



City of Independence

Regular Meeting Agenda

City Council

Tuesday, July 14, 2026 @ 6:30 PM

Civic Center - Council Chambers

(see agenda footer for meeting attendance information)

-
1. **Call to Order**
 2. **Roll Call**
 3. **Minutes**
 - 3.1. Regular Meeting 06/23/2026
 4. **Visitors/Public Comment**
 5. **Reports/Presentations**
 - 5.1. Center Street Bridge Project Update (ODOT)
 - 5.2. Mayor
 - 5.3. Council Liaison Reports
 - 5.3.1. Councilor Sorce: MINET Board
 - 5.3.2. Councilor Roden: Parks Board
 - 5.4. City Manager
 6. **Unfinished Business**
 7. **New Business**
 - 7.1. Public Hearing: CDBG Grant Funding (Irvine)
 - 7.2. Liquor License Application, Change of Ownership: Mendi's Pizza (Gilbert)
 - 7.3. Public Hearing: Proposed Ordinance 1638, an Ordinance to Adopt a Set of Revisions to the Independence Development Code to Implement Recommendations from the Housing Production Strategy (Evander)
 - 7.4. Q3 Financials (Carey)
 - 7.5. Q3 Board, Commission, Committee Appointments (West)
 - 7.6. Executive Session, 3rd Floor Conference Room Pursuant to ORS 192.660(2)(e) to conduct deliberations with persons designated by the governing body to negotiate real property transactions.
 - 7.7. Potential Action from Executive Session: Real Estate Negotiation (West)
 8. **Council Announcements**

9. General Information

9.1. Management Team Notes

9.1.1. 06/24/2026

9.2. Miscellaneous Correspondence. Any communications received after publication of the agenda packet, but before 3:00 pm the date of the meeting, will be provided to Council at the meeting and will become a part of the official record

9.2.1. Correspondence: Scheck, received 7/13/2026

9.3. Pending Agenda Calendar

9.3.1. 06/24/2026

10. Adjournment

Meeting Attendance Information:

The City Council will hold this meeting in-person in City Hall Council Chambers, via video conference (Zoom) or by phone. Meetings are also live-streamed on the City's YouTube channel at: <https://www.youtube.com/c/CityofIndependenceOR>.

- To attend in person, the City Hall address is 555 S. Main St.
- For Zoom login
visit: <https://us06web.zoom.us/j/85953570028?pwd=3mptEpNR0pCIF5sFSUauB0aKImQa6t.1>
- To participate in the meeting **by phone**, dial **US: +1-253-215-8782** and enter **Webinar ID: 859 5357 0028** and **Passcode: 242747**

Written comments are also welcome and may be delivered to City Hall or emailed to CouncilComments@ci.independence.or.us no later than 4:00 pm the day of the meeting.

The meeting location is accessible to persons with disabilities. A request for an interpreter for the hearing impaired, or for other accommodations for persons with disabilities, should be made at least 72 hours in advance of the meeting to Myra Russell, City Recorder, 503-838-1212/TTY: 800-735-2900.



City of Independence Minutes

City Council Meeting
Tuesday, June 23, 2026

1. **Call to Order.** Mayor Schwarzler called the meeting to order at 7:30 pm.

2. **Roll Call.** Mayor Schwarzler present.

Present: Councilor Evan Sorce, arrived at 6:33 pm
Councilor Dawn Roden
Councilor Bill Boisvert
Councilor/Council President Kathy Martin-Willis
Councilor Marilyn Morton
Councilor Shannon Corr

Absent:

City Staff Present: Kenna West, City Manager
Myra Russell, City Recorder
Amanda Carey, Finance Director
Fred Evander, City Planner
Shawn Irvine, Assistant City Manager
Juventino Banuelos, Police Chief

3. **Minutes. Action:**

Councilor Morton moved to approve both sets of minutes; Councilor/Council President Martin-Willis seconded. Discussion: Councilor Corr requested that the Council formally acknowledge that the Council Announcements portion of meetings should be limited to announcements only. Any Council member wishing to make a statement should follow Council Rule Section 3.2 by requesting that the item be placed on a future agenda so City staff, the Council, and the public receive advance notice.

Roll call vote. Motion 5-0-0

Ayes: Dawn Roden, Bill Boisvert, Kathy Martin-Willis, Marilyn Morton,
Shannon Corr

Nays: None

Abstentions: None

3.1. **Regular Meeting 06/09/2026.**

3.2. **Work Session Minutes 06/09/2026.**

4. **Visitors/Public Comment.**

Written Correspondence received:

- **Kathleen Dinges Rice**, Independence, OR: As a longtime resident and parent, she believes that Independence's library, museum, parks, sports programs, and

cultural spaces are essential to the health, identity, and future of the community. She supports community fees because investing in these shared resources helps retain young people and families, strengthens community connections, and ensures Independence remains a vibrant place to live, work, and raise children.

Public Comment:

- **Wyatt Flow**, Independence, OR: a Western Oregon University history student and volunteer at the Independence Heritage Museum, spoke in support of the museum, highlighting its role in preserving the community's history, educating residents, attracting visitors, and contributing to the local economy. He also noted the museum's upcoming 50th anniversary on July 4 and encouraged continued community support for its mission.
- **Kim Jensen**, Monmouth, OR: a Western Oregon University history professor, spoke in support of the Independence Heritage Museum, highlighting its role in preserving local history, fostering community engagement, and providing valuable educational and career opportunities for students through internships and volunteer experiences. She urged the Council to continue supporting the museum as an important community resource for present and future generations.
- **Steve Russell**, Independence, OR: a long-time resident spoke in support of the proposed fee to fund the library, museum, and parks, emphasizing that these amenities enhance Independence's identity, attract visitors, preserve the community's history, and provide valuable recreational and educational opportunities. He encouraged the City to continue investing in these community assets.
- **Michael Hicks**, Independence, OR: A resident spoke in support of the proposed community services fee, stating that it would help maintain the library, museum, and parks while preserving important community services and events. He highlighted the educational, recreational, and accessibility benefits of these facilities and encouraged the Council to consider the long-term value they provide to the community.
- **Vickie McCubbin**, Independence, OR: A resident supports the Community Services and Parks fee and believes the library is an essential community resource. She shared a recent interaction with a young local resident who became excited about getting a library card and participating in library programs, illustrating how these services continue to engage and benefit community members of all ages.

