

Town Council Agenda

SHEPHERDSTOWN TOWN COUNCIL MEETING AGENDA

Wednesday, June 10, 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

1. Call to Order

2. Attendance

3. Approval of Minutes

- a. Special Town Council Minutes of April 21, Regular Town Council Minutes of May 13, Special Town Council Meeting of June 8

4. Public Comment Period

- a. [Registered speakers / public comment item]

5. Public Hearings

- a. Second Reading of Planned Unit Development Ordinance Amendment

6. Mayor's Report and Proclamations

7. Ongoing Business

- a. Certification of June 2 Municipal Election Results
- b. Winning Design – Town Welcome Banner – Announcement/Discussion
- c. Market House Plaza - Update
- d. Flower Bed Maintenance – Update
- e. Real Estate Matters

8. New Business

- a. Equipment Purchase (Trash Truck) – Discussion/Vote
- b. Briefing on Water Line Replacement / Streetscape Planning - Discussion
- c. Town Council Priorities for Grant Funding - Discussion
- d. Town Council Committee Structure - Discussion
- e. Age Friendly Shepherdstown 2026 Action Plan - Discussion
- f. Volunteer Applications
 - i. Age Friendly Shepherdstown

- ii. Shepherdstown Planning Commission
- g. Shepherdstown Community Grant Applications
 - i. Roving Peregrine Theatre Company
 - ii. Rose Hill Cemetery
 - iii. 2026 Contemporary American Theater Festival
- h. Donations to the Town
- i. Town Applications for Grants – Status/Discussion
- j. Special Events Request – Slonaker/Hamilton Wedding at Rumsey Monument

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

10. Adjourn

Town Council Meeting Minutes

DRAFT Minutes

SHEPHERDSTOWN TOWN COUNCIL MEETING AGENDA

Wednesday, May 13, 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

1. Call to Order: 6:34 pm

2. Attendance:

Town Council Members: Mayor Gatz, Cheryl Roberts, Marcy Bartlett, Linus Bicker, Shannon Thomas, Carrie Blessing (on Zoom), Marty Amerikaner (Recorder)

Staff: Gino Sisco, Maged Kirollos, Woody Coe, Karl Musser, Chief Mike King

3. Approval of Minutes

a. Town Council Meeting Minutes of April 8 and 21:

April 8: One needed word change was noted by Marcy; with that change, minutes were approved unanimously

April 21: postponed until next TC meeting

4. Public Comment Period

a. People who have registered to address Town Council:

- i. Hunter Mize, an intern at JCDA, reported on a Child Care Status follow up study. The key finding is that there has been no substantive improvement in crisis regarding childcare needs in the County during the last 3 years. JCDA is working on several fronts to help in this area.
- ii. Jonathan Sherman, (Shepherd Facilities Management Director) reported on a variety of work projects on the Shepherd campus this summer, including periodic potential impact on town streets and sidewalks.
- iii. Elizabeth McGowan spoke to encourage TC adoption of her statement in support of Town limits regarding immigration enforcement by ICE.
- iv. Kay Schultz commented on the new proposed PUD ordinance and potential confusion in wording regarding potential contamination of Town Run.

5. Public Hearings

a. First Reading of Replacement Ordinance – Planned Unit Development: C. Roberts moved and M. Amerikaner seconded a motion to approve the first reading of the PUD ordinance replacement. M. Bartlett made several suggestions for wording changes. Motion passed unanimously.

6. Ongoing Business

a. Briefing on Election Planning

i. Set Compensation for Poll Workers: Gino and Marty outlined the proposed compensation rates for poll workers (\$50 for attending training workshop, \$87.50 for half-day shifts on election day, \$40 for evening counting board. This compensation, plus costs of food/beverages for poll workers will be well inside the \$2500 budgeted for this year's election. The motion passed unanimously

b. Community Conversation on Plaza – Thursday, May 21, 2026: Council was reminded of the upcoming Conversation. It will be a facilitated discussion period, not a “hearing”

c. Path to Morgan Grove Park Project - Status Mayor Gatz reported on a new date of completion that the DOH reported to him, pushing it back to July 2027.

d. Young/Shibley Annexation – Status: no report

e. Green Infrastructure Storm Water Control Projects

i. Old Queen Alley rain garden

ii. Church Street Paper Street drainage improvement

Karl reported that an engineering study will be the first step. He noted that several residents had expressed concern about retaining access to their property, which apparently resulted from some misunderstanding about the exact locations of the work.

f. Historic Preservation Materials: Karl described several new documents prepared by the Mills Group for the HLC, which was funded by a grant from the State Historic Preservation Dept.

g. Food and Yard Waste Pilot/Demonstration: Materials are being prepared to describe the project, and a survey regarding possible participation is ready to distribute.

h. Real Estate matters: postponed until end of meeting. 8:55pm: M. Bartlett moved and M. Amerikaner seconded motion to enter Executive Session to discuss Real Estate issues, as noted in State Statute. Motion passed unanimously. 9:05 pm: motion by M. Bartlett, second by S. Thomas to end Executive Session. M. Bartlett moved and C. Roberts seconded motion to approve adjustments to leases on the Hurley Property homes. Motion passed unanimously

7. New Business

- a. Asking Saves Lives Day (ASK Day) Proclamation: M. Bartlett moved and C. Roberts seconded motion to approve the Proclamation. Approved unanimously
- b. Request for Event Permit - Town-Sponsored First Friday Events: M. Bartlett moved and M. Amerikaner seconded a motion to approve Experience Shepherdstown's revised music schedule for June, July and August; locations must still be finalized. Motion passed unanimously
- c. Town Support for Parades
 - i. Pride Parade, June 1: Unanimous approval for requested funds to pay for flag poles (which will be reused in future years)
 - ii. Independence Day Parade: Interested groups can sign up to participate in the parade on the Shepherdstown Rotary website.
- d. Shepherdstown Community Grant Applications
 - i. Shepherdstown Public Library (Installation of Solar Panels): The Finance Committee recommended approval of the library's request for \$20000 towards the \$200000 needed for their Solar Panel project. The goal is to decrease the high costs of electricity that the library incurs each month by generating as much of its own electric power as possible. After discussion, the motion (M. Bartlett moved, S. Thomas seconded) passed unanimously.
 - ii. Shepherdstown Street Fest, Inc.: M. Amerikaner moved, L. Bicker seconded motion to approve request for \$2500 to support Street Fest; motion was approved unanimously with the added contingency that the organizers report to TC which non-profit group(s) are the recipients of any donations that are made with funds available after the event.
- e. Donations to the Town - Cash Donation, Bill Lukens
- f. Town Applications for Grants
 - i. Current Applications - Status
 - ii. New Application – Safe Streets Grant: C. Roberts moved and M. Bartlett seconded motion to approve submission of this grant application
 - iii. Grant Writer Consultant: Mayor Gatz provided an overview of the RFP for a part time grant writer and encouraged wide distribution of the notification.
- g. Town Owned Buildings: postponed until next month
- h. Briefing on Bond Financing: Brief comment from Mayor Gatz about a planned presentation on Bond Financing; Possible dates are June 4,5,8,9,11 or 12. It will be an evening presentation lasting 1 hour.
- i. Flower Bed Maintenance: M. Amerikaner moved and S. Thomas seconded a motion to permit the Mayor to review submissions responding to the RFP and choose a contractor for this work. Passed Unanimously

8. Town Staff / Department Reports

- a. Department Reports: See reports attached to the packet for this meeting.
- b. Town Financial Status: Maged reported that the Town continues run a significant surplus for the fiscal year, due primarily to lower than budgeted expenditures.

c. Approval of Town Expenditures: M. Bartlett moved and C. Roberts seconded motion to approve the expenditure report provided by Maged. Passed Unanimously

9. Reports by Committees, Commissions, and Boards

Draft and/or approved meeting minutes

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

10. Mayor's Report: none

11. Adjournment: M. Amerikaner moved, C. Roberts seconded motion to adjourn at 9:05pm.
Passed unanimously

DRAFT

SPECIAL SHEPHERDSTOWN TOWN COUNCIL MEETING MINUTES

Tuesday, April 21, 2026 – 6:30 p.m.

1. Call to Order:

Meeting called to order at 6:35 p.m.

2. Attendance

Council: Mayor Gatz, Marty Amerikaner, Marcy Bartlett, Cheryl Roberts, Linus Bicker, Shannon Thomas

Absent: Carrie Blessing

3. Public Comment Period: none

4. Laying of the Levy for FY 27: Motion to approve as presented by Maged: Marty moved. Marcy seconded; vote to approve was unanimous.

5. Public Hearing:

- a. Second Reading of an Ordinance Annexing to the Corporation of Shepherdstown Two Contiguous Parcels of Real Estate Containing 437 Acres, More or Less, in the Aggregate, and Identified as Parcels 41 and 44.1 on Tax Map 8, Which are Presently Located in the Shepherdstown District, Jefferson County, West Virginia. Motion to approve annexation: moved by Marcy, Seconded by Marty; vote to approve was unanimous.
- b. Second Reading of an Ordinance Amending Section 2-601 of Chapter 6 of Title 2 of the Code of Shepherdstown, West Virginia for Clarification and to Allow an Official to Decline Compensation.
 - i. Motion was amended to eliminate the words “payable monthly” and to eliminate the section about “donations.”

Motion to approve (as amended) made by Marcy, seconded by Shannon; vote was unanimous to approve.

6. Real Estate Matters: 6:50 pm: Motion by Marcy, second by Linus to go into Executive Session (under WV Code 6-9A regarding potential purchase of real estate). Motion

approved unanimously. 7:10 pm: Motion to exit Executive Session (Marty moved, Linus second) approved Unanimously; no further discussion or votes

7. Adjournment. Marty moved, Linus seconded motion to adjourn at 7:10 pm. Vote was unanimous to approve

Second Reading of Planned Unit Development Ordinance Amendment

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: _____

Age Friendly Shepherdstown Action Plan



Age-Friendly Shepherdstown Action Plan June 2026 - DRAFT



Photo credit: Michael Chalmers

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[Hold for letter from Mayor }

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Community Profile

Shepherdstown, West Virginia, is “a true blend of amazing history and modern wonders” (Shepherdstown Visitors Center website). Recognized as West Virginia’s oldest town, Shepherdstown ranked among the top ten Best Historic Small Towns in the 2026 USA TODAY 10 BEST Readers’ Choice Awards. Shepherdstown is located 90 minutes from the Washington, DC, and Baltimore, Maryland, metropolitan areas. This friendly, “beautiful and charming” (Travelers Today) historic university town offers rich music, theater, and cultural offerings in a close-to-nature setting. Budget Travel described Shepherdstown as a “picturesque town... [with a] hip coffee culture.” Current Shepherdstown, with its “cool shops, bars, and restaurants” (Washingtonian), has a rich history.

Shepherdstown’s History

“Colonial settlers began their migration into the northern end of the Shenandoah Valley in the early 1700s. . . . The colony of Virginia began issuing Valley land grants in the 1730s, but settlers in the area of what became Shepherdstown had arrived earlier, perhaps before 1720. In 1734, Thomas Shepherd took up a tract of 222 acres on the south side of the Potomac [River], along the Falling Spring Branch, now known as Town Run. More than twenty natural springs feed Town Run before it enters the south end of town. The Run rarely floods and never runs dry; it meanders through backyards, under houses, across alleys and beneath five streets before it rushes into the Potomac. . . .

The town contributed liberally to the cause of American Independence. Its cemeteries contain at least thirty-eight Revolutionary veterans, a measure of the town’s military involvement. Citizens also supplied clothing, wagons, saddles and other items for military use. . . .

On December 3, 1787, a historical moment during the critical days of the early republic, James Rumsey conducted a successful trial of a steamboat. A large gathering of townspeople and notables witnessed the event from the banks and bluffs of the Potomac River. . . . In addition to Rumsey’s ingenuity,

Shepherdstown's early records reveal impressive examples of wit, learning, and culture. West Virginia's first newspaper (*The Potowmack Guardian and Berkeley Advertiser*) and first book (*The Christian Panoply*) were published here in the 1790s. A number of schools had been started before the Revolution, including an English school and a German school, and the first academy in what became West Virginia opened shortly afterwards. . . . The free school movement in Virginia led to the establishment of two free schools in town in 1848. One still stands on the southeast corner of Princess and New Streets. The first school for black students is believed to have operated from c.1867 to 1883 on Brown's Alley, between W High and W German Streets.

Because Shepherdstown provided a convenient stopover for wagon masters and other sojourners, many taverns and inns sprang up. In addition to food, drink, and lodging, these establishments provided horse racing, gambling, cockfighting, and other entertainments for the weary travelers and interested townspeople. . . .

The 1790s brought many changes. The first post office in what became West Virginia opened in 1793. By 1794, Welsh's brickyard operated along Town Run on the south side of Washington Street between Princess and King. . . . Houses for the brickyard workers, known as Fossett Row, still stand on W High Street. Black workers, both [enslaved] and free, lived at each end of German Street, Little Philadelphia on the west and Angel Hill on the east. By 1857, nearly 100 [enslaved individuals] lived in Shepherdstown.

The arrival of the Chesapeake and Ohio Canal in the 1830s and the opening of a Shepherdstown lock eased connections downriver to Georgetown, lowering the cost of shipping agricultural products to the seaboard. Later the canal also opened the way west to Cumberland, Maryland. . . . In 1879 the Shenandoah Valley Railroad arrived in Shepherdstown, introducing a powerful new dynamic of development that turned the town away from the river. . . . over the course of the mid-19th century, western wheat shipped by rail to eastern markets brought an end to local wheat cultivation. Apple growing became a new specialty of the area. . . .

As a border town on the Potomac shaped by the culture and institutions of the Old South, including slavery, Shepherdstown faced trying and tragic times during the [Civil] War. . . . After the Battle of Antietam, September 17, 1862, General Robert E. Lee's infantry retreated south across the Potomac at Pack Horse Ford. In one of the most consequential moments in its history, Shepherdstown provided care for 5,000 to 8,000 casualties. The wounded and dying filled nearly every house, building, church, alley, and street. The Battle of Shepherdstown, September 19-20, added to the carnage, leaving 162 men, including 63 Confederates and 99 Federals and many additional wounded. . . .

