

Shepherdstown Finance Committee Agenda

Wednesday, August 5th, 2026

6:30 P.M.

Town Hall

104 N. King Street

Join online by Zoom:

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

Or join by telephone:

Dial: (301) 715-8592

Meeting ID: 860 6712 0451

Passcode: 818383

1. Call to order
2. Approval of the minutes of July 1, 2026
3. **Community Grant Applications:**
 - a. *“The Wall” Native Garden*
 - b. *Boots-on-the-Ground Youth Leadership Academy*
 - c. *Shepherdstown Chess Club*
4. Plan and timeline for creating proposed and final FY28 budget
5. Strategy for integrating grants received and grants applied for into the FY27 budget and budgets going forward
6. Adjournment

SHEPHERDSTOWN FINANCE COMMITTEE MEETING MINUTES

July 1, 2026 – 6:30 p.m.

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 :**
- d. 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
WEST VIRGINIA

**Shepherdstown
Community Grant Application**

Date: 7/10/26

Applicant Information

Applicant organization name: **Jamie Byron**

Mailing address: **PO Box 568, Shepherdstown 25443**

Physical address, if different: **45 Lynmouth Lane, Shepherdstown**

Website: **N/A**

Year organization was founded: **1991**

Organization's tax-exempt number (EIN): **N/A**

Organization's total operating budget for current fiscal year: **N/A**

Name/title of the organization's representative for this application:

Jamie Byron

Telephone: **703-608-8178**

Email: **jebyron3@gmail.com**



Grant Application, cont.

Brief description of the applicant's experience and qualifications for administering the grant and managing the project to be funded:

I have worked and operated a business in landscaping, arboriculture and ecological land management for 8+ years -- implementing several native landscaping designs and installations in and around Shepherdstown.

Grant Request Information

Project name: "The Wall" Native Garden

Amount requested: \$2500

Non-grant funds and in-kind services to be provided by the applicant:

I expect the plant and soil amendment budget to exceed \$2500, so I will make up the remainder with personal funds and funds donated by several community supporters. I will be handling the design and project management myself, and relying on a small team of landscaping-experienced volunteer for installation and maintenance.

Implementation timeline, including delivery of any progress reports and the final report: Sourcing and design Dec. '26 - Feb. '27. Spring planting Mar-May 2027.

Watering + weeding Summer '27. Fall followup planting Sept. - Oct '27. Final Report Winter '27-'28.

Project budget (including both grant and non-grant funds):

We expect this project to cost ~\$3000 in materials for plants and soil amendments, breaking down to roughly ~\$300 for the central tree, ~\$550 for 12 shrubs, ~\$900 for 60 native perennial flowers, \$400 in native sedges, ferns and bunch grasses ~\$600 in groundcover plugs ~\$250 in compost, mulch and soil amendments.

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Grant Application, cont.

Project Description:

This project was conceived several years ago, when many folks in town mourned the removal of the beautiful Sycamore in the unkempt and wild, but beautiful little natural garden area along the Town Run, between McMurrin lawn, "The Wall", and 107 E German St. That tree provided shade for the folks sitting on the Wall and the bed of native violets that thrive in the moist soil below. Ever since the University made the decision to remove that Sycamore, and cover up the violets with landscape fabric and mulch, that historic hangout on of German Street has been noticeably less vibrant. We aim to restore that precious corner of town to a state of beauty, healthy ecology, and a community gathering spot by installing and maintaining a native garden beside the Run and behind the Wall -- "The Wall Garden".

This garden area is part of the McMurrin property and owned by the McMurrin Trust, however it is under lease and maintained by Shepherd University. I've been advocating to Shepherd for 3 years to get permission to plant and maintain that area, submitting plans and proposals to numerous administrators, and finally earlier this year, President Hendrix formally gave us permission to establish and maintain a garden there. The President's requirements were that we implement and maintain the garden at no cost or maintenance requirements to the University, and we plant appropriate trees and plants that won't threaten the walls or neighboring building 107 E German St.