5. Reports/Presentations.

5.1. Mayor.

- Started a new video series with the city called "We've Heard..." to answer common questions from the community. Please give suggestions for future topics.
- Welcomed new businesses downtown in the last couple weeks.

- Start of summer events at Riverview park, movie in the park on June 26 and the 4th of July event next week. The first summer series concert is on Friday, July 10.

5.2. City Manager.

- The City Manager shared remarks in memory of St. Helens City Administrator John Walsh, recognizing his dedicated public service, professionalism, kindness, and friendship within the local government community. The Council observed a brief moment of silence in his honor.

6. Unfinished Business.

6.1. **2nd Reading: Proposed Ordinance # 1639, An Ordinance Adopting Independence Municipal Code (IMC) Chapter 2, Administration, Article VIII, Service Fees; and Amending IMC 34-400, Utility Service Billing (West).**

City Manager West presented the second reading of Ordinance No. 1639, which would establish a Community Services and Parks Fee to address the City's structural General Fund deficit and support library, museum, and parks operations. The presentation reviewed the City's financial reforms, the recommendations of independent financial reviews, the Budget Committee and ad hoc committee process, and the potential service reductions and closure timelines that could result if the ordinance were suspended through a successful referendum. Discussion between council and staff regarding how the proposed fee of approximately \$235 per year would support library, museum, and parks services. This fee is significantly reduced from a previously considered levy of about \$630 per year. Council mentioned that several residents spoke in support of the fee, highlighting the importance of these services to the community. The council discussed the implementation of a \$19.65 fee (net \$12.65 after reduction of the public safety fee) to fund library, museum, and park services, with opponents advocating for a referendum to stop the fee. CM West explained that if the referendum proceeds, it would immediately cease museum operations and park maintenance, potentially causing infrastructure to deteriorate over the summer months. Closure of the library would take longer due to state law. The council was advised that using utility fund transfers to temporarily cover costs would risk damaging critical infrastructure like water, sewer, and streets for decades. The discussion highlighted the financial challenges of maintaining these services without the fee revenue, with staff emphasizing that the community would face significant impacts and closure of the museum, library, and parks if the fee is not implemented.

Action:

Motion: Councilor Morton moved to read the proposed Ordinance No. 1639 for the second time by title only; Councilor/Council President Martin-Willis seconded. Discussion: Councilor Boisvert discussed the distinction between the previously proposed levy and the proposed fee, noting that the fee is part of the adopted budget and intended to provide ongoing funding for the library,

museum, and parks. Councilor Sorce also emphasized that supporting these community services requires a dedicated funding source and expressed support for adopting the fee to sustain them.

Roll call vote. Motion 5-1-0

Ayes: Evan Sorce, Bill Boisvert, Kathy Martin-Willis, Marilyn Morton, Shannon Corr

Nays: Dawn Roden

Abstentions: None

Recorder Russell read Title: An Ordinance Adopting Independence Municipal Code (IMC) Chapter 2, Administration, Article VIII, Service Fees; and Amending IMC 34-400, Utility service billing

Action:

Motion: Councilor/Council President Martin-Willis moved to adopt the proposed Ordinance No. 1639; Councilor Corr seconded. Discussion: None.

Roll call vote. Motion 5-1-0

Ayes: Evan Sorce, Bill Boisvert, Kathy Martin-Willis, Marilyn Morton, Shannon Corr

Nays: Dawn Roden

Abstentions: None

7. New Business.

7.1. Proposed Resolution # 26-1657: A Resolution Classifying Certain Fees and Charges as Not Subject to the Limitations of Article XI, Section 11b of the Oregon Constitution (Measure 5) (West).

City Manager West explained that Resolution No. 26-657 does not create or modify the Community Services and Parks Fee, but instead classifies it as an "incurred charge" under Oregon law and outside the limitations of Measure 5. The resolution was presented as a procedural step to provide legal clarity and authorize the required public notice of the classification.

Action:

Councilor/Council President Martin-Willis moved to adopt Resolution 26-1657 classifying the Community Services and Parks Fee as an incurred charge and directing the City Recorder to publish the appropriate notice.; Councilor Corr seconded. Discussion: Councilor Sorce stated we need to repeal Measure 5.

Councilor Roden had concerns about calling it a fee and not a tax and not allowing citizens to vote on it. Technically it is a fee, not a tax and Councilor Martin-Willis mentioned that there is a process to refer the ordinance on the fee to a vote of the people and that process may have begun.

Roll call vote. Motion 5-1-0

Ayes: Evan Sorce, Bill Boisvert, Kathy Martin-Willis, Marilyn Morton, Shannon Corr

Nays: Dawn Roden

Abstentions: None

7.2. Public Hearing: To Consider renaming "Madrona Street E." in Independence to "I Street" (Evander).

Mayor Kate Schwarzler read the hearing script regarding how the meeting would be conducted.

- Public Hearing opened at 7:41 pm by Mayor Schwarzler.
- Staff Report as submitted in the agenda packet was reviewed by City Planner Evander. Evander explained that the original plan to name the street "Madrona Street East" would create address duplication issues and logical inconsistencies with Monmouth. After reviewing the city code, staff recommended changing the name to I Street,
- Discussion: None.
- Further questions from the Council. None.
- Objections or testimony received: None.
- Public Testimony: None.
- Discussion: Staff Response to testimony-None.
- Hearing closed at 7:45 PM.