In the post war period, Shepherdstown served as the county seat because of changing political fortunes and war damage to the courthouse in Charles Town. . . . Though Shepherdstown lost the county seat, it found a new future as a college town, a role in keeping with its long-standing devotion to education. . . . At first Shepherd [State Normal School] provided primarily secondary education, but gradually collegiate courses were added. From this seed Shepherd University grew. From its beginning the school helped shape the town, providing educational and employment opportunities and cultural attractions. Today, the East Campus occupies about one-third of the town proper, and the West Campus takes up a large area just northwest of the corporate limits

Most of the town has been designated as a Historic District on the National Register of Historic Places. From time to time (notably in 1912) fire destroyed important buildings, but the rows of 18th and 19th century houses remain remarkably intact, likely the best-preserved assemblage of buildings of this vintage in the state. . . .

In 1924, the C&O Canal closed, and the state road commission built a new road through the town, signaling the arrival of the Good Roads Movement and the advance of the automobile. The canal enjoyed something of a 20th century renaissance after it became the Chesapeake and Ohio Canal National Historic Park in 1971. . . .

Today's Shepherdstown retains the ambiance of an earlier time, but local folks are not content to live in a museum. They make the most of the town's historic

heritage, preserving the old buildings by adapting them to new uses including many shops, restaurants, and venues for artists, crafts[people], and musicians. Shepherd University’s rich program of cultural events, including an innovative summer festival of contemporary plays [The Contemporary American Theatre Festival], adds to the attraction that makes the town a tourist destination.”¹

Shepherdstown’s Character

Downtown Shepherdstown is the heart and soul of the community. As a vital part of the town's economic, cultural, social, and historic fabric, the downtown area is viewed by residents as the single most important part of the larger community. Downtown Shepherdstown has a unique character as a retail and artistic hub within an historic setting. Originally built in 1910, the Shepherdstown Opera House, a historic performing arts venue, reopened in 2024. It quickly retook its place as a local cultural hub with diverse programming.

Also, the town is serious about developing and protecting local green spaces. It is home to six parks, and all buildings in the historic district are required to maintain a considerable amount of green space as part of the property. Further, Shepherdstown has maintained its designation as a “Tree City USA” member by the Arbor Day Foundation for over 21 years. Starting in 2023, community members concerned about the health of Shepherdstown’s Town Run formed a Town Run Watershed Group dedicated to preserving, protecting, and restoring this important resource, which provides clean water and beautiful places to enjoy nature. Further, the Town is conducting a study along the length of the Town Run Watershed to establish baseline data on the state of the watershed, identify risks to our water supply, and provide actionable recommendations to ensure Town Run remains a secure, clean, and reliable water source for the Town. The Town and the Watershed Group are working together on these efforts. In 2023, Shepherdstown also became officially recognized as a Bee City USA.

¹ Excerpts from a *Brief History and Walking Tour* revised by James C. Price and Harold Snyder in 1998 and by Jerry Thomas and Robbye Horowicz in 2011 and 2014

Greater Shepherdstown is defined not only by its downtown hub, its focus on education and the arts, and its historic nature, but by the beauty of the natural landscape. Part of a network of Canal Towns because of its proximity to the Chesapeake and Ohio Canal and path, Shepherdstown is a tourist attraction for those interested in biking, hiking, white-water rafting, climbing, birding, and gardening. It is home to an impressive array of environmentally focused organizations and events, including the Potomac Valley Audubon Society, the National Conservation Training Center, the American Conservation Film Festival, Solar Holler, Earth Fest, Freedom's Run, Sacred Roots Herbal Sanctuary, Save Our Soil, and Sky Truth.

For a small town, Shepherdstown is surprisingly non-parochial. This is due in part to the close relationship between Shepherd University and the Shepherdstown community. The university's strong music program provides regular, high-quality, open-to-the-community events and sponsors the Masterworks Chorale, composed of both students and community members. Also, the renowned Contemporary American Theater Festival (CATF) is housed on the Shepherd University campus. Named one of the top theater festivals in the world by publications such as the New York Times and the World Guide, CATF provides Shepherdstown residents and visitors with opportunities to see the newest plays in America in the oldest town in West Virginia. In addition, the Lifelong Learning Program, the Robert Byrd Center, the Center for Appalachian Studies and Communities, and the Stubblefield Institute, all housed at Shepherd University, provide rich opportunities for educational and cultural experiences. In the spirit of cooperative work towards making Shepherdstown an Age-Friendly Community, Shepherd University opens its doors to all residents, and in 2020, signed on to the Silver Sneakers program, which promotes wellness for older adults.

The non-parochial nature of Shepherdstown also may be related to the fairly large number of residents who are not native to Shepherdstown or even to West Virginia. The town is a unique combination of rural and urban, young and old, locals and newcomers. Having Amtrak and Maryland commuter train stations within 10 miles enables individuals to easily travel to neighboring cities, such as Washington, DC, and Baltimore.

Shepherdstown Demographics

According to the 2025 Shepherdstown Comprehensive Plan, the population of Shepherdstown is approximately 1,539, including students residing at Shepherd University during the 2020 census. Because of the large number of university students, the median resident age is 22.3 years, compared to West Virginia's median age of 42.9 years, one of the highest in the nation. Approximately 5% of the Shepherdstown population is under the age of 5; 65% are between the ages of 18 and 24; and about 12% are 65 years of age or older. Based on 2020 census data, the town's gender makeup is 46.5% male and 53.5% female. The town is predominantly white (83.9%). Black residents make up 9.4% of the population, Hispanics 2.9%, and those of two or more races 2.4%.

It is noteworthy that the Corporation of Shepherdstown serves as the “hub” of the greater Shepherdstown area (zip code 25443), and many of the almost 7500 residents within this area, all of whose mailing addresses are “Shepherdstown,” consider themselves Shepherdstown residents. However, they do not reside within the Corporation’s limits. According to Shepherdstown’s 2025 Comprehensive Plan, the town population has remained steady, but Jefferson County, which includes Shepherdstown, has experienced significant population growth recently. Jefferson County’s population grew from around 53,000 in 2010 to around 60,000 in 2024. This can be seen in the dramatic increase in library cards issued since our new, larger Shepherdstown Public Library, which serves Jefferson County, opened in 2022. Likewise, a new, larger Shepherdstown Elementary School, which serves students in the greater Shepherdstown area, opened in 2026. While the facilities have modernized and expanded, they have also relocated from the historic Shepherdstown district to locations that are only safely accessible by a vehicle.

Based on 2024 figures from Data USA and Census Reporter, the estimated median household income in Shepherdstown is \$63,750. According to Salary.com, the cost of living in Shepherdstown is \$3,531 per month for singles and \$7,776 per month for families of four. According to Data USA, the 2024 median property value in Shepherdstown was \$485,200, with a homeownership

rate of 73.2%. The poverty rate is 7.7%, below the national average of 12.4%. According to uscitydata.com, the local economy in Shepherdstown shows an unemployment rate of 13.2%, significantly above the national rate of 3.7%. The U.S. Bureau of Labor Statistics reports the January 2026 unemployment rate in West Virginia overall at 4.6%, much lower than the rate in Shepherdstown.

Age-Friendly Work in Shepherdstown

Shepherdstown is on the leading edge of efforts in West Virginia to make communities livable for people of all ages and abilities. It is home to Shepherdstown Area Independent Living (SAIL), West Virginia's first member of the national Village to Village Movement. It is also home to Shepherd Village, West Virginia's first cohousing community. It has a strong, active Lifelong Learning Program in partnership with Shepherd University. In 2018, Shepherdstown became the second community in West Virginia to become part of the World Health Organization (WHO) and AARP's Network of Age-Friendly Cities and Communities.

As noted in our 2022 Action Plan, before Shepherdstown's acceptance into the network of Age-Friendly Cities and Communities, the Shepherdstown Accessibility Committee endeavored to make the town increasingly accessible. Working with the Town Council and various community stakeholders, the committee focused on installing curb cuts and revising historic renovation guidelines to include ADA requirements. In addition, Accessibility Committee members worked with Shepherd University to create walkable community access to campus buildings, including a designated community walkway with lighting and handrails, and safety paint stripes on the steps of buildings frequently used by community members. Finally, the Accessibility Committee developed an informational brochure for local business property owners, outlining ideas for making structures more accessible.

People Guiding the Work

Upon our acceptance into the Age-Friendly Network, we formed an Age-Friendly Shepherdstown (AFS) Advisory Board consisting of many of the same people

who had worked with the Accessibility Committee. Currently, the individuals guiding the work include the following:

Linda Spatig, Past President of SAIL (Shepherdstown Area Independent Living), Founding member and former chair of Shepherdstown Public Library's Nourishing Literacy Giving Circle, Founding member and Chair of Age-Friendly Shepherdstown Advisory Board.

Marcy Bartlett, Shepherdstown Town Council member, Shepherd Village resident, and former board member, Shepherd University Lifelong Learning Advisory Committee, former member.

Marty Amerikaner, Shepherdstown Town Council member, Parks and Recreation Committee member, SAIL member, Instructor for Shepherd University's Lifelong Learning program.

Jan Hafer, Shepherdstown Shares Board of Directors, and co-chair of the Senior Lounge program hosted by Shepherdstown Public Library.

Leigh Ann Evanson, Community member, Strong Towns Jefferson County Local Conversation leader.

Lois Spreen, Community member, Founding member of Artfull Codgers, former clerk of Session and HR Lead for Shepherdstown Presbyterian Church, Shepherd University Lifelong Learning Instructor.

Lou Ann Stovall, Community Member, member of the SAIL Board of Directors.

Community Partnerships

Our primary community partners are the Shepherdstown Town Council, SAIL, Shepherd Village, Experience Shepherdstown, and Shepherd University, especially through Shepherd's Age-Friendly University initiative. Other groups with whom we are working include the Shepherdstown Parks and Recreation

Committee, especially committee chair and Town Council member, Cheryl Roberts; and the Shepherdstown Public Works Committee, especially Mayor James Gatz and Councilman Linus Bicker.

Assessment and Data Collection

For the initial community needs assessment conducted in 2019, we used two data collection strategies recommended by AARP: in-person listening sessions and an online AARP Community Survey. Data generated by these strategies helped develop our initial 2022 Action Plan, which featured five themes: Communication, Non-Vehicular Mobility and Safety, Public Transportation, and Need for Mixed-income and Accessible Housing.

Other Data We Used

In addition to data from 2019/2020 listening sessions and online survey, we have rooted this Action Plan in Shepherdstown's *2025 Comprehensive Plan*. The plan was the result of a 20-month-long deliberative and consultative process. The Comprehensive Plan expresses the community's vision and four goals that guide the local government's actions over the next decade:

Vision: Shepherdstown will be the cultural hub of the WV Eastern Panhandle while continuing to cherish our historic treasures, natural beauty, and small-town riverside charm.

Goals:

- 1) Promote economic prosperity and cultural vibrancy (EC),
- 2) Preserve, protect, restore, and complement historic attributes (H)
- 3) Conserve natural resources and preserve green spaces while supporting growth and development in the greater Shepherdstown area (LU)
- 4) Administer a range of high-quality and affordable services for residents, businesses, and visitors. (PS)

Each goal enumerates strategies the Town will pursue to achieve them. Age-Friendly Shepherdstown has aligned its proposed activities to ensure that they contribute to the town's goals and reflect its strategies.

Furthermore, we used data from an online survey developed and administered in 2023/24 in collaboration with Shepherd University's Age-Friendly University Committee. 323 individuals responded to the survey designed to gauge their views on the possibility of an Eastern Panhandle Transit Authority (EPTA) shuttle bus in Shepherdstown.

Other sources of data for this new Action Plan include two systematic assessments we conducted to document potential safety problems at Shepherdstown's two railroad crossings, at six parks, and in the downtown Shepherdstown area. Those assessments were conducted in 2023 and 2024.

Challenges

AFS is a volunteer committee that relies on its members' availability, skills, and willingness to complete tasks. During the previous action plan, AFS experienced significant turnover, with representatives from the cohousing community and Shepherd University stepping down. AFS has spent considerable effort recruiting and transitioning members, which has compromised the continuity of AFS's actions and its ability to achieve its goals.

As an advisory Board, AFS does not have budget, authority, or oversight functions. AFS will collaborate with Town Committees and other stakeholders to implement this action plan, which also means AFS must negotiate and adapt to align with other Committees' priorities. AFS can offer support to implementation, contributing technical assistance and other support as needed.

Introduction to the Plan

Vision

We envision Shepherdstown, our quaint and delightfully quirky historic town, as an accessible, life-enhancing place where people of all ages and abilities can thrive and participate actively in community life.

Mission

Our mission is to increase Shepherdstown's livability, attractiveness, and accessibility for residents, local businesses, and visitors of all ages and abilities.

Value Statement

Age-Friendly Shepherdstown supports the Town's overall values by considering access and appropriateness of activities and programs for all ages and abilities, especially those who are often marginalized.

- **Outdoor activities and green spaces:** We are proud of our parks, green space requirements, and easy access to outdoor recreation. An Age-Friendly priority is to improve the quality (e.g., beauty) of these spaces and maximize accessibility and utilization.
- **Historic Preservation:** Shepherdstown is the oldest town in West Virginia and is proud of its historic buildings and associated heritage. An Age-Friendly priority is to encourage and facilitate prioritization of safety and accessibility to historic sites for people of all ages and abilities.
- **Tourism:** Tied to the historic and green space themes noted above, Shepherdstown is proud of how attractive the area is to tourists, and our economy is intimately tied to tourism. An Age-Friendly priority is to support activities and programs that interest tourists of all ages and

abilities, and to facilitate the accessibility and safety measures required in a diverse tourism environment.

- **Communication:** One value commonality, as revealed through our data collection, is a desire for greater communication within the Town about key Town issues and activities. An Age-Friendly priority is to promote new communication methods, especially those designed to enhance access to it in public spaces.
- **Arts and Education:** For a small town, Shepherdstown demonstrates a high level of commitment to and benefits from the arts and educational programs that are available in the community. An Age-Friendly priority is to encourage and support arts and educational programs that interest people of all ages and abilities, as well as to ensure safe, reliable access to those activities for all.

Community Assessment and Results

As noted earlier, initially (2019/20), we used both listening sessions and a survey to collect data to establish Age-Friendly Shepherdstown's goals and priorities.

Initial Community Assessment

Many of the community assessment results from the listening sessions and the survey were favorable. Further, the identification of concerns- particularly those that emerged within both of our assessment methods- provided guidance for our Advisory Board in terms of the key themes and priority activities introduced in our initial Action Plan and addressed in the new 2026 Action Plan, as described below. See Appendix A for a detailed summary of findings from the listening sessions and online survey.