The vision for this garden centers around a single centerpiece shade tree (perhaps a magnolia), with an arc of native flowering shrubs in the background, patches of native perennial flowers timed to flower throughout the growing season with clumps of ornamental grasses and sedges between, ferns and ephemerals in the shade of the wall and the tree, and a carpet of native groundcovers throughout. This site is ecologically special for three reasons -- it is nearly the only spot in town that is essentially entirely protected from deer browse, it is semi-riparian being next to the town run so watered from below, and the walls and water create a unique microclimate where some of the more sensitive sub-tropical species native to our eco-region are more likely to thrive. These three unique characteristics allow us to lean into plants that aren't deer resistant, grow along creeks and rivers, and highlight some of the showier southern sub-tropical species that aren't common here.

I've consulted several local experts on the planning of this project -- James Dillon of Native Havens, Kate Didden of Birds Nest Native Nursery, landscape architect Evan Whalen, and the Town Run Watershed group -- who have all offered advice and support in design, planning, installing and maintaining this garden. We have a small group of experienced volunteers to implement and maintain the garden, and several community members who have offered to donate plants and/or funds to purchase native plants.

The benefits of this garden to our town and community are many -- beautifying German Street, a backdrop to the famous historic hangout spot 'the Wall', shade and sidewalk temperature mediation, supporting and attracting rare birds and pollinators, and educating the public on the importance of urban ecology. While we expect to receive some funds from donations from community members, we would appreciate a Town Grant, so we can purchase all the plants we need to make this an outstanding garden and focus our energy and time on planning and implementing this project in a timely manner. Thank you for considering "The Wall Native Garden" for a community grant!

Applicant's signature & date:

James Beynon

7/10/26

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Native Habitat Garden at “The Wall”

A plan for designing, planting and maintaining a volunteer-run native garden behind The Wall

Purpose + Goals

For decades, even centuries, the modest triangular garden area between Town Run, and 107 E German Street has been a backdrop for the quintessential Shepherdstown hangout spot for students and townies alike – The Wall! Previously home to a beautiful sycamore shade tree and a colorful array of unkempt weeds and wildflowers, this garden is now barren. The removal of the sycamore stirred up quite the controversy among the townsfolk – It was a sad day for many who appreciated the beauty of this space. Since then, online and on the street, folks have been discussing the potential for restoring this small but important green space back into something beautiful! One idea that has risen to the surface is to organize a small volunteer group and install a low-maintenance pollinator/songbird habitat garden. We propose the following plan for a Native Habitat Garden at The Wall!

- 1) Collaborate with Landscape Architect + Shepherd alumni Evan Whalen, who has offered to design a bird + pollinator friendly planting, consisting of a few appropriate small native trees and shrubs, interplanted with low maintenance wildflowers and groundcovers.
- 2) Organize a small group of volunteers to install the garden this Fall and following Spring. Reach out to community members to donate funds for purchasing plants.
- 3) Continue to maintain the garden with Spring and Fall pruning, planting, and cleanup days, staffed by volunteers, and organized by Jamie.



Requirements + Considerations

Besides selecting and arranging beautiful native wildflowers, shrubs, and small trees that support songbirds and pollinators, we have identified these additional important requirements and considerations when designing and planting Native Habitat Garden at The Wall:

- 1) Low Maintenance – the plants selected should require no maintenance from the University grounds crew, and require minimal maintenance (two volunteer work days a year) to keep healthy and beautiful.
- 2) Appropriate Species and Size – The trees and shrubs will be selected and spaced such that they don't get too large for the area, impede on or pose any risk to the neighboring property, or have invasive roots that could compromise any of the surrounding walls or foundations.
- 3) Non-Invitational – The layout and design will be beautiful to observe at a distance from the Wall and German Street, but designed such that it doesn't pose an invitation for folks to jump the wall and walk in the garden. So no paths or seating areas, while spacing and selecting plants that don't invite people to walk among them.

Town Run Triangle Garden Planting Plan

I would like to take on the design, fundraising, and planting of a lovely native flower garden in the small triangular plot nestled between the McMurran Lawn, “The Wall”, and the Town Run. The goal is to plant a low maintenance native wildflower and pollinator garden to provide a beautiful backdrop for folks walking by on German Street and gathering on Mcmurran Lawn, and attract hummingbirds, butterflies, and songbirds to the center of Shepherdstown. This garden will be populated with a number of beautiful native wildflowers, ferns, and a small native ornamental tree as a centerpiece. The design, planting, and ongoing maintenance will be conducted by a small group of volunteers who have generously offered to help implement this project. The funds to purchase plants and planting materials will be fundraised within the Shepherdstown Community.

The Central Tree – a compact, beautiful, appropriate native tree planted roughly in the center of the garden for a bit of height, shade, and structure to the garden design. The species listed below are in order of preference and were selected for small size (<40’ mature height), strong hardy growth in our region, appropriate to plant next to a water course, and non-invasive roots that pose no risk to surrounding walls, sidewalks and foundations.

Sweetbay Magnolia (This is our ideal selection! We will go with Sweetbay if we can source a nice one.)

Alternate: Cyrilla Racemiflora “Leatherwood”

Alternate: ‘Little Gem’ Southern Magnolia

Full Sun Ornamentals – a selection of flowers, forbs, and an ornamental bunch-grass to bring an array of color throughout the season, with varied height and structure, visual interest in winter time, and attract butterflies, songbirds and hummingbirds throughout the year.

Cardinal Flower

Monarda/Bee Balm

Silverleaf Mountain Mint

Native Iris

Native Asters

Wood Lily

Daffodils

Little Bluestem

Part Shade Ornamentals – flowers, ferns and ground cover for the shadier parts of the garden along the wall and neighboring building.

Columbine

Ostrich Fern

Christmas Fern

Wild Ginger

Hostas

Planting Plan and Schedule

Once we receive approval and written permission from the relevant staff at Shepherd, we will begin fundraising for the cost of the plants. I will launch a GoFundMe with the garden design and proposal, and share with supporters in the community (several of which have already agreed to financially support this project). Once the funds have been raised, we will start ordering plants, ideally in January and February. Over winter, we will conduct the soil improvement phase, bringing in compost and adjusting the underlying landscape fabric to prepare for planting. Once conditions in Spring are ripe for planting, we will gather the volunteers and begin planting!

inbox x



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Mar 3, 2026, 11:39 AM

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Mary



Shepherd University

301 N. King St.

Shepherdstown, WV 25443-5000

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www.shepherd.edu

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Shepherdstown
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Shepherdstown Community Grant Application

Date:

Applicant Information

Applicant organization name:

Mailing address:

Physical address, if different:

Website:

Year organization was founded:

Organization's tax-exempt number (EIN):

Organization's total operating budget for current fiscal year:

Name/title of the organization's representative for this application:

Telephone:

Email:



Grant Application, cont.

Brief description of the applicant's experience and qualifications for administering the grant and managing the project to be funded:

Grant Request Information

Project name:

Amount requested:

Non-grant funds and in-kind services to be provided by the applicant:

Implementation timeline, including delivery of any progress reports and the final report:

Project budget (including both grant and non-grant funds):



Shepherdstown
WEST VIRGINIA

Grant Application, cont.

Project Description:

The Multicultural Festival will be a community-wide celebration designed to bring people of all ages, cultures, and backgrounds together through education, entertainment, food, storytelling, art and interactive cultural experiences. Our aim is to create a welcoming environment where our youth and other attendees can celebrate diversity, build meaningful relationships, embrace the uniqueness, and develop a deeper appreciation for the many cultures that enrich our communities.

Included will be cultural performances, educational hubs, youth presentations, interactive activities, and opportunities for those in attendance to experience traditions from around the world.

A central component of the festival will be youth leadership. Scholars from the Boots-on-the-Ground Youth Leadership Academy and other local youth, will serve as ambassadors, emcees, and presenters, affording them the opportunity to gain valuable experience in event planning, public speaking, community engagement, and civic leadership. By actively participating in the festival, our youth will strengthen through leadership skills and promote a greater cultural awareness and appreciation.

Teresa Holmes-Lindsey 07/30/2026

Applicant's signature & date:

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Shepherdstown
WEST VIRGINIA

**Shepherdstown
Community Grant Application**

Date: 6/30/2026

Applicant Information

Applicant organization name: **Shepherdstown Chess Club**

Mailing address: **PO Box 454, Charles Town, WV 25414**

Physical address, if different:

Website: **<https://shepherdstownchessclub.substack.com/>**

Year organization was founded: **2025**

Organization's tax-exempt number (EIN): **Application In-Progress**

Organization's total operating budget for current fiscal year: **\$554**

Name/title of the organization's representative for this application:
Anya Ellis

Telephone: **+1 (773) 234-7182**

Email: **anyaaellis@protonmail.com**

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Shepherdstown
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Grant Application, cont.

Brief description of the applicant's experience and qualifications for administering the grant and managing the project to be funded:

The Shepherdstown Chess Club has organized 6 different chess tournaments in Shepherdstown since May 2025. We have held tournaments and events at the following locations: the War Memorial Building (Shepherdstown Community Club), Shepherd University, Shepherdstown Public Library, and Game Knights (local game store). The club's lead organizer has directed over a dozen chess tournaments and has assisted many more all across the nation (IL, OH, MD, WV). In addition, the club has received in-kind donations from 5 local businesses for past events and 47 WV residents.

Grant Request Information

Project name: Shepherdstown 2-Day Chess Tournament

Amount requested: \$1000

Non-grant funds and in-kind services to be provided by the applicant:

(1) Entry fees from players. (2) Donations and in-kind services from previous donors and local businesses may become available. (3) Out-of-state chess directors and organizers may volunteer services such as time, materials, or funds. (4) WV Chess Association will advertise for free.

Implementation timeline, including delivery of any progress reports and the final report:

The tournament can be held in three months post fund dispersion. We expect the tournament to be held by early December.

Any progress reports can be delivered monthly or every 2 weeks with a final report 2 weeks after the event.

Project budget (including both grant and non-grant funds):

Location Rental (2-Days): \$500. Guaranteed Prize Fund: \$300. Non-Guaranteed Prize Fund: \$200. Free US Chess Memberships to Shepherd Students: \$100. Compensated Entries Valued At: \$80. Expected Games Fees owed to US Chess Federation (National Entity): \$50. Email Marketing (600 active players): \$31. Print Marketing: \$50. TOTAL BUDGET = \$1311

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Grant Application, cont.

Project Description:

The Shepherdstown Chess Club plans to hold a two-day event which should draw circa 40 players. A number of local West Virginian players will participate but the event will also draw a large proportion of players from the DMV area. The club will give free entries (estimated value \$80) and 1-year national chess memberships (estimated value \$100) to Shepherd students. This two-day event will be the first grand prix chess tournament held in the area. The tournament will be held on a weekend. The US Chess Federation (national entity) requires that grand prix tournaments have three months of marketing to lead up to the event. Therefore, the club expects the tournament to be held some time between mid-November to early December, but this depends on when funds are dispersed.

The Shepherdstown Chess Club is a US Chess Federation affiliate club which has brought over 60 people to the area with many of them coming back time and again for our events. Players have traveled from: NY, VA, MD, PA, MI, TX. We have previously highlighted and partner with local businesses and plan to do the same for this event. We believe that a few of the players will book stays at the local hotels and most of them will eat/visit other local establishments. This would be a great event to boost local tourism in the early winter. Thank you for considering the club's goals to fund better and better chess tournaments.

Applicant's signature & date:

Arjan Elms 6/30/2026

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