7.3. **Proposed Ordinance # 1640: To Consider renaming "Madrona Street E." in Independence to "I Street" (Evander).**

This Ordinance pertains to the previous public hearing.

Action:

Councilor Roden moved to read Ordinance 1640, an ordinance to change the name of "Madrona Street E." in Independence to "I Street," the text of which is contained in the Council packet, for the first time.; Councilor Morton seconded.

Discussion: None.

Roll call vote. Motion 6-0-0

Ayes: Evan Sorce, Dawn Roden, Bill Boisvert, Kathy Martin-Willis, Marilyn Morton, Shannon Corr

Nays: None

Abstentions: None

Recorder Russell read the Title: Adoption of an Ordinance Renaming "Madrona Street E." in Independence as "I Street"

Action:

2nd Motion: Councilor/Council President Martin-Willis moved to read the proposed Ordinance 1640 for the second time by title only; Councilor Corr seconded. Discussion:None

Roll call vote. Motion 6-0-0

Ayes: Evan Sorce, Dawn Roden, Bill Boisvert, Kathy Martin-Willis, Marilyn Morton, Shannon Corr

Nays: None

Abstentions: None

Recorder Russell read the title of the proposed ordinance, Adoption of an Ordinance Renaming "Madrona Street E." in Independence as "I Street"

Action:

3rd Motion: Councilor Morton moved to adopt proposed Ordinance 1640; Councilor Boisvert seconded. Discussion: None

Roll call vote. Motion 6-0-0

Ayes: Evan Sorce, Dawn Roden, Bill Boisvert, Kathy Martin-Willis, Marilyn Morton, Shannon Corr

Nays: None

Abstentions: None

7.4. **Executive Session, 3rd Floor Conference Room Pursuant to ORS 192.660(2)(e) to conduct deliberations with persons designated by the governing body to negotiate real property transactions..**

The Mayor read the information regarding the Executive Session: The governing body will meet in executive session pursuant to ORS 192.660(2)(e) to conduct deliberations with persons designated by the governing body to negotiate real property transactions. Executive sessions are closed to the public.

Representatives of the news media and designated staff may attend, except as otherwise provided by law.

All information discussed in the executive session is confidential and may not be disclosed.

Council left the council chamber for the executive session in the 3rd Floor conference room at 7:48 pm.

The council meeting resumed at 8:44 pm.

7.5. **Potential Action from Executive Session: Real Estate Negotiation (West).**

The meeting reconvened after the Executive session.

Action:

Councilor/Council President Martin-Willis moved to direct City Manager West to continue negotiations on the museum building; Councilor Sorce seconded.

Discussion: Councilor Sorce clarified that potential service reductions were not a reflection of the quality of the museum or its staff, expressing appreciation for the Museum Director's work and confidence that the community's history could continue to be shared in creative ways if necessary.

Roll call vote. Motion 6-0-0

Ayes: Evan Sorce, Dawn Roden, Bill Boisvert, Kathy Martin-Willis, Marilyn Morton, Shannon Corr

Nays: None

Abstentions: None

7.6. **Public Hearing: CDBG Grant Funding (Irvine).**

This item will be moved to the July 14 council meeting due to public hearing notice requirements.

7.7. **Proposed Resolution # 26-1655: Budget Adjustment (Carey).**

Finance Director Carey explained Resolution 26-1655 to amend the fiscal year 2025-26 adopted budget, including transfers of appropriations among departments to align with actual expenditures and match salary allocations in the general fund. Councilor Boisvert asked if this was operational or if it needed council approval. Per local budget law, the governing body is the authority to approve appropriations of revenue.

Action:

Councilor Corr moved that Council approve Resolution No. 26-1655 to amend the fiscal year 2025-26 Adopted Budget in accordance with the above-noted recommendations; Councilor/Council President Martin-Willis seconded.

Discussion: None.

Roll call vote. Motion 6-0-0

Ayes: Evan Sorce, Dawn Roden, Bill Boisvert, Kathy Martin-Willis,

Marilyn Morton, Shannon Corr

Nays: None

Abstentions: None

7.8. **Public Hearing: Proposed Resolution # 26-1658: Supplemental Budget (Carey).**

Mayor Kate Schwarzler read the hearing script regarding how the meeting would be conducted. State Law Required Statements read.

- Public Hearing opened at 8.53 pm by Mayor Schwarzler.
- Staff Report: Finance Director presented a supplemental budget for the Tourism and Events Fund, explaining that Oregon budget law requires a public hearing because the proposed appropriation change exceeds 10% of the fund's budget. The Finance Director also explained that the adjustment resulted from year-end accounting reconciliations and corrections to personnel cost allocations following staffing and budget changes.
- Discussion: Council asked why it took so long to find this issue. Staff responded that it was part of balancing and clean up for year-end regarding loss of staff in that department.
- Further questions from the Council. None.
- Objections or testimony received: None
- Public Testimony: None
- Discussion: Staff Response to testimony-None.
- Hearing closed at 8:55 PM.

Action:

Councilor/Council President Martin-Willis moved that City Council approve resolution # 26-1658 to amend the fiscal year 2025-2026 adopted budget in accordance with the above-noted recommendation; Councilor Morton seconded.

Discussion: None

Roll call vote. Motion 6-0-0

Ayes: Evan Sorce, Dawn Roden, Bill Boisvert, Kathy Martin-Willis, Marilyn Morton, Shannon Corr

Nays: None

Abstentions: None

8. **Council Announcements.**

- Councilor Roden: is excited to see the chairs out so early for the parade this year.
- Councilor Boisvert: let everyone know that tickets for Indy Days are still available online at friendsofcommunityparks.org and at the Farmer's Market this Saturday.
- Councilor Sorce: encouraged respectful and professional dialogue among Council members, noting community concerns about the tone of Council discussions and emphasizing the importance of modeling positive behavior.
- Councilor Morton: thanked everyone that came to the last day of school event put together by the Independence Downtown Association. It was a well attended, great event.

9. **General Information.** Items submitted here in the packet are for information only; no action was required by city council.

9.1. **Management Team Notes.**

9.2. **Miscellaneous Correspondence.** Any communications received after publication of the agenda packet, but before 3:00 pm the date of the meeting, will be provided to Council at the meeting and will become a part of the official record.

9.3. **Pending Agenda Calendar.**

10. **Adjournment.** Mayor Schwarzler adjourned the meeting at 8:59 pm.

MAYOR KATE SCHWARZLER

ATTEST:

Myra Russell, City Recorder

Agenda Item 7.1

Public Hearing: CDBG Grant Funding (Irvine)



CITY OF INDEPENDENCE MEMORANDUM

TO: Mayor and City Council
FROM: City Manager Kenna West
MEETING DATE: July 14, 2026
SUBJECT: Public Hearing for CDBG Grant Application

☒ Information Only

☐ Action Requested

Statement of Issue:

Staff is requesting Council hold a public hearing to solicit input on the potential use of Community Development Block Grant funds.

Background:

The City of Independence is eligible to apply for a 2026 Community Development Block Grant from Business Oregon. Community Development Block Grant (CDBG) funds come from the U.S. Department of Housing and Urban Development. The grants can be used for constructing public facilities, housing improvements, microenterprise assistance and other projects that primarily benefit people with low or moderate incomes.

Before submitting a pre-application for a CDBG grant, the City Council is required to hold a public hearing to solicit input from the community on the needs of low to moderate income residents and potential uses of CDBG funds. The City Council is not required to take any action after holding the public hearing

The City's proposed project, Habitat for Humanity Affordable Housing Infrastructure, would fund public infrastructure improvements (water, sewer, street, sidewalks) for Habitat for Humanity's planned 10 unit development on 7th Street. It is estimated that the proposed project will benefit at least 125 people (2.5 people per housing unit each year for 5 years), all of whom will be low or moderate income.

Discussion:

The lack of affordable housing in the community has been well documented. Independence's Housing Needs Analysis determined that in the next twenty years, the community would need just under 1,000 additional housing units priced at a level affordable to people making 80% of Area Median Income. Independence's Housing Production Strategy identifies a number of priority actions to support the creation of more affordable housing including "Proactively pursue State and Federal grants for infrastructure." Habitat for Humanity has a long record of supplying affordable ownership housing to low and moderate income populations. The organization uses a model where the future homeowner contributes sweat equity to the project by helping construct the home along with other volunteers.

Habitat for Humanity has purchased a property on 7th Street and is working through the permitting process to enable construction of ten townhome/duplex-type homes. The primary roadblock to

starting construction on the homes is the cost of constructing the public infrastructure that will serve the homes – the cul-de-sac, sidewalks, water and sewer mains. CDBG has a funding category that supports the development of public infrastructure to support low to moderate income populations. After discussions with CDBG staff, it was determined that the City could seek funding to support construction of Habitat for Humanity's public infrastructure. While the grant has not been prepared yet, we anticipate a request near the maximum allowable \$750,000.

The City would act as the fiscal agent for this grant application, in the same way it has for other CDBG projects. Habitat for Humanity would construct the project and track performance measures, with the City ensuring grant requirements are followed and processing reimbursement requests. The City would not be responsible for providing any matching funds required by this grant.

Fiscal Impact:

There is minimal fiscal impact to the City from this project. A small amount of staff time would be required to process financial disbursements. Habitat for Humanity will write the grant application.

Options:

- A. No action is needed other than opening and closing the hearing.

Memo prepared by: Shawn Irvine, Economic Development Manager

Agenda Item 7.2

Liquor License Application, Change of Ownership:
Mendi's Pizza (Gilbert)



CITY OF INDEPENDENCE MEMORANDUM

TO: Mayor and City Council
FROM: Lyle Gilbert, Police Lieutenant
MEETING DATE: July 14, 2026
SUBJECT: New Owner Liquor License Applicant

☐ Information Only

☒ Action Requested

Statement of Issue:

Muttley's LLC has made an application to the Oregon Liquor and Cannabis Commission for a change of ownership of Mendi's, which is located at 1695 Monmouth Street, Independence, Oregon. The change of ownership would allow the new owner to continue retail off-premises sales, as well as on-premises sales and consumption of beer, wine and cider.

Background:

In 2020 our City adopted resolution #20-1541, which establishes criteria for screening liquor license applications. The police department was assigned the task to do initial reviews of each liquor license application. The police department then completes a staff report on those findings for the City Council review.

Analysis:

Trevor and Christa Hailwood (Muttley's LLC) have purchased Mendi's Pizza and take possession on July 8, 2026. Muttley's LLC is a registered corporation with the Oregon Secretary of State's Office and is in good standings.

Trevor Hailwood has an extensive history in the restaurant business as both a chef, and as resource to others who have relied on him for his expertise when opening their own restaurants. Trevor Hailwood currently works in food service as well.

Trevor and Christa plan on updating Mendi's appearance, but the day-to-day food and drink offerings will likely stay the same. According to Trevor, Mendi's will continue to be a place where families can come to watch sports, play board games, and celebrate special occasions.

A background was completed on Trevor and Christa Hailwood. I was unable to locate any information that would preclude him from licensure with the OLCC.

Fiscal Impact:

As of this date, City fees have been paid. OLCC instruction states their fees will be collected at a later time.

Options:

1. Council may recommend approval for this establishment.
2. Council may recommend denying the license for this establishment if reasonable grounds can be established.
3. Council may impose an option of its own choosing.

Recommended Motion:

Option 1. I move to recommend approval of the above liquor license request.