Transportation Survey

In Fall 2023, we worked with members of the Shepherd University Age-Friendly University committee to develop an online survey to collect community feedback on the idea of public transportation in Shepherdstown via an Eastern

Panhandle Transit Authority (EPTA) shuttle bus. The 10-item survey was open 88 days from late fall 2024 through early spring 2025. In total, 323 individuals responded.

Overall, respondents expressed a strong interest in pursuing an EPTA shuttle bus service in Shepherdstown, with 89% agreeing or strongly agreeing that it is a good idea. Almost all respondents indicated a willingness to pay a fee to ride the bus (91% agreed or strongly agreed). In anticipating how often and when they would use such a service, most respondents said it would depend on where the stops were and how reliable the schedule was.

Safety and Fall Prevention Audits

A member of the Age-Friendly Advisory Board, along with additional community volunteers, assessed safety risks in Shepherdstown by conducting two systematic audits.

In 2023, the audit examined our two railroad crossings and six public parks. This assessment found several safety risks in our public parks, including playground edging with protruding rebar, broken or missing steps at park entryways, and missing segments of stairway railings. Assessment results were presented to the Parks and Recreation Committee, and Town staff addressed all identified issues.

The 2024 audit focused on safety risks in downtown Shepherdstown. The audit noted that curb ramps were in generally good shape, with two needing attention. The report identified several risks. Uneven sidewalks were identified as the most significant risk, with 42 specific risk areas. Other issues included a lack of or faulty railings, streets without sidewalks, improperly anchored manhole covers or stormwater grates, and sidewalk work areas without safe pedestrian passage. Shepherdstown's Public Works Committee has been working to address these concerns, but many remain unresolved and need continued attention to enhance safety.

Action Plan

Preface and Notable Developments

As a preface to discussing our Action Plan, we offer some additional context. First, we note again that the non-student population of the Corporation of Shepherdstown hovers around 1,000. While Shepherdstown has always ‘punched above its weight,’ this small community has proportionately fewer resources than larger communities in the Age-Friendly Network. Our partners care deeply about Age-Friendly issues, and we take pride in our ongoing efforts in these areas, while also accepting that our small size requires us to focus on key priorities.

In 2020, a new medical facility associated with West Virginia University opened just on the edge of our town limits, while the public library was relocated to a new, modern building out of town that opened in July of 2022. Shepherdstown Elementary School was also relocated from an adjacent, walkable location to an educational campus a mile outside of town. These developments affect the quality of life of our residents and are important factors in achieving our age-friendly goals.

Our 2026 Action Plan is organized around six key themes—communication, non-vehicular mobility and safety, public transportation, public green space, mixed-income/accessible housing, and health—that emerged from the data explained above. In discussing them, we tie each to the relevant World Health Organization (WHO)/Age-Friendly Domain(s). In addition, when applicable, we include a reference to the Town’s 2025 Comprehensive Plan, noting the goal and strategy to which it aligns.

We plan to conduct a second AARP Community Assessment Survey during the 2026 Action Plan period. A good deal of time has passed since our initial assessment in 2019/20. We believe it is important to touch base again with community members to update our findings and incorporate the more recent findings from issue-specific assessments, like the sidewalk safety audits. We will

use AARP resources to gather quantitative and qualitative information regarding the WHO Domains and AFS will adapt its actions based on the results.

I. COMMUNICATION

The first theme is improving communication in the town, particularly between the town government and town residents. We understand the need to reflect residents' desire to be more fully informed about issues discussed by town governing bodies, as well as to improve communication about upcoming events in the community. As Shepherdstown is a tourist destination, AFS also wants to ensure visitors of all abilities can easily access relevant information.

Goals and Actions for this theme align with the following strategies of the Shepherdstown's Comprehensive Plan: EC1 Market Shepherdstown as a Destination and Highlight its Local Businesses; EC2: Highlight Shepherdstown as a Tourist and Outdoor Recreation Destination; EC3: Coordinate Promotion of the C&O Canal Towpath Trail; EC4: Increase the Town's Social Media Presence; and PS7: Enhance Public Information and Outreach.

WHO Domains: Communication and Information, Social Participation

A. GOAL: IMPROVE COMMUNICATION FROM THE TOWN TO RESIDENTS.

Building on Shepherdstown's prior achievements (namely, establishing an electronic communication network that includes town alerts, informational emails, and a monthly newsletter), we will encourage the expansion and improvement of direct communication to residents who would like to receive more information from the town government.

1. Follow up with the Town government to ensure accessibility for all public government meetings.
 - a) Push-button entry doors to Town Hall and other buildings where government meetings may be held.

- b) Adequate amplification and assisted listening devices available in all buildings where public government events occur, and closed captioning for virtual attendees.
 - c) Accessibility info/news in Messages from the Town including information on accessible services and other accommodations.
2. Conduct targeted outreach to older adults to promote access and use of Town-generated information.
- a) Work with Shepherdstown Area Independent Living (SAIL) to forward town communication to the SAIL members.
 - b) Explore the possibility of conveying messages by phone to those without access to electronic messages.

B. GOAL: ADVOCATE FOR PROVIDING RESIDENTS AND VISITORS WITH INFORMATION ABOUT TOWN ACTIVITIES AND EVENTS, LOCAL SERVICES, AREA ATTRACTIONS, AND LOCAL BUSINESSES

1. Collaborate with the Shepherdstown Welcome Center (which is managed by Jefferson County Convention and Visitor Bureau (CVB)) and Experience Shepherdstown to develop materials that share upcoming events, town attractions, and available services (especially public bathrooms and amenities like handicapped parking) that are placed where people in wheelchairs can see them and are produced in larger, legible fonts. We will also advocate for basic information that is accessible - even when the Welcome Center is closed.

Time Frame: Goal A is a *Short-Term Goal* because a good bit of it is already underway. Goal B is an intermediate goal because it features activities that have not yet been initiated.

II. NON-VEHICULAR MOBILITY AND SAFETY

The second theme that emerged from our community assessment was improving the built environment to promote safety, accessibility, and enjoyment of public spaces for pedestrians, cyclists, and people outside of vehicles. This includes walking paths, bike routes, sidewalks, building accessibility, crosswalks, and alleys.

AFS's priority activities for this theme align with many of the town's strategies to administer a range of high-quality and affordable services for residents, businesses, and visitors; to preserve, protect, restore, and complement historic attributes; and to promote economic prosperity and cultural vibrancy. Specific strategies are PS15: Support the Development of a Regional Bicycle and Pedestrian Plan; PS16: Establish and Improve Bicycle and Pedestrian Routes Between Parks and Neighborhoods; PS17: Establish and Improve Bicycle and Pedestrian Routes from Shepherdstown and Area Parks, Schools, and Shopping; PS18: Improve Pedestrian Safety in Town; H5: Implement Capital Improvement Planning and a Project Review Policy; EC7 Expand Parking Capacity; and EC8 Develop a Town-wide Comprehensive Parking Strategy.

WHO Domains: Outdoor Spaces and Buildings, Transportation, Social Participation, and Health Services and Community Support

A. GOAL: SUPPORT MAINTENANCE AND EXTENSION OF BIKE AND WALKING PATHS

1. Advocate for the completion of Morgan's Grove sidewalk. The Town has recently been informed that the West Virginia Department of Highways (WVDOH) has postponed work on the path connecting our downtown area to the largest park in the greater Shepherdstown area, Morgan's Grove Park. The park is currently not safe to access on foot or by bicycle. This plan has been in development for several years without progress. Construction is scheduled to be completed by July 2027, and questions remain about the path's safety and comfort. As amended, WVDOH plans have narrowed the

path along this road that currently has no shoulder and a 45 MPH speed limit. AFS will work with the Town Council and county officials to press for the completion of a path that is accessible, safe, and comfortable for pedestrians and cyclists to share.

2. Advocate for maintenance of cycling infrastructure. Sharrow markings installed along High Street pavement in 2025 have not stood the test of time, and most have worn off. AFS will work with the Parks and Recreation Committee to ensure the sharrows are replaced and maintained. We will also advocate for sharrows and bike route markings to be extended when the Morgan's Grove path is completed.
3. Assist with advertising the new bike and pedestrian routes connecting town parks and other sites. Shepherdstown has designated a bike route that connects the C&O Canal path with the historic downtown and public parks, using low-traffic streets maintained by the town and linking to the bike path at Maddex Square shopping mall. Residents, visitors, and businesses should have access to information about the bike route.
4. Work with Town Communications staff and area cycling groups to develop and disseminate bike route information.
5. Encourage the Welcome Center to provide information on local bike routes.

Time Frame: Short to intermediate, depending on how long it takes to find new Age-Friendly Advisory Board members and volunteers to lead these activities.

B. GOAL: IMPROVE PEDESTRIAN SAFETY AND ACCESSIBILITY WITHIN THE TOWN

1. Work with the Town government to improve sidewalk safety. AFS will work with the Public Works Committee to review and revise current ordinances to prioritize pedestrian safety and accessibility.

2. AFS will also provide support to the Town's Grant Committee in seeking grants for infrastructure improvements to improve pedestrian safety and accessibility.
3. Conduct biennial (every two years) accessibility audits, including a prioritized remediation list.
4. Include downtown sidewalks as part of AFS's biennial accessibility audit.
5. Assess the effectiveness of snow and ice removal practices downtown and within Town limits, especially for households that struggle to shovel.
6. Participate in regional bicycle/pedestrian plan. Development of the West Virginia Statewide Bicycle and Pedestrian Plan began in May 2026. Age-Friendly Shepherdstown will encourage broad participation in online surveys and community planning workshops so all views are included.
7. Advocate for increased safety at railroad crossings. There have been multiple significant injuries due to the uneven surfaces around the at-grade railroad crossing. We will advocate to Public Works to work with CSX to repair these areas, and to the Grants Committee to prioritize grants that would assist pedestrians in these areas.
8. Assess Town buildings to identify where assistive devices (e.g., handrails or signage providing directions to an accessible entrance) can be installed and then work with the Town on processes to foster compliance with ADA requirements.
9. Promote accessible town amenities such as public benches with additional arms.
10. Assess public perceptions of the effectiveness of current street lighting. The town previously piloted new lighting schemes but abruptly shut them down after residents complained. We will advocate for the Public Works committee to revisit the issue, including a lighting study that identifies

areas where there is perceived need for additional or different lighting and gathers information for aesthetic concerns.

11. Advocate for the incorporation of accessibility concerns in Town planning exercises. The Comprehensive Plan mentions a planning exercise for capital improvements and a parking study to be completed over the next 10 years. If the studies are completed during this action plan, AFS will advocate to ensure accessibility is prioritized; for instance, a parking study should specifically assess the adequacy of accessible parking spaces and the possibility of creating drop-off zones.

Time Frame: Several of these activities can begin in the short term by working directly with the Town Council, its committee review, and participation in planning efforts. That includes sidewalk safety, grant support, downtown accessibility audits, snow and ice removal review, regional bicycle/pedestrian planning, and the incorporation of accessibility into capital and parking studies. These steps are largely about policy, coordination, and information gathering so that they can move forward quickly.

Other activities will require an intermediate- to long-term horizon because they involve public consultation, engineering review, coordination with outside agencies, funding, and Town approval. That includes lighting changes, railroad crossing improvements, building accessibility upgrades, and any built-environment changes that require design decisions or capital investment.

III. NEED FOR PUBLIC TRANSPORTATION

Another priority for many is the development of a public transportation option for residents who are unable to drive, walk, or bike to destinations such as the new medical center, social or educational events in town, or on campus, and the shopping complex located just outside of town limits.

AFS activities under this theme align with the Comprehensive Plan goals related to public services, namely PS4: Partner with West Virginia and Jefferson County to Expand Access to Public Services; PS20: Expand the Availability of Transportation, Including Direct Public Transit Connections to the MARC Train; and PS21: Expand Bus Routes.

WHO Domains: Transportation, Social Participation, Respect, and Social Inclusion

A. GOAL: ADVOCATE FOR PUBLIC TRANSPORTATION FOR TOWN RESIDENTS

1. Collaborate with Eastern Panhandle Transit Authority (EPTA) and Shepherdstown Town Council to pilot a local shuttle.
2. Collaborate with EPTA and Town Council to draft a pilot proposal and solicit community input.
3. Assist with finding potential funding sources, including grants.
4. Support pilot implementation, including data collection, analysis, and dissemination of findings.

Time Frame: These are intermediate to long-term activities, based on the Town and EPTA's capacity to discuss and negotiate a pilot design. Much will depend on the EPTA's flexibility in its bus routes, its ability to estimate demand for these services, and the potential for cooperation with Shepherd University regarding existing University bus routes and schedules. Approval of routes and necessary funding would also need to be approved by Town committees and by the Town Council.

IV. DEVELOPMENT OF GREEN SPACES

The fourth theme that emerged from our community assessment data was a desire for more and improved public “green spaces” in town. Ideas within this theme are closely tied to hoped-for improvements in the town’s parks, as well as the development of newer green areas for public gatherings and enjoyment. Shepherdstown is proud of its designation as a “Tree City USA”, and it is consistent with the town’s Comprehensive Plan to work continually on improvements and access to the community’s parks and outdoor spaces.

Actions under this theme align with the Town’s goals to provide high-quality services, and these specific strategies: PS8: Develop a Parks and Recreation Master Plan; PS11: Maintain Morgan’s Grove as a Public Park; PS12: Develop Neighborhood Parks; PS13: Improve Princess Street River Access; PS16: Establish and Improve Bicycle and Pedestrian Routes Between Parks and Neighborhoods.

WHO Domain: Outdoor Spaces and Buildings

A. GOAL: IMPROVE AND INCREASE PUBLIC GREEN SPACE IN SHEPHERDSTOWN

1. Advocate for restroom/s in the public park system.
 - a) Collaborate with stakeholders including the Shepherdstown Parks and Recreation Committee, the Public Works Committee, Town Council, the “Rumsian Society” (a local group of individuals whose mission is to maintain and improve Rumsey Park), residents, and businesses about the preferred location of park restroom facilities. AFS will also support a restroom facilities pilot, including data collection, ensuring accessibility is considered, and sharing findings. Depending on the pilot results, AFS will support efforts to secure funding for permanent restroom facilities.
2. Encourage the Town to establish and implement an auditing schedule for park equipment, reviewing safety, suitability, and needs of all ages and abilities.

3. Promote the creation of more public green space in central Shepherdstown.
 - a) Assist with the Town’s planned temporary pilot pedestrian plaza around the Market House building by supporting the pilot’s research agenda and helping the town collect data and disseminate findings.

4. Ensure that Hurley Park plans include a focus on accessibility for all ages and abilities.
 - a) Include a wide age range of individuals (youth, young adults, and seniors) in plans for the park.

 - b) Ensure that park amenities such as benches are age-friendly.

Time Frame: While the Market House pilot appears imminent, the rest of these activities are longer-term and in the purview of the Parks and Recreation Committee. These longer-term projects involve significant community discussion, followed by detailed planning, committee reviews, and construction for any approved project(s). AFS can provide technical assistance in the design phase and help with data collection.

V. MIXED-INCOME AND ACCESSIBLE HOUSING

The fifth theme that emerged from our data centered on a perceived need for more mixed-income housing and accessible housing options (e.g., one-story) in the community. As a small town with a significant historic district within the corporate limits, existing housing is often ill-suited for aging in place and is comparatively expensive for the region. Within the town limits, there is limited space for new housing. Current zoning ordinances – including structure size minimums and parking requirements - restrict homeowners’ ability to add additional housing units by constructing ADUs and subdividing lots.

The Town has also prioritized expanded housing under its economic development goal while accounting for its historic preservation and natural resources

conservation goals. AFS actions that align with the specific strategies include EC12: Incentivize Affordable Housing Development; EC13: Take Action to Allow Accessory Housing Development; EC14: Repurpose underused sites, such as vacant buildings or lots, for affordable housing to maximize land use the revitalize neglected areas; H1 Support Historic Preservation; H3 Use Illustrated Architectural and Site Development Standards; H4 Produce Educational Materials, Resources, and Workshops on Historic Preservation; and LU16: Revise Development Ordinances to Accommodate New Growth.

WHO Domain: Housing

A. GOAL: PROMOTE INCREASED MIXED-INCOME AND ACCESSIBLE HOUSING IN SHEPHERDSTOWN

1. Recommend that Town Council amend ordinances as needed to expand the diversity of housing options within town limits.
2. Recommend the use of Universal Design Principles in proposed new structures and in renovations of old structures within corporate limits. The principles provide guidelines for designing environments, products, and communications to be accessible and usable by all people— regardless of age, size, or ability—without requiring adaptation or specialized design.
3. Support the development of information about universal design in historic preservation to residents and businesses.
4. Recommend that business and home owners located in the Shepherdstown Historic District use “universal design in historic preservation” guidelines when planning to redo properties or build new ones.
5. Promote the use of ADUs (Accessory Dwelling Units) within the corporation as a way of increasing accessible housing options.

6. Recommend reusing under-utilized building space as an aging-in-place strategy.

Time Frame: Intermediate to long-term; this is a significant, long-standing structural problem in our community, but some planned actions may be accomplished fairly easily and others are likely to take extensive, sustained attention over a period of years if real progress is to be made.

VI. HEALTH SERVICES

In our 2019-20 community consultations, Health and Medical services did not emerge as a top concern among community participants. However, respondents did lament the lack of local urgent care services and reported that seeking better health/medical services would be a major factor in deciding to leave Shepherdstown. Further, Shepherdstown's lowest score (39/100) on AARP's Livability Index is for Health, which includes prevention, access, and quality. Based on this information, AFS added a sixth theme to our 2026 Action Plan.

A new medical facility (WVU Medicine Shepherdstown) opened in town during the period when this Action Plan was being developed. The facility is now fully operational, providing primary care, pediatric outpatient care, laboratory and imaging services, and specialists in rheumatology, endocrinology, and plastic surgery. However, many community members report long waiting times (sometimes over a year) to be accepted as a physician's patient or to get an appointment. Shepherdstown residents have unmet clinical needs.

In addition, food security and nutrition are concerns. According to Feeding America's Map the Meal 2025 report, the rates of food insecurity among those 50 and older are growing overall, with certain demographics disproportionately affected; those with disabilities are two to three times more likely to be food insecure; renters are more than three times more likely to experience food insecurity; and those from communities of color. Locally, 10.2% of households in

Jefferson County were food insecure in 2023, yet more than half of those households did not qualify for SNAP benefits.

AFS activities under this theme align with the Town's strategy PS4: Partner with West Virginia and Jefferson County to expand Access to Public Services.

WHO Domain: Health Services and Community Supports

A. GOAL: PROMOTE ACCESS TO A WIDER RANGE OF PRACTITIONERS AT THE WVU MEDICAL FACILITY IN SHEPHERDSTOWN

1. Consult with WVU Medical facility to explore the possibility of devoting a greater portion of each day to "walk-in" visits and to scheduling additional WVU practitioners with diverse specialties.

B. GOAL: PROMOTE LOCAL PROGRAMS TO IMPROVE NUTRITION AND REDUCE FOOD INSECURITY

1. Work with local organizations such as churches, markets, food pantries, and senior groups to promote access to nutritional foods.
 - a) Work with Shepherdstown Shares, SAIL, and local Meals on Wheels to compile food resources and disseminate information to local populations, including hours of operation, food access programs, and farmer's markets participating in SNAP.
 - b) Explore a partnership with the commercial kitchen at Shepherd University to increase access to meals for the local population.

Time Frame: Scheduling meetings with WVU Medical administration is more of a short-term goal, but it is likely that AFS members and other volunteers will lead these activities.

Appendix

1. Listening sessions

Five listening sessions were conducted in the spring and summer of 2019.

These were held with key constituency groups, including:

- a. Members of SAIL (Shepherdstown Area Independent Living, which is part of the Village to Village Movement and a key partner in the Age-Friendly effort)
- b. Shepherdstown business owners
- c. Residents of Shepherd Village, a co-housing community within the town, which aims “to create a close-knit neighborhood that will support aging in place, staying actively engaged in life and enjoying deep friendships” (Shepherd Village Website).
- d. Asbury United Methodist Church, a primarily African American church in Shepherdstown.
- e. An open session for all members of the community.

Results: Respondents spoke favorably about living in Shepherdstown, often mentioning the benefits of a small community with an abundance of educational, cultural, and social activities and opportunities. That said, five areas of concern were identified by participants across the groups:

1. Lack of **public transportation** (raised in all five groups, with much interest in some kind of shuttle or circulator bus system)
2. Need for improved **sidewalks, alleys, bike and pedestrian paths** (raised in all five groups, with special concerns raised by residents at both east and west ends of town)
3. Need for better **communication** about town events and activities (raised in 4 groups)
4. Need for more **mixed-income and accessible housing** (raised in four groups)
5. Desire for more **public green spaces** (raised in four groups)

2. AARP Community Survey

The AARP Age-Friendly Online Community Survey was open from midDecember, 2019, through the end of February, 2020. A total of 356 individuals, 95% of whom are white, completed the survey. The respondents were relatively senior in age (bimodal ages – 68 and 70), and well-educated, with 54% having received a graduate or professional degree and another 30% having completed a college degree and graduate study. They were relatively new to greater Shepherdstown, the majority having moved here in the last 10 years. About 60% lived outside the town limits, with 40% living in town. Seventy-three percent of the respondents identified as female, 27% as male. The majority (63%) were married; with 15% widowed. Most respondents' incomes (68%) ranged from \$50,000 to greater than \$150,000.

Results: Key results are presented here; the full, 68-page report is available upon request. We focus on items for which there was convergence of results; items with widely divergent responses are not reported or discussed. Respondents expressed strong positive views of Shepherdstown as a livable community, with 88% rating the town as an excellent, very good, or good place for people to live as they age. Further, the majority of respondents (70%) hope to stay here permanently. For those who foresee a possible future relocation, seeking better health care facilities is the main reason. For a large majority (93%) it is very important to live independently at home as they age. Also, there were strong positive ratings on social engagement. Most respondents were socially connected in the community with (87%) reporting daily or multiple times per week contact with family, friends, or neighbors and over 70% rarely or never feeling lonely or a lack of companionship. Further, most respondents rated Shepherdstown as excellent, very good, or good on providing opportunities for volunteering.

Respondents had less favorable views about getting around in the community. Sidewalks were rated fair or poor by 75% and pedestrian and bike paths were rated fair or poor by 87%. Also, 78% gave a fair or poor rating on "audio and visual pedestrian crossings." Ratings of public transportation were similarly low, with 92% rating it as fair or poor.

Ratings related to access to community information also were low. The majority of respondents gave fair or poor ratings on an item asking about “access to community information in one central source” and one about “clearly displayed community information with large lettering.”

DRAFT

Commission and Committee Appointments



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. Lois Spreen Address: 211 West Washington Street
Phone numbers – Home: NA Work: NA Cell: 202 468 5662
Email address: lcspreen@comcast.net Employer: Retired
Occupation: Human Resource Management

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

Please describe your background and education.

Education:

BA/Religion Smith College
MA/Human Resource Management George Washington University

Special Training: Certified Life Coach The Coaches Training Institute

Work Experience: 32 years in various leadership and staff human resource roles.
Worked for large corporations (IBM, TRW, Northrop Grumman) and a small, privately held company (Bates White).

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

Work responsibilities that may apply to this board/commission include leading the HR function, managing projects (i.e., implementing new plans, change management, conducting surveys), interacting with management and employees to resolve issues and address concerns, and leading meetings/making presentations.

Post retirement experience includes managing all human resource responsibilities for the Shepherdstown Presbyterian Church; conducting a church wide survey, leading feedback sessions, and developing actions plans; and serving on the Session. Designed and led a Lifelong Learning class.

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

I was interested in finding a way to support the town and Linda Spatig made me aware of this opportunity. I felt it would be a good match for my skills and interests.

Please describe what you know about this board/commission.

The Age Friendly advisory board/commission has been successful in completing an in depth assessment of the needs of this community and put together a comprehensive action plan in 2022. The commission is currently in the process of updating its action plan for 2026 to include the areas of communication, non vehicular mobility and safety, transportation, green space, and housing. Linda is looking for someone to take over the responsibility for the oversight of this board/commission.


How did you hear about this board/commission?

I heard about this board/commission from Linda Spatig.

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

Linda Spatig 304 617 5318

Keri Mahoney 304 268 7070

Signature:  Date submitted: May 12, 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.

Community Grant Applications



Shepherdstown
WEST VIRGINIA

**Shepherdstown
Community Grant Application**

Date: 05/03/2026

Applicant Information

Applicant organization name: The Roving Peregrine Theatre Company

Mailing address: 473 First Street Inwood WV 25428

Physical address, if different: 113 S. Princess Street
Shepherdstown WV 25443

Website: www.rovingperegrinetheatre.org

Year organization was founded: 2021

Organization's tax-exempt number (EIN): 87-3257955

Organization's total operating budget for current fiscal year: \$57,050

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

Heather Wallen

Telephone: 717 801 5942

Email: therovingperegrine@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:

The Roving Peregrine Theatre Company has consistently produced theatre and workshop opportunities for five years, with the move to this location happening in 2024. The founding artistic director holds a degree in Theatre Administration and runs the theatre with a board of 10 members of varying professional experience. This grant will help support out theatrical season for the fall of 2026. We already have experience bringing theatre to the area and know how to market to the community and serve the community both onstage, behind the scenes, and as audience members.

Grant Request Information

Project name: A Production of 'Gutenberg, The Musical' in Winter 2026

Amount requested: \$1,250

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

Applied for another grant for \$2000 and haven't heard back.
Funds from previous shows help pay for the next show.
Donations from previous donors may become available again.

Implementation timeline, including delivery of any progress reports and the final report: The musical will premiere in December of 2026

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

Six performances of Project Gutenberg Rights are \$2,300
Scripts and LibrettosL \$600
Staffing (Director, Music Director, Stage Manager)- \$2,000
Costumes, Props, Set - \$200



Shepherdstown
WEST VIRGINIA

Grant Application, cont.

Project Description:

The Roving Peregrine Theatre Company will bring a theatrical presentation of "Gutenberg The Musical" To The black box arts center in Shepherdstown in 2026. The show will run for six performances and feature six prominent Shepherdstown figures as walk on roles as well as two local actors as the feature roles. We plan to partner with other local businesses to bring this production to life. Roving Peregrine is a creative outlet for both local and regional actors and theatre makers, bringing new people to the area but also giving opportunities to locals and students at Shepherd University. Thank you for your consideration as we find ways to fund out Fall Season.

Applicant's signature & date:

Town Hall | 104 N. King St. | PO Box 248 (mail) | Shepherdstown, WV 25443



Shepherdstown
WEST VIRGINIA

**Shepherdstown
Community Grant Application**

Date: 05/22/26

Applicant Information

Applicant organization name: Jefferson County Historic Landmarks Commission

Mailing address: PO Box 23, Charles Town, WV 25414

Physical address, if different: 116 E. Washington Street Charles Town

Website: jeffersoncountyhlc.org

Year organization was founded: 1974

Organization's tax-exempt number (EIN): 45-3213370

Organization's total operating budget for current fiscal year: 90,000

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

Addison Reese, JCHLC Chair

Telephone: 301-788-7239

Email: addisonrreese@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 applied for, received, and administered dozens of grants.

Grant Request Information

Project name: Rose Hill Tree Removal and Maintenance

Amount requested: \$2000

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

I will complete any site prep and necessary cleanup after trees are removed. I will oversee any work that is done in the cemetery and bring in volunteers when appropriate.

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

I have already received a quote for the necessary tree work and will schedule the work as soon as funding is secured. Maintenance funds will be used by the end of the year and a final report can be submitted at that time. Progress reports can also be submitted as required.

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

Viking tree service has given us a highly discounted rate to have 5 hazard trees removed for \$600. Beyond that, we need additional clearing done in the cemetery (bamboo and brush removal) to prepare the site for ground penetrating radar (a grant has been secured for that work from the state). Other money will be used for routine maintenance of the cemetery.



Shepherdstown
WEST VIRGINIA

Grant Application, cont.

Project Description:

For this project, we are asking for funds to remove several dead/dying trees on the hillside at Rose Hill Cemetery. The trees are currently a hazard to visitors and the headstones surrounding them. Additionally, funds will be used to clear invasive bamboo and brush along the top portion of the cemetery in preparation for ground penetrating radar to locate unmarked burials. Any remaining funds will be used for routine maintenance of the cemetery.

Applicant's signature & date:

Addison Reese 05/22/26

Town Hall | 104 N. King St. | PO Box 248 (mail) | Shepherdstown, WV 25443

Shepherdstown Community Grant Application

Date: 5/26/2026

Applicant Information

Applicant organization name:

Contemporary American Theater Festival

Mailing address:

PO Box 429

Shepherdstown, WV 25443

Physical address, if different:

92 W Campus Drive, Center for Contemporary Arts

Shepherdstown, WV 25443

Website:

www.catf.org

Year organization was founded:

1991

Organization's tax-exempt number (EIN):

55-0711349

Organization's total operating budget for current fiscal year:

\$ 2,682,585.98

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

Hope Gundlah, Grant Writer

Telephone:

681-240-4048

Email:

hgundlah@catf.org

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

Celebrating its 36th season, the Contemporary American Theater Festival is one of the leading cultural organizations in West Virginia's Eastern Panhandle, generating over \$5.8 million in related economic activity (exclusive of ticket sales) in the region each year. CATF's current audience base includes patrons from 40 states, Washington DC, and two Canadian provinces, demonstrating the Festival's ability to draw substantial tourism to Shepherdstown. CATF has maintained a mutually beneficial relationship with the Shepherdstown Town Council and

Experience Shepherdstown for many years, collaborating on numerous local events and projects. CATF has a long track record of successfully managing grants and donations from a wide variety of governmental and private funders, including COVID-19 relief funding, an ongoing play commission with the Town Council, and a Community Grant for marketing during the 2025 Festival.

Grant Request Information

Project name:

Shepherdstown-Forward Marketing for the 2026 Festival

Amount requested:

\$25,000

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

CATF is providing \$14,164 in funding, which includes payment for the Graphic Designer and Publicist, as well as CATF's Director of Marketing & Communications and Marketing Intern. CATF also has a pending partnership with Amtrak, in which Amtrak would provide in-kind support in the form of train tickets as well as tourism-focused social media collaborations with CATF.

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

June: Graphic Designer designs brochures, window cards, sandwich board, signs, and digital ads.

June 16: Allied Global Media begins their geo-targeted digital advertising campaign

June 23: CATF intern begins operating box office at Shepherdstown Welcome Center.

July 5, 7, 8, 9 & 10: Preview performances

July 10: Regular run performances begin (Wednesdays through Sundays). User-generated content partners attend performances throughout the run and publish content.

August 2: Festival closes, ad campaigns end, Welcome Center box office ends

October 1: CATF Grant Writer will submit final report, including final data from user-generated content and Allied Global Media geo-targeted digital advertising

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

Category	Grant Funded	CATF Funded
Director of Marketing and Communications		\$ 7,639
Marketing Intern		\$ 425
Publicist		\$ 4,500
Graphic Designer		\$ 1,600
Welcome Center Box Office		
Staffing	\$ 2,000	
Brochures	\$ 250	
Window cards & posters	\$ 250	
Sandwich Board & Signs	\$ 500	
User-generated content	\$ 10,000	
Allied Global Media Geo-Targeted Digital Advertising	\$ 12,000	
	\$ 25,000	\$ 14,164

Project Description:

The Contemporary American Theater Festival seeks grant funding to support its Shepherdstown-forward marketing efforts for the 2026 Festival, running July 10 through August 2. This marketing is specifically targeted to draw tourists from the greater DMV region to visit Shepherdstown and CATF, as well as to provide better access to CATF information for residents and visitors to downtown Shepherdstown.

Following the success of last year, CATF will operate a satellite box office at the Welcome Center in downtown Shepherdstown. An intern will staff this box office starting on June 23 – about two weeks before preview performances – and ending on the Festival’s closing day.

CATF’s new digital advertising agency, Allied Global Media, will execute a geo-targeted campaign focused on prospective tourists residing in the Washington DC, northern Virginia, and Baltimore areas. Allied Global Media promises to provide detailed metrics with a complete picture of how the advertising dollars spent translate into impressions and sales.

In place of last year’s influencer initiative with Wild Side Media, CATF is pivoting into user-generated content with a focus on hiring creators from Shepherdstown and surrounding towns. While last year’s initiative hired theatre influencers from the DC and Baltimore areas, this user-generated content strategy will not only elevate locals who are knowledgeable and passionate about the region, but also encourage cross-over with different interests and types of tourism. CATF has compiled a roster of 20 brand ambassadors to create user-generated content. Some are foodies who will spotlight local restaurants alongside CATF; others are adventure content creators who will highlight hiking destinations alongside CATF; and still others are history buffs who will show viewers Shepherdstown’s historical sites in addition to CATF. CATF believes that this campaign will draw visitors to Shepherdstown for more than just the Festival.

Applicant's signature & date:

A handwritten signature in black ink, appearing to read "John E. Smith". The signature is written in a cursive style with a large initial "J" and "S".

5/26/2026

Special Event Requests

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 30 days prior to the proposed special event.**

Event Title Slonaker/Hamilton wedding Event Date June 29, 2026
 Event Sponsor N/A Secondary Date _____

Organizer's Contact Information

Name: SANDY HAMILTON Cell: 304-283-8880
 Address: 87 Thornberry Dr., Martinsburg, WV 25403
 Email sandyhamilton304@gmail.com Alt. Phone N/A

Event Information

Requested Area(s) _____ City Streets/Sidewalks _____ Sidewalks only Other _____
 Location of Event Rumsey Monument
 Attach route for processional events. Be precise when indicating location.
 Event Hours 2:30-3:30 PM until _____ Set up start time 1:00 PM Clean up end time 3:30 p.m.
 ****NOTE**** Town Square Events are limited to SIX (6) Hours, including set-up and clean-up time.
 Anticipated Attendance (per day): Participants 4 Spectators 36

Office Use Only

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

Police: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Conditional	Planning: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Conditional
Fire: <input type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Conditional	Public Works: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Conditional
Town Manager: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Conditional	Town Council: <input type="checkbox"/> Approved <input type="checkbox"/> Denied <input type="checkbox"/> Conditional

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

Event Information

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

Name of Event Toku Slovaker / SANDRA HAMILTON wedding

Brief Description of Event: private, simple, wedding ceremony

Has your organization held this event in the past? N/A

When and Where? N/A

Is the event a fundraiser? N/A

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

Will items be left overnight? No What and where? N/A
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? N/A Are you charging admission N/A?
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 N/A

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 loudspeakers or amplification devices? No Will you be installing temporary structures, such as tents, bleachers, stages, inflatables? No What and where? N/A
Check with Planning for U&O Requirements

Will you require dedicated parking or bagged meters? No

What and where? N/A
Check with Parking for costs and arrangements

Indemnification

I SANDRA J. HAMILTON 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 N/A (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 Sandra J. Hamilton Date 5-20-2026

Title _____

FEE SCHEDULE

Application Fee--\$25

Police Fees--\$35 per hour or partial hour worked, per officer.

Fire/EMS--\$35 per hour or partial hour worked, per firefighter and \$100 per hour or partial hour for firefighting apparatus and/or medic unit

Public Works--\$20 per hour or partial hour worked, per laborer, including time requested or deemed necessary for set up and/or clean up

*** Additional fees for Town Service may be waived for all Town Funded Events and Town Co-Funded Events***

*** The need for Town services is determined by applicant request or staff recommendation and ultimately approved by Town Council***



Staff Reports

Shepherdstown Wastewater, Water and Streets

Water/Sewer Leaks / Issues

- 1) Main leak- 142 Berridge Dr
- 2) Meter relocate -German St
- 3) Sewer backup- German St
- 4 Sewer issue- German St
- 5) 6 inch valve break-Clarion Hotel

Water plant/Wastewater plant

Water plant-

- UV system ordered new Ballast
- UV recirculation design
- CL2 pump replaced
- New Drain valve actuator being built from AUMA

Wastewater plant-

- PFAS biosolid sampling
- Land applying Sludge

Lead and Copper rule

- GRR plan-line replacement deadline Oct 2037
- GRR presentation

Streets

Fix street signs

Garden tour Banners up

2 new benches delivered to artists

Road work/ patch work

Pride parade – Prep/Cleanup

Street Fest- Prep/Cleanup

Shepherdstown Wastewater, Water and Streets Cont.

Trash/Recycling/Yard waste/Rough cost

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

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

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

Yard Waste- 15 loads. Including clean up weeks- Dump cost \$750

Clean up week totals

Trash-32 tons

Recycling-2 tons

Yard waste- 5 loads

PATH Project update (Kenny Shipley)

construction scheduled to start in July 2026

Operator update

Still accepting applications for OIT water and CDL laborer PW

Shepherdstown Police Department

A total of 430 police service calls include 21 assists for the Jefferson County Sheriff's Office. That is 4.8% of the calls being an assist to another agency. Jefferson County assisted us with 6 calls for service.

The assist calls are typically an emergency type of call, or a "back-up" type of call where 2 officers are required due to the nature of the call. These types of calls were alarms, motor vehicle accidents with injury, panic alarms, and suspicious persons etc. It should be noted that all the agencies in Jefferson have an MOU to reciprocate with that type of service on some of our calls.

Note Worthy Events:

In the month of May, a person who has yet to be identified continued to call in 2 school threats. This type of a call is resource draining for the entire county simply due to the nature of the call. Our agency assisted with the handling of police related calls throughout the county so that the "threat" could be dealt with in a way that provided the most safety for all involved.

25% of our calls for the month were traffic enforcement.

Town Financial Status

Executive Summary: Corporation of Shepherdstown FY26 Budget vs Actuals
Through April 30, 2026

Financial Performance Overview

Metric	Budget (Thru 4/30)	Actuals (Thru 4/30)	Variance
Total Revenues	\$2,379,583	\$2,493,778	+\$114,195 (4.8% favorable)
Total Expenses	\$2,381,469	\$2,129,876	-\$251,593 (10.6% favorable)

Key Revenue Highlights

Strong Performers (Over Budget):

- **Video Lottery:** +\$53,880 (weekly WV tax distributions)
- **Interest Income:** +\$47,802 (operating account)
- **Ad Valorem Taxes:** +\$46,388 (property tax collections)
- **B&O Tax:** +\$18,353 (First Energy quarterly tax)
- **Utility Tax:** +\$17,969

Underperforming (Under Budget):

- **Hotel/Motel Tax:** -\$87,630 (significant shortfall)
- **Supplemental Taxes:** -\$21,295 (reassessed property values)
- **Fines, Fees & Court Costs:** -\$14,169
- **Parking Meters:** -\$11,243

Key Expense Highlights

Over Budget Departments:

- **City Hall:** +\$99,904 (professional services, building repairs, contracted services)
- **Contributions/Transfers:** +\$48,151 (Visitor's Center community grants)
- **Sanitation:** +\$28,543 (salaries, landfill fees)
- **Streets:** +\$13,072 (equipment R&M)

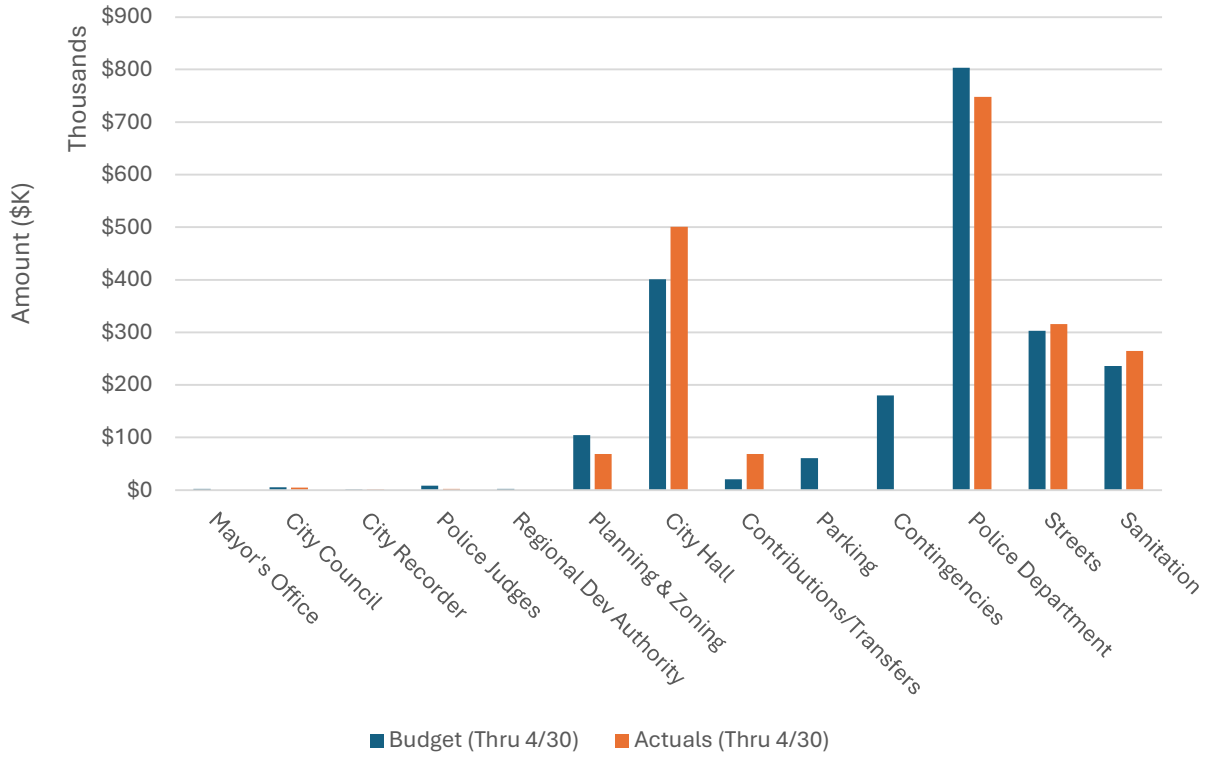
Under Budget Departments:

- **Contingencies:** -\$179,956 (unspent reserve)
- **Civic Promotions:** -\$70,721 (contributions not yet made)
- **Parking:** -\$60,452 (new dept, no expenses recorded yet)
- **Police Department:** -\$55,176 (retirement, overtime, supplies)
- **Planning & Zoning:** -\$35,928 (salaries, FICA, retirement)

- **Bottom Line**

The Corporation is in a **strong financial position** with a **\$365,788 surplus** through April 2026. Revenues exceed budget by 4.8%, while expenses are 10.6% under budget. Key concerns include the Hotel/Motel tax shortfall and City Hall overspending, but these are offset by significant savings in Contingencies and operational departments

FY26 Budget vs Actuals by Department (Thru 4/30/2026)



Corporation of Shepherdstown

Balance Sheet
As of Apr 30, 2026

	Total
Assets	
Current Assets	
Bank Accounts	
106 Petty Cash	\$440.00
GENERAL FUNDS BANKING	\$4,936,604.42
RESTRICTED FUNDS	\$327,882.08
RESTRICTED FUNDS BANKING	\$0.00
RESTRICTED FUNDS ICS ACCOUNTS	\$4,542.22
Undeposited Funds	617.98
Total for Bank Accounts	\$5,270,086.70
Accounts Receivable	
General Funds A/R	\$139,867.40
Total for Accounts Receivable	\$139,867.40
Other Current Assets	
112.011 Tobacco Warehouse	0.00
150.00 Net OPEB Asset	19,086.00
Direct Deposit Payroll Due	0.00
Other Current Assets	
112.01 Prepaid Expenses	94,650.40
112.02 Supplies & Materials Inventory	0.00
112.07 Workers Comp Deposit	0.00
Total for Other Current Assets	\$94,650.40
Uncategorized Asset	0.00
Total for Other Current Assets	\$113,736.40
Total for Current Assets	\$5,523,690.50

Corporation of Shepherdstown

Balance Sheet
As of Apr 30, 2026

	Total
Fixed Assets	
General Fixed Assets (Gov-Wide)	\$5,488,057.62
Total for Fixed Assets	\$5,488,057.62
Other Assets	
Beneficial Interest in Assets Held by Others	53,343.10
Due from Market House Legal Settlement	15,104.00
Total for Other Assets	\$68,447.10
Total for Assets	\$11,080,195.22
Liabilities and Equity	
Liabilities	
Current Liabilities	
Accounts Payable	
244.01 General Fund Payable - Payroll	0.00
General Funds A/P	\$22,479.84
Total for Accounts Payable	\$22,479.84
Credit Cards	
213 Purchase Card Payable	\$45,870.63
Fifth Third	0.00

Corporation of Shepherdstown

Balance Sheet
As of Apr 30, 2026

	Total
Total for Credit Cards	\$45,870.63
Other Current Liabilities	
140.01 DO-RHBT Payments Subsequer	0.00
140.02 DO - Change in Proportionate	-1,320.00
140.3 DO - Difference in Earnings	0.00
140.4 DO-Reallocation of Opt. Out	0.00
140.5 DO - Change in Assumptions	-2,695.00
200.02 EVCF Endowment Fund	0.00
2104 PEIA Payable	4,356.00
242 Sewer Payable - Payroll Fund	0.00
243 Water Payable - Payroll Fund	0.00
245 Unreceipted Cash W/S G Dept)	0.00
250.10 Net OPEB Liability	0.00
260 Accrued Compensated Absences	84,750.59
280.10 DI-Different Expected/Actual I	11,110.00
280.20 DI-Difference Proj/Actual Earn	318.00
280.30 DI-Changes/Differences Prop. S	13,022.00
280.40 DI - Changes in Assuptions	10,648.00
280.5 DI-Reallocation of Opt. Out	0.00
290.50 Restricted for Equipment	96,206.00
292.20 PPA-Beginning OPEB Liability	927.00
292.30 PPA-2017 RHBT Payment	-15,460.00
292.40 PPA-Beginning Net OPEB Obligati	0.00
Child Support	-971.53
Christmas Club	-400.00
Due to (from) Coal Severance	-22,750.31
Due to (from) Sewer	-446,233.98
Due to (from) Water	-948,227.84
Garnishments	3,170.12
Gen Fund Other Current Liab.	\$71,293.20
Payroll Liabilities	29,818.31
VALIC Retirement Payable	17,657.27
Total for Other Current Liabilities	-\$1,094,782.17
Total for Current Liabilities	-\$1,026,431.70
Total for Liabilities	-\$1,026,431.70

Corporation of Shepherdstown

Balance Sheet
As of Apr 30, 2026

	Total
Equity	
290 Investment in Gen. Fixed Assets	5,200,923.00
Fund Balance	6,211,937.83
Retained Earnings	650,295.88
Net Income	43,470.21
Total for Equity	\$12,106,626.92
Total for Liabilities and Equity	\$11,080,195.22

Corporation of Shepherdstown

FY26 Budget vs Actuals

Through April 30, 2026

	REVENUES	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
299	Carryover	\$ 240,000	\$ 174,950	\$ 384,522	\$ 320,435	\$320,435	\$ 0	
301	Taxes Ad Valorem	\$ 239,731	\$ 253,444	\$ 253,444	\$ 211,203	\$257,592	\$46,388	Property Taxes (Collections are heavy in Aug/Sep and Feb/Mar)
301-06	Supplemental Taxes	\$ 23,100	\$ 26,155	\$ 26,155	\$ 21,796	\$501	(\$21,295)	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	\$ 4,167	\$3,817	(\$350)	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	\$ 66,667	\$84,636	\$17,969	Monthly Utility Taxes assessed on all utilities
305	B&O Tax	\$ 83,000	\$ 85,000	\$ 85,000	\$ 70,833	\$89,186	\$18,353	Quarterly tax assessed on First Energy Only
306	Liquor Tax	\$ 185,000	\$ 185,000	\$ 185,000	\$ 154,167	\$163,680	\$9,513	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	\$ 333	\$170	(\$163)	Fees for dog tags collected by Jefferson County
308	Hotel/Motel Tax	\$ 300,000	\$ 300,000	\$ 300,000	\$ 250,000	\$162,370	(\$87,630)	Monthly Tax assessed on local hotels, motels, and short term rentals
314	Sales Tax	\$ 560,000	\$ 560,000	\$ 560,000	\$ 466,667	\$463,911	(\$2,756)	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	\$ 45,833	\$31,665	(\$14,169)	
321	Parking Violations	\$ 30,000	\$ 12,000	\$ 12,000	\$ 10,000	\$16,760	\$6,760	
325	Business Licenses	\$ 20,000	\$ 10,000	\$ 10,000	\$ 8,333	\$10,733	\$2,400	Revenue received as beginning of FY26
326	Building Permits	\$ 4,000	\$ 4,000	\$ 4,000	\$ 3,333	\$3,128	(\$206)	
327	WV Opioid settlement fund	\$ 0	\$ 0	\$ 0	\$ 0	\$9,369	\$9,369	
328	Franchise Tax	\$ 9,000	\$ 5,500	\$ 5,500	\$ 4,583	\$7,894	\$3,311	Quarterly Tax assessed by Shepherdstown on Comcast Cable
330	Interstate/International Registration Plan	\$ 7,000	\$ 5,000	\$ 5,000	\$ 4,167	\$1,622	(\$2,545)	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	\$ 129,167	\$117,924	(\$11,243)	Includes Parking Meter and Parking Permit Revenue
345	Rent and Concession Revenue	\$ 45,000	\$ 45,000	\$ 45,000	\$ 37,500	\$45,701	\$8,201	Monthly rent from the Water and Sewer Departments (\$1,800 each)
350	Refuse Collection	\$ 175,000	\$ 175,000	\$ 175,000	\$ 145,833	\$157,129	\$11,296	Monthly refuse collection revenue
368	Contributions from Other Entities	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	
374	Payroll Reimbursement	\$ 1,095,600	\$ 0	\$ 0	\$ 0	\$3,131	\$3,131	
376	Gaming Income	\$ 110,000	\$ 90,000	\$ 90,000	\$ 75,000	\$84,835	\$9,835	Monthly Tax assessed by WV on gaming revenue in The State
380	Interest Income - Operating Account	\$ 80,000	\$ 130,000	\$ 130,000	\$ 108,333	\$156,135	\$47,802	
381	Misc. Reimbursements	\$ 2,000	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	
382	Refunds and Rebates	\$ 10,000	\$ 10,000	\$ 10,000	\$ 8,333	\$6,988	(\$1,346)	Quarterly Rebate from WV Purchasing Card
391	Recycling Program	\$ 34,000	\$ 36,000	\$ 36,000	\$ 30,000	\$35,114	\$5,114	Monthly recycling collection revenue
397	Video Lottery	\$ 240,000	\$ 243,129	\$ 243,129	\$ 202,608	\$256,487	\$53,880	Weekly Tax assessed by WV on Video Lottery Games
399	Miscellaneous Revenue	\$ 350	\$ 350	\$ 350	\$ 292	\$2,868	\$2,576	Payroll Reimbursement for Police grant work
	Total Revenues	\$ 3,746,181	\$ 2,645,928	\$ 2,855,500	\$ 2,379,583	\$ 2,493,778	\$ 114,195	

	Department Expense Line Items	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
409	Mayor's Office - 409	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
101	Salary	\$ 2,000	\$ 2,000	\$ 2,000	\$ 1,667	\$ 0	(\$1,667)	
104	FICA	\$ 151	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	
111	Telephone	\$ 970	\$ 500	\$ 500	\$ 417	\$ 0	(\$417)	
226	Liability Insurance	\$ 100	\$ 100	\$ 100	\$ 83	\$ 0	(\$83)	Workers Comp
	Total Mayor's Office	\$ 3,221	\$ 2,600	\$ 2,600	\$ 2,167	\$ 0	(\$2,167)	
410	City Council -410	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	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 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	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 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
223	Professional Services	\$ 8,900	\$ 9,900	\$ 9,900	\$ 8,250	\$ 2,000	(\$6,250)	One Municipal Court Judge and one prosecutor
	Total Police Judges	\$ 8,900	\$ 9,900	\$ 9,900	\$ 8,250	\$ 2,000	(\$6,250)	
435	Regional Dev Authority - 435	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
222	Dues & Subscriptions	\$ 1,439	\$ 2,649	\$ 2,649	\$ 2,208	\$ 0	(\$2,208)	Annual Bill from Regional Development Authority
	Total Regional Dev. Authority	\$ 1,439	\$ 2,649	\$ 2,649	\$ 2,208	\$ 0	(\$2,208)	
437	Planning & Zoning - 437	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
103	Salaries	\$ 75,200	\$ 85,508	\$ 85,508	\$ 71,257	\$ 22,887	(\$48,369)	
104	FICA	\$ 6,169	\$ 6,541	\$ 6,541	\$ 5,451	\$ 1,751	(\$3,700)	
105	Group Insurance	\$ 14,364	\$ 12,000	\$ 12,000	\$ 10,000	\$ 10,241	\$ 241	
106	Retirement	\$ 8,000	\$ 8,550	\$ 8,550	\$ 7,125	\$ 0	(\$7,125)	
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	\$ 7,083	\$ 25,813	\$ 18,729	legal costs
226	Insurance & Bonds	\$ 2,000	\$ 2,000	\$ 2,000	\$ 1,667	\$ 1,130	(\$537)	Workers Comp
230	Contracted Services	\$ 0	\$ 2,000	\$ 2,000	\$ 1,667		(\$1,667)	
341	Departmental Supplies	\$ 0	\$ 0	\$ 0	\$ 0	\$ 176	\$ 176	

	Department Expense Line Items	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	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	\$ 104,249	\$ 68,321	(\$35,928)	
438	Elections - 438	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
103	Salaries	\$ 0	\$ 1,000	\$ 1,000	\$ 833	\$ 0	(\$833)	
222	Departmental Supplies	\$ 0	\$ 4,500	\$ 4,500	\$ 3,750	\$ 0	(\$3,750)	
223	Total Elections	\$ 0	\$ 5,500	\$ 5,500	\$ 4,583	\$ 0	(\$4,583)	No election in FY 25
440	City Hall - 440	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
103	Salaries	\$ 161,173	\$ 202,008	\$ 202,008	\$ 168,340	\$ 202,379	\$34,039	
104	FICA	\$ 12,330	\$ 15,454	\$ 15,454	\$ 12,878	\$ 15,370	\$2,491	
105	Group Insurance	\$ 21,500	\$ 32,000	\$ 32,000	\$ 26,667	\$ 18,775	(\$7,892)	
106	Retirement	\$ 7,797	\$ 25,930	\$ 25,930	\$ 21,608	\$ 16,116	(\$5,492)	
108	Overtime/Extra Help	\$ 4,000	\$ 2,000	\$ 2,000	\$ 1,667	\$ 0	(\$1,667)	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	\$ 9,000	\$ 8,000	\$ 8,000	\$ 6,667	\$ 6,386	(\$280)	
213	Utilities	\$ 10,000	\$ 12,000	\$ 12,000	\$ 10,000	\$ 10,000	\$0	
214	Travel	\$ 2,000	\$ 2,000	\$ 2,000	\$ 1,667	\$ 0	(\$1,667)	
215	R&M Building & Grounds	\$ 3,800	\$ 8,000	\$ 8,000	\$ 6,667	\$ 22,857	\$16,191	Oracle Elevator - Replace door operator board on elevator -\$12K
216	R&M Equipment	\$ 2,100	\$ 2,000	\$ 2,000	\$ 1,667	\$ 2431	\$764	
218	Postage	\$ 2,500	\$ 4,000	\$ 4,000	\$ 3,333	\$ 1,000	(\$2,333)	Mail Machine
219	Building & Equipment Rental	\$ 850	\$ 700	\$ 700	\$ 583	\$ 0	(\$583)	
221	Training and Education	\$ 1,500	\$ 2,000	\$ 2,000	\$ 1,667	\$ 390	(\$1,276)	
220	Advertising/Legal Publications	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,000	\$ 881	(\$119)	
222	Dues & Subscriptions	\$ 1,450	\$ 0	\$ 0	\$ 0	\$ 2,584	\$2,584	Zoom, Adobe Acro, Monday.com subscription --annual - 5 seats for Work Management
223	Professional Services	\$ 50,000	\$ 25,000	\$ 25,000	\$ 20,833	\$ 52,292	\$31,459	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	\$ 29,167	\$ 36,341	\$7,174	Workers Comp and liability insurance
230	Contracted Services	\$ 57,850	\$ 41,000	\$ 41,000	\$ 34,167	\$ 45,595	\$11,428	Gusto Payroll Fees and Fogle CPA fees - FY26 Local Assessment for the Eastern Panhandle 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	\$ 19,167	\$ 27,305	\$8,138	Office Supplies, Cleaning Supplies, Town Uniform Laundry Services, Etc
353	Computer Software/IT	\$ 20,000	\$ 30,000	\$ 30,000	\$ 25,000	\$ 26,197	\$1,197	Tek Advisor IT Services , Intuit software
	Total City Hall	\$ 443,050	\$ 479,392	\$ 479,292	\$ 400,743	\$ 500,647	\$99,904	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 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
566	Contributions/Transfers to Other Funds	\$ 13,739	\$ 0	\$ 0	\$ 0	\$ 0	\$0	Streets Grant Expense - Pass-Through Grant Expenses
568	Contributions - Community Grants	\$ 15,000	\$ 15,000	\$ 15,000	\$ 12,500	\$ 61,450	\$48,950	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	\$ 20,500	\$ 68,651	\$48,151	
571	Parking-571	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
103	Salaries	\$ 0	\$ 51,084	\$ 51,084	\$ 42,570	\$ 0	(\$42,570)	New Dept for FY 26 - will allocate from Police Dept moving forward.
104	FICA	\$ 0	\$ 3,908	\$ 3,908	\$ 3,257	\$ 0	(\$3,257)	
105	Group Insurance	\$ 0	\$ 6,800	\$ 6,800	\$ 5,667	\$ 0	(\$5,667)	

	Department Expense Line Items	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
106	Retirement	\$ 0	\$ 8,000	\$ 8,000	\$ 6,667	\$ 0	(\$6,667)	
216	R&M Equipment	\$ 0	\$ 2,000	\$ 2,000	\$ 1,667	\$ 0	(\$1,667)	
345	Uniforms	\$ 0	\$ 750	\$ 750	\$ 625	\$ 0	(\$625)	
	Total Parking	\$ 0	\$ 72,542	\$ 72,542	\$ 60,452	\$ 0	(\$60,452)	
699	Contingencies-699	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
566	Merit	\$ 0	\$ 0	\$ 0	\$ 0		\$0	
	COLA	\$ 0	\$ 0	\$ 0	\$ 0		\$0	
566	Unexpected Contingencies	\$ 0	\$ 6,375	\$ 215,947	\$ 179,956		(\$179,956)	
	Total Contingencies	\$ 0	\$ 6,375	\$ 215,947	\$ 179,956	\$ 0	(\$179,956)	
700	Police Department - 700	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
103	Salaries	\$ 445,000	\$ 467,725	\$ 467,725	\$ 389,771	\$ 413,565	\$23,794	Inlcudes Parking Enforcement and Admin Support - Parking will be allocated to new created dept (Parking)
104	FICA	\$ 40,545	\$ 35,781	\$ 35,781	\$ 29,818	\$ 31,057	\$1,239	
105	Group Insurance	\$ 92,000	\$ 106,720	\$ 106,720	\$ 88,933	\$ 88,752	(\$181)	
106	Retirement	\$ 30,000	\$ 53,000	\$ 53,000	\$ 44,167	\$ 16,821	(\$27,346)	
108	Overtime/Extra Help	\$ 85,000	\$ 40,000	\$ 40,000	\$ 33,333		(\$33,333)	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	\$ 8,333	\$ 9,019	\$686	
213	Utilities	\$ 5,000	\$ 5,000	\$ 5,000	\$ 4,167	\$ 5,000	\$833	
215	R&M Building & Grounds	\$ 15,000	\$ 15,000	\$ 15,000	\$ 12,500	\$ 15,000	\$2,500	
216	R&M Equipment	\$ 4,000	\$ 5,000	\$ 5,000	\$ 4,167	\$ 5,139	\$972	
217	R&M Auto	\$ 14,000	\$ 14,000	\$ 14,000	\$ 11,667	\$ 8,657	(\$3,010)	
218	Postage	\$ 2,100	\$ 2,100	\$ 2,100	\$ 1,750	\$ 1961	\$211	
219	Building & Equipment Rental	\$ 0	\$ 0	\$ 0	\$ 0		\$0	
220	Advertising/Legal Publications	\$ 1,000	\$ 1,000	\$ 1,000	\$ 833		(\$833)	
221	Training & Education	\$ 4,000	\$ 5,000	\$ 5,000	\$ 4,167	\$ 1,477	(\$2,690)	
222	Dues & Subscriptions	\$ 0	\$ 0	\$ 0	\$ 0		\$0	
223	Professional Services	\$ 17,000	\$ 6,000	\$ 6,000	\$ 5,000	\$ 6,776	\$1,776	Law Firm Fees + Police Legal Fees
226	Insurance & Bonds	\$ 65,000	\$ 77,500	\$ 77,500	\$ 64,583	\$ 63,735	(\$849)	Workers Comp and Liability Insurance
229	Court Costs and Damages	\$ 5,000	\$ 1,000	\$ 1,000	\$ 833	-\$ 647	(\$1,481)	
230	Contracted Services	\$ 3,450	\$ 3,450	\$ 3,450	\$ 2,875	\$ 5,292	\$2,417	Magistrate and Police Court Attorney
235	Police Remittance Fees	\$ 6,000	\$ 7,000	\$ 7,000	\$ 5,833	\$ 5,425	(\$408)	
307	Bank Charges	\$ 0	\$ 0	\$ 0	\$ 0		\$0	
341	Departmental Supplies	\$ 35,210	\$ 35,000	\$ 35,000	\$ 29,167	\$ 9,390	(\$19,777)	
343	Police Gas/Fuel	\$ 20,000	\$ 20,000	\$ 20,000	\$ 16,667	\$ 28,919	\$12,252	
345	Uniforms	\$ 5,000	\$ 6,400	\$ 6,400	\$ 5,333	\$ 5,508	\$175	Mostly for new officers
353	Computer Software/IT	\$ 15,000	\$ 47,000	\$ 47,000	\$ 39,167	\$ 27,042	(\$12,124)	Software costs, Tek Advisors Etc - (Notebooks for 2 police vehicles)
	Total Police Dept	\$ 919,305	\$ 963,676	\$ 963,676	\$ 803,063	\$ 747,887	(\$55,176)	
750	Streets - 750	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
103	Salaries	\$ 130,000	\$ 123,963	\$ 123,963	\$ 103,303	\$ 102,694	(\$609)	
104	FICA	\$ 10,000	\$ 9,483	\$ 9,483	\$ 7,903	\$ 7,794	(\$109)	
105	Group Insurance	\$ 23,000	\$ 29,500	\$ 29,500	\$ 24,583	\$ 22,529	(\$2,054)	
106	Retirement	\$ 7,000	\$ 6,500	\$ 6,500	\$ 5,417	\$ 5,309	(\$108)	
211	Telephone	\$ 700	\$ 600	\$ 600	\$ 500		(\$500)	

	Department Expense Line Items	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
213	Utilities	\$ 25,000	\$ 28,000	\$ 28,000	\$ 23,333	\$ 21,249	(\$2,085)	Potomac Edison - Street Lights/Master Bill Account
215	R&M Buildings & Grounds	\$ 40,000	\$ 7,000	\$ 7,000	\$ 5,833	\$ 6,303	\$470	Street Maintenance - Panhandle Dumpsters invoice "Standard 30 yd pricing 409 E. High Street \$1847"
216	R&M Equipment	\$ 9,000	\$ 5,000	\$ 5,000	\$ 4,167	\$ 22,318	\$18,152	Shepherdstown Ash Treatments x 31 trees \$4k, Mini Excavator tracks \$1.5k, Mini Excavator tracks rental \$1.2k
217	R&M Auto	\$ 9,000	\$ 11,000	\$ 11,000	\$ 9,167	\$ 10,848	\$1,681	
220	Advertising/Legal Publications/Postage	\$ 250	\$ 250	\$ 250	\$ 208	\$ 2,700	\$2,492	
221	Training & Education	\$ 255	\$ 250	\$ 250	\$ 208		(\$208)	
226	Insurance & Bonds	\$ 20,000	\$ 22,000	\$ 22,000	\$ 18,333	\$ 16,686	(\$1,648)	Workers Comp and Liability Insurance
230	Contracted Services	\$ 70,000	\$ 72,500	\$ 72,500	\$ 60,417	\$ 65,054	\$4,637	Includes Tree Maintenance - Street Grant Expense
341	Departmental Supplies	\$ 30,400	\$ 35,000	\$ 35,000	\$ 29,167	\$ 22,290	(\$6,877)	PA Municipal, Inc. Invoice for \$6,755 in Sept. and Kable Excavating for \$1,483
343	Auto Supplies	\$ 7,500	\$ 7,500	\$ 7,500	\$ 6,250	\$ 6,774	\$524	
345	Uniforms	\$ 5,000	\$ 5,000	\$ 5,000	\$ 4,167	\$ 3,480	(\$687)	
	Total Streets	\$ 387,105	\$ 363,546	\$ 363,546	\$ 302,955	\$ 316,027	\$13,072	
800	Sanitation-800	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
103	Salaries	\$ 126,600	\$ 137,780	\$ 137,780	\$ 114,817	\$ 148,616	\$33,799	
104	FICA	\$ 5,800	\$ 10,540	\$ 10,540	\$ 8,783	\$ 11,290	\$2,507	
105	Group Insurance	\$ 10,000	\$ 10,000	\$ 10,000	\$ 8,333	\$ 8,193	(\$141)	
106	Retirement	\$ 5,000	\$ 12,200	\$ 12,200	\$ 10,167	\$ 11,871	\$1,704	
216	R&M Equipment	\$ 15,000	\$ 1,000	\$ 1,000	\$ 833		(\$833)	
217	R&M Auto	\$ 10,000	\$ 10,000	\$ 10,000	\$ 8,333	\$ 7,105	(\$1,229)	
218	Postage	\$ 5,000	\$ 250	\$ 250	\$ 208		(\$208)	
220	Advertising	\$ 100	\$ 100	\$ 100	\$ 83		(\$83)	
221	Training & Education	\$ 400	\$ 200	\$ 200	\$ 167		(\$167)	
226	Insurance & Bonds	\$ 35,000	\$ 1,200	\$ 1,200	\$ 1,000	\$ 900	(\$100)	Workers Comp
230	Contracted Services	\$ 20,000	\$ 25,000	\$ 25,000	\$ 20,833	\$ 22,781	\$1,947	Reimbursement to Bavarian Inn for Trash Service Per Annexation Agreement
341	Departmental Supplies	\$ 10,000	\$ 12,000	\$ 12,000	\$ 10,000	\$ 6,412	(\$3,588)	
343	Auto Supplies	\$ 12,000	\$ 5,000	\$ 5,000	\$ 4,167	\$ 200	(\$3,967)	
345	Uniforms	\$ 3,000	\$ 4,000	\$ 4,000	\$ 3,333	\$ 3,551	\$217	
349	001-Landfill	\$ 28,400	\$ 28,000	\$ 28,000	\$ 23,333	\$ 28,466	\$5,132	Landfill Fees
349	002-Recycling	\$ 15,000	\$ 20,000	\$ 20,000	\$ 16,667	\$ 14,603	(\$2,064)	Recycling Fees
353	Software/IT	\$ 12,000	\$ 6,000	\$ 6,000	\$ 5,000	\$ 615	(\$4,385)	Intuit, Tek Advisors Etc
	Total Sanitation	\$ 313,300	\$ 283,270	\$ 283,270	\$ 236,058	\$ 264,601	\$28,543	
806	Water & Sewer-806	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	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 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	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	\$ 2,083	\$ 3,414	\$1,330	
106	Retirement	\$ 200	\$ 0	\$ 0	\$ 0		\$0	
213	Utilities	\$ 250	\$ 250	\$ 250	\$ 208	\$ 43	(\$166)	

	Department Expense Line Items	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
215	R&M Buildings & Grounds	\$ 5,000	\$ 8,000	\$ 8,000	\$ 6,667	\$ 3,593	(\$3,073)	
216	R&M Equipment	\$ 0	\$ 1,000	\$ 1,000	\$ 833		(\$833)	
226	Insurance & Bonds	\$ 1,137	\$ 1,500	\$ 1,500	\$ 1,250	\$ 2,459	\$1,209	Workers Comp and Liability Insurance
341	Departmental Supplies	\$ 2,000	\$ 2,000	\$ 2,000	\$ 1,667		(\$1,667)	
343	Auto Supplies	\$ 2,000	\$ 1,000	\$ 1,000	\$ 833	\$ 1,710	\$877	
459	Capital Outlay-Equipment	\$ 60,200	\$ 0	\$ 0	\$ 0		\$0	
	Total Parks and Rec	\$ 80,000	\$ 16,250	\$ 16,250	\$ 13,542	\$ 11,219	(\$2,323)	
901	Visitor's Bureau - 901	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
567	Contributions	\$ 150,000	\$ 150,000	\$ 150,000	\$ 125,000	\$ 95,839	(\$29,161)	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	\$ 125,000	\$ 103,731	(\$21,269)	
912	Civic Promotions-912	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	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	\$ 18,152		(\$18,152)	
568-002	Contributions-Housing & Historical Preservation	\$ 0	\$ 21,782	\$ 21,782	\$ 18,152	\$ 13,211	(\$4,940)	Installation of Christmas lights at the Market House and Town Hall
568-003	Contributions-Land Use Planning	\$ 0	\$ 21,782	\$ 21,782	\$ 18,152		(\$18,152)	
568-004	Contributions-Sustainable Services	\$ 0	\$ 21,782	\$ 21,782	\$ 18,152	\$ 6,826	(\$11,326)	Tobacco Warehouse Flood Insurance
568-005	Contributions-Town Facilities & Parks	\$ 0	\$ 21,782	\$ 21,782	\$ 18,152		(\$18,152)	
	Total Civic Promotions	\$ 0	\$ 108,910	\$ 108,910	\$ 90,758	\$ 20,037	(\$70,721)	
916	Library 916	FY25 Budget Rev 1	FY26 Budget Approved	FY26 Budget Rev 1	FY26 Budget Thru 4/30/2026	FY 26 Actuals Thru 4/30/2026	Over/(Under) Budget Thru 4/30/26	Notes and Explanations
567	Contributions	\$ 21,600	\$ 24,840	\$ 24,840	\$ 20,700	\$ 20,700	\$0	Monthly Contribution from Shepherdstown to the library of \$2,070
	Total Library	\$ 21,600	\$ 24,840	\$ 24,840	\$ 20,700	\$ 20,700	\$0	
381	Total Expenses	\$ 3,746,181	\$ 2,645,928	\$ 2,855,400	\$ 2,381,469	\$ 2,129,876	(\$251,593)	
382								
383	Surplus or (Deficit)						365,788	Transfer to Capital Outlay
	True Surplus or (Deficit)						365,788	

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					
05/06/2026	Bill Payment (Check)	ACH Payment	CivicPlus, LLC	Recodification: Planning and Zoning; 5 copies with binders and tabs	-3,851.99
05/11/2026	Bill Payment (Check)		Fogle Accounting and Consulting		-2,750.00
05/13/2026	Bill Payment (Check)	23833	Final Touch Construction, LLC	Police Dept Office Renovation	-4,025.00
05/13/2026	Bill Payment (Check)	ACH Payment	Edmunds GovTech	Edmunds ERP Financial software	-2,070.83
05/14/2026	Bill Payment (Check)	23835	Kable Excavating	Stone Class II Haul from Inwood x 2 loads to city yard	-1,002.99
05/14/2026	Bill Payment (Check)	23836	Ecological Services LLC	Planting 2 replacement Dogwood trees - German St.	-500.00
05/15/2026	Bill Payment (Check)	23834	C & O Canal Trust	Annual dues 2026	-500.00
05/18/2026	Bill Payment (Check)	ACH Payment	Viking Tree Service	Storm damage removal-W. Union Alley and neighboring yards/Tree Pruning with crane-assisted pruning of dead wood and end-weight reduction	-2,800.00
05/18/2026	Bill Payment (Check)	ACH Payment	Viking Tree Service	Sugar Maple - Tree Removal and Stump Grinding	-450.00
05/18/2026	Bill Payment (Check)	ACH Payment	Corporation of Shepherdstown	Water Bill for 104 N. King Street	-438.17
05/18/2026	Bill Payment (Check)	ACH Payment	Corporation of Shepherdstown	Water bill for 102 N. King Street	-80.33
05/18/2026	Bill Payment (Check)	ACH Payments	Ghosh Engineers, Inc.	Town Hall Engineering Contract service for the town/ Services for 4/1/2026 - 4/30/2026--SH1000-29 / WVDOH Permit Exhibits	-412.50
05/19/2026	Bill Payment (Check)	23838	Traveler's	Legal fees for Claimant: William R. Sweeney	-1,137.40
05/19/2026	Bill Payment (Check)	23837	East Mountain Health Physicians Inc.	Pre-Employment Placement Screenings for Chase W. Hagaman and Donavon R. Shry	-87.00
05/19/2026	Bill Payment (Check)	23839	Shepherdstown Visitor's Center dba Experience Shepherdstown	Contribution - Community Grant --FY25-26 - Payment #4	-13,050.00
05/19/2026	Bill Payment (Check)	23840	Casto & Harris of WV, LLC	Reprint of Ballots / Shipping and Handling	-304.61
05/20/2026	Bill Payment (Check)	23841	Kay Casto & Chaney PLLC	Professional Services through April 30, 2026	-4,818.00

05/20/2026	Bill Payment (Check)	23842	CoxHollidaYoung, PLLC	FY 2025 Financial Audit prepration	-2,500.00
		April 2026			
05/20/2026	Expense	fees	WV Treasury	Remittance by Municipal Court fees-April 2026	-920.00
05/21/2026	Bill Payment (Check)	ACH Payment	Shepherdstown Visitor's Center	Hotel/Motel Tax receipts for April 2026 - 50%	-7,498.42
05/21/2026	Bill Payment (Check)	23843	The Bavarian Inn	Reimbursement for trash service per agreement - Feb./March/April/May 2026	-10,290.65
05/21/2026	Bill Payment (Check)	ACH Payment	Potomac Edison Company	Police / City Hall Elec bill	-947.05
05/21/2026	Bill Payment (Check)	ACH Payment	Potomac Edison Company	Rumsey Park Lights	-12.15
05/28/2026	Bill Payment (Check)	ACH Payment	Potomac Edison Company	Lighting for O'Hurley's Trailer Park	-32.95
05/28/2026	Bill Payment (Check)	ACH Payment	Potomac Edison Company	Street lights	-19.32
05/28/2026	Bill Payment (Check)	ACH Payment	Potomac Edison Company	Street lights	-1,837.01
06/03/2026	Bill Payment (Check)	23844	Storm, LLC	June/July 2026 Lease	-1,250.00
06/03/2026	Bill Payment (Check)	23845	Shepherdstown Public Library	Monthly donation for June 2026	-2,070.00
06/03/2026	Bill Payment (Check)	23846	D. Frank Hill, III, Municipal Judge	Municipal Judge	-200.00
06/03/2026	Bill Payment (Check)	23847	Tek Advisors	IT Services	-190.00
06/03/2026	Bill Payment (Check)	23848	United States Postal Service	Postage	-126.00
06/03/2026	Bill Payment (Check)	23849	D&A Cleaning Company, LLC	Cleaning Services	-950.00
06/03/2026	Bill Payment (Check)	ACH Payment	Michael Chalmers	Monthly Communication Director fees	-1,700.00
06/03/2026	Bill Payment (Check)	23850	Tek Advisors	IT Services	-2,366.25

**Total for 101.011 General
Operating Funds 6209**

-\$67,336.63

101.09 PoliceDR/CR Acct-all
6798

05/12/2026	Expense		Merch SETL EPX	MERCH SETL EPX ST 290414701	-0.35
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05/14/2026	Expense		Merch SETL EPX	MERCH SETL EPX ST 290414701	-0.35
05/19/2026	Expense		Merch SETL EPX	MERCH SETL EPX ST 290414701	-0.35

**Total for 101.09
PoliceDR/CR Acct-all 6798**

-\$1.05

101.50 Payroll Checking
0471

	Bill Payment	ACH			
05/14/2026	(Check)	Payment	Aflac	Benefits	-567.52
05/14/2026	Expense		VALIC	VALIC Retirement Payable	-8,123.94
05/20/2026	Expense		PEIA	Benefits	-483.00
05/29/2026	Check	23585	JSB	Christmas Club	-280.00
06/01/2026	Check	23586	JSB	Christmas Club	-280.00
	Bill Payment				
06/03/2026	(Check)	23587	WV-Mountaineer Flexible Benefits	Benefits	-1,728.14

**Total for 101.50 Payroll
Checking 0471**

-\$11,462.60

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

-\$78,800.28

213 Purchase Card Payable

04/01/2026	Expense	4810	Home Depot	Dept. Supplies (water)	245.13
04/01/2026	Expense	3082	Mission Communications,	Contract for water source monitoring (sewer &water)	635.40
04/01/2026	Expense	3082	Adobe	Annual Subscription (sewer/water)	254.27
04/01/2026	Expense	3082	Belson Outdoors	8 traditional benches	877.45
04/01/2026	Expense	4802	Safelite Auto Glass	Streets Vehicle Expenses: R&M Auto	497.29
04/01/2026	Expense	5623	WV DHHR Bureau for Public Health	Lab Testing (635.11 water)	20.00
04/01/2026	Expense	5623	Apple Valley Waste Inc	Sanitation Dumping Fees: Recycling	924.65
				R&M CH--Quarterly Maintenance 4/1/2026 -	
04/01/2026	Expense	5623	Oracle Elevator Holdco Inc.	6/30/2026	599.18
04/01/2026	Expense	5623	Intuit	Quickbook fees	123.05
04/01/2026	Expense	5623	Intuit	Quickbook fees	123.05
04/01/2026	Expense	5623	Intuit	Quickbook fees	80.25
04/01/2026	Expense	3009	Les's Auto & Truck Repair	Police Vehicle Repair expenses	21.78
04/02/2026	Expense	3985	Zoom.US	Zoom dues	373.59
04/02/2026	Expense	5623	Everest Window Cleaning (Bolyard Ent.)	Cleaning services	91.80
04/02/2026	Expense	5623	Cintas Corporation	Uniform	569.82
04/02/2026	Expense	5623	Quill Corporation	Supplies	44.33
04/02/2026	Expense	2540	Berkeley Club Beverages	Police Departmental Supplies	37.48
04/03/2026	Expense	3985	Comcast Phone of WV	Sewer Plant phone (401.22 sewer)	297.07
04/03/2026	Expense	3985	Berkeley Club Beverages	5 Gallons of Spring Water	34.06
04/03/2026	Expense	3985	Comcast Phone of WV	Phone / Telecommunications	576.52
04/03/2026	Expense	5623	WV DHHR Bureau for Public Health	Lab Testing (635.11 water)	69.00
04/03/2026	Expense	5623	Cintas Corporation	Uniform	569.82
04/03/2026	Expense	5623	Cintas Corporation	Uniform	669.16
04/03/2026	Expense	5623	Cintas Corporation	Uniform	530.75
04/03/2026	Expense	5623	Cintas Corporation	Uniform	567.06
04/04/2026	Expense	3082	Shepherdstown Rocs	Fuel/Gas for vehicle (650.1 water)	83.20
04/06/2026	Expense	4802	Northeastern Supply	Water spigots/parts	1,018.86
04/06/2026	Expense	5623	Hach Company	635.11 (water) Invoice #14946287 (Service Agreement)	11,350.00
04/06/2026	Expense	5623	Pitney Bowes-Town lease	Postage machine	175.98
04/06/2026	Expense	5623	Waste Management Inc	Landfill / Sludge	1,554.29

04/06/2026	Expense	4586	Advance Auto	Police Vehicle Expenses: R&M Auto	103.81
04/08/2026	Expense	9895	Specialty Business Supplies, Inc	Bike Path Maps	3.00
04/08/2026	Expense	4258	Capital Electric	Fuses for WWTP (401.42 sewer)	134.90
04/08/2026	Expense	4802	Cool Green Auto & Tire Inc	Streets Vehicle Expenses: R&M Auto	1,706.48
04/08/2026	Expense	5623	Intuit	Quickbook fees	294.25
04/08/2026	Expense	5623	Top Asphalt Suppliers, LLC	Parks & Rec Wearing C T -1	246.82
04/08/2026	Expense	5623	Top Asphalt Suppliers, LLC	Parks & Rec Wearing C T -1	714.67
04/08/2026	Expense	2615	Walmart	City Hall Departmental Supplies	\$39.64
04/08/2026	Expense	2615	Home Depot	City Hall Departmental Supplies	\$8.54
04/09/2026	Expense	3985	Comcast Business Class	Communication	\$1,156.75
04/09/2026	Expense	3985	Comcast Phone of WV	Water telecommunications (401.22 water)	\$487.77
04/09/2026	Expense	4810	Specialty Business Supplies, Inc	Shipping lab samples (635.11 water)	\$15.25
04/09/2026	Expense	4802	Home Depot	Mulch/grass seed/dept. supplies	\$452.76
04/09/2026	Expense	5623	Cintas Corporation	Uniform	\$541.97
				GENERAL FUNDS BANKING:101.011 General	
04/10/2026	Expense		US Bank	Operating Funds 6209	-\$54,346.57
04/10/2026	Expense	4258	Capital Electric	Lamp for WWTP (401.42 sewer)	\$11.59
04/10/2026	Expense	5623	Oldcastle APG	Sanitation Dumping Fees:-Recycling	\$250.00
04/13/2026	Expense	5623	Top Asphalt Suppliers, LLC	Parks & Rec Wearing C T -1	\$178.00
04/14/2026	Expense	4258	Dollar General Store	Trash bags for WWTP (401.42 sewer)	\$32.28
04/14/2026	Expense	4802	Home Depot	Galvanized pipe (401.42 water)	\$380.89
04/14/2026	Expense	5623	Bob's Tire Service	Balance left over - Auto Repair(sewer)	\$24.72
04/14/2026	Expense	5623	WV DHHR Bureau for Public Health	Lab Testing (635.11 water)	\$69.00
04/15/2026	Expense	3985	CallingPost Communications, Inc.	Contracted Services (CH, Water & Sewer)	\$583.00
04/15/2026	Expense	4258	WV DMV	CDL License (401.28 sewer)	\$45.00
04/15/2026	Expense	2615	QR Code Creator	QR Code Creator Annual Dues & Sub	\$186.96
04/15/2026	Expense	5623	Everest Window Cleaning (Bolyard Ent.)	Cleaning services	\$91.80
04/16/2026	Expense	4802	Home Depot	2 Water Dispenser	\$429.96
04/17/2026	Expense	3082	Dollar General Store	Dept. Supplies (water 401.42)	\$99.16
04/17/2026	Expense	5623	Super Shoes	Streets Uniforms	\$394.99
04/17/2026	Expense	5623	Cintas Corporation	Uniform	\$541.97
04/17/2026	Expense	5623	Cintas Corporation	Uniform	\$634.88
04/19/2026	Expense	5623	T-Mobile	Telcommunications	\$1,102.62
04/20/2026	Expense	3985	Comcast Phone of WV	City Hall Utilities: Utilities	\$347.00
04/20/2026	Expense	4802	Sunny Meadows	Mulch for Devonshire Park	\$336.00
04/20/2026	Expense	4802	Carquest of Martinsburg- (S.Corp.)	Streets Vehicle Expenses: R&M Auto	\$364.46
04/21/2026	Expense	4802	Home Depot	Benches	\$300.46
04/21/2026	Expense	5623	Everest Window Cleaning (Bolyard Ent.)	Window Cleaning - City Hall	\$255.00
04/21/2026	Expense	5623	Waste Management Inc	Landfill / Sludge	\$1,394.32
				Monthly fee for web site hosting and content	
04/22/2026	Expense	3985	EVO GOV	management system	\$150.00
04/22/2026	Expense	3985	Adobe Acropro	Adobe Acropro	\$254.27
04/22/2026	Expense	5623	Aqua-Aerobics System	Invoice #1052731 - Parts (401.46 sewer)	\$821.62
04/22/2026	Expense	5623	Kershner Controls	Invoice #254 (401.43 sewer)	\$520.00

04/23/2026	Expense	5623	Gladhill Pest Control Inc.	Pest Control	\$653.00
04/23/2026	Expense	2540	Quill Corporation	Police Departmental Supplies	\$247.51
04/24/2026	Expense	3082	Amazon.com	Police Departmental Supplies	\$39.74
04/24/2026	Expense	2654	Amazon.com	Police R&M Equipment	\$18.18
04/24/2026	Expense	3009	Amazon.com	Police Department Supplies	\$135.60
04/27/2026	Expense	9895	Dollar General Store	Streets Departmental Supplies	\$15.90
04/27/2026	Expense	5623	Griffith Energy Services, Inc. (gasoline)	Gasoline	\$1,421.54
04/27/2026	Expense	5623	Griffith Energy Services, Inc. (diesel)	Diesel	\$2,405.61
04/27/2026	Expense	5623	Quill Corporation	Supplies	\$556.80
04/28/2026	Expense	5623	Oldcastle APG	Sanitation Dumping Fees: Recycling	\$750.00
04/28/2026	Expense	5623	Adobe Acropro	Adobe Acropro monthly dues	\$21.19
04/28/2026	Expense	5623	Miss Utility of West Virginia Inc	Message Fees (water/ sewer)	\$74.40
04/29/2026	Expense	2654	Amazon.com	Police Uniforms	\$10.59
04/29/2026	Expense	2540	Galls/Quartermaster	Police Uniforms	\$786.99

**Total for 213 Purchase Card
Payable**

-\$8,488.67

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