deficiencies.

8. The official administrative review period, whether completed by the Mayor and/or Zoning Officer or by the Planning Commission, shall not commence until the PUD Development Plan or phase plan is determined to be complete. Official Administrative Review by Mayor and/or Zoning Officer.

- (a) It shall be the responsibility and authority of the Mayor and/or Zoning Officer to review and render a decision on PUD Development Plans or phases, and Planning Commission consideration or action shall not be required when such review and decision authority has been delegated; unless the PUD Outline Plan and the PUD Development Plan are submitted and approved as a single plan or the Planning Commission retains PUD Development Plan review and decision authority at the time the Planning Commission rendered a decision on the PUD Outline Plan; or Town Council approves an Outline Plan for which the Planning Commission recommended denial.

- (b) Within fifteen (15) calendar days of submission, the Mayor and/or Zoning Officer shall determine in writing whether the PUD Development Plan and Application are complete.

- (1) If the PUD Development Plan and Application are incomplete, the applicant shall be notified in writing of deficiencies.

- (2) The official administrative review period shall not commence until the PUD Development Plan and Application are determined to be complete.

- (c) The period of official administrative review by the Mayor and/or Zoning Officer shall not exceed forty-five (45) calendar days; provided the applicant may consent in writing to an extension of the review period.

- (d) Where, at the time of official administrative review of the PUD Outline Plan the Mayor and/or Zoning Officer determined that the PUD or any phase thereof includes, may include, or may affect historic resources, the PUD Development Plan or phase plan and application shall be referred to the Historic Landmarks Commission for review and, where required, for issuance of a Certificate of Appropriateness pursuant to § 9-309. Any

denial of a Certificate of Appropriateness, or conditions imposed as part of an approved Certificate of Appropriateness by the Historic Landmarks Commission, shall be binding upon the Mayor and/or Zoning Officer.

- (1) Review by the Historic Landmarks Commission and the Mayor and/or Zoning Officer shall occur concurrently following determination of completeness. Each reviewing authority shall render its decisions within the time period applicable to that authority, and such periods need not be of equal duration.
 - (2) Provided, the review of the Mayor and/or Zoning Officer shall not be completed, approval granted, or a project permit issued prior to the certificate of appropriateness approval by the Historic Landmarks Commission.
 - (3) In the event the Historic Landmarks Commission review extends beyond the period of official administrative review by the Mayor and/or Zoning Officer, the latter official administrative review period shall be completed within fifteen (15) calendar days following the Historic Landmarks Commission certificate of appropriateness approval.
 - (e) The Mayor and/or Zoning Officer shall review the Development Plan or phase plan to include site plan review, in accordance with the requirements of the Planning and Zoning Ordinance and the approved PUD Outline Plan.
9. Official Administrative Review by Planning Commission. When the Planning Commission retained PUD Development Plan review and decision authority at the time the Planning Commission rendered a decision on the PUD Outline Plan or Town Council approved an Outline Plan for which the Planning Commission recommended denial, the Planning Commission shall have the responsibility and authority to review and render a decision on PUD Development Plans or phases.
- (a) Within fifteen (15) calendar days of submission, the Mayor and/or Zoning Officer shall determine in writing whether the PUD Development Plan and Application are complete.
 - (1) If the PUD Development Plan and Application are incomplete, the applicant shall be notified in writing of deficiencies.
 - (2) The official administrative review period shall not commence until

the PUD Development Plan and Application are determined to be complete.

(b) The period of official administrative review by the Planning Commission shall not exceed forty-five (45) calendar days; provided the applicant may consent in writing to an extension of the review period.

(c) The Planning Commission shall:

(1) Review the PUD Development Plan or phase plan to include site plan review, in accordance with the requirements of the Planning and Zoning Ordinance and the approved PUD Outline Plan.

(2) Hold a public hearing in accordance with §9-7A06.C.3.

(3) Either approve, deny, or approve with modifications to the PUD Development Plan or phase plan.

(4) Complete its review and render a decision on the PUD Development Plan or phase plan within forty-five (45) calendar days of its public hearing, unless an extension of time is granted by the applicant.

(5) Where, at the time of official administrative review of the PUD Outline Plan the Mayor and/or Zoning Officer determined that the PUD or any phase thereof includes, may include, or may affect historic resources, the PUD Development Plan or phase plan and application shall be referred to the Historic Landmarks Commission for review and, where required, for issuance of a Certificate of Appropriateness pursuant to § 9-309. Any denial of a Certificate of Appropriateness, or conditions imposed as part of an approved Certificate of Appropriateness by the Historic Landmarks Commission, shall be binding upon the Planning Commission.

(a) Review by the Historic Landmarks Commission and the Planning Commission shall occur concurrently following determination of completeness. Each reviewing authority shall render its decisions within the time period applicable to that authority, and such periods need not be of equal duration.

(b) Provided, the review of the Planning Commission shall not be completed, approval granted, or a project permit issued prior to the certificate of appropriateness approval by the

Historic Landmarks Commission.

- (c) In the event the Historic Landmarks Commission review extends beyond the period of official administrative review by the Planning Commission, the latter official administrative review period shall be completed within fifteen (15) calendar days following the Historic Landmarks Commission certificate of appropriateness approval.

10. Estimated Cumulative PUD Development Plan Review Timeline. Figure 9-7A06-2 illustrates the estimated cumulative timeline for PUD Development Plan review and decision points. The table is provided for reference only and shall not be considered regulatory. Review timelines provided herein are dependent upon the reasonable scheduling of public meetings and shall be adjusted, as applicable, to reflect regularly scheduled Planning Commission and Historic Landmark Commission meetings, requisite public notice, and changes in meeting dates.

PUD Development Plan Phase Track 1 – Mayor/Zoning Officer Track 2 – Planning Commission	Duration	Estimated Cumulative Timeline	Description
Development Plan Submission			
Tracks 1 & 2 – Phase 1 Initiation	15 days	Days 1–15	Application completeness review and determination.
Track 1 – Phase 2a Administrative Review	60 days	Days 16-60	Official administrative review by Mayor and/or Zoning Officer.
Track 1 – Phase 2b (if applicable) Historic Landmarks Commission	60 days	Days 16-60	Historic Landmarks Commission review and certificate of appropriateness (if applicable)

PUD Development Plan Phase Track 1 – Mayor/Zoning Officer Track 2 – Planning Commission	Duration	Estimated Cumulative Timeline	Description
Track 2 – Phase 2 Public Hearing Notice	15 days	Days 1-15	Planning Commission Public Hearing advance notice.
Track 2 – Phase 3a Administrative Review	45 days	Days 16-60	Official administrative review by Planning Commission.
Track 2 – Phase 3b (if applicable) Historic Landmarks Commission	45 days	Days 16-60	Historic Landmarks Commission review and certificate of appropriateness (if applicable)

Figure 9-7A06-2 – PUD Development Plan Estimated Cumulative Time

11. Expiration of Approved PUD Development Plan. The PUD Development Plan shall expire two (2) years after approval, unless project permits have been obtained and are still current and valid on that date. This rule shall also apply to each phase of a PUD Development Plan approved in phases. The applicant may request, in writing and not less than sixty (60) days prior to the expiration deadline, an extension of time, and the approving authority may extend the time limit for good cause. Such extension may be considered at the time of PUD Development Plan or phase approval.
12. Effect of Approval of PUD Development Plan. No permit of any kind shall be issued for any purpose within a Planned Unit Development except in accordance with the approved PUD Development Plan, and after acceptance by the Corporation of Shepherdstown of all required guarantees for improvement.

Section 9-7A06 Specific Content of Plans

Planned Unit Development plans and supporting data shall include all documentation listed in this Section of Chapter 7A of Title 9 unless certain documentation is deemed superfluous by the Mayor and/or Zoning Officer due to the specific circumstances of the particular request.

A. Pre-application Conference Requirements

1. A written letter of intent from the applicant describing the applicant's purposes and objectives for developing the area proposed for Planned Unit Development (PUD) designation.
2. A scaled drawing of the contemplated PUD area, in simple sketch form, showing the proposed location and extent of the land uses, major streets, and the approximate location of any existing easements, natural features, and topographic or geologic constraints.

B. PUD Outline Plan Requirements

1. A drawing of the proposed Planned Unit Development shall be prepared at scale not less than 1" = 50' and shall show in concept major circulation; generalized location and dimensions of building structures and parking areas; open space areas, recreation facilities, and other details to indicate the character of the proposed development. The submission shall include:
 - (a) A site location map.
 - (b) Map data such as north point, scale and date of preparation.
 - (c) The name of the proposed development, with the words "Outline Plan" in the title block.
 - (d) Boundary lines and acreage of each land use component.
 - (e) Existing easements, including location, width and purpose.
 - (f) Existing land use on abutting and adjacent properties.
 - (g) Other conditions on adjoining land: topography (at no less than 2-foot contour intervals) including any embankments or retaining walls; use and location of major buildings, railroads, power lines, towers and other influences; name of any adjoining subdivision plat.
 - (h) Existing streets on and adjacent to the tract, including street name, right-

of-way width, walks, curbs, gutters, culverts and drainageways.

- (i) Proposed public improvements: streets and other major improvements planned by the public for future construction on or adjacent to the tract.
 - (j) Existing utilities on the tract.
 - (k) Any land within the proposed PUD area designated by FEMA as a Special Flood Hazard Area (SFHA) with a 1-Percent Annual-Chance of flooding (100-year flood) and the floodway.
 - (l) Other conditions on the tract, including water courses, wetlands, sinkholes, wooded areas, isolated trees six (6) inches or more in diameter at 4.5 feet above ground, existing structures, and other significant features.
 - (m) Existing vegetation to be preserved and the locations, nature, and purpose of proposed landscaping.
 - (n) The geographic Area of Potential Effect (APE) within which the PUD may directly or indirectly cause alterations in the character or use of above ground historic properties, including historic buildings, districts, structures, and/or objects, should they exist.
2. Miscellaneous. The Mayor and/or Zoning Officer shall inform the applicant of any additional documents or data requirements after the Pre-application Conference. The developer must submit 10 copies of any page of any portion of the plan that exceeds 11 inches by 17 inches in size. If fewer copies than required are submitted, the Mayor and/or Zoning Officer shall deem the application to be incomplete and shall not schedule hearing dates until the situation is resolved.
3. Written Statement of Character of the Planned Unit Development. An explanation of the character of the Planned Unit Development and the reasons why it has been planned to take advantage of the flexibility of these PUD regulations. The written statement shall include:
- (a) Objectives. A specific explanation of how the proposed Planned Unit Development meets the objectives of all adopted land use policies which affect the land in question.
 - (b) Ownership. A statement of present and proposed ownership of all land within the project including the beneficial owners of a land trust.

(c) Scheduling. Timing of proposed development indicating:

- (1) Phases in which the project will be built, including the area, density, use, public facilities, and open space to be developed with each phase. Each phase shall be described and mapped; and
- (2) Projected dates for beginning and completion of each phase of land development.

(d) Proposed Uses. A schedule of proposed permitted land uses, both by-right and conditional uses, along with the following details:

- (1) Residential Uses: dwelling unit types, gross area, architectural concepts (narrative, sketch, or representative imagery), number of units, bedroom breakdown, proposed occupancy limits for each residential component, and building heights.
- (2) Nonresidential Uses: specific nonresidential uses to be permitted, including gross floor areas (GFA), architectural concepts (narrative, sketch, or representative imagery), and building heights.

(e) Facilities Plan. Preliminary concepts and feasibility reports for:

- (1) Streets, roadways and bikeways
- (2) Sidewalks and pedestrian pathways
- (3) Water supply system
- (4) Sanitary sewers
- (5) Stormwater management
- (6) Public utilities
- (7) Streetscaping, furniture and lighting

(f) Traffic Impact Analysis. If requested by the Mayor and/or Zoning Officer or by the Planning Commission, a study of the traffic impact caused by the proposed Planned Unit Development and/or any measures proposed to mitigate that impact. Such study shall be conducted by a traffic or transportation engineer licensed in the State of West Virginia.

C. PUD Development Plan Requirements. The application for PUD Development Plan

approval shall include, but not be limited to, the following documents:

1. Such additional information as may have been required by the PUD Outline Plan approval.
2. An accurate map exhibit of the entire phase for which PUD Development Plan approval is being requested, showing the following:
 - (a) Tabulation on each separate subdivided use area, including land area, number of buildings, number of dwelling units per acre, type of dwelling units, bedroom breakdown, and limits on occupancy.
 - (b) Precise location of all buildings to be constructed, setbacks, and a designation of the specific use or range of uses for each building. Single-family residential development on individual lots need not show precise locations of buildings on each lot, but plans shall show minimum and/or maximum building setback lines and other design constraints.
 - (c) Design and precise location of all streets, drives, and parking areas, including construction details, centerline elevations, pavement type, curbs, gutters, and culverts details.
 - (d) Location of all public utility lines and easements.
 - (e) A final detailed landscape plan. A detailed final landscape shall be drawn to scale and depict existing and proposed site conditions, including buildings, parking, circulation, utilities, easements, and areas of disturbance. It shall identify all existing vegetation to be preserved or removed and all proposed landscaping, including trees, shrubs, groundcover, turf, buffers, and screening. The plan shall include plant quantities, species (botanical and common names), sizes, spacing, installation details, and landscape schedules. Required buffers, open space areas, screening, and any stormwater or environmental landscaping features shall be clearly shown. Where applicable, the plan shall include irrigation, phasing, and a maintenance and replacement program identifying the responsible party. The final landscape plan shall demonstrate compliance with the approved PUD Outline Plan and all applicable zoning and development standards.
 - (f) A detailed Permanent Open Space Plan showing the location and acreage of Improved Open Space, Natural Open Space and total Permanent Open Space; how it will be owned and maintained; and all proposed

improvements.

3. If lands to be subdivided are included in the Planned Unit Development, a subdivision plat meeting the requirements of a preliminary plat, as modified by the PUD Outline Plan approval, is required where platting is to be proposed concurrent with the PUD Development Plan review and approval process.
4. Projected construction schedule.
5. Agreements and covenants which govern the use, maintenance, and continued protection of the Planned Unit Development and its common spaces, shared facilities, and private roads.
6. Guarantee of Performance for Completion of Improvements. A bond or other guarantee acceptable to the Corporation of Shepherdstown shall be provided for all proposed public improvements and shall be executed at time of project permit application or platting, whichever comes first. Improvements that must be guaranteed include facilities that shall become public and may include other facilities or improvements as may be specified in the PUD Outline or PUD Development Plan approval. If the project is to be built in phases, the guarantee shall be posted prior to the commencement of work on each phase. The guarantee shall specify the time for completion of improvements and shall be in an amount of one hundred twenty-five percent (125%) of the estimated cost of the improvements, as determined by the project contractor or engineer, and as approved by the Planning Commission.

Section 9-7A07 Review Criteria

In consideration of a Planned Unit Development Outline Plan, the Mayor and/or Zoning Officer in his/her report to the Planning Commission, the Planning Commission in their recommendation to Town Council, and the Town Council in its decision, shall consider as many of the following principles as may be relevant to the specific proposal:

- A. The extent to which the proposed plan meets the purposes of the Planning and Zoning Ordinance, the Comprehensive Plan, and any other adopted planning objectives of the Corporation of Shepherdstown.
- B. The extent to which the proposed plan meets the requirements, standards, and stated purpose of the Planned Unit Development regulations.
- C. The extent to which the proposed plan complies with the Planning and Zoning Ordinance, including but not limited to, the density, dimension, bulk, use, required improvements, and construction and design standards.

- D. The extent to which the proposed plan supports public health, safety, and general welfare.
- E. The extent to which the physical design of the proposed plan makes adequate provision for public services, ensures adequate control over vehicular traffic while promoting alternative forms of transportation, preserves and protects designated permanent open space, and enhances the amenities of Shepherdstown's small-town character, which includes considerations for environmental stewardship, recreation, and visual enjoyment.
- F. The extent to which the proposed plan directly or indirectly alters the character or use of above ground historic properties, including historic buildings, districts, structures, and/or objects, should they exist, within the Area of Potential Effect (APE).
- G. The extent to which the proposed plan meaningfully advances the Town's affordable housing objectives through the provision of income-restricted units, integration of affordable units throughout the site, long-term enforceability of affordability restrictions, and proportionality between requested regulatory flexibility and public benefit.
- H. The extent to which the proposed plan promotes relationship, compatibility, and buffering to the adjacent properties and neighborhoods, and whether the proposed plan would substantially interfere with the use or diminish the value of adjacent properties and neighborhoods.
- I. The extent to which the proposed plan promotes the Corporation of Shepherdstown's physical development, tax base, and economic well-being. Special consideration in the form of increased development flexibility may be given to projects that are intended to rehabilitate or replace dilapidated areas, brownfields, or other areas of general visual or economic blight. Such special consideration shall not be granted to projects intended for construction on lands that consist of 60 percent or more previously undisturbed lands.
- J. The extent to which the proposed plan will not cause undue traffic congestion, and can be adequately served by existing or programmed public facilities, services, and infrastructure.
- K. The extent to which the proposed plan preserves natural, scenic, and environmental resources.
- L. The extent to which the proposed plan will enhance the appearance, image, function, and economic sustainability of the community at large.
- M. The extent to which the proposed plan supports multi-modal transportation options, preserves useful open space, provides significant amenities to residents, and incorporates architectural detailing, massing, and scale that is consistent with Shepherdstown's historic community character.

N. The extent to which the proposed plan is designed to a human scale, with design objectives that generally include, but are not limited to:

1. Building setbacks designed to reinforce and prioritize pedestrian-oriented streetscapes, frames the street, encourages social interaction, and supports an attractive and walkable community character. Examples might include, but are not limited to 5 to 15-foot front setbacks for single-family residential uses; 0 to 10-foot front setbacks for townhouses, mixed-use, and commercial buildings; minimum and maximum front setbacks that create a continuous street wall; non-residential uses with a public entrance facing the street; parking placed at the rear of buildings; etc.
2. Pedestrian infrastructure and design elements that prioritize walkability, enhance safety and accessibility, and create an inviting, human-scaled public realm. Examples might include, but are not limited to sidewalks on both sides of the street (i.e., 6-foot width for residential spaces and 10-foot width for mixed-use and commercial spaces); crosswalks at all intersections, mid-block crossings for blocks exceeding 300 feet, raised crosswalks and/or curb extensions in high-pedestrian areas; dedicated bicycle lanes or multi-use paths along arterial streets connecting to town-wide trails; larger PUDs (i.e., over 10 acres) that include a mile or more of internal pedestrian and bike paths; etc.
3. Mixed-use and active storefront development patterns that create vibrant and walkable environments by integrating public street building orientation, compact and dynamic commercial, office, and civic uses on ground-floor frontage, transparent facades, and pedestrian-scaled design thereby strengthening economic vitality, enhancing the public realm, and supporting safe, attractive, and dynamic community centers.

Section 9-7A08 Changes in the Approved Planned Unit Development

A. Changes Requiring PUD Outline Plan Approval. Material changes that alter the approved concept or intent of the Planned Unit Development shall require PUD Outline Plan Approval following the procedures under Section 9-7A06(C). Material changes include but are not limited to:

1. Significant changes in density;
2. Significant changes in the proportion or allocation of land uses;
3. Change in the list of approved uses;
4. Changes in the locations of uses;

5. Changes in functional uses of open space, where such change constitutes an intensification of use of the open space; and/or
 6. Changes in the final governing agreements where such changes conflict with the approved Outline Plan.
- B. Changes Requiring PUD Development Plan Approval. Material, site-specific changes that alter the development's approved functional, physical, or performance impacts shall require PUD Development Plan Approval following the procedures under Section 9-7A06(E). Material, site-specific changes include but are not limited to:
1. Revisions to lot arrangement, or addition of buildable lots that alter the approved development density;
 2. Modifications to approved site design standards, include but not limited to required landscaping, signage, building height, architectural character, building massing, or footprint;
 3. Alterations to the internal street network or off-street parking configuration;
 4. Changes to the design, location, or function of drainage or stormwater management facilities;
 5. Amendments to the approved Permanent Open Space Plan;
 6. Changes in site access that result in an intensification of traffic on roadways classified above local streets; and/or
 7. All other changes not expressly addressed under Section 9-7A09A shall require approval of a new or amended PUD Development Plan.

_____(Mayor)

_____(Recorder)

First Reading: May 13, 2026

Second Reading: _____

Adopted: _____

Market House Plaza Pilot/Demonstration

TO: Town Council Members

FROM: James Gatz

DATE: July 6, 2026

SUBJECT: Status of Grant Funding for the Plaza Pilot

The AARP Foundation awarded our Town \$13,455 on June 24, 2026, to support the implementation and evaluation of the Plaza Pilot. The grant requires the town to design and implement the pop-up pilot and to administer an evaluation that will inform the Town's decision on next steps after the pilot.

Our grant application was general enough so that we can make final decisions about the layout, design and evaluation of the pilot over the coming few weeks to address issues and concerns voiced by residents who attended the May 24 community conversation and the follow-up surveys. The application does indicate the pilot would be implemented from sometime in August through at least sometime in October. Regardless of the specific information presented in the application, I believe the foundation will allow us to make minor changes to the plan if needed.

See the attached "Resident and Business Input for Plaza Concept" for a summary of comments received at the Community Conversation meeting and the follow-up survey.

Chief King of the Shepherdstown Police Department has indicated, "The potential closing of S. King St from German St to Back Alley, "Market Plaza", should have no impact on police response or capabilities. In fact this street closure, in my opinion, will reduce traffic hazards to pedestrians walking along German St."

Chief Ross Morgan with the Shepherdstown Volunteer Fire Department is comfortable with the pilot as long as there is any barrier at the intersection of South King and Back Alley would be easily moved to give access from that direction. He sees no need have movable barriers at the intersection of South King and German Street.

Town staff are tracking usage data including timing and use of the plaza area and other designated loadings zones. In addition, staff are tracking traffic counts on both sides of the market house building and we are in conversation with an engineering firm for a more complete study of the impact on area traffic patterns.

Karl Musser and the Town Public Works crew have begun firming up plans and the timeline for the effort, and we've reached out to the Age Friendly Shepherdstown and others to

assist with designing and evaluating the pilot. It's imperative that the initial designs must address input and concerns received from residents over the past few weeks.

We have asked staff to submit their proposed initial implementation and evaluation plans by July 24, 2026.

Resident and Business Input

Initial Concepts for Administering a Test / Demonstration Public Plaza on Parts of South King Street

Introduction

The Shepherdstown Town Council Public Works Committee hosted a facilitated Community Conversation on May 21, 2026, at the War Memorial Building to introduce the Town's initial vision for a temporary, three-month demonstration of a pedestrian plaza in the northern portion of South King Street and to gather community feedback.

More than 50 residents attended the session, which included a presentation by Town Council Member Linus Bicker, a question-and-answer period, and small-group discussions. Participants were invited to share their thoughts, concerns, and ideas about the proposed demonstration, including ways the concept might be improved or potential issues that should be addressed.

At the conclusion of the meeting, attendees completed written response cards answering three questions about the proposed demonstration. Shortly afterward, an attendee shared those same questions on the Shepherdstown Community Facebook page, inviting additional public input from anyone interested, regardless of whether they attended the meeting. The Town likewise posted the questions on its website to encourage broader community participation.

In total, the Town received responses from approximately 23 individuals, including both meeting attendees and residents who shared their perspectives with the Town afterward. The Town did not track responses posted only on Facebook.

The Town is committed to making this feedback publicly available as part of its ongoing effort to keep residents informed and engaged throughout the planning process. The comments and suggestions received will help inform future discussions and will be carefully considered as the Town evaluates whether and how to proceed with any temporary demonstration project. While no final decisions have been made, community input will remain an important part of the decision-making process.

Residents were asked the following three questions—responses/summaries received and are provided in the interest of transparency and public information.

Question 1:

What are positive outcomes you envision from the development of a Market Plaza?

Key Themes of Responses:

1. Improved Pedestrian Safety

- Most often cited benefit.
- Reduced vehicle conflicts, protecting the Market House, improving conditions for cyclists, and a safer environment for pedestrians.

2. Additional Community Gathering Space

- Added public space for events, social interaction, dining, and community activities.
- Several comments referenced a centralized space for residents and visitors.

3. Enhanced Downtown Experience

- Improved walkability, beautification, increased pedestrian activity, and potential benefits for local businesses and tourism.

Question #2:

What are two concerns you hold about the development of a Market House Plaza?

Key Themes of Responses:

1. Traffic and Circulation Impacts

- Concerns about increased traffic on nearby streets, U-turns on town streets, truck movements, and changes to existing traffic patterns.

2. Deliveries and Business Access to Loading Docks

- Concerns about the impact on deliveries to area businesses including for events at the War Memorial Building and other downtown businesses.

3. Parking, Accessibility to Homes and Businesses, Inconvenience

- Concerns about reduction in the number of public parking spaces, access to King Street by residents of that street and by nearby businesses, reduced emergency vehicle access to South King and Back Alley, and overall convenience for residents and visitors.

Question #3:

What ideas do you have for exploring and addressing these concerns?

1. Test the Plaza Concept with a Temporary Pilot Program

- Test the concept temporarily before making permanent changes.
- As part of the pilot, incorporate ways to address any negative impacts on traffic, parking, businesses, and operational issues.

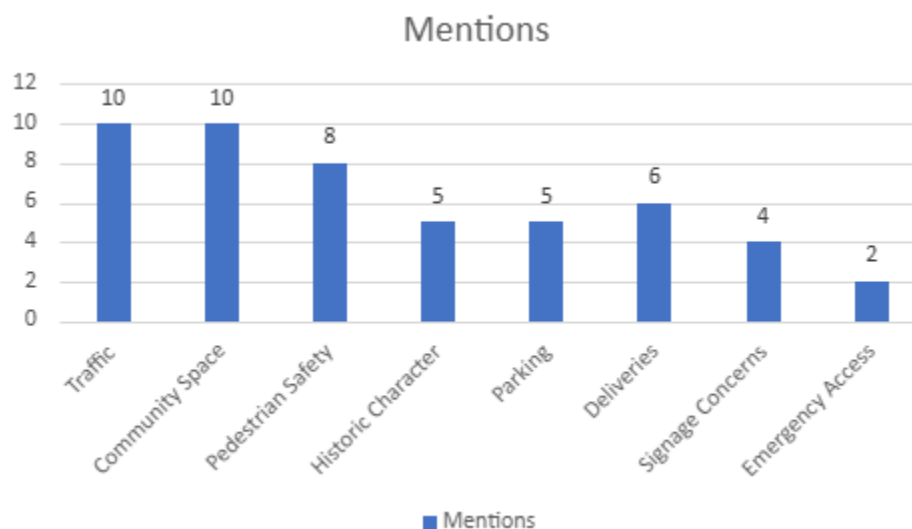
2. Delivery and Loading Accommodations

- Retain designated loading zones in town, establish access to plaza space for deliveries during specified hours, and enforce a detailed delivery management plan.

3. Modified Plaza Design

- Reduce the size of the plaza footprint, create a flexible space that could be closed for events and open to traffic at times, and explore an alternative location for a plaza.

The following figure shows the frequency of key topics raised by survey respondents. The strongest areas of interest were the creation of community space, traffic conditions, and pedestrian safety, indicating that public discussion was primarily focused on improving the pedestrian experience while maintaining accessibility.



Additional Comments

Historic Character

- Concerns that the design of the plaza should keep the historic character of the Market House area and avoid changes that diminish its historic significance.

Project Management and Operations

- Concerns about the Town's ability to maintain the plaza, enforce plaza rules and uses, produce adequate programming at the plaza, and finance all that will be needed. Additional concerns focused on the Town's overall management of the space over time.

Business Input

The town sent emails on May 21, 2026, asking all 52 downtown businesses (those located on German Street) for information on their use of in-town loading zones, including the zone on South King Street behind the Market House and zones on German Street.

A total of 10 businesses responded to the request for information.

Key Themes of Responses Received

Question 1:

Do you receive deliveries from trucks that park on South King St. behind the Market House?

Yes – 4

No – 6

If yes, what days/times are typical for deliveries from that location?

- Multiple times per week; typically mid-day and early evening; deliveries use street loading zone in early morning – 1 response
- Deliveries are every day, throughout the day – 2 responses
- Deliveries on Tuesday through Friday at different times – 1 response

Question 2:

Do you receive deliveries from trucks that park in loading zones on North King Street or German Street?

Yes – 4

No – 6

If yes, what days/times are typical for deliveries from that location?

- Early mornings – 1 response
- Trucks use any available loading zone, but traffic is blocked when using loading zones on German Street near the shop – 1 response
- Delivery trucks as well as customers use the loading zone on German Street near the shop.
- We use the area near the War Memorial Building for uploading goods.

Question 3:

Please tell us your ideas or concerns about the plaza concept.

- Impacts on deliveries to shops and businesses – 4
- Impacts on traffic flow throughout downtown – 4
- Impacts on availability of residential parking – 2
- Police/Fire protection and EMS access – 1
- Impacts on the historic street infrastructure - 1

- Opposes the demonstration – 1

- Supports the demonstration as a means to increase traffic/pedestrian safety – 1
- Supports the demonstration of a non-permanent version of a plaza - 2

Flower Bed Maintenance

TO: Town Council Members

FROM: James Gatz

DATE: July 6, 2026

SUBJECT: Contract with Native Havens for Town Flower Bed Maintenance

We have selected Native Havens, a well-respected local landscaping firm, to transform and maintain the downtown flower beds including those on German and Process Streets. The firm submitted a very impressive proposal and bid in response to the town's request for proposals.

Over the coming two years, the firm will install native plants that attract pollinators and bring beauty, ecological value, and seasonal interest to our downtown area. According to Native Havens, "The plantings will be supportive of the existing street trees by cooling and protecting their root systems, improving water infiltration and nutrient cycling, and enhancing the ecological function and beauty of the streetscape." In addition, Native Havens will install containers 2-3 feet in height in the in the four primary planters at the corners of King and German Streets.

As described in the proposal, the redesign of the planters will bring, "[A] unique sense of place through flowers, texture, seasonal interest, and thoughtfully curated planting design supported by expert garden maintenance during establishment and beyond."

Native Havens will implement the project in four phases. The effort, which will cost \$33,000 over two fiscal years, will involve removing existing plants including all invasive plants and installing native plants which will require less maintenance, replacing the topsoil with an engineered topsoil mix, leveling / grading the beds, and removing all excess mulch. In addition, Native Havens will monitor the beds for trash pick-up and weeding, and will water the beds 1-2 times per week as needed.

In addition, James Dillon will be available to provide information to the public about the transformation of the town beds and growing native plants.

Special Events Request

Special Events Application

The Corporation of Shepherdstown has enacted Ordinance 8-801 et seq. requiring a special events application be submitted for all assemblies, demonstrations, special events and parades, as detailed in Sections 8-801 through 8-810 in the Corporation of Shepherdstown Codified Ordinances. All requests must be submitted for departmental and Town Council review. The information requested by this form will be used to determine eligibility for a special events permit. **The event will not be considered for approval until the entire application and all of its parts have been submitted.** Applications are due to the Office of the Town Administrator no later than **14 days** prior to the proposed special event.

Event Title Good trouble live son -Vigil + Community gathering Event Date Friday July 17, 2020
 Event Sponsor EASTERN PANHANDLE INDIVISIBLE Secondary Date _____

Event Information

Name: SUSAN PIPES Cell: _____
 Address: _____
 Email: _____ Alt. Phone: _____

Event Information

Requested Area(s) _____ City Streets/Sidewalks ☒ Sidewalks only _____ Other _____

Location of Event "The wall" in front of McMoran Hall
 Attach route for processional events. Be precise when indicating location.

Event Hours 6:30 until 8 pm Set up start time 6:00 pm Clean up end time 8 pm
 ****NOTE**** Town Square Events are limited to SIX (6) Hours, including set-up and clean-up time.

Anticipated Attendance (per day): Participants 25 Spectators 100

Office Use Only

Department Heads: Please indicate disposition of event proposal and attach any comments or conditions.

Police: ☒ Approved _____ Denied _____ Conditional _____	Planning: ☒ Approved _____ Denied _____ Conditional _____
Fire: _____ Approved _____ Denied _____ Conditional _____	Public Works: ☒ Approved _____ Denied _____ Conditional _____
Town Manager: ☒ Approved _____ Denied _____ Conditional _____	Town Council: _____ Approved _____ Denied _____ Conditional _____

Recorder _____ Amount Due _____ Amount Paid _____ Insurance Provided _____ Council Agenda _____
 Permit No. _____ Conditions Attached? _____

- GRS
- 1) Sidewalks must remain open to pedestrians.
 - 2) No Signs encouraging driver's to honk horns.
 - 3) Please keep the signs out of roadway so not to distract driver's, for the safety of all.

Will you be installing temporary structures, such as tents, bleachers, stages, inflatables? NO What and where? _____

Check with Planning for U&O Requirements

Will you require dedicated parking or bagged meters? No

What and where? _____

Check with Parking for costs and arrangements

Indemnification

I Susan Pipes shall defend and hold harmless the Corporation of Shepherdstown, its officers, employees, agents and representatives thereof, from all suits, actions, claims of any kind, including attorney's fees, brought on account of any personal injuries, damages or violation of rights sustained by any person or property in consequence of any neglect on behalf of Eastern Panhandle Indivisible (name of organization or business), while their personal property is situated on Town property. I shall further hold the Corporation of Shepherdstown harmless from any claims or amounts arising from any violation of any law, bylaw, ordinance, regulation or decree.

[If required] A certificate of general liability insurance coverage in the amount of no less than \$1 million per instance and \$2 million aggregate naming the Corporation of Shepherdstown as an additional insured is attached to this application.

I further swear that all information provided in this application is true and accurate to the best of my knowledge and understand that the Shepherdstown Town Council has authority to change or amend my indicated needs, as necessary, and I am responsible for additional fees.

Signature Susan Pipes Date June 18 2026

Title Organizer

Event Information

Answer the following questions, in full, and attach any additional information

Name of Event Good Trouble Lives On - Vigil and Community Gathering

Brief Description of Event: A peaceful community vigil honoring the legacy of John Lewis and promoting civil rights, voting rights, and democracy.

Participants will gather for reflection, solidarity, and nonviolent civic engagement.

Has your organization held this event in the past? No

When and Where? _____

Is the event a fundraiser? No

Will you require assistance from Fire/EMS? No (additional fees apply) How many units? _____ Council reserves the right to assign additional units at applicant cost.

Will you require assistance from the Police Department? No (additional fees apply) How many units? _____ Council reserves the right to assign additional units at applicant cost.

Will items be left overnight? No What and where? _____ Hazmat items must be attended constantly.

Will you be providing private security? No

Will alcohol No or food No be served? Additional approvals may be necessary through the ABCA or Health Department.

Will you have vendors? No Are you charging admission No? Check with B&O Licensing to obtain additional licenses and tax information.

Will streets No or intersections No be blocked? Requires police department assistance. List streets and/or intersections _____

Public Works assistance needed? No Street Sweeping No Barricades or fencing Material NO (additional fees apply)—Council reserves right to assign additional units at applicant cost

Will you be using loud speakers or amplification devices? No

Continued on next page

Volunteer Applications



BOARDS AND COMMISSIONS APPLICATION

*Please write at least a paragraph for the sections that ask for a description
(attach additional sheets if necessary).*

You are also welcome to submit a résumé.

Name: ☐ Mr. ☐ Ms. _____ Address: _____

Phone numbers – Home: _____ Work: _____ Cell: _____

Email address: _____ Employer: _____

Occupation: _____

Which board/commission would you like to serve on? Shepherdstown Planning Commission

Please describe your background and education.

Please describe your experience and any special training you may have that apply to this board/commission.

Please describe your motivation for serving on this board/commission.

I would like to help develop Shepherdstown (of which I am a resident) in a healthy and sustainable fashion for the long term benefit of its residents, government, businesses and visitors. I believe that smart growth must balance considerations of economic, social and environmental impact as well as historic preservation and aesthetics.

Please describe what you know about this board/commission.

I believe that I understand the mission of the Planning Commission, as well as the overall process involved in its work. In the past, I have interacted with the Commission in the development of the Shepherd Village Senior Cohousing Community (of which I am a Member). I am aware that the Commission meets monthly and that preparation involves reviewing plans and other documents related to each meeting.

How did you hear about this board/commission?

Neighbors of mine have served on the Town Council and I am involved in various organization and activities related to development of the Town and of Jefferson County.

Please provide two personal or professional references (include name and phone number).

Marcy Bartlett - [REDACTED]

Harriet Pearson - [REDACTED]

Signature: Mike Binder Date submitted: 6/15/2026

Please type in your answers and submit the completed form by hand, mail, fax or email to:

Town Clerk's Office
104 North King Street
P.O. Box 248
Shepherdstown, West Virginia 25443-0248
304-876-1473 (fax)
clerk@shepherdstown.us

For additional information, or to request a hard copy of the application, please call 304-876-2398.



BOARDS AND COMMISSIONS APPLICATION

Please write at least a paragraph for the sections that ask for a description
(attach additional sheets if necessary).

You are also welcome to submit a résumé.

Name: ☐ Mr. ☒ Ms. LouAnn Stovall Address: [REDACTED]

Phone numbers – Home: _____ Work: _____ Cell: [REDACTED]

Email address: [REDACTED] Employer: [REDACTED]

Occupation: _____

Which board/commission would you like to serve on? Age Friendly Shepherdstown

Please describe your background and education.

I moved to Shepherdstown with my husband James Stovall in 1999 and resided on Shepherd Grade Road across from NCTC. I now live in Fernbank at Cress Creek. My hometown is Birmingham, Alabama, but during my childhood I spent summers with my grandparents in a small town in Oklahoma. I have a BA in Mathematics from Oklahoma State University and a MA from the University of Alabama. While my husband was in the Army, we lived in California and Germany. After he left the Army, we lived in Bethesda, Maryland, for thirty years. In addition to raising two girls there, I taught mathematics in private schools and, when government agencies began to use computers, I worked for software training companies where I taught government employees to use computer software. Once we moved to Shepherdstown, I worked for the Coast Guard Operations System Center as a software test engineer. I have been a SAIL member since its founding and am a member of Shepherdstown Presbyterian Church.

Please describe your experience and any special training you may have that apply to this board/commission.

I have served on boards for PTA public schools, American Association of University Women, Shepherdstown Area for Independent Living, and Money Unlimited Investment Club. Secretary was my most often held position.



Please describe your motivation for serving on this board/commission.

I was asked to serve as the Shepherdstown Area Independent Living representative.

Please describe what you know about this board/commission.

The committee is a recent addition to the Corporation of Shepherdstown Council. It was founded to help make the town more accessible for people of all ages and abilities.

How did you hear about this board/commission?

I was asked to be a representative from Shepherdstown Area Independent Living.

Please provide two personal or professional references (include name and phone number).

Lois Spreen - [REDACTED]

Linda Spatig - [REDACTED]

Signature: LaurAnn Howell Date submitted: June 25, 2026

Please type in your answers and submit the completed form by hand, mail, fax or email to:

*Town Clerk's Office
104 North King Street
P.O. Box 248
Shepherdstown, West Virginia 25443-0248
304-876-1473 (fax)
clerk@shepherdstown.us*

For additional information, or to request a hard copy of the application, please call 304-876-2398.

Resolution in Support of Petition to Complete the Path to Morgan Grove Park

Development of Ordinance on Accessory Dwelling Units

TO: Town Council Members

FROM: James Gatz

DATE: July 6, 2026

SUBJECT: Status of draft Ordinance to Authorize Accessory Dwelling Units

We asked Ryan Simonton to draft a Town ordinance that would authorize property owners to build and install accessory dwelling units (ADU) in town. Please see the attached background document from Ryan which includes information on the recently enacted State statute about ADUs. Ryan will provide text of the draft ordinance by mid-July.

**Accessory Dwelling Units
Summary of State Law
June 15, 2026**

2026 Legislation:

2026 Senate Bill 659
(https://www.wvlegislature.gov/Bill_Status/bills_history.cfm?INPUT=659&year=2026&sessiontype=RS) requires municipalities to allow one accessory dwelling unit by right on each lot or parcel occupied by a single-family dwelling.

Brief overview

Municipalities may not require additional parking or fees in lieu of parking, require the ADU match the design/pitch/finishing of the principal dwelling; among several other restrictions, and must allow manufactured homes used as ADUs. The municipality may require an application fee up to \$250 and require a will-serve letter from water/sewer systems.

FAQ/Legal Requirements

1. 2026 SB 659 passed March 6, 2026, and becomes effective June 4, 2026.
2. The bill adds a new Article 40 to Chapter 8 of the WV Code
3. In brief, it requires municipalities to allow Accessory Dwelling Units on **every lot or parcel that contains a single-family dwelling unit**.
4. An Accessory Dwelling Unit is “a self-contained and independently accessed living unit on the same parcel as a single-family dwelling of greater square footage that includes its own cooking, sleeping, and sanitation facilities and complies with, or is otherwise exempt from, any applicable regulatory requirements.”
 - a. The single-family dwelling must be larger than the ADU.
 - b. The ADU has its own cooking, sleeping, and sanitation facilities.
 - c. A **manufactured home** may be used as an ADU, and it may share water, sewer, and utility connections with the single-family dwelling. (W. Va. Code 8-40-2(h) and (i)).
 - i. A Manufactured Home is “a structure constructed in compliance with the federal Manufactured Home Construction and Safety Standards, 42 U.S.C. §5401 *et seq.*, and installed on a permanent foundation.”
5. A Single-Family Dwelling is “a building with one or more rooms designed for residential living purposes by one household that is detached from any other dwelling unit.”
 - a. **The bill does not require someone to be living in the Single-Family Dwelling in order to have an ADU**
6. ADUs must be permitted “by right,” – this is defined at § 8-40-1(b) as approval without (1) a public hearing, (2) a variance, conditional use permit, special permit, or special exception; or (3) other discretionary zoning action other than site plan approval and confirming construction plans conform to regulatory requirements [here, regulatory requirements means the Fire Code, local law, zoning code, building code, and other generally applicable law - §8-40-1(d)(2)]
7. The ADU can be attached, detached, or internal to the single-family dwelling.

- a. A detached ADU has a maximum size: 75% of gross floor area for the single-family dwelling, or 1,000 square feet, whichever is less.
- 8. There are several categories where municipalities cannot regulate. Cannot require:
 - a. Additional parking for an ADU or fees in lieu of parking
 - b. Matching exterior design of the single-family dwelling (**exception for historical districts where there is a district-wide regulation**)
 - c. Family/marital/employment relationship between occupants of the Single Family Dwelling and the ADU
 - d. Development impact fees over \$250 [can have a \$250 fee]
 - e. Improvements to streets or sidewalks (but repair/reconstruction is permitted if damaged by construction)
 - f. Maximum building heights, minimum setbacks, minimum lot sizes, maximum lot coverages, or minimum building frontage **that are more restrictive than those for the single-family dwelling (i.e., general zoning code requirements can apply)**
 - g. Restrictive covenant (this does not limit or prohibit restrictive covenants between private parties, i.e. HOAs can require them, but cities cannot)
 - h. Require separate water or sewer connection for the ADU
- 9. There are several things municipalities specifically *can do*. Cities can:
 - a. Regulate short-term rentals (subject to W. Va. Code 8-1-5a)
 - b. Require an application/review fee of up to \$250 for an ADU, in addition to usual fees for building permits (“building fees” in the bill)
 - c. Require a “will-serve” letter from the water and sewer system serving the single-family dwelling, or approval from Department of Health if municipal water/sewer service is not available.
- 10. Effective date: any regulation in violation of the bill is invalid as of January 1, 2027. Indicates compliance need by 1/1/27 (rather than 6/4/26).
- 11. This will require updates to the existing Zoning Code.
 - a. ADUs definition will need to be updated to the state law definition
 - b. The ADU should likely to be defined as an accessory use permitted by right in all zoning districts, subject to a supplemental regulation requiring that they be accessory to an existing single family dwelling on the same lot or parcel.
 - c. Supplemental regulations related to accessory structures will need to be updated.
 - d. Council can decide whether to assess the application fee, whether to reduce setbacks or lot coverage requirements (or whether to require that these apply to ADUs in the same way they apply to single-family dwellings)
- 12. Process options:
 - a. Prepare draft ordinance, Planning Commission review, recommendation to Council.
 - b. Discussion with Council / draft to Council, Council refers preferred draft to Planning Commission for concurrence on Comprehensive Plan, and adopts ordinance after Planning Commission recommendation.
 - c. Ordinance should be adopted no later than December 31, 2026.

Sec. XXX.XX. - Definition of terms.

Accessory Dwelling Unit means a self-contained and independently accessed living unit on the same parcel as a single-family dwelling of greater square footage that includes its own cooking, sleeping, and sanitation facilities and complies with, or is otherwise exempt from, any applicable regulatory requirements.

Attached Accessory Dwelling Unit means a self-contained and independently accessed living unit on the same parcel as a single-family dwelling of greater square footage that includes its own cooking, sleeping, and sanitation facilities and complies with, or is otherwise exempt from, any applicable regulatory requirements, and is a part of the same structure used or intended as a single-family dwelling on the parcel.

Detached Accessory Dwelling Unit means a self-contained and independently accessed living unit on the same parcel as a single-family dwelling of greater square footage that includes its own cooking, sleeping, and sanitation facilities and complies with, or is otherwise exempt from, any applicable regulatory requirements and is not attached to the structure used or intended as a single-family dwelling on the parcel.

Manufactured Home means a structure constructed in compliance with the federal Manufactured Home Construction and Safety Standards, 42 U.S.C. §5401 *et seq.*, and installed on a permanent foundation.

Table XXX.XX.X: Permitted Land Uses

Uses	X	Y	Z	AA	BB	CC	DD	EE	FF	GG	HH	Supplemental Regulations
<u><i>Accessory Dwelling Unit</i></u>	<u>A</u>	<u>A</u>	<u>A</u>	<u>A</u>	<u>A</u>							<u>XX</u>
<u><i>Attached Accessory Dwelling Unit</i></u>	<u>A</u>	<u>A</u>	<u>A</u>	<u>A</u>	<u>A</u>							<u>XX</u>
<u><i>Detached Accessory Dwelling Unit</i></u>	<u>A</u>	<u>A</u>	<u>A</u>	<u>A</u>	<u>A</u>							XX

Sec. XXX.XX. - Supplemental regulations pertaining to permitted land uses table.

(XX) A single Accessory Dwelling Unit (ADU) shall be permitted on any parcel containing a single family dwelling, subject to the following requirements:

- i. The ADU may be attached or detached from the primary structure
- ii. The ADU must have a smaller area than the existing single family dwelling, determined by measuring gross floor area

iii. Setbacks: setbacks from front, side, and rear property lines for detached ADUs will be the same as those for single family dwellings in the district.

iv. Maximum building heights, minimum setbacks, minimum lot sizes, maximum lot coverages, and minimum building frontage shall be the same as for single family dwellings in the district.

v. Parking: No additional off-street parking shall be required beyond what is required for the principal dwelling.

vi. Use: ADUs may be rented, leased, or used for short-term rental purposes subject to applicable law.

vii. Application: No ADU may be constructed or occupied without a permit issued by the Town on application forms to be provided by the Town. Each application shall be accompanied by an application fee of \$250.

viii. No ADU will be permitted unless the applicant provides with the application a “will-serve” letter from the water and sewer system serving the single-family dwelling, or approval from Department of Health if municipal water/sewer service is not available

ADUs will be subject to all other requirements of the Zoning Code, except where a different requirement is specified by this Supplemental Regulation (XX).

Water Department FY27 Budget

Shepherdstown WaterWorks
FY 2025 , 2026 Actuals
FY 2027 Budget - Final 6.15.2026

	REVENUES	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	Notes and Explanations
419	Water Interest Income	80,000	165,553	150,000	105,853	140,000	Interest Income on Waterworks bank accounts
522	Water Metered Revenue	1,800,000	1,791,213	2,000,000	1,371,011	1,860,000	Water Metered Revenue
	Total Revenues	1,880,000	1,956,765	2,150,000	1,476,864	2,000,000	Total Revenues
	Department Expense Line Items	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	Notes and Explanations
	Expenses	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	Notes and Explanations
401.1	Water Billing Expenses	20,000	41,485	20,000	8,617	12,000	Billing Suuplies , Billing Reimb Expenses
401.2	Water Administration	50,000	37,990	45,000	40,623	60,000	Memberships/ Dues/ Subsc, communication exp, admin supplies, and Admin cross-charge
401.3	Water Utility Billing	200,000	228,353	240,000	179,694	240,000	Shepherdstown Water Plant utilitiy - Water bill (16k-\$22k / monthly)
401.4	Water Plant Expenses	175,000	198,762	254,000	146,320	220,000	Uniforms, Plant Maintence (treatment distribution and service maintenance)
408	Taxes (Other than Income)	46,397	51,725	53,000	42,344	60,000	Employer portion of FICA taxes and Workers Comp
521	Employee Screening	300	235	350	161	369	Employee Screening
601	Water Salaries & Wages	497,463	499,169	610,000	407,500	625,000	Water Salaries & Wages
604	Employee Pensions & Benefits	169,209	145,267	170,000	133,074	180,000	Employee Pensions & Benefits
615	Purchased Power	75,000	82,726	68,000	43,288	60,000	Purchased Power
618	Chemicals	85,000	119,108	115,000	102,229	140,000	Chemicals
631	Contractual Svc-Engineering	70,000	67,454	110,000	30,100	50,000	Lead Line Inventory and Meter Testing
632	Contractual Svc-Accounting	25,000	43,948	38,000	15,783	26,000	Contractual Svc-Accounting
633	Contractual Svc-Legal	5,000	175	2,000	5,930	20,000	Contractual Svc-Legal
635	Contractual Svc-Testing	35,000	22,430	29,000	11,333	20,000	Contractual Svc-Testing
636	Contractual Svc-Other	25,000	23,650	25,000	42,573	56,000	Mainly IT services
650	Transportation Expense	5,000	2,514	2,000	3,187	5,000	Gasoline Purchases from Purchasing Card
657	Insurance-General Liability	65,000	85,920	86,000	64,440	90,000	Monthly insurance is \$7,160, this will go over budget by year end
659	Insurance-Other	-	-	-	510	750	
660	Advertising Expense	1,000	-	650	-	3,000	Advertising Expense
676	Bond Issuance Expense	-	-	-	-	-	
	Total Operating Expenses	1,549,369	1,650,913	1,868,000	1,277,705	1,868,119	
	GROSS OPERATING PROFIT	330,631	305,852	282,000	199,159	131,881	

	Bond Expenses and Transfers	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	Notes and Explanations
	03-A Water Bond	26,896	26,896	26,896	20,172	26,896	Monthly Payment of \$2,241.34
	12 Water Bond	125,555	125,555	125,555	94,166	127,715	Monthly Payment of \$10,462.92
	17 Water Bond	151,881	151,881	153,835	115,376	153,835	Monthly Payment of \$12,819.55
	21 Water Bond	99,504	99,504	99,504	74,628	99,504	Monthly Payment of \$8,292.02
	21 Water Reserve	9,931	9,931	9,931	7,448	9,931	Monthly Payment of \$827.55
	Monthly Transfer to Working Cap Reserve	222,636	222,636	175,000	90,640	-	Temporarily hold, Water Cap Reserve for 2027 - Board Voting
	Depreciation Reserve	50,000	48,919	53,750	36,922	54,000	2.5% from Water revenue
	Total Bond Expenses & Transfers	686,403	685,322	644,471	439,352	471,881	
	Surplus or (Deficit)	(355,771)	(379,470)	(362,471)	(240,193)	\$ (340,000)	This is the "True" Deficit after taking the Bond Expenses/Transfers into account
	Non-Cash Expenses	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	
427	Interest Expense	150,000	141,239	130,000	123,772	135,000	Bond Interest being included under "Bond Expenses" below)
403	Depreciation Expense	175,000	355,522	150,000	266,641	360,000	Utility Plant Depreciation (Estimates from prior years are being used here that may be causing the large overage)
675	Admin Lending Fees	8,000	3,830	2,000	2,944	3,000	"Bond Expenses"
	Total Non-Cash Expenses	183,000	359,352	152,000	269,585	363,000	
	Other Water Revenue - Restricted	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	Notes and Explanations
	Capacity Accounts Interest		983	-	532	500	Capacity Accounts Interest
	Other Water Revenues	10,000	1,664,339	10,000	3,950	10,000	FY 2025 Tap Fees, Capacity Fees, Reconnection Fees, Grant Revenue (\$95k Capacity Fees & \$1.5m Grants YTD)

Sewer Department FY27 Budget

Shepherdstown Sewer
FY 2025 , 2026 Actuals
FY 2027 Budget - Final 6.15.2026

	REVENUES	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	Notes and Explanations
419	Sewer Interest Income	90,000	121,952	128,000	80,125	115,000	Interest Income on Sewer bank accounts
522	Metered Sewer Revenue	1,521,983	1,618,470	1,800,000	1,245,450	1,750,000	Metered Sewer Revenue
	Total Revenues	1,613,983	1,826,522	1,930,000	1,330,049	1,865,000	
	Department Expense Line Items	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	Notes and Explanations
	Expenses	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	Notes and Explanations
401.1	Sewer Billing Expenses	12,000	13,106	17,000	7,522	12,000	Office Supplies, Public Notices Etc
401.2	Sewer Administration	62,000	42,565	82,000	40,139	55,000	Safety Equipment / Admin communication exp, Admin Supplies / expenses, permit fees, Mainly monthly rent paid to the Town from the Water Dept (\$1,800 per month)
401.3	Sewer Utility Billing-Water Bill	30,000	55,903	25,000	14,104	20,000	Sewer Plant Water bill - Average \$1,8000/ month
401.4	Sewer Plant Maintenance	157,808	194,651	170,000	125,142	170,000	Sewer Plant Maintenance (Pumping repairs & Maintenance, Treatment Maint , Equipment Maint.)
408	Taxes (Other than Income)	26,775	35,783	36,000	28,528	42,000	Employer portion of FICA taxes and Workers Comp
701	Salaries & Wages	396,260	489,869	550,000	374,670	575,000	Salaries & Wages - 5 % Merit Cola Increase
704	EE Pensions & Benefits	122,240	103,814	120,000	92,139	128,000	EE Pensions & Benefits
711	Sludge Removal	25,000	10,728	40,000	9,891	25,000	Sludge Removal
715	Purchased Power	152,000	182,494	165,000	113,882	155,000	Purchased Power
718	Chemicals	121,000	139,241	180,000	74,406	107,000	Chemicals
731	Contractual Svc-Engineering	5,000	17,366	30,000	21,804	40,000	Ghosh Engineers
732	Contractual Svc-Accounting	25,000	44,398	38,000	15,783	30,000	Accounting Fees - Audit
733	Contractual Svc-Legal	5,000	-	5,000	2,111	15,000	Legal Fees
735	Contractual Svc-Testing	10,000	22,449	25,000	11,725	17,000	Testing
736	Contractual Svc-Other	13,000	21,411	15,000	15,293	22,000	IT Services
750	Transportation Expense	4,000	1,451	4,000	6,838	12,000	Gasoline/ Diesel Purchases
757	Insurance-General Liability	50,000	64,056	65,000	49,311	70,000	Monthly insurance - General Liability
760	Advertising	2,500	-	1,000	-	3,000	Advertising Fees
	Total Operating Expenses	1,219,583	1,439,286	1,568,000	1,003,288	1,498,000	
	GROSS OPERATING PROFIT	394,400	387,236	362,000	326,761	367,000	

	Bond Expenses and Transfers	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	Notes and Explanations
	Membrane Transfer Reserve	157,200	157,200	157,200	117,900	157,200	Monthly Transfer of \$13,100
	10-A Sewer Bond	221,953	221,953	221,953	166,465	221,953	Monthly Payment of \$18,496.08
	Working Capital Reserve	143,004	143,004	143,004	107,253	143,004	Monthly Transfer of \$11,917
	Depreciation Reserve Account	40,350	45,663	48,250	33,251	45,000	2.5% from billing Revenue
	Total Bond Expenses & Transfers	562,507	567,820	570,407	424,869	567,157	
	Surplus or (Deficit)	(168,107)	(180,584)	(208,407)	(98,108)	(\$200,157.0)	This is the "True" Deficit after taking the Bond Expenses/Transfers into account
	Non-Cash Expenses	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	Notes and Explanations
403	Depreciation Expense	380,000	354,913	360,000	279,932	375,000	Estimated based on prior years actuals
775	Sewer Admin Lending Fees	14,400	14,370	-	10,778	15,000	"Bond Expenses"
	Total Non-Cash Expenses	394,400	369,283	360,000	290,710	390,000	
	Other Income - Restricted Income	FY25 Budget Approved	FY25 Budget Actuals	FY26 Budget Approved	FY 26 Actuals Thru 3/31/2026	FY 2027 Budget	Notes and Explanations
	Capacity Accounts Interest - Restricted Income	-	495	-	266	500	Capacity Accounts Interest
	Other Sainitary Revenues - Restricted Income	2,000	85,605	2,000	4,208	4,000	Capacity Fees

Proposed Donations to the Town



Shepherdstown
WEST VIRGINIA

Shepherdstown Donation Application

Donor Information

Donor Name:

Historic Shepherdstown

Mailing address:

Post Office Box 1786
129 East German Street

Website/URL:

<https://historicshepherdstown.com/>

Contact Name:

Doug Perks

Contact Phone number:

[REDACTED]

Contact Email address:

[REDACTED]

Type of Proposed Donation (select as many as appropriate)

- Monetary
- Real Property (land, buildings, etc.)
- Vehicle
- X Other (wayside)
- Service or Labor

Estimated Value of Proposed Donation – Please provide a dollar value and describe how the value was determined (appraisal or supporting documentation may be required).

Estimated at \$1,500 - \$2,000

Description of the Proposed Donation – Please provide a detailed description of the item(s) to be donated, including the condition, size, materials, or scope of services, and whether installation will be required (attach additional pages and supporting documentation, such as photographs, if necessary).

Since 1850, Shepherdstown has been served by a number of bridges which crossed the Potomac River. A toll bridge at the bottom of Princess Street replaced a ferry and connected the town to Maryland. It's piers remain today. Both the Shenandoah Valley and the Norfolk and Western rail lines built bridges crossing the Potomac at Shepherdstown. The old Shenandoah Valley piers still stand and the Norfolk Southern bridge carries daily rail traffic. The James Rumsey bridge replaced the Virginia and Maryland bridge which was washed away by the flood of 1936. The first Rumsey bridge was replaced in 2004 by the current bridge.

The Historic Shepherdstown Wayside committee (Keith Alexander, Patrick Fuller, and Doug Perks) are working to provide text and graphics for a wayside which we would like to place in Rumsey Park at a location which affords a view of the piers and bridges. The wayside will provide a concise history of the Virginia and Maryland bridge, the James Rumsey bridge, and the rail road bridges. We are considering adding a QR code to the wayside which will offer a more detailed description of the bridges to those who may be interested. We estimate that the text/graphics will be completed by fall 2026 ready to be submitted to a vendor for production.

Estimate of Annual Maintenance and Operations Costs – Please indicate whether the donation will require ongoing maintenance by the Town and, if so, what is the estimated amount of annual maintenance.

It may require regular lawn maintenance to trim around the wayside. Otherwise, no ongoing maintenance is expected.

Donor Certification – I certify that I am authorized to submit this application for donation and that the information provided is accurate to the best of my knowledge. I understand that all proposed donations are subject to review and acceptance by the entire Town Council and the Town of Shepherdstown and, if accepted, all donations immediately become the sole property of the Town.

Donor Signature: *S Unger*

Printed Name: Stephanie Unger

Date: 5/3/2026

Staff Reports

Wastewater, Water and Streets

Water/Sewer Leaks / Issues

- 1) sewer back up- High st
- 2) sewer blockage- German St
- 3) Water leak investigation- German St
- 4 Water line -Rumsey Park
- 5) Water leak – Heather field

Water plant/Wastewater plant

Water plant-

- UV tech scheduled
- UV recirculation pump/line install
- CL2 pump replaced- CITCO to replumb
- New Drain valve actuator being built from AUMA- 7/7 install

Wastewater plant-

- PFAS biosolid sampling complete
- Land applying Sludge

Lead and Copper rule

- GRR plan-line replacement deadline Oct 2037

Streets

Fix street signs/ pick up state sign

Hometown heroes banner up

Road work/ patch work

July 4th parade – Prep/Cleanup

Sharrow repair

Paper street blockage

Trash/Recycling/Yard waste/Rough cost

Glass- No glass dumping/ Not accepting at drop off station

Trash – 48 Tons collected in the month of June \$2500.00

Recycling- 12 Tons collected in the month of June \$1200.00

Yard Waste- 10 loads - Dump cost \$500

PATH Project update (Kenny Shipley)

construction scheduled to start in July 2026

Operator update

Setting interviews OIT water and CDL laborer PW

Town Financial Status

Corporation of Shepherdstown FY26 Budget vs Actuals Through May 31, 2026, Executive Summary: -

FY26 results through May 31 show revenues essentially on plan, while expenses are meaningfully under budget, resulting in a \$272.2K true surplus. Key watch items are Hotel/Motel Tax and Sales Tax shortfalls, plus expense pressure in City Hall, Contributions/Transfers, and Sanitation.

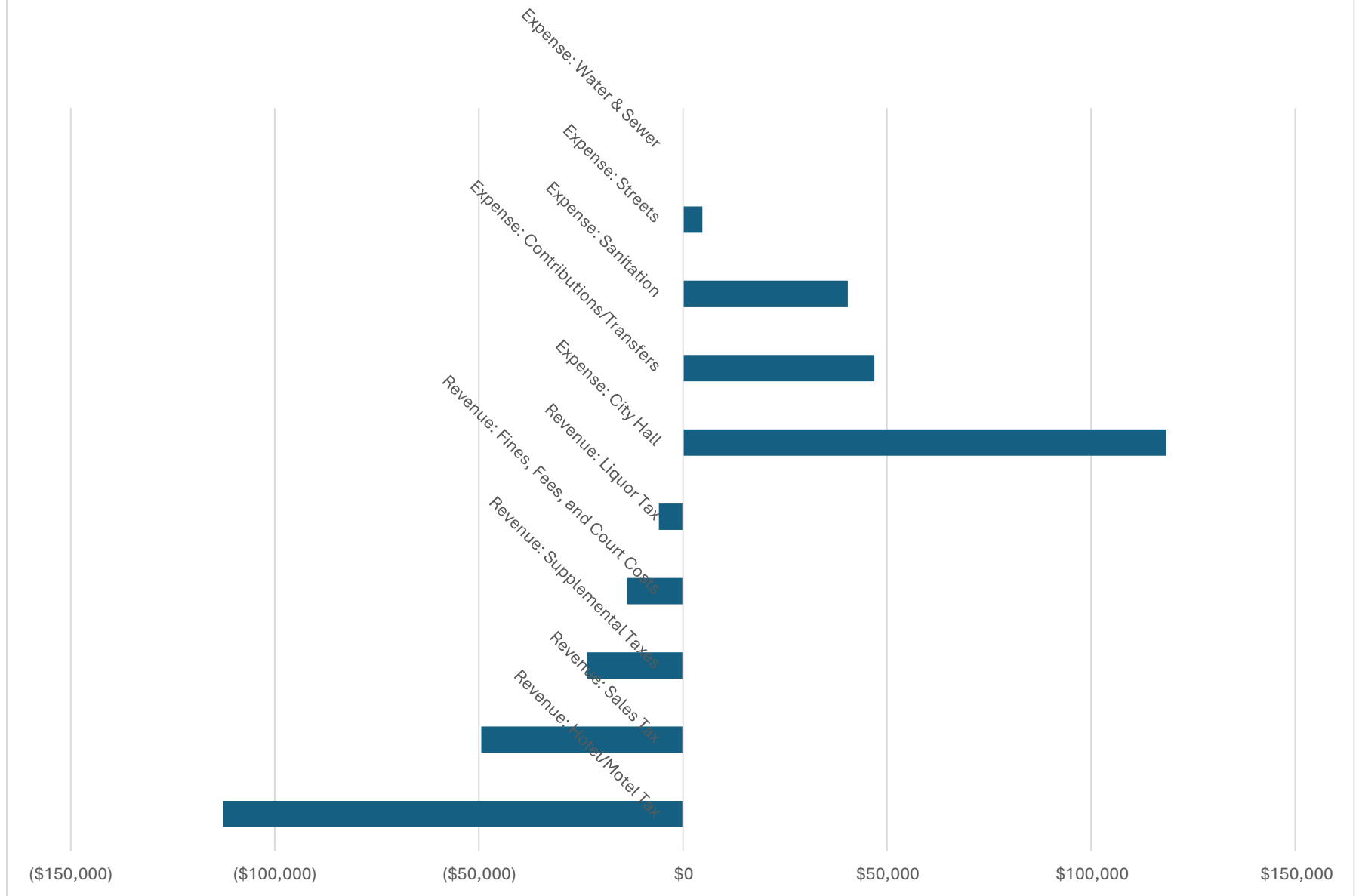
Highlights:

- True surplus: \$272.2K
- Revenues are nearly on budget: \$2.612M actual vs. \$2.618M budget (\$5.8K under).
- Expenses are well under budget: \$2.339M actual vs. \$2.617M budget (\$278.0K under).
- Biggest revenue positives:
- Video Lottery: +\$63.6K
- Interest Income: +\$37.0K
- Taxes Ad Valorem: +\$25.3K
- Biggest revenue shortfalls:
- Hotel/Motel Tax: -\$112.6K
- Sales Tax: -\$49.4K
- Supplemental Taxes: -\$23.5K
- Expense pressure:
- City Hall: +\$118.5K
- Contributions/Transfers: +\$46.9K
- Sanitation: +\$40.4K

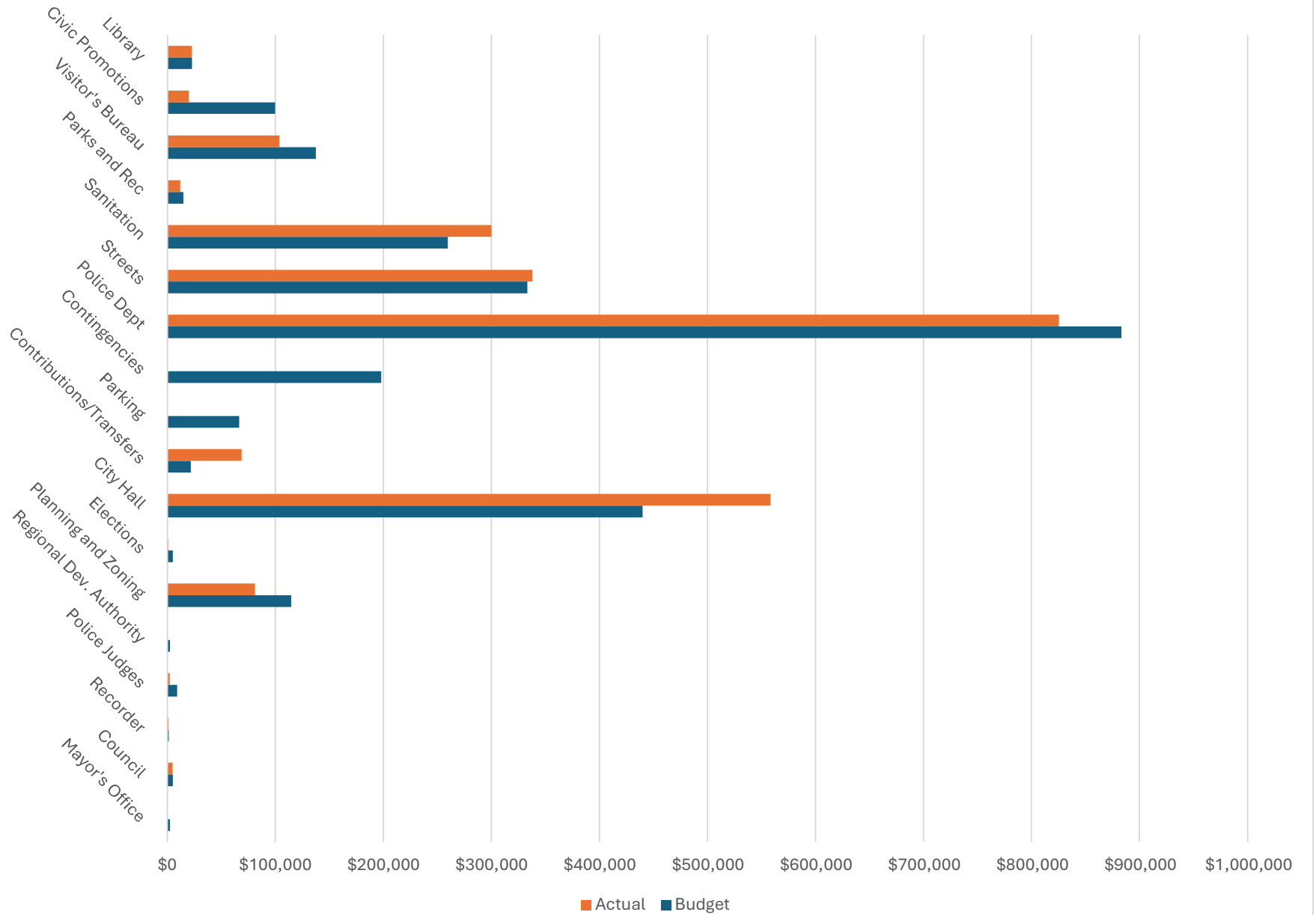
FY26 results through May 31 show revenues essentially on plan, while expenses are meaningfully under budget, resulting in a **\$272.2K true surplus**. Key watch items are Hotel/Motel Tax and Sales Tax shortfalls, plus expense pressure in City Hall, Contributions/Transfers, and Sanitation.

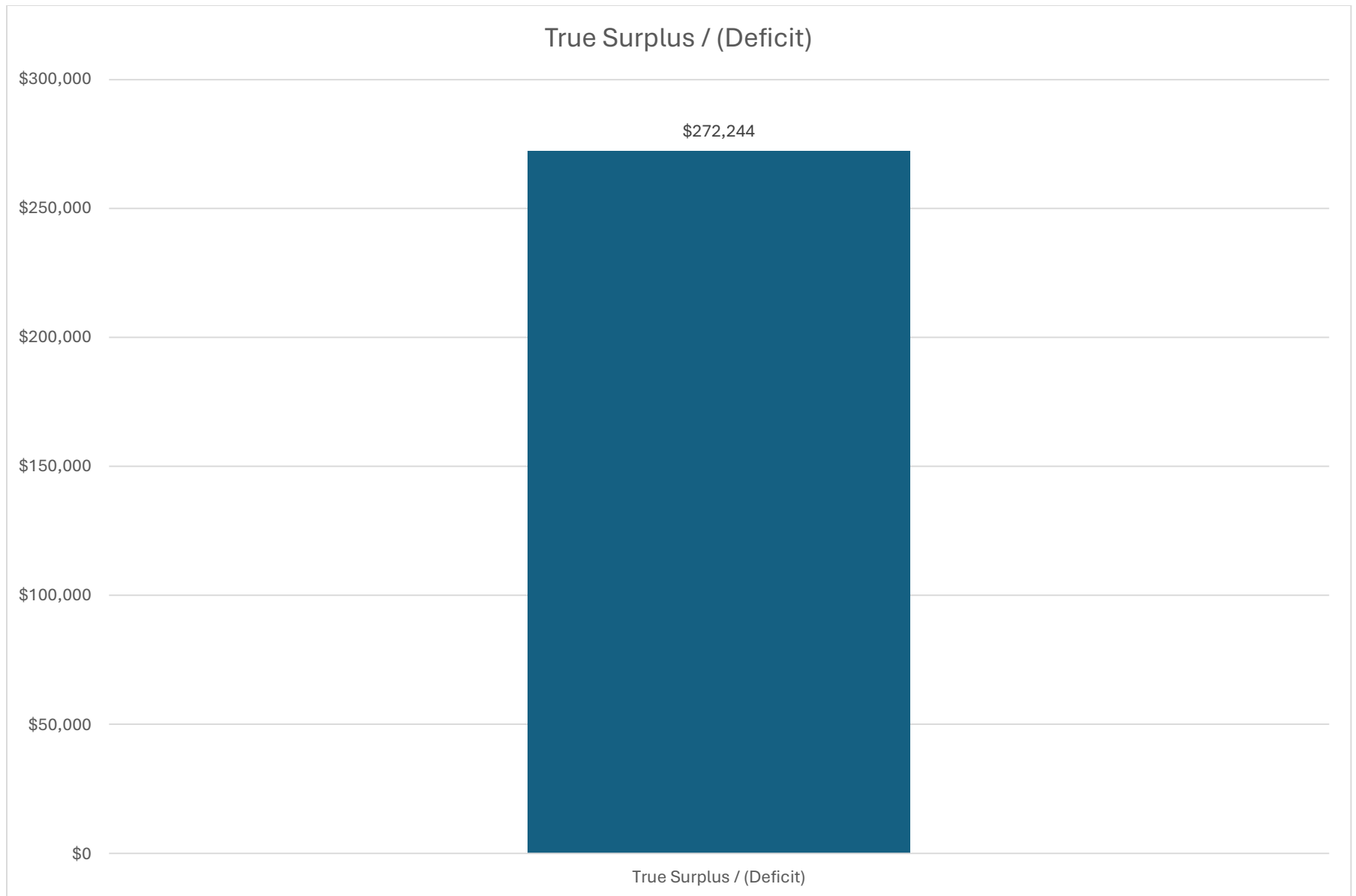
Executive Summary								
Corporation of Shepherdstown — FY26 Budget vs. Actuals Through May 31, 2026								
Metric	Amount / Rate	Readout	Executive readout					
Revenue vs. budget	(\$5,762)	Below budget	Through May 31, FY26 actual revenues are essentially on plan at 99.8% of budget, with a shortfall of \$5,762.					
Expense vs. budget	(\$278,006)	Under budget	Expenses are materially under budget at 89.4% utilization, producing a favorable expense variance of \$278,006.					
True surplus / (deficit)	\$272,244	Surplus	The town is showing a true surplus of \$272,244 through the period.					
Revenue attainment	99.8%	Actual / budget through period	Key areas to monitor include revenue shortfalls in Hotel/Motel Tax and Sales Tax, and expense overruns in City Hall, Contributions/Transfers, and Sanitation.					
Expense utilization	89.4%	Actual / budget through period						
Largest favorable revenue variances				Largest unfavorable revenue variances				
Item	Budget	Actual	Variance	Item	Budget	Actual	Variance	
Video Lottery	\$222,868	\$286,497	\$63,628	Hotel/Motel Tax	\$275,000	\$162,370	(\$112,630)	
Interest Income - Operating Account	\$119,167	\$156,135	\$36,968	Sales Tax	\$513,333	\$463,911	(\$49,423)	
Taxes Ad Valorem	\$232,324	\$257,592	\$25,268	Supplemental Taxes	\$23,975	\$501	(\$23,475)	
Utility Tax	\$73,333	\$92,422	\$19,088	Fines, Fees, and Court Costs	\$50,417	\$36,735	(\$13,682)	
Refuse Collection	\$160,417	\$172,430	\$12,013	Liquor Tax	\$169,583	\$163,680	(\$5,904)	
Largest expense overruns				Largest expense underruns				
Item	Budget	Actual	Variance	Item	Budget	Actual	Variance	
City Hall	\$440,018	\$558,503	\$118,485	Contingencies	\$197,951	\$0	(\$197,951)	
Contributions/Transfers	\$21,750	\$68,651	\$46,901	Civic Promotions	\$99,834	\$19,987	(\$79,847)	
Sanitation	\$259,664	\$300,038	\$40,373	Parking	\$66,497	\$0	(\$66,497)	
Streets	\$333,251	\$337,995	\$4,744	Police Dept	\$883,370	\$825,311	(\$58,058)	
Water & Sewer	\$0	\$0	\$0	Visitor's Bureau	\$137,500	\$103,731	(\$33,769)	

Top Revenue Shortfalls and Expense Overruns



Department Expense Budget vs. Actual





Corporation of Shepherdstown								
FY26 Budget vs Actuals								
Through May 31, 2026								
	REVENUES	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
299	Carryover	\$ 240,000	\$ 174,950	\$ 384,522	\$ 352,479	\$352,479	\$0	
301	Taxes Ad Valorem	\$ 239,731	\$ 253,444	\$ 253,444	\$ 232,324	\$257,592	\$25,268	Property Taxes (Collections are heavy in Aug/Sep and Feb/Mar)
301-06	Supplemental Taxes	\$ 23,100	\$ 26,155	\$ 26,155	\$ 23,975	\$501	(\$23,475)	These are additional Property Taxes that are collected on reassessed values of properties throughout the year
303	Gas & Oil Severance Tax	\$ 20,000	\$ 5,000	\$ 5,000	\$ 4,583	\$3,817	(\$766)	Annual distribution from WV for Gas and Oil mining taxes imposed on businesses (Distribution occurs in October)
304	Utility Tax	\$ 56,000	\$ 80,000	\$ 80,000	\$ 73,333	\$92,422	\$19,088	Monthly Utility Taxes assessed on all utilities
305	B&O Tax	\$ 83,000	\$ 85,000	\$ 85,000	\$ 77,917	\$89,186	\$11,269	Quarterly tax assessed on First Energy Only
306	Liquor Tax	\$ 185,000	\$ 185,000	\$ 185,000	\$ 169,583	\$163,680	(\$5,904)	Quarterly tax assessed on the sale of Wine, Liquor, and Private Clubs by WV - Anticipation of higher revenue in Q2
307	Animal Control Tax	\$ 400	\$ 400	\$ 400	\$ 367	\$170	(\$197)	Fees for dog tags collected by Jefferson County
308	Hotel/Motel Tax	\$ 300,000	\$ 300,000	\$ 300,000	\$ 275,000	\$162,370	(\$112,630)	Monthly Tax assessed on local hotels, motels, and short term rentals
314	Sales Tax	\$ 560,000	\$ 560,000	\$ 560,000	\$ 513,333	\$463,911	(\$49,423)	Quarterly 1% sales tax collected by WV on sales within Shepherdstown limits (Distributions received in Oct, Jan, Apr, and Jul)
320	Fines, Fees, and Court Costs	\$ 57,000	\$ 55,000	\$ 55,000	\$ 50,417	\$36,735	(\$13,682)	
321	Parking Violations	\$ 30,000	\$ 12,000	\$ 12,000	\$ 11,000	\$18,040	\$7,040	
325	Business Licenses	\$ 20,000	\$ 10,000	\$ 10,000	\$ 9,167	\$10,736	\$1,569	Revenue received as beginning of FY26
326	Building Permits	\$ 4,000	\$ 4,000	\$ 4,000	\$ 3,667	\$3,293	(\$374)	
327	WV Opioid settlement fund	\$ 0	\$ 0	\$ 0	\$ 0	\$1,029	\$1,029	
328	Franchise Tax	\$ 9,000	\$ 5,500	\$ 5,500	\$ 5,042	\$7,894	\$2,853	Quarterly Tax assessed by Shepherdstown on Comcast Cable
330	Interstate/International Registration Plan	\$ 7,000	\$ 5,000	\$ 5,000	\$ 4,583	\$1,622	(\$2,962)	Fees assessed by WV on commercial vehicles using the roads in The State (Usually collected monthly, but they are sporadic)
342	Parking Meters	\$ 120,000	\$ 155,000	\$ 155,000	\$ 142,083	\$137,474	(\$4,610)	Includes Parking Meter and Parking Permit Revenue
345	Rent and Concession Revenue	\$ 45,000	\$ 45,000	\$ 45,000	\$ 41,250	\$49,901	\$8,651	Monthly rent from the Water and Sewer Departments (\$1,800 each)
350	Refuse Collection	\$ 175,000	\$ 175,000	\$ 175,000	\$ 160,417	\$172,430	\$12,013	Monthly refuse collection revenue
368	Contributions from Other Entities	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$0	
374	Payroll Reimbursement	\$ 1,095,600	\$ 0	\$ 0	\$ 0	\$0	\$0	
376	Gaming Income	\$ 110,000	\$ 90,000	\$ 90,000	\$ 82,500	\$92,682	\$10,182	Monthly Tax assessed by WV on gaming revenue in The State
380	Interest Income - Operating Account	\$ 80,000	\$ 130,000	\$ 130,000	\$ 119,167	\$156,135	\$36,968	
381	Misc. Reimbursements	\$ 2,000	\$ 0	\$ 0	\$ 0	\$2,993	\$2,993	
382	Refunds and Rebates	\$ 10,000	\$ 10,000	\$ 10,000	\$ 9,167	\$7,054	(\$2,113)	Quarterly Rebate from WV Purchasing Card
391	Recycling Program	\$ 34,000	\$ 36,000	\$ 36,000	\$ 33,000	\$38,177	\$5,177	Monthly recycling collection revenue
397	Video Lottery	\$ 240,000	\$ 243,129	\$ 243,129	\$ 222,868	\$286,497	\$63,628	Weekly Tax assessed by WV on Video Lottery Games
399	Miscellaneous Revenue	\$ 350	\$ 350	\$ 350	\$ 321	\$2,965	\$2,644	Payroll Reimbursement for Police grant work
	Total Revenues	\$ 3,746,181	\$ 2,645,928	\$ 2,855,500	\$ 2,617,542	\$ 2,611,780	(\$5,762)	

	Department Expense Line Items	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
409	Mayor's Office - 409	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
101	Salary	\$ 2,000	\$ 2,000	\$ 2,000	\$ 1,833	\$ 0	(\$1,833)	
104	FICA	\$ 151	\$ 0	\$ 0	\$ 0	\$ 0	\$0	
111	Telephone	\$ 970	\$ 500	\$ 500	\$ 458	\$ 0	(\$458)	
226	Liability Insurance	\$ 100	\$ 100	\$ 100	\$ 92	\$ 0	(\$92)	Workers Comp
	Total Mayor's Office	\$ 3,221	\$ 2,600	\$ 2,600	\$ 2,383	\$ 0	(\$2,383)	
410	City Council -410	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
101	Salaries	\$ 6,000	\$ 6,000	\$ 6,000	\$ 4,500	\$ 4,500	\$0	
104	FICA	\$ 450	\$ 450	\$ 450	\$ 338	\$ 344	\$7	
226	Liability /Workers Comp Insurance	\$ 550	\$ 250	\$ 250	\$ 188		(\$188)	Workers Comp
	Total Council	\$ 7,000	\$ 6,700	\$ 6,700	\$ 5,025	\$ 4,844	(\$181)	
87								
411	City Recorder	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
101	Salaries	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,125	\$ 1,125	\$0	
104	FICA	\$ 115	\$ 115	\$ 115	\$ 86	\$ 86	(\$0)	
226	Liability /Workers Comp Insurance	\$ 64	\$ 64	\$ 64	\$ 48		(\$48)	Workers Comp
	Total Recorder	\$ 1,679	\$ 1,679	\$ 1,679	\$ 1,259	\$ 1,211	(\$48)	
141								
416	Police Judges - 416	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
223	Professional Services	\$ 8,900	\$ 9,900	\$ 9,900	\$ 9,075	\$ 2,200	(\$6,875)	One Municipal Court Judge and one prosecutor
	Total Police Judges	\$ 8,900	\$ 9,900	\$ 9,900	\$ 9,075	\$ 2,200	(\$6,875)	
435	Regional Dev Authority - 435	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
222	Dues & Subscriptions	\$ 1,439	\$ 2,649	\$ 2,649	\$ 2,428		(\$2,428)	Annual Bill from Regional Development Authority
	Total Regional Dev. Authority	\$ 1,439	\$ 2,649	\$ 2,649	\$ 2,428	\$ 0	(\$2,428)	
437	Planning & Zoning - 437	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
103	Salaries	\$ 75,200	\$ 85,508	\$ 85,508	\$ 78,382	\$ 29,488	(\$48,895)	
104	FICA	\$ 6,169	\$ 6,541	\$ 6,541	\$ 5,996	\$ 2,256	(\$3,740)	
105	Group Insurance	\$ 14,364	\$ 12,000	\$ 12,000	\$ 11,000	\$ 11,324	\$324	
106	Retirement	\$ 8,000	\$ 8,550	\$ 8,550	\$ 7,838	\$ 0	(\$7,838)	
211	Telephone	\$ 2,000	\$ 0	\$ 0	\$ 0		\$0	
214	Travel	\$ 0	\$ 0	\$ 0	\$ 0		\$0	
218	Postage	\$ 105	\$ 0	\$ 0	\$ 0	\$ 202	\$202	
220	Advertising/Legal Publications	\$ 1,000	\$ 0	\$ 0	\$ 0	\$ 697	\$697	
221	Training & Education	\$ 300	\$ 0	\$ 0	\$ 0		\$0	
222	Dues & Subscriptions	\$ 105	\$ 0	\$ 0	\$ 0		\$0	
209	Professional Services	\$ 21,300	\$ 8,500	\$ 8,500	\$ 7,792	\$ 29,769	\$21,977	legal costs
226	Insurance & Bonds	\$ 2,000	\$ 2,000	\$ 2,000	\$ 1,833	\$ 1,242	(\$590)	Workers Comp
230	Contracted Services	\$ 0	\$ 2,000	\$ 2,000	\$ 1,833		(\$1,833)	
341	Departmental Supplies	\$ 0	\$ 0	\$ 0	\$ 0	\$ 769	\$769	

	Department Expense Line Items	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
353	Computer Software / Tech	\$ 0	\$ 0	\$ 0	\$ 0	\$ 5,424	\$5,424	
	Total Planning and Zoning	\$ 130,543	\$ 125,099	\$ 125,099	\$ 114,674	\$ 81,172	(\$33,502)	
438	Elections - 438	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
103	Salaries	\$ 0	\$ 1,000	\$ 1,000	\$ 917	\$ 0	(\$917)	
222	Departmental Supplies	\$ 0	\$ 4,500	\$ 4,500	\$ 4,125	\$ 956	(\$3,169)	
223	Total Elections	\$ 0	\$ 5,500	\$ 5,500	\$ 5,042	\$ 956	(\$4,085)	No election in FY 25
440	City Hall - 440	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
103	Salaries	\$ 161,173	\$ 202,008	\$ 202,008	\$ 185,174	\$ 225,893	\$40,719	
104	FICA	\$ 12,330	\$ 15,454	\$ 15,454	\$ 14,166	\$ 17,155	\$2,988	
105	Group Insurance	\$ 21,500	\$ 32,000	\$ 32,000	\$ 29,333	\$ 21,329	(\$8,005)	
106	Retirement	\$ 7,797	\$ 25,930	\$ 25,930	\$ 23,769	\$ 18,136	(\$5,633)	
108	Overtime/Extra Help	\$ 4,000	\$ 2,000	\$ 2,000	\$ 1,833	\$ 0	(\$1,833)	Overtime is not being broken out separately but is being included in Salary line (This had not been previously separated from Salaries before FY25)
211	Telephone	\$ 9,000	\$ 8,000	\$ 8,000	\$ 7,333	\$ 7,400	\$67	
213	Utilities	\$ 10,000	\$ 12,000	\$ 12,000	\$ 11,000	\$ 10,794	(\$206)	
214	Travel	\$ 2,000	\$ 2,000	\$ 2,000	\$ 1,833		(\$1,833)	
215	R&M Building & Grounds	\$ 3,800	\$ 8,000	\$ 8,000	\$ 7,333	\$ 22,153	\$14,820	Oracle Elevator - Replace door operator board on elevator -\$12K
216	R&M Equipment	\$ 2,100	\$ 2,000	\$ 2,000	\$ 1,833	\$ 2431	\$597	
218	Postage	\$ 2,500	\$ 4,000	\$ 4,000	\$ 3,667	\$ 1,000	(\$2,667)	Mail Machine
219	Building & Equipment Rental	\$ 850	\$ 700	\$ 700	\$ 642	\$ 704	\$62	
221	Training and Education	\$ 1,500	\$ 2,000	\$ 2,000	\$ 1,833	\$ 390	(\$1,443)	
220	Advertising/Legal Publications	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,100	\$ 1,440	\$340	
222	Dues & Subscriptions	\$ 1,450	\$ 0	\$ 0	\$ 0	\$ 3,245	\$3,245	Zoom, Adobe Acro, Monday.com subscription --annual - 5 seats for Work Management
223	Professional Services	\$ 50,000	\$ 25,000	\$ 25,000	\$ 22,917	\$ 66,725	\$43,808	Monthly Communication Director and Longerbeam Tax for Aug and Sept. Kimley-Horn & Assoc Mill St Drainage Project for \$19K - Legal services TH
224	Audit Costs	\$ 12,000	\$ 8,100	\$ 8,000	\$ 8,000	\$ 13,748	\$5,748	Yearly Audit Costs - BHM, CPA HRP - CH Audit Cost June 30, 2024
226	Insurance & Bonds	\$ 42,000	\$ 35,000	\$ 35,000	\$ 32,083	\$ 38,338	\$6,254	Workers Comp and liability insurance
230	Contracted Services	\$ 57,850	\$ 41,000	\$ 41,000	\$ 37,583	\$ 50,303	\$12,720	Regional Planning & Dev. - Region 9 - Monthly contracted lease rent for 102 N. King St \$1,250 plus security deposit
341	Departmental Supplies	\$ 20,000	\$ 23,000	\$ 23,000	\$ 21,083	\$ 30,788	\$9,705	Office Supplies, Cleaning Supplies, Town Uniform Laundry Services, Etc
353	Computer Software/IT	\$ 20,000	\$ 30,000	\$ 30,000	\$ 27,500	\$ 26,532	(\$968)	Tek Advisor IT Services , Intuit software
	Total City Hall	\$ 443,050	\$ 479,392	\$ 479,292	\$ 440,018	\$ 558,503	\$118,485	Even though appears to be an increase reflects lines that are underbudgeted in the current year
444	Contributions/Transfers-444	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
566	Contributions/Transfers to Other Funds	\$ 13,739	\$ 0	\$ 0	\$ 0		\$0	Streets Grant Expense - Pass-Through Grant Expenses
568	Contributions - Community Grants	\$ 15,000	\$ 15,000	\$ 15,000	\$ 13,750	\$ 61,450	\$47,700	Shepherdstown Visitor's Center - Community Grant - PYMT # 1, 2 - WV Advancement and Development Division
568-1	Fire Dept	\$ 4,700	\$ 8,000	\$ 8,000	\$ 8,000	\$ 7,201	(\$799)	
	Total Contributions/Transfers	\$ 33,439	\$ 23,000	\$ 23,000	\$ 21,750	\$ 68,651	\$46,901	
571	Parking-571	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
103	Salaries	\$ 0	\$ 51,084	\$ 51,084	\$ 46,827	\$ 0	(\$46,827)	New Dept for FY 26 - will allocate from Police Dept moving forward.
104	FICA	\$ 0	\$ 3,908	\$ 3,908	\$ 3,582		(\$3,582)	
105	Group Insurance	\$ 0	\$ 6,800	\$ 6,800	\$ 6,233	\$ 0	(\$6,233)	
106	Retirement	\$ 0	\$ 8,000	\$ 8,000	\$ 7,333	\$ 0	(\$7,333)	

	Department Expense Line Items	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
216	R&M Equipment	\$ 0	\$ 2,000	\$ 2,000	\$ 1,833	\$ 0	(\$1,833)	
345	Uniforms	\$ 0	\$ 750	\$ 750	\$ 688	\$ 0	(\$688)	
	Total Parking	\$ 0	\$ 72,542	\$ 72,542	\$ 66,497	\$ 0	(\$66,497)	
699	Contingencies-699	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
566	Merit	\$ 0	\$ 0	\$ 0	\$ 0		\$0	
	COLA	\$ 0	\$ 0	\$ 0	\$ 0		\$0	
566	Unexpected Contingencies	\$ 0	\$ 6,375	\$ 215,947	\$ 197,951		(\$197,951)	
	Total Contingencies	\$ 0	\$ 6,375	\$ 215,947	\$ 197,951	\$ 0	(\$197,951)	
700	Police Department - 700	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
103	Salaries	\$ 445,000	\$ 467,725	\$ 467,725	\$ 428,748	\$ 457,166	\$28,418	Inlcudes Parking Enforcement and Admin Support - Parking will be allocated to new created dept
104	FICA	\$ 40,545	\$ 35,781	\$ 35,781	\$ 32,799	\$ 34,333	\$1,534	
105	Group Insurance	\$ 92,000	\$ 106,720	\$ 106,720	\$ 97,827	\$ 98,143	\$317	
106	Retirement	\$ 30,000	\$ 53,000	\$ 53,000	\$ 48,583	\$ 17,946	(\$30,637)	
108	Overtime/Extra Help	\$ 85,000	\$ 40,000	\$ 40,000	\$ 36,667		(\$36,667)	Overtime is not being broken out separately but is being included in Salary line (This had not been previously separated from Salaries before FY25)
211	Telephone	\$ 10,000	\$ 10,000	\$ 10,000	\$ 9,167	\$ 9,595	\$429	
213	Utilities	\$ 5,000	\$ 5,000	\$ 5,000	\$ 4,583	\$ 5,600	\$1,017	
215	R&M Building & Grounds	\$ 15,000	\$ 15,000	\$ 15,000	\$ 13,750	\$ 19,025	\$5,275	PD Renovation
216	R&M Equipment	\$ 4,000	\$ 5,000	\$ 5,000	\$ 4,583	\$ 5,492	\$908	
217	R&M Auto	\$ 14,000	\$ 14,000	\$ 14,000	\$ 12,833	\$ 7,742	(\$5,091)	
218	Postage	\$ 2,100	\$ 2,100	\$ 2,100	\$ 1,925	\$ 1961	\$36	
219	Building & Equipment Rental	\$ 0	\$ 0	\$ 0	\$ 0		\$0	
220	Advertising/Legal Publications	\$ 1,000	\$ 1,000	\$ 1,000	\$ 917		(\$917)	
221	Training & Education	\$ 4,000	\$ 5,000	\$ 5,000	\$ 4,583	\$ 1,477	(\$3,107)	
222	Dues & Subscriptions	\$ 0	\$ 0	\$ 0	\$ 0		\$0	
223	Professional Services	\$ 17,000	\$ 6,000	\$ 6,000	\$ 5,500	\$ 920	(\$4,580)	Law Firm Fees + Police Legal Fees
226	Insurance & Bonds	\$ 65,000	\$ 77,500	\$ 77,500	\$ 71,042	\$ 70,189	(\$853)	Workers Comp and Liability Insurance
229	Court Costs and Damages	\$ 5,000	\$ 1,000	\$ 1,000	\$ 917	-\$ 647	(\$1,564)	
230	Contracted Services	\$ 3,450	\$ 3,450	\$ 3,450	\$ 3,163	\$ 12,747	\$9,585	Magistrate and Police Court Attorney
235	Police Remittance Fees	\$ 6,000	\$ 7,000	\$ 7,000	\$ 6,417	\$ 6,345	(\$72)	
307	Bank Charges	\$ 0	\$ 0	\$ 0	\$ 0		\$0	
341	Departmental Supplies	\$ 35,210	\$ 35,000	\$ 35,000	\$ 32,083	\$ 11,284	(\$20,800)	
343	Police Gas/Fuel	\$ 20,000	\$ 20,000	\$ 20,000	\$ 18,333	\$ 31,656	\$13,322	
345	Uniforms	\$ 5,000	\$ 6,400	\$ 6,400	\$ 5,867	\$ 6,410	\$543	Mostly for new officers
353	Computer Software/IT	\$ 15,000	\$ 47,000	\$ 47,000	\$ 43,083	\$ 27,930	(\$15,153)	Software costs, Tek Advisors Etc - (Notebooks for 2 police vehicles)
	Total Police Dept	\$ 919,305	\$ 963,676	\$ 963,676	\$ 883,370	\$ 825,311	(\$58,058)	
750	Streets - 750	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
103	Salaries	\$ 130,000	\$ 123,963	\$ 123,963	\$ 113,633	\$ 109,796	(\$3,837)	
104	FICA	\$ 10,000	\$ 9,483	\$ 9,483	\$ 8,693	\$ 8,336	(\$357)	
105	Group Insurance	\$ 23,000	\$ 29,500	\$ 29,500	\$ 27,042	\$ 24,913	(\$2,128)	
106	Retirement	\$ 7,000	\$ 6,500	\$ 6,500	\$ 5,958	\$ 5,696	(\$262)	
211	Telephone	\$ 700	\$ 600	\$ 600	\$ 550	\$ 580	(\$169)	
213	Utilities	\$ 25,000	\$ 28,000	\$ 28,000	\$ 25,667	\$ 22,813	(\$2,854)	Potomac Edison - Street Lights/Master Bill Account
215	R&M Buildings & Grounds	\$ 40,000	\$ 7,000	\$ 7,000	\$ 6,417	\$ 6,303	(\$113)	\$1847"

	Department Expense Line Items	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
216	R&M Equipment	\$ 9,000	\$ 5,000	\$ 5,000	\$ 4,583	\$ 23,905	\$19,321	Shepherdstown Ash treatments X 31 trees \$4k, Mini Excavator tracks \$1.9k, Mini Excavator tracks rental \$1.2k
217	R&M Auto	\$ 9,000	\$ 11,000	\$ 11,000	\$ 10,083	\$ 10,878	\$795	
220	Advertising/Legal Publications/Postage	\$ 250	\$ 250	\$ 250	\$ 229	\$ 2,700	\$2,471	
221	Training & Education	\$ 255	\$ 250	\$ 250	\$ 229	\$ 36	(\$194)	
226	Insurance & Bonds	\$ 20,000	\$ 22,000	\$ 22,000	\$ 20,167	\$ 18,325	(\$1,842)	Workers Comp and Liability Insurance
230	Contracted Services	\$ 70,000	\$ 72,500	\$ 72,500	\$ 66,458	\$ 63,033	(\$3,426)	Includes Tree Maintenance - Street Grant Expense
341	Departmental Supplies	\$ 30,400	\$ 35,000	\$ 35,000	\$ 32,083	\$ 29,604	(\$2,479)	PA Municipal, Inc. Invoice for \$6,755 in Sept. and kable Excavating for \$1,483
343	Auto Supplies	\$ 7,500	\$ 7,500	\$ 7,500	\$ 6,875	\$ 7,272	\$397	
345	Uniforms	\$ 5,000	\$ 5,000	\$ 5,000	\$ 4,583	\$ 4,006	(\$577)	
	Total Streets	\$ 387,105	\$ 363,546	\$ 363,546	\$ 333,251	\$ 337,995	\$4,744	
800	Sanitation-800	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
103	Salaries	\$ 126,600	\$ 137,780	\$ 137,780	\$ 126,298	\$ 162,295	\$35,996	
104	FICA	\$ 5,800	\$ 10,540	\$ 10,540	\$ 9,662	\$ 12,330	\$2,668	
105	Group Insurance	\$ 10,000	\$ 10,000	\$ 10,000	\$ 9,167	\$ 9,059	(\$107)	
106	Retirement	\$ 5,000	\$ 12,200	\$ 12,200	\$ 11,183	\$ 12,479	\$1,295	
216	R&M Equipment	\$ 15,000	\$ 1,000	\$ 1,000	\$ 917	\$ 875	(\$42)	
217	R&M Auto	\$ 10,000	\$ 10,000	\$ 10,000	\$ 9,167		(\$9,167)	
218	Postage	\$ 5,000	\$ 250	\$ 250	\$ 229		(\$229)	
220	Advertising	\$ 100	\$ 100	\$ 100	\$ 92		(\$92)	
221	Training & Education	\$ 400	\$ 200	\$ 200	\$ 183		(\$183)	
226	Insurance & Bonds	\$ 35,000	\$ 1,200	\$ 1,200	\$ 1,100	\$ 990	(\$110)	Workers Comp
230	Contracted Services	\$ 20,000	\$ 25,000	\$ 25,000	\$ 22,917	\$ 33,071	\$10,155	Reimbursement to Bavarian Inn for Trash Service Per Annexation Agreement
341	Departmental Supplies	\$ 10,000	\$ 12,000	\$ 12,000	\$ 11,000	\$ 8,420	(\$2,580)	
343	Auto Supplies	\$ 12,000	\$ 5,000	\$ 5,000	\$ 4,583	\$ 7,846	\$3,262	
345	Uniforms	\$ 3,000	\$ 4,000	\$ 4,000	\$ 3,667	\$ 3,979	\$313	
349	001-Landfill	\$ 28,400	\$ 28,000	\$ 28,000	\$ 25,667	\$ 31,300	\$5,633	Landfill Fees
349	002-Recycling	\$ 15,000	\$ 20,000	\$ 20,000	\$ 18,333	\$ 16,717	(\$1,616)	Recycling Fees
353	Software/IT	\$ 12,000	\$ 6,000	\$ 6,000	\$ 5,500	\$ 677	(\$4,823)	Intuit, Tek Advisors Etc
	Total Sanitation	\$ 313,300	\$ 283,270	\$ 283,270	\$ 259,664	\$ 300,038	\$40,373	
806	Water & Sewer-806	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
103	Salaries	\$ 798,600	\$ 0	\$ 0	\$ 0	\$ 0	\$0	Salaries are being recorded in Due To/From Account Instead of here
104	FICA	\$ 62,000	\$ 0	\$ 0	\$ 0	\$ 0	\$0	FICA is being recorded in Due To/From Account Instead of here
105	Group Insurance	\$ 170,000	\$ 0	\$ 0	\$ 0	\$ 0	\$0	
106	Retirement	\$ 65,000	\$ 0	\$ 0	\$ 0	\$ 0	\$0	Retirement is being recorded in Due To/From Account Instead of here
	Total Water & Sewer	\$ 1,095,600	\$ 0	\$ 0	\$ 0	\$ 0	\$0	Water and Sewer will reimburse for these expenses
900	Parks and Rec - 900	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
103	Salaries	\$ 7,000	\$ 0	\$ 0	\$ 0		\$0	
104	FICA	\$ 536	\$ 0	\$ 0	\$ 0		\$0	
105	Group Insurance	\$ 1,677	\$ 2,500	\$ 2,500	\$ 2,292	\$ 3,775	\$1,483	
106	Retirement	\$ 200	\$ 0	\$ 0	\$ 0		\$0	
213	Utilities	\$ 250	\$ 250	\$ 250	\$ 229		(\$174)	
215	R&M Buildings & Grounds	\$ 5,000	\$ 8,000	\$ 8,000	\$ 7,333	\$ 3,593	(\$3,740)	
216	R&M Equipment	\$ 0	\$ 1,000	\$ 1,000	\$ 917		(\$917)	

	Department Expense Line Items	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
226	Insurance & Bonds	\$ 1,137	\$ 1,500	\$ 1,500	\$ 1,375	\$ 2,708	\$ 1,333	Workers Comp and Liability Insurance
341	Departmental Supplies	\$ 2,000	\$ 2,000	\$ 2,000	\$ 1,833		(\$1,833)	
343	Auto Supplies	\$ 2,000	\$ 1,000	\$ 1,000	\$ 917	\$ 1,881	\$964	
459	Capital Outlay-Equipment	\$ 60,200	\$ 0	\$ 0	\$ 0		\$0	
	Total Parks and Rec	\$ 80,000	\$ 16,250	\$ 16,250	\$ 14,896	\$ 12,012	(\$2,884)	
901	Visitor's Bureau - 901	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
567	Contributions	\$ 150,000	\$ 150,000	\$ 150,000	\$ 137,500	\$ 95,839	(\$41,661)	50% of Hotel/Motel Tax Collections
460	Construction in progress	\$ 150,000	\$ 0	\$ 0	\$ 0	\$ 7,892	\$ 7,892	Rankin Painting - Market House Painting Project for \$12k
	Total Visitor's Bureau	\$ 300,000	\$ 150,000	\$ 150,000	\$ 137,500	\$ 103,731	(\$33,769)	
912	Civic Promotions-912	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
568	Contributions	\$ 0	\$ 0	\$ 0	\$ 0		\$0	50% of Hotel/Motel Tax Collections - New Department
568-001	Contributions-Vibrant Downtown & Support the Businesses	\$ 0	\$ 21,782	\$ 21,782	\$ 19,967		(\$19,967)	
568-002	Contributions-Housing & Historical Preservation	\$ 0	\$ 21,782	\$ 21,782	\$ 19,967	\$ 13,161	(\$6,806)	Installation of Christmas lights at the Market House and Town Hall
568-003	Contributions-Land Use Planning	\$ 0	\$ 21,782	\$ 21,782	\$ 19,967		(\$19,967)	
568-004	Contributions-Sustainable Services	\$ 0	\$ 21,782	\$ 21,782	\$ 19,967	\$ 6,826	(\$13,141)	Tobacco Warehouse Flood Insurance
568-005	Contributions-Town Facilities & Parks	\$ 0	\$ 21,782	\$ 21,782	\$ 19,967		(\$19,967)	
	Total Civic Promotions	\$ 0	\$ 108,910	\$ 108,910	\$ 99,834	\$ 19,987	(\$79,847)	
916	Library 916	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 5/31/2026	FY 26 Actuals Thru 5/31/2026	Over/(Under) Budget Thru 5/31/26	Notes and Explanations
567	Contributions	\$ 21,600	\$ 24,840	\$ 24,840	\$ 22,770	\$ 22,770	\$0	Monthly Contribution from Shepherdstown to the library of \$2,070
	Total Library	\$ 21,600	\$ 24,840	\$ 24,840	\$ 22,770	\$ 22,770	\$0	
381	Total Expenses	\$ 3,746,181	\$ 2,645,928	\$ 2,855,400	\$ 2,617,387	\$ 2,339,381	(\$278,006)	
382								
383	Surplus or (Deficit)						272,244	Transfer to Capital Outlay
	True Surplus or (Deficit)						272,244	

Summary of Key Points: Corporation of Shepherdstown, WV 2025 Audit Report

This summary provides an overview of the main findings and highlights from the independent audit and financial statements for the Corporation of Shepherdstown, West Virginia, for the fiscal year ending June 30, 2025.

1. Audit Opinion and Scope

- The independent auditors (BHM CPA Group, Inc.) issued an unmodified (clean) opinion, stating that the financial statements present fairly, in all material respects, the financial position and results of operations of the Corporation as of June 30, 2025.
- The audit was conducted in accordance with U.S. generally accepted accounting principles (GAAP) and Government Auditing Standards.
- No material weaknesses or significant deficiencies in internal control were identified, and no instances of noncompliance were reported.

2. Financial Highlights

- **Net Position:** Increased by \$1.5 million, from \$29.1 million to \$30.6 million.
 - Governmental activities net position increased by \$0.3 million (3%).
 - Business-type activities (water and sewer) net position increased by \$1.2 million (7%).
- **Revenues and Expenses:**
 - Governmental activities revenues increased by \$0.3 million (11%), expenses increased by \$0.3 million (13%).
 - Business-type activities revenues increased by \$1.4 million (35%), expenses increased by \$0.5 million (14%).
- **Fund Balances:**
 - General fund ended with a balance of \$6.7 million, up \$0.1 million (2%) from 2024.
 - Combined governmental fund balance was \$6.8 million, up 1% (\$0.1 million).
- **Capital Additions:** \$0.6 million in governmental capital additions (e.g., bike path, market house renovations); \$5.8 million in water fund additions (main lines, equipment, plant upgrades).
- **Debt:** No new fixed debt issued in 2025. Outstanding debt at year-end was \$9.9 million, a decrease of \$0.4 million from the prior year.
- **Budget Performance:** Actual general fund revenues exceeded budget by \$0.6 million; expenditures were \$0.8 million less than budgeted.

3. Major Financial Statements and Results

- **Statement of Net Position:**

- Total assets and deferred outflows: \$41.5 million.
- Total liabilities and deferred inflows: \$10.9 million.
- Net investment in capital assets: \$18.5 million.
- Restricted net position: \$5.1 million.
- Unrestricted net position: \$7.0 million.
- **Statement of Activities:**
 - Total revenues: \$8.4 million (governmental: \$3.0M; business-type: \$5.4M).
 - Total expenses: \$6.9 million (governmental: \$2.7M; business-type: \$4.2M).
 - Change in net position: \$1.5 million increase.
- **Governmental Funds:**
 - Main revenue sources: taxes (\$1.5M), charges for services (\$0.4M), grants/donations (\$0.2M), video lottery/table gaming (\$0.4M).
 - Main expenditures: public safety (\$0.9M), general government (\$0.6M), streets/transportation (\$0.4M), health/sanitation (\$0.3M), culture/recreation (\$0.2M), capital outlay (\$0.5M).

4. Capital Assets and Debt

- **Capital Assets:**
 - Total net capital assets: \$28.3 million (governmental: \$5.4M; business-type: \$22.9M).
 - Major additions: water main lines, equipment, market house renovations, bike path.
- **Long-Term Liabilities:**
 - Total outstanding debt: \$9.9 million (all business-type, mainly water/sewer bonds).
 - No new debt issued in 2025.
 - Compensated absences liability increased due to implementation of GASB 101.

5. Pension and OPEB (Other Postemployment Benefits)

- The Corporation made all required contributions to its retirement and OPEB plans.
- OPEB liability was eliminated in 2025 due to changes in actuarial assumptions and plan funding.

6. Compliance and Internal Controls

- The Corporation was in compliance with all significant bond covenants (e.g., debt service coverage ratios for water and sewer bonds).
- No material weaknesses or significant deficiencies in internal control were found.
- No instances of noncompliance with laws, regulations, contracts, or grant agreements were identified.

7. Budgetary Compliance

- Some overages in general government and culture/recreation due to personnel and capital costs, but overall budgetary compliance was maintained using available fund balances and grants.

8. Economic Outlook

- The Corporation is optimistic about future economic growth due to population increases, infrastructure improvements, annexation, and successful grant procurement.

9. Other Notable Items

- No blended or discretely presented component units.
- No significant subsequent events requiring disclosure after June 22, 2026.
- The Corporation maintains strong liquidity and fund balances, supporting ongoing operations and future projects.

Approval of Town Expenditures

Transaction Detail by Account
Corporation of Shepherdstown
May 06 - June 04

	Transaction date	Transaction type	Num	Name	Memo/Description	Amount
GENERAL FUNDS BANKING						
101.011 General Operating Funds 6209						
	06/05/2026	Bill Payment (Check)		SmartBill	SmartBill - CH, W, S Billing Expense	-1,649.63
	06/08/2026	Bill Payment (Check)	23851	Final Touch Construction, LLC	PD Renovation - Final flooring draw	-4,625.00
	06/08/2026	Bill Payment (Check)	23852	Eagle's View Enterprises	Community Conversation Comment Cards - Market House	-58.78
	06/08/2026	Bill Payment (Check)	23853	Bob's Tire Service, Inc.	PD Auto Repair	-890.80
	06/09/2026	Bill Payment ACH (Check)	Payment	Frontier	Elevator phone for the Market House for May and June	-355.60
	06/10/2026	Bill Payment ACH (Check)	Payment	Viking Tree Service	Wenner House -- limb break hit roof	-4,660.00
	06/12/2026	Bill Payment (Check)	Payment	Ghosh Engineers, Inc.		-412.50
	06/12/2026	Bill Payment (Check)	23854	For Generations Quilting LLC	Hem uniform pants x 3; curtain for under counter	-60.00
	06/12/2026	Bill Payment (Check)	23855	Jefferson County Emergency Communications	Cradlepoint devices unlimited x 5 - FirsNet Nighthawks CAD/Mobile Data - 3/6/26 - 4/5/26	-217.92
	06/12/2026	Bill	Customer Dep. Refunds	Corporation of Shepherdstown	Customer Deposit Refunds for Daniel Easton, Alivia Deyo Samuel Poe, Jeremy Dobrzanski	426.73
	06/15/2026	Bill Payment (Check)	23856	Arthur J. Auxer, III	3 arraignments - 5/15/26, 5/28/26, and 6/4/26	-120.00
	06/16/2026	Bill Payment (Check)	23857	United Way of the Eastern Panhandle	Teen Court Remittance for April 2026	-235.00
	06/16/2026	Bill Payment (Check)	23866	Shepherdstown StreetFest, Inc.	Grant for Street Fest 2026	-2,500.00
	06/16/2026	Bill Payment (Check)	23858	The Roving Peregrine Theatre Company	Grant for Gutenberg, The Musical	-1,250.00
	06/16/2026	Bill Payment (Check)	23859	Contemporary American Theater Festival	Grant for CATF's 36th season	-25,000.00
	06/16/2026	Bill Payment (Check)	23860	Shepherdstown Public Library	Grant for installation of solar panels on the library	-20,000.00
	06/16/2026	Bill Payment (Check)	23861	Rose Hill Cemetery Association	Grant for the maintenance of Rose Hill Cemetery	-2,000.00

06/16/2026	Bill Payment (Check)	23862	Jefferson Co. Solid Waste Authority	Sanitation Dumping Fees:001-Landfill	-1,183.00
06/16/2026	Bill Payment (Check)	23863	Jefferson County Emergency Communications	NetMotion Licensing - Annual Maintenance x 8--- Annual Maintenance	-652.00
06/16/2026	Bill Payment (Check)	23864	Danielle Corsetto	Welcome Banners winning entry	-300.00
06/16/2026	Bill Payment ACH (Check) Payment		Corporation of Shepherdstown	Water bill for 102 N. King Street	-81.83
06/17/2026	Bill Payment (Check)	23865	Frank McCluskey	(Poll Worker for Election on June 2, 2026)	-137.50
06/17/2026	Bill Payment (Check)	23867	Kay Schultz	(Poll Worker for Election on June 2, 2026)	-137.50
06/17/2026	Bill Payment (Check)	23868	David Rampy	(Poll Worker for Election on June 2, 2026)	-137.50
06/17/2026	Bill Payment (Check)	23869	John Schaffer	(Poll Worker for Election on June 2, 2026)	-137.50
06/17/2026	Bill Payment (Check)	23870	Adam Thomas	(Poll Worker for Election on June 2, 2026)	-50.00
06/17/2026	Bill Payment (Check)	23871	Deb Tucker	(Poll Worker for Election on June 2, 2026)	-50.00
06/17/2026	Bill Payment (Check)	23872	Phil Bakershenk	(Poll Worker for Election on June 2, 2026)	-137.50
06/17/2026	Bill Payment (Check)	23873	Kathleen Stratton	(Poll Worker for Election on June 2, 2026)	-137.50
06/17/2026	Bill Payment (Check)	23874	Carolyn Rodis	(Poll Worker for Election on June 2, 2026)	-137.50
06/17/2026	Bill Payment (Check)	23875	Shannon Purvis Thomas	(Poll Worker for Election on June 2, 2026)	-137.50
06/17/2026	Bill Payment (Check)	23876	Linda Layne	(Poll Worker for Election on June 2, 2026)	-50.00
06/17/2026	Bill Payment (Check)	23877	Michael Binder	(Poll Worker for Election on June 2, 2026)	-50.00
06/17/2026	Bill Payment (Check)	23878	Leah Rampy	(Poll Worker for Election on June 2, 2026)	-50.00
06/17/2026	Bill Payment (Check)	23879	Jack Childers	(Poll Worker for Election on June 2, 2026)	-90.00
06/17/2026	Bill Payment (Check)	23880	Emily Gross	(Poll Worker for Election on June 2, 2026)	-90.00
06/17/2026	Bill Payment (Check)	23881	Lois Spreen	(Poll Worker for Election on June 2, 2026)	-90.00
06/17/2026	Bill Payment (Check)	23882	Peter Spreen	(Poll Worker for Election on June 2, 2026)	-90.00

06/17/2026	Bill Payment (Check)	23883	Amy Jacot Deboinod	(Poll Worker for Election on June 2, 2026)	-90.00
06/18/2026	Bill Payment (Check)	23884	WECI, Inc.	Environmental Inspection of Former Shepherdstown Elementary School	-7,750.00
06/22/2026	Bill Payment (Check)	23885	CoxHollidaYoung, PLLC	Preparation of 6/30/2025 Financial Statement with Footnotes (Progress Invoice #3)	-833.34
06/30/2026	Bill Payment ACH (Check) Payment		Jefferson County CVB	Hotel/Motel 50%--Receipts--May 2026 payment	-19,120.15
06/30/2026	Bill Payment ACH (Check) Payment		Iron Mountain Solutions Inc	Shredding Service	-302.40
07/02/2026	Bill Payment ACH (Check) Payment		Michael Chalmers	Communication Director role per contract -June 2026	-1,700.00
Total for 101.011 General Operating Funds 6209					-\$97,331.22

101.09 PoliceDR/CR Acct-all 6798					
06/17/2026	Expense		Merch SETL EPX	MERCH SETL EPX ST 290414701	0.00
06/17/2026	Expense		Merch SETL EPX	MERCH SETL EPX ST 290414701	0.00
06/17/2026	Expense		Merch SETL EPX	MERCH SETL EPX ST 290414701	0.00
Total for 101.09 PoliceDR/CR Acct-all 6798					\$0.00

101.50 Payroll Checking 0471					
06/08/2026	Expense		EREMIT PRM VALIC	VALIC Retirement Payable	-9,512.82

06/09/2026	Expense		PEIAPREAUT WVTREASURY	Benefits	-483.00
	Bill Payment	ACH			
06/12/2026	(Check)	Payment	Aflac	Aflac	-567.52
Total for 101.50 Payroll Checking 0471					-\$10,563.34

**Total for GENERAL FUNDS
BANKING with sub-accounts**

-\$107,894.56

213 Purchase Card Payable					
05/01/2026	Expense	3009	Amazon.com	700 Police Department:700.345 Uniforms	421.65
05/01/2026	Expense	2654	Amazon.com	700 Police Department:700.345 Uniforms	52.95
05/01/2026	Expense	4810	Cool Green Auto & Tire Inc	Auto Repair	93.23
05/01/2026	Expense	3985	B2B	440 City Hall:City Hall Other Expenses:440.222 City	
05/01/2026	Expense	5623	WV DHHR Bureau for Public Health	Hall Dues & Subscriptions	129.00
05/01/2026	Expense	5623	Quill Corporation	Lab Testing (635.11 water)	20.00
05/01/2026	Expense	5623	Everest Window Cleaning (Bolyard Ent.)	City Hall Departmental Supplies	83.99
05/01/2026	Expense	5623	Apple Valley Waste Inc	Window cleaning	91.80
05/01/2026	Expense	5623	Intuit	Sanitation Dumping Fees:800.349-002 002-Recycling	908.85
05/01/2026	Expense	5623	Intuit	440.353 City Hall Computer Software	80.25
05/01/2026	Expense	5623	Intuit	Water Membership for QuickBooks (401.211 water)	123.05
05/01/2026	Expense	5623	Intuit	Sewer Membership for QuickBooks (401.211 water)	123.05
05/03/2026	Expense	2540	Berkeley Club Beverages	Rental of Water Cooler / Water Gallons 5	91.22
05/03/2026	Expense	3985	Comcast Phone of WV	Sewer Dept. Phone Bill (401.22 sewer)	297.00
05/04/2026	Expense	2654	Amazon.com	700.216 Police R&M Equipment	17.09

05/04/2026	Expense	2654	Amazon.com	700 Police Department:700.341 Departmental Supplies	29.94
05/04/2026	Expense	2654	Amazon.com	700 Police Department:700.341 Departmental Supplies	32.07
05/04/2026	Expense	48101	Cool Green Auto & Tire Inc	Auto Repair	93.14
05/04/2026	Expense	4810	Home Depot	Tools / Supplies Water	105.78
05/04/2026	Expense	3985	Zoom	440 City Hall:City Hall Other Expenses:440.222 City Hall Dues & Subscriptions	10.00
05/04/2026	Expense	3985	Comcast Phone of WV	Telecommunications	431.29
05/04/2026	Expense	3985	Amazon.com	440.341 City Hall Departmental Supplies	20.97
05/04/2026	Expense	3985	Berkeley Club Beverages	440.341 City Hall Departmental Supplies	51.44
05/04/2026	Expense	5623	Gladhill Pest Control Inc.	Pest Control	653.00
05/04/2026	Expense	5623	Gladhill Pest Control Inc.	Pest Control	655.00
05/05/2026	Expense	4258	SP Martinsburg	Repairs on Ford Dump Truck (750.2 sewer)	1,091.36
05/06/2026	Expense	4258	Carquest of Martinsburg- (S.Corp.)	Oil for pumps (401.43 sewer)	191.04
05/06/2026	Expense	4802	Sunny Meadows	Streets Maintenance & Equipment:750.341 Departmental Supplies	161.70
05/06/2026	Expense	4802	RC Towing	800.216 Sanitation R&M Equipment	758.47
05/06/2026	Expense	3082	Amazon.com	Rain suits W&S	265.95
05/06/2026	Expense	5623	Oldcastle APG	Sanitation Dumping Fees:800.349-002 002-Recycling	450.00
05/06/2026	Expense	5623	Waste Management Inc	Landfill, Sludge	1,665.95
05/06/2026	Expense		AR&E	Invoice #R1650 (401.42 water)	358.55
05/07/2026	Expense	3082	Amazon.com	Rain suits	454.86
05/07/2026	Expense	5623	Aqua-Aerobics System	Invoice #1052939 (Parts) 401.42 sewer	1,629.22
05/07/2026	Expense	5623	Gerald Taylor Co	Plant Maintenance (401.42 water)	2,120.38
05/08/2026	Expense	3985	Comcast Business, Inc	Communications CH, W, S, Saint, Police	1,144.14
05/08/2026	Expense	3985	Comcast Phone of WV	Water telecommunications (water 401.22)	364.44
05/08/2026	Expense	5623	Intuit	CH Advanced Online QuickBooks	\$294.25
05/11/2026	Expense	4810	Specialty Business Supplies, Inc	Due to (from) Water	\$12.25
05/12/2026	Expense		US Bank	GENERAL FUNDS BANKING:101.011 General Operating Funds 6209	-\$45,870.63
05/12/2026	Expense	11.46	Walmart	440.341 City Hall Departmental Supplies	\$11.46
05/13/2026	Expense	2540	MacKay Meters	700 Police Department:700.341 Departmental Supplies	\$248.95
05/13/2026	Expense	2654	Amazon.com	Office Equipment - 10 inch clock with day and date, Men's Stretch Utility Shorts	\$95.20
05/13/2026	Expense	2654	Amazon.com	700 Police Department:700.341 Departmental Supplies	\$19.25
05/13/2026	Expense	3082	Dollar General Store	Supplies Water	\$5.83
05/13/2026	Expense	3082	Dollar General Store	Supplies Water	\$80.24
05/14/2026	Expense	4802	Cool Green Auto & Tire Inc	Streets Vehicle Expenses:750.217 R&M Auto	\$14.06
05/14/2026	Expense	3985	Spirit of Jefferson	440 City Hall:440.220 Advertising/Legal Publications	\$558.54
05/14/2026	Expense	5623	Everest Window Cleaning (Bolyard Ent.)	Window Cleaning (Bolyard Ent.)	\$51.00

05/14/2026	Expense	5623	Cintas Corporation	Uniforms	\$609.75
05/14/2026	Expense	5623	Cintas Corporation	Uniforms	\$538.93
05/14/2026	Expense	5623	Cintas Corporation	Uniforms	\$630.03
05/15/2026	Expense	2540	Shepherdstown Peddle & Paddle	700.216 Police R&M Equipment	\$295.95
05/15/2026	Expense	3985	CallingPost Communications, Inc.	Repairs / maintenance to Police bikes x 2	\$583.00
05/15/2026	Expense	5623	Rentals Unlimited	750 Streets:750.230 Contracted Services	\$378.97
05/15/2026	Expense	5623	WV DHHR Bureau for Public Health	Lab Testing (635.11 water)	\$69.00
05/15/2026	Expense	5623	Super Shoe Stores/Macro Retail	Unifrom	\$184.99
05/16/2026	Expense	5623	Quill Corporation	Supplies - Sewer	\$177.58
05/16/2026	Expense	5623	STH, Inc.	INV32937 (Fernbank Pump Station Spare Capacitor Kit) 401.43 sewer	\$395.00
05/17/2026	Expense	2654	Amazon.com	700.216 Police R&M Equipment	\$39.54
05/17/2026	Expense	2654	Amazon.com	700 Police Department:700.345 Uniforms	\$134.79
05/18/2026	Expense	3985	Panhandle Printing and Design	440.341 City Hall Departmental Supplies	\$124.20
05/19/2026	Expense	4258	Maxlock, LLC	Locks for Pump Stations (401.43 sewer)	\$247.50
05/19/2026	Expense	4802	Dog Waste Depot	Sanitation Other Expenses:800 Sanitation:800.341	
05/19/2026	Expense		Sheetz	Departmental Supplies	\$289.77
05/19/2026	Expense	5586	Walmart	Streets Vehicle Expenses:750.217 R&M Auto	\$15.99
05/19/2026	Expense	3985	Comcast Phone of WV	440.341 City Hall Departmental Supplies	\$144.86
05/19/2026	Expense	5623	WV DHHR Bureau for Public Health	City Hall Utilities:440.211 Telephone/Utilities/Water	\$346.93
05/19/2026	Expense	5623	Specialty Printing	Lab Testing (635.11 water)	\$92.00
05/19/2026	Expense	5623	Specialty Printing	437 Planning & Zoning:437.341 Departmental Supplies	\$404.00
05/19/2026	Expense	5623	Specialty Printing	440.341 City Hall Departmental Supplies	\$28.00
05/19/2026	Expense	5623	Specialty Printing	440.341 City Hall Departmental Supplies	\$50.00
05/19/2026	Expense	5623	Specialty Printing	6 3/4 window envelopes x 1000	\$183.00
05/19/2026	Expense	5623	Specialty Printing	437 Planning & Zoning:437.341 Departmental Supplies	\$6.80
05/19/2026	Expense	5623	Specialty Printing	437 Planning & Zoning:437.341 Departmental Supplies	\$29.00
05/19/2026	Expense	5623	Specialty Printing	Sanitation Other Expenses:800 Sanitation:800.341	
05/20/2026	Expense	2654	Amazon.com	Departmental Supplies	\$654.00
05/20/2026	Expense	2654	Amazon.com	700 Police Department:700.345 Uniforms	\$16.00
05/20/2026	Expense	2654	Amazon.com	700 Police Department:700.345 Uniforms	\$52.41
05/20/2026	Expense	3082	Amazon.com	Supplies - Water Works	\$16.58
05/20/2026	Expense	3082	Amazon.com	Supplies - Water Works	\$237.98
05/20/2026	Expense	3985	Bowles Rice LLP	Legal Services	\$6,537.00
05/20/2026	Expense	3985	Bowles Rice LLP	Legal Services	\$736.75
05/20/2026	Expense	3985	Bowles Rice LLP	Legal Services	\$876.75
05/20/2026	Expense	3985	Walmart	440.341 City Hall Departmental Supplies	\$161.72
05/20/2026	Expense	5623	AR&E	Invoice #RF1002 (401.42 water) Monthly inspection of raw water pumps	\$335.67
05/20/2026	Expense	5623	Specialty Printing	440.341 City Hall Departmental Supplies	\$113.00

05/20/2026	Expense	5623	T-Mobile	Communications CH, W, S, Saint, Police	\$1,099.28
05/21/2026	Expense	4594	Dollar General Store	700 Police Department:700.341 Departmental Supplies	\$10.07
05/21/2026	Expense	4802	Bobcat of Hagerstown	Streets Maintenance & Equipment:750.216 R&M Equipment	\$695.46
05/21/2026	Expense	4802	Carquest of Martinsburg- (S.Corp.)	Sanitation Vehicle Expenses:800.217 R&M Auto	\$413.40
05/21/2026	Expense	4802	Home Depot	Tools / Supplies - Water	\$92.25
05/21/2026	Expense	3082	Hach Co.	Water reagents (635.11 water)	\$1,405.85
05/21/2026	Expense	5586	MJ's	440.341 City Hall Departmental Supplies	\$131.84
05/21/2026	Expense	5586	Panhandle Printing and Design	440.341 City Hall Departmental Supplies	\$62.10
05/21/2026	Expense	5623	Oldcastle APG	Sanitation Dumping Fees:800.349-002 002-Recycling	\$250.00
05/21/2026	Expense	5623	Miss Utility of West Virginia Inc	Message Fees W/S	\$74.35
05/22/2026	Expense	4258	Dollar General Store	Supplies	\$32.86
05/22/2026	Expense	4802	Carquest of Martinsburg- (S.Corp.)	800.216 Sanitation R&M Equipment	\$116.58
05/22/2026	Expense	5586	Tommeez Pizza & Sub LLC	440.341 City Hall Departmental Supplies	\$33.73
05/22/2026	Expense	3985	EVO GOV	440.223 City Hall Professional Services	\$150.00
05/22/2026	Expense	3985	Haworth	440.341 City Hall Departmental Supplies	\$1,818.00
05/22/2026	Expense	5623	Quill Corporation	Supplies	\$249.41
05/22/2026	Expense	5623	Waste Management Inc	Landfill, Sludge	\$1,448.64
05/23/2026	Expense	5623	Quill Corporation	440.341 City Hall Departmental Supplies	\$37.99
05/25/2026	Expense	3082	Amazon.com	CL 2 Parts (401.45 water)	\$80.13
05/26/2026	Expense	4258	Team Viewer	Renewal of Team Viewer License (401.211 sewer)	\$1,448.28
05/26/2026	Expense	5623	Everest Window Cleaning (Bolyard Ent.)	Window Cleaning	\$91.80
05/26/2026	Expense	5623	Cintas Corporation	Uniforms	\$539.93
05/26/2026	Expense	5623	Cintas Corporation	Uniforms	\$539.93
05/26/2026	Expense	5623	Griffith Energy Services, Inc. (gasoline)	Gasoline	\$3,421.23
05/26/2026	Expense	5623	Griffith Energy Services, Inc. (diesel)	Diesel	\$1,309.59
05/27/2026	Expense	2654	GS-JJ.COM	700 Police Department:700.341 Departmental Supplies	\$896.00
05/27/2026	Expense	2654	Amazon.com	700 Police Department:700.341 Departmental Supplies	\$40.65
05/27/2026	Expense	4258	USA Bluebook	Gloves for WWTP (401.24 sewer)	\$353.22
05/28/2026	Expense	2540	Quill Corporation	700 Police Department:700.341 Departmental Supplies	\$353.31
05/28/2026	Expense	3009	E-Bay	700 Police Department:700.341 Departmental Supplies	\$220.37
05/28/2026	Expense	4802	WV DMV	750 Streets:750.221 Training & Education	\$35.50
05/28/2026	Expense	5623	Casto & Harris of WV, LLC	438 Elections:438.02 Election Supplies & Expense	\$956.46
05/28/2026	Expense	5623	Adobe Acropro	440 City Hall:City Hall Other Expenses:440.222 City Hall Dues & Subscriptions	\$21.19
Total for 213 Purchase Card Payable					\$4,959.06

RESTRICTED FUNDS				
103 Customer Deposit Accounts 3194				
	04/01/2026	Check	Customer Deposit Refunds	0.00
	04/17/2026	Check	Customer Deposit Refunds	0.00
	04/30/2026	Check	Customer Deposit Refunds	0.00
	05/01/2026	Check	Customer Deposit Refunds	0.00
	05/15/2026	Check	Customer Deposit Refunds	0.00
Total for 103 Customer Deposit Accounts 3194				\$0.00
Total for RESTRICTED FUNDS with sub-accounts				\$0.00
TOTAL				\$0.00

Reports of Committees, Commissions and Boards

Monthly Report to the Town Council from the Water and Sanitary Boards for June 2026

- The Water and Sanitary Boards started discussions to consider changes to the Water and Sanitary tariffs. The current water tariff, issued in March 2011, is due for an update. The current sewer tariff was adopted in March 2023. The board members were given guidance to review other area tariffs on the PSC website to gain a better understanding of the tariffs overall.
- FY27 budgets for both the water and sewer departments were approved. These budgets are distinct from the Town budget, although all three impact the residents of Shepherdstown. The water and sewer approved budgets are to be included in the July Town Council Meeting package.

- At the request of the Board, the sanitary department recently tested the biosolids coming from the sewer plant for PFAS (Per- and Polyfluoroalkyl Substances).

PFAS are a large family of human-made chemicals used in non-stick pans, stain-resistant fabrics, food packaging, firefighting foams, and many industrial processes. They don't break down easily, which is why they're often called **"forever chemicals."**

The staff collected representative samples from the dewatered solids following EPA-approved sampling protocols.

The samples were sent to lab where they tested the full suite of 40 PFAS compounds using the EPA Draft Method 1633A, which is designed for wastewater, solids, and biosolids testing.

The results were encouraging. Although West Virginia has not yet established standards defining the acceptable levels for several of the PFAS components, Maryland has. The town's results are well below the levels that require any action.

Age-Friendly Shepherdstown
June 17, 2026

MINUTES

Attendees:

Members Attending: Marty Amerikaner, Leigh Ann Evanson, Jan Hafer, Linda Spatig, Lois Spreen

Members Absent: Marcy Bartlett

Guests: Tera Lynn Gray

Introductions: Tera Lynn Gray was a guest at the meeting hoping to learn more about the work of the committee. She has experience supporting/developing accessibility programs.

Minutes: The minutes of the May 27 committee meeting were approved.

New Committee Member/Committee Chair Selection: Lois Spreen was approved as a committee member by the Town Council on June 10. She was also approved today by the committee as the new chair of Age-Friendly Shepherdstown. (Linda Spatig will be relocating at the end of the month.)

Old Business:

- a) The 2026 Age-Friendly Shepherdstown Action Plan was approved by Town Council on June 10. It has also been approved by SAIL. A couple of edits were suggested by Council Member Shannon Thomas which will be incorporated into the final document. Finalization of the action plan document will be complete upon receipt of letters from SAIL and Mayor Gatz.

Due to technical difficulties, the meeting ended abruptly prior to completing Old Business and addressing any New Business.

Next meeting: TBD

SHEPHERDSTOWN FINANCE COMMITTEE MEETING MINUTES

[Month, Day, Year] – [Time]

Town Hall – 104 North King Street

1. **Call to Order** The meeting was called to order at 6:30 p.m.

2. **Attendance**

- a. **Members Present:** James Gats (J Gatz), Marcy Bartlett (M Bartlett)
- b. **Staff Present:** Maged Kirolos (M Kirolos), Hunter Wetzel (H Wetzel)
- c. **Visitors Present:** Gail Seiler (G Seiler), Simon Marquez (S Marquez)

3. **Approval of Minutes**

- a. A motion was made by (M Bartlett) to accept June 3, 2026, meeting minutes. The motion was seconded by (J Gatz). The motion was passed unanimously.
- b. The Committee discussed a section on page 7 regarding staff providing clearer information to Town Council. The minutes were approved with a small edit to remove the phrase referencing an explanation of the global account and due-to/due-from balances, and to reflect a clearer summary for Town Council.

4. **Community Grant Application**

- a. Shepherd Village Solar
 - i. (G Seiler) presented the Shepherd Village Solar grant application. She explained that Shepherd Village had received four donated solar panels and requested \$2,273 to purchase batteries, an inverter, switches, cables, and related equipment to capture solar energy for greenhouse use.
 - ii. The Committee discussed whether the project would primarily benefit Shepherd Village or the broader community. Discussion focused on partial Town funding, possible Village or outside funding, ownership by Shepherd Village, and strengthening the application by adding an education and outreach commitment for the Town, community groups, faith groups, Shepherdstown Shares, and similar audiences.
 - iii. The Committee requested that Shepherd Village return with an adjusted proposal that includes a reduced Town funding request, possible additional funding sources, and a clearer commitment to public education and outreach.

5. **Edmunds Gov Software Implementation - Update**

- a. Staff reported that the Edmunds implementation is ahead of schedule. Testing had been completed for internet, firewall, speed, and multi-user functions, and work is now focused on transferring three years of historical account data, especially for water and sewer billing.
- b. The Committee discussed the transition schedule, with the goal of having billing and financial core modules active by July 1, 2027. Staff expect the core financial transition to be completed within approximately 60 days after the billing transfer, with 45 to 60 days reserved for validation, testing, and staff training.

- c. The Committee also discussed custom financial reports, possible read-only access or report generation for Finance Committee/Town Council needs, archiving approximately 20 years of legacy data, and the need for an updated written implementation timeline and data catalog. Staff also noted that residents using autopay may need to re-enter banking information in the new system for security reasons.

6. Update on State Audit for FY 2025 - Final Financial Statement for Corp. Shepherdstown

- a. Staff reported that the FY 2025 State Audit was completed with BHM CPA Group. The audit covered the Corporation of Shepherdstown, including water and sanitary operations, for the year ending June 30, 2025, and included government-wide and fund financial statements and budget comparisons.
- b. Staff summarized financial highlights, including an increase in net position, increased revenues and expenses compared with the prior year, capital additions, no new debt issued in 2025, a reduction in outstanding debt, and total outstanding debt of approximately \$9.9 million, primarily related to water and sewer bonds.
- c. The Committee discussed capital assets and infrastructure items, including the classification and wording for bike path or transportation-related project expenses, the Market House renovation, water main lines, water treatment equipment, and sewer monitoring equipment. Staff agreed to review and correct the bike path/transportation description as needed.
- d. The Committee also discussed a Housing Authority account or fund that appeared in the financial statements, including its history, possible restrictions, and whether approximately \$54,000 was available or whether the amount was being misread. Staff agreed to investigate and report back.
- e. The Committee discussed requesting a post-audit conference with BHM to help Town Council, new members, and water/sewer-related board members better understand the audit and the Corporation/Enterprise structure. Staff indicated they would contact BHM about scheduling a post-audit conference, preferably in a shorter format.

7. Adjourn Motion made by (M Bartlett) to adjourn at 8:04 p.m. Seconded by (J Gatz). Motion voted unanimously and the meeting was adjourned.

SHEPHERDSTOWN PUBLIC WORKS COMMITTEE SPECIAL MEETING MINUTES

June 22, 2026 - 6:30 p.m.

Town Hall - 104 North King Street / Zoom

1. Call to Order The Meeting was called to order at 6:32 p.m.

2. Attendance

- a. **Members Present:** Linus Bicker (L Bicker), James Gatz (J Gatz)
- b. **Staff Present:** Gino Sisco (G Sisco), Hunter Wetzel (H Wetzel)
- c. **Visitors Present:** Keith Alexander (K Alexander), Marcy Bartlett (M Bartlett).

3. Approval of Minutes

- a. Approval of April 30 Meeting Minutes
 - i. A typo was noted under item 4B, Congressionally Directed Funding Applications. A correction was also noted for item 4H, Mill Street property, because the transcript indicates the trailer had not been removed and staff would confirm the wording.
 - ii. Motion made by L Bicker to approve the minutes with the purposed changes. Second, by J Gatz. Motion passed unanimously.

4. Public Comment

- a. Historic Landmarks Commission - Visitor Center Sign and Bollards
 - i. K Alexander spoke regarding the Historic Landmarks Commission resolution asking the Public Works Committee and the Town to work with the Commission on more historically appropriate materials and fastening methods for the Visitor Center sign.
 - ii. He also discussed the German Street bollards, stating that safety remains the priority, but the Commission would like to work with the Town on less obtrusive alternatives.

5. Ongoing Business

- a. Green Infrastructure / Storm Water Improvement Projects - Status
 - i. The contractor is expected to complete work by July 1. Surveyors have been on site and are working on designs; the Paper Street project was described as more complex because of erosion on the north side of the property.
- b. Community Composting Project - Status
 - i. Approximately 20 or 21 people have expressed interest in the project. The Town is working on an MOU with Shepherd University, with a 12-month demonstration project expected to begin in September.

- c. Market House Plaza Project and Area Traffic Study - Status
 - i. Draft project notes have been prepared but had not yet been shared with Jeff Feldman. Asher is reviewing video recordings to count cars and trucks at different times of day and provide additional information on traffic and loading-zone activity.
- d. Artistic Bench Project and Memorial Benches - Status
 - i. The Shepherdstown-themed bench is in progress through coordination with Shepherd University, and Danielle Corsetto is working on the design for the second bench.
 - ii. The Committee also discussed two donated memorial benches, possible placement locations, and moving or removing existing benches ahead of CATF and the Fourth of July parade.
- e. Collaboration with State Highway Department - Status
 - i. The Chair reported on a recent call with the State Highway Department regarding four-way stops, standing water on Duke Street and Princess Street, and a speed study on Duke Street. Photos of standing water were sent to the State Highway Department, and the Committee discussed continuing a path petition through the Fourth of July parade before sending it to the State Highway Department.
- f. Mill Street Property - Status
 - i. The former resident has moved, but the trailer remains on the property. The family has donated the trailer to the Town, although the donation form had not yet been completed, and the Town is considering how to proceed with removal.

6. New Business

- a. Public Works Equipment Purchase (Trash Truck) - Discussion
 - i. The Committee discussed a proposed trash truck purchase that was not included in the budget. The estimated cost discussed was approximately \$250,000, and the Committee requested clearer written justification, including the need, urgency, used options, and financing alternatives.
- b. Review of Long-Term Plan for Water Line and Streetscape Improvements
 - i. The Committee discussed required replacement of galvanized water lines that are downstream, or may have been downstream, from lead lines. Approximately 422 lines were referenced, with replacement required by 2037, and the Committee discussed coordinating water line replacement with long-term streetscape improvements.

7. Summary for Town Council

- a. Items identified for Town Council included the stormwater improvement projects, community composting project, Market House Plaza project, and related project notes.
- b. It was also noted that a grant announcement was expected later in the month.

8. Member Comments

- a. L Bicker discussed the Tree Commission's request for Public Works to identify 11 possible new tree well or planting locations around town.
- b. The discussion included sidewalk constraints, ADA compliance, underground infrastructure, and possible opportunities on Town roads.

9. Chair Comments

- a. The Chair reported that the Mills Group selected the Town's application for design work related to the tobacco warehouse.
- b. The work will be design-related only, not construction, but may assist future fundraising for construction

10. Adjourn Motion made to adjourn by L Bicker at 7:13 p.m. Seconded by J Gatz. Motion passed unanimously and the meeting was adjourned.

Shepherdstown Tree Commission Draft Minutes
Thursday, June 11, 2026 at 6:30pm, train station

Members present: Linus Bicker, Charlotte Baker-Shenk, Terry Hadley

Absent: Robin McGrorty

1. Linus called the meeting to order at 6:30 PM.

2. Approval of April 23, 2026 minutes.

Approved unanimously

Approval of May 14, 2026 minutes.

These minutes were reviewed for a few needed additions concerning who attended the meeting and a typo, then were approved unanimously.

3. Public comments: none

4. Unfinished business.

a. Review pending and completed tree actions – Tree Action Log

213 W German

Action: Linus will talk with Woody and homeowner. (See April minutes: Linus will ask Woody to coordinate with the state about needed improvements to correct water drainage issue and also talk with homeowner to verify current situation in their basement)

220 W German

Action: Linus will coordinate with Mayor Gatz and Woody concerning the Tree Commission request to create 11 new tree wells, with this 2 of those 11 being requested in this area. — see April minutes “i” under section 4).

Action: Linus needs get map from Woody.

299 E German — Cherry Tree needs pruning. Ecological services declined to perform this work.

Action: Linus will solicit bid from Viking.

Town Hall retaining wall — not yet found a contractor interested in doing this work.
Need expand our search for a stone mason

Action: hoping Robin will lead this search.

Hurley Park— Linus and Shawn reviewed the area and were pleased to see several mature native trees including black walnuts, black locust, eastern red cedar, mulberry. There are also some invasives like tree of heaven that will need removal.

Action: plan for vendor fall cut down of invasive trees and application of herbicide. Coordinate with Parks & Recreation.

Action: plan for oak tree plantings. Recommend plantings closer to where other trees of value are already located.

Observed upheaval of gravel on sidewalk near Entler.

Action: Linus will ask Woody to do permanent repair

Rumsey Park tree 978 that may have been hit by lightning

Action: ask Robin to assess tree

312 High— resident (Sylvia) requesting new planting of cherry tree. Need to inform her that the other new tree needs to be a native.

Action: Linus will request bid from Viking for removal of dead sugar maple.

Action: plan for fall planting of two trees— a cherry and a native.

Remaining remedial work in tree wells— Jamie still needs to do the removal of prior landscaper's unfortunate "volcano" mulching in the beds and check for girdling, doing excavations as needed.

Tree Health work— awaiting update from Robin about consultation with Shawn Walker on proposed use of tree auger and added compost.

323 E German

Action: Linus still needs to talk with the owner.

Viking bid on dead tree removal for Bones Wright.

Action: Linus will check to see if the work has been done.

210 W High tree removed

Action: consider this site for fall new tree planting.

71 East Back Alley — Linus requested Viking bid for tree removal.

- b. 2026 Tree Planting – The tree commission recapped previous discussion from May to identify 11 new tree wells that could be planted in the fall. Robin will generate material for the town newsletter to solicit homeowners who are interested in having trees planted in front of their property in the town right of way.
- c. Soil amending plan – no updates
- d. Hurley Park Tree Assessment
- e. Watering plan - Town Landscaping update— two bids have been received.

Charlotte raised the question of whether town could procure a Motorized Watering Cart? **Action:** Charlotte will send information to other members of the tree commission

Discussion about using the water spigot at the Mary Tyler Moore building **Action:** Linus will ask about use of the spigot for tree watering.

- f. Arborscope – Bartlett has not yet responded to request to change email for accessing the inventory
- g. Jefferson County Tree canopy plan – no updates

5. New Business

211 W New— request from Jay Cline

Action: Linus will ask Viking to assess for pruning (2 Japanese Elms).

Lutheran Church (King & High)

Action: Linus will ask Viking to assess for pruning.

Crabapple in front of welcome center— Jamie has agreed to do this work pro bono.

Linus announced that after July he will discontinue his role as chair of the tree commission. Members present agreed to appoint a new chair at July meeting. Request was made by members to ask Jim Auxer if he would be interested in joining tree commission as a representative from Town Council.

6. Meeting adjourned at 8 PM.