Memo prepared by: Lieutenant Lyle Gilbert



OREGON LIQUOR & CANNABIS COMMISSION
Local Government Recommendation – Liquor License

Annual Liquor License Types

Off-Premises Sales	Brewery-Public House
Limited On-Premises Sales	Brewery
Full On-Premises, Caterer	Distillery
Full On-Premises, Commercial	Grower Sales Privilege
Full On-Premises, For Profit Private Club	Winery
Full On-Premises, Non Profit Private Club	Wholesale Malt Beverage & Wine
Full On-Premises, Other Public Location	Warehouse
Full On-Premises, Public Passenger Carrier	

Section 1 – Submission – To be completed by Applicant:

License Information

Legal Entity/Individual Applicant Name(s): Muttley's LLC

Proposed Trade Name: Mendis Pizza

Premises Address: 1695 Monmouth Street

Unit:

City: Independence

County: Oregon

Zip: 97351

Application Type: ☐ New License Application ☒ Change of Ownership ☐ Change of Location

License Type: Limited On-Premises Sales ☐ Additional Location for an Existing License

Application Contact Information

Contact Name: Trevor Hailwood

Phone: 626 253 4404

Mailing Address: 5760 Talmadge Rd

City: Independence

State: Oregon

Zip: 97351

Email Address: hailwoods@outlook.com

Business Details

Please check all that apply to your proposed business operations at this location:

☐ Manufacturing/Production

☒ Retail Off-Premises Sales

☒ Retail On-Premises Sales & Consumption

If there will be On-Premises Consumption at this location:

☒ Indoor Consumption

☒ Outdoor Consumption

☒ Proposing to Allow Minors

Section 1 continued on next page



Local Government Recommendation – Liquor License

Section 1 Continued – Submission - To be completed by Applicant:

Legal Entity/Individual Applicant Name(s): Muttley's LLC

Proposed Trade Name: Mendis Pizza

IMPORTANT: You MUST submit this form to the local government PRIOR to submitting to OLCC.
Section 2 must be completed *by the local government* for this form to be accepted
with your CAMP application.

Section 2 – Acceptance - To be completed by Local Government:

Local Government Recommendation Proof of Acceptance

After accepting this form, please return a copy to the applicant with received and accepted information

City or County Name:

Optional Date Received Stamp

Date Application Received:

Received by:

RECEIVED

JUN 29 2026

CITY OF
INDEPENDENCE

Section 3 – Recommendation - To be completed by Local Government:

- ☐ Recommend this license be granted
- ☐ Recommend this license be denied (Please include documentation that meets [OAR 845-005-0308](#))
- ☐ No Recommendation/Neutral

Name of Reviewing Official:

Title:

Date:

Signature:

After providing your recommendation and signature, please return this form to the applicant.



City of Independence
555 S Main St; PO Box 7
Independence, OR 97351
(503) 838-1212

XBP Confirmation Number: [REDACTED]

Transaction detail for payment to City of Independence.			Date: 06/30/2026 - 11:54:42 AM MT		
Transaction Number: [REDACTED]					
Visa — XXXX-XXXX-XXXX-[REDACTED]					
Status: Successful					
Account #	Item	Receipt Number	Void Receipt Number	Quantity	Item Amount
Mendis	LIQUOR LICENSE Mendis			1	\$75.00

TOTAL: \$75.00

Billing Information

Trevor Hailwood
5760 Talmadge Rd
Independence, OR 97351
hailwoods@outlook.com

Transaction taken by: Admin mrussell

Agenda Item 7.3

Public Hearing: Proposed Ordinance 1638, an Ordinance to Adopt a Set of Revisions to the Independence Development Code to Implement Recommendations from the Housing Production Strategy (Evander)



CITY OF INDEPENDENCE MEMORANDUM

TO: Mayor and City Council
FROM: Planning Manager Fred Evander
MEETING DATE: July 14, 2026
SUBJECT: Ordinance 1638, an Ordinance to Adopt a Set
of Revisions to the Independence
Development Code to Implement
Recommendations from the Housing
Production Strategy

☐ Information Only

☒ Action Requested

Statement of Issue:

The City Council is asked to consider Ordinance 1638 – proposed revisions to the Independence Development Code to adopt a set of revisions to the Independence Development Code to implement recommendations from the Housing Production Strategy. A public hearing on the revisions is scheduled as part of the July 14, 2026, City Council meeting. Following the hearing, the Council may act on the ordinance.

Background / Discussion:

What is the Problem?

The City of Independence is projected to need around 2,000 new homes over the next 20 years. In early 2025, the city completed a Housing Production Strategy that outlined ways to help achieve this growth. Among the goals included strategies to:

1. Allow a wider range of middle housing types in the Low Density Residential (RS) and Medium Density Residential (RM) Zones (see Action 2.4 of the Housing Production Strategy).
2. Allow cottage cluster housing (see Action 2.5).
3. Allow for small lot detached homes in the Medium Density Residential (RM) and High Density Residential (RH) Zones (see Action 2.7).
4. Improve standards and review processes for small infill housing projects (see Action 2.10).

What is Proposed?

This project would help achieve these goals/actions through a series of changes to the Independence Development Code. A description of the changes is included in Exhibit A of the attached ordinance.

Fiscal Impact: None.

Options:

The City Council will hold a Public Hearing on the legislative amendments at the meeting of July 14, 2026. Following the close of the hearing, the City Council will:

- A. Make a motion to approve Ordinance 1633 as submitted.
- B. Make a motion to approve Ordinance 1633 with amendments.
- C. Take no action.

Recommendation/Suggested Motion:

Following the closure of the Public Hearing, staff recommends approval of Option A.

1st MOTION: "I move to read the proposed Ordinance 1638, an ordinance to adopt a set of revisions to the Independence Development Code to implement recommendations from the Housing Production Strategy, in full as the text is contained in the Council packet, for the first time."

Should the motion pass unanimously, a second motion would be in order:

2nd MOTION: "I move to read the proposed Ordinance 1638 for the second time by title only."

Should the motion pass, a third motion would be in order:

3rd MOTION: "I move to adopt the proposed Ordinance 1638."

Attachments:

- A. Ordinance 1638, with Exhibits

Memo prepared by: Fred Evander, Community Planner
Reviewed by: Kenna West, City Manager

**BEFORE THE CITY COUNCIL OF THE CITY OF INDEPENDENCE
IN THE COUNTY OF POLK, STATE OF OREGON**

An Ordinance to Adopt a Set of Revisions to	)	
the Independence Development Code to	)	Ordinance 1638
Implement Recommendations from the	)	
Housing Production Strategy	)	

ORDINANCE NO. 1638

WHEREAS, the City of Independence adopted the Independence Housing Production Strategy on January 14, 2025, and the document was acknowledged by the State of Oregon on May 21, 2025; and

WHEREAS, the Housing Production Strategy included a variety of measures that are meant to promote the production of housing to address identified needs in the City of Independence including: allowing a wider range of middle housing types in the Low Density Residential (RS) and Medium Density Residential (RM) Zones (see Action 2.4 of the Housing Production Strategy); allowing cottage cluster housing (see Action 2.5); allowing for small lot detached homes in the Medium Density Residential (RM) and High Density Residential (RH) Zones (see Action 2.7); and improving standards and review processes for small infill housing projects (see Action 2.10); and

WHEREAS, the City of Independence pursued and received a grant from the Department of Land Conservation and Development to help consider potential code amendments to address a number of the measures identified in the Housing Production Strategy; and

WHEREAS, the potential scope and focus of the code changes was considered at Joint City Council/Planning Commission meetings on July 22, 2025 and January 27, 2026; and

WHEREAS, the Independence Planning Commission held a series of meetings on November 3, 2025, February 2, 2026, and May 4, 2026, to consider the proposed amendments; and

WHEREAS, the City of Independence submitted a notice of the potential changes to the Oregon State Department of Land Conservation and Development on April 28, 2026; and

WHEREAS, the City of Independence published notice of the potential changes in the Polk County Itemizer-Observer on June 3, 2026; and

WHEREAS, on June 15, 2026, the Independence Planning Commission conducted a properly noticed public hearing to consider the changes, at which time interested parties and the general public had an opportunity to be heard on the matter; and

WHEREAS, following the hearing, the Planning Commission recommended that the City Council adopt the changes to the Independence Development Code; and

WHEREAS, the City Council conducted a properly noticed public hearing about the proposed code change at their meeting on July 14, 2026, during which time the Council reviewed the record and recommendations of the Commission and at which time interested parties, and the general public had an opportunity to be heard regarding the proposal; and

WHEREAS, the Council finds that the proposed amendments comply with applicable provisions of the Statewide Planning Goals, the City of Independence Comprehensive Plan, and the Independence Development Code, as shown in the findings contained in the Staff Report, attached as Exhibit A, and meet the intents of the Independence Housing Production Strategy.

NOW, THEREFORE, THE CITY OF INDEPENDENCE DOES ORDAIN AS FOLLOWS:

Section 1: Findings. The City of Independence hereby adopts the above recitals and findings contained within the Staff Report, attached hereto as Exhibit A and incorporated herein by this reference, in support of the proposed amendments.

Section 2: Section 11.002 is hereby amended and restated in its entirety as provided in Exhibit B.

Section 3: Independence Development Code, Subchapter 13, Definitions is hereby amended to include the following amended definitions:

Dwelling Unit

"Dwelling Unit" means a building, or a portion of a building, that has independent living facilities including provisions for sleeping, cooking, and sanitation, and that is designed for residential occupancy by a group of people. Buildings with more than one set of cooking facilities are considered to contain multiple dwelling units or accessory dwelling units, as applicable, unless the additional cooking facilities are clearly accessory to the primary use, such as an outdoor grill or wet bar. This definition shall not include a hotel, motel, single room occupancy unit, campground, or recreational vehicle.

Dwelling, Single-Unit

"Dwelling, Single-Unit" means a detached structure on a lot or parcel that is comprised of a single dwelling unit. Detached single-unit dwellings may be constructed off site, e.g., manufactured homes or prefabricated dwellings.

Dwelling, Townhouse

"Dwelling, Townhouse" means a single-unit structure, which is attached on one or more sides to another single-unit structure, and so designed that each individual dwelling unit is located upon a separate lot or parcel.

Dwelling, Duplex

"Dwelling, Duplex" two attached or detached dwellings in any configuration on a lot or parcel, other than a lot or parcel created by a middle housing land division.

Dwelling, Multiple-Unit

"Dwelling, Multiple-Unit" means five or more dwelling units on one lot or parcel, excluding cottage cluster developments.

Section 4: Independence Development Code, Subchapter 13, Definitions is hereby amended to add the following definitions:

Accessory Dwelling Unit (ADU)

"Accessory Dwelling Unit" means an interior, attached, or detached residential structure that is used in connection with, or that is accessory to, a primary dwelling.

Common Courtyard

"Common courtyard" means a common area for use by residents of a cottage cluster. A common courtyard may function as a community yard. Hard and soft landscape features may be included in a common courtyard, such as pedestrian walkways, lawn, groundcover, trees, shrubs, patios, benches, or gazebos.

Cottage

"Cottage" means an individual, detached dwelling unit that is part of a cottage cluster.

Cottage Cluster

"Cottage cluster" means a grouping of no fewer than five detached or attached dwelling units per parcel, located on a single lot or parcel that includes a common courtyard. Cottage clusters that also meet the definition of "manufactured dwelling park" or "mobile home park" may be subject to additional requirements, pursuant to ORS 446.003 through 446.140.

Cottage Cluster Project

"Cottage cluster project" means a development site with one or more cottage clusters. Each cottage cluster as part of a cottage cluster project must have its own common courtyard.

Dwelling, Triplex

"Dwelling, Triplex" means 3 attached or detached dwelling units in any configuration on a lot or parcel.

Dwelling, Quadplex

"Quadplex" means 4 attached or detached dwelling units in any configuration on a lot or parcel.

Shared trash storage facility

"Shared trash storage facility" means an enclosure used to store trash and/or recycling materials for more than one dwelling unit.

Section 5: Independence Development Code, Subchapter 13, Definitions is hereby amended to delete the following definitions:

Apartment

"Apartment" means a dwelling unit that is part of an apartment house.

Apartment house

"Apartment House" means three or more dwelling units within the same building or sharing one or more common walls on one lot or parcel and designed for occupancy by three or more families living independently of each other. (Same as dwelling, MULTIPLE-FAMILY.)

Dwelling, Accessory

"Dwelling, Accessory" means a single dwelling unit, either attached or detached, that is a subordinate use on the same lot with any single-family dwelling unit.

Section 6: Independence Development Code, Subchapter 13, Definitions is hereby amended to add Section 13.050 to include the Historic Preservation Definitions as presented in Exhibit C.

Section 7: Independence Development Code, Subchapter 17, Allowed Uses in Residential Zones is hereby amended and restated in its entirety as provided in Exhibit D.

Section 8: Independence Development Code, Subchapter 18, Density, Area, and Dimension Requirements in Residential Zones is hereby amended and restated in its entirety as provided in Exhibit E.

Section 9: Independence Development Code, Subchapter 19, Residential Design Standards is hereby amended and restated in its entirety as provided in Exhibit F.

Section 10: Independence Development Code, Section 21.065, Development Standards for Multiple-Unit Development is hereby amended and restated in its entirety as provided in Exhibit G.

Section 11: Independence Development Code, Section 22.065, Development Standards for Multiple-Unit Development is hereby amended and restated in its entirety as provided in Exhibit H.

Section 12: Independence Development Code, Subchapter 23, Mixed Density Residential (MX) Zone is hereby amended and restated in its entirety as provided in Exhibit I.

Section 13: Independence Development Code, Section 34.050, Townhomes, Rowhouses and Multifamily Standards is hereby amended and restated in its entirety as provided in Exhibit J.

Section 14: Independence Development Code, Section 34.055, Additional Development Standards is hereby amended and restated in its entirety as provided in Exhibit K.

Section 15: Independence Development Code, Section 54.005, Applicability is hereby amended and restated in its entirety as provided in Exhibit L.

Section 16: Independence Development Code, Section 54.010, Buffering and Screening Requirements is hereby amended and restated in its entirety as provided in Exhibit M.

Section 17: Independence Development Code, Section 54.105, Setbacks Required is hereby amended and restated in its entirety as provided in Exhibit N.

Section 18: Independence Development Code, Section 54.205, Landscaping Requirements is hereby amended and restated in its entirety as provided in Exhibit O.

Section 19: Independence Development Code, Section 59.40, Definitions is hereby repealed in its entirety.

Section 20: Independence Development Code, Section 73.010, Required Number of Parking Spaces is hereby amended and restated in its entirety as provided in Exhibit P.

Section 21: Independence Development Code, Section 74.010, Specific Standards for Accessory Dwelling Units is hereby amended and restated in its entirety as provided in Exhibit Q.

Section 22: Independence Development Code, Section 75.030, Average Setback from Street is hereby repealed in its entirety.

Section 23: Independence Development Code, Section 75.060, Zero-Side Yard (Townhouse) Dwelling Units is hereby amended and restated in its entirety as provided in Exhibit R.

Section 24: Independence Development Code, Section 75.070, Cottage Cluster Developments is hereby added to the Independence Development Code as provided in Exhibit S.

Section 25: Independence Development Code, Section 90.40.015, Filing an Application for a Minor Partition Action is hereby amended and restated in its entirety as provided in Exhibit T.

Section 26: Independence Development Code, Section 90.40.025, Standards for Minor Partition Requests is hereby amended and restated in its entirety as provided in Exhibit U.

Section 27: Independence Development Code, Subchapter 90.80, Improvements is hereby amended and restated in its entirety as provided in Exhibit V.

Section 28: Independence Development Code, Subchapter 90.90.010, Streets is hereby amended and restated in its entirety as provided in Exhibit W.

Section 29: Independence Development Code, Subchapter 90.115, Middle Housing Land Divisions is hereby added to the Independence Development Code as provided in Exhibit X.

Section 30: Effective Date. This ordinance shall become effective thirty (30) days after final passage and its signature by the Mayor.

First Reading to the Council this ____ day of _____, 2026.

Second Reading to the Council this ____ day of _____, 2026.

Adopted this day of ____ day of _____, 2026.

Signed by the Mayor this ____ day of _____, 2026.

KATE SCHWARZLER, MAYOR

ATTEST:

Myra Russell, City Recorder



INDEPENDENCE

Oregon's Story Begins Here

PUBLIC HEARING MORE HOUSING, SAME (GREAT) NEIGHBORHOOD (FILE NO. LA | 2026-03) STAFF REPORT

MEETING DATE:	July 14, 2026
FILE NUMBER:	LA 2026-03
RE:	PUBLIC HEARING – MORE HOUSING, SAME (GREAT) NEIGHBORHOOD
CRITERIA:	Oregon State Planning Goals Independence Comprehensive Plan Independence Development Code (IDC) -Subchapter 10: General Provisions -Subchapter 11: Administrative Provisions
CONTENTS:	I. Summary II. What is the Problem? III. Proposed Change IV. Public Process V. Staff Findings – Oregon State Planning Goals and Independence Comprehensive Plan VI. Staff Findings – Independence Development Code
ATTACHMENTS:	A. Proposed Code Changes (58 pages) B. Existing Zoning Map (1 page)

I. SUMMARY

At the meeting of July 14, 2026, the Independence City Council will hold a public hearing on draft revisions to the Independence Development Code that would promote infill development in existing neighborhoods, while respecting the character of those neighborhoods. The Planning Commission held a public hearing on the proposed changes on June 15, 2026, and forwarded a recommendation of approval to the Independence City Council.

II. WHAT IS THE PROBLEM?

The City of Independence is projected to need around 2,000 new homes over the next 20 years. In early 2025, the city completed a Housing Production Strategy that outlined ways to help achieve this growth. Among the goals included strategies to:

1. Allow a wider range of middle housing types in the Low Density Residential (RS) and Medium Density Residential (RM) Zones (see Action 2.4 of the Housing Production Strategy).
2. Allow cottage cluster housing (see Action 2.5).

3. Allow for small lot detached homes in the Medium Density Residential (RM) and High Density Residential (RH) Zones (see Action 2.7).
4. Improve standards and review processes for small infill housing projects (see Action 2.10).

III. WHAT IS PROPOSED?

This project would help achieve these goals/actions through a series of changes to the Independence Development Code. These changes include:

Expanding the housing types that are permitted in residential zones (see Table for Subchapter 17). Currently, the Low-Density and Medium Density Residential zones do not allow uses such as triplexes or quadplexes, even though examples of the housing types exist within the zones. The proposed revisions would expand the allowed uses in the zones to better reflect how the city has grown over time (and address Action 2.4 of the Housing Production Strategy).¹

Slightly reducing the minimum lot size for single-unit homes and duplexes (see Table for Subchapter 18). The existing development code relies on a 5,000 square-foot minimum lot size, which does not allow the division of many of the historic lots in Independence (which were platted at 9,801 square feet). One historic subdivision within the community is allowed to have 4,500-square-foot lot sizes, with the approval of a variance, but the variance process is unnecessarily complicated and does not apply to other subdivisions with the same lot size.

The proposed revisions would reduce the minimum lot size from 5,000 to 4,800 square feet and make it easier to divide the lots. The revisions would also create a related average lot size of 2,400 square feet per unit for uses such as triplexes and quadplexes or a combination of single homes, ADUs and/or duplexes. These changes together would significantly expand the options that are available for people to construct additional housing on their land – especially in older portions of town (helping to address Action 2.4 of the Housing Production Strategy) – and streamline review processes (to help achieve Action 2.10).

Tweaking the residential design standards to respond to the additional types of housing that may be constructed (see Subchapter 19). The existing residential design standards primarily apply to uses such as single-family homes and duplexes, and do not effectively address housing types such as triplexes, quadplexes, or cottage clusters. The proposed draft would better address how things like parking and the provision of windows would apply to properties with multiple units. The new standards would help make better use of alleys (and establish standards for homes oriented to alleys), ensure driveways do not overwhelm certain portions of lots, and effectively distribute access and parking areas on individual properties.

Adding standards for cottage clusters (see Section 75.070). No cottage housing standards currently exist in the Independence Development Code. The proposed revisions would allow the housing type and add new standards to the code, helping to address Action 2.5 of the Housing Production Strategy.

Adding Standards for Middle Housing Land Divisions (see Section 90.115). The State of Oregon recently passed legislation allowing and establishing standards for Middle Housing Land Divisions. The draft code would incorporate this language and apply the standards and criteria to projects that look to divide the ownership of duplexes, triplexes, quadplexes, cottage clusters and structures that contain townhouses. Incorporation of these standards would support Action 2.7 (to create smaller lot attached and detached homeownership options) and Action 2.10 of the Housing Production Strategy (to improve standards and review processes for small infill housing projects).

Editing the public facility improvement standards for land divisions to primarily rely on the Public Works Design Standards (see Section 90.80). The existing code either contradicts or unnecessarily duplicates the Independence Public Works Design Standards (PWDS) in several areas. The proposed revisions would rely more heavily on the Public Works Design Standards and ensure that a clear and objective standard is applied to review. The proposed

¹ To help accommodate these allowances, the draft changes also include new definitions for cottage clusters, triplexes, and quadplexes that are based on recent changes to state law. A change to the duplex definition will also likely be required.

standards would also set up a potential secondary discretionary path for individuals to use, so long as certain requirements are met.

Ensuring all standards related to housing are clear and objective. Lastly, the draft proposes a variety of minor changes to standards related to landscaping, architectural design, and other aspects of development to ensure the standards are simple to understand and administer, meet state requirements, and are consistent within the code.

IV. PUBLIC PROCESS

The City of Independence used several measures to inform area landowners about the proposed revisions associated with this project. Staff hosted two walking tours that showcased various triplexes, quadplexes, and smaller-lot homes that are found in Independence, created a short informational video about the project, hosted two joint City Council/Planning Commission meetings, and discussed the code changes over the course of several Planning Commission meetings. Additionally, details about the proposed changes and public hearings were posted on the City of Independence website.

Beyond these items, staff posted a notice of the changes on the Oregon Department of Land Conservation "PAPA" website on April 28, 2026, and published a Notice of the Public Hearings before the Planning Commission and the City Council in the Polk County Itemizer-Observer on June 3, 2026.

No formal comments were received through these public outreach methods as of the date of the writing of this staff report.

V. STAFF FINDINGS - OREGON STATE PLANNING GOALS AND INDEPENDENCE COMPREHENSIVE PLAN

Updates to the Independence Development Code are required to meet the Oregon State Planning Goals. Among these goals are provisions related to Citizen Involvement (Goal 1), Land Use Planning (Goal 2), Housing (Goal 10), and Urbanization (Goal 14), which together are implemented through measures such as the Independence Comprehensive Plan and Development Code. Combined these goals seek to “accommodate urban population and urban employment inside urban growth boundaries” and “ensure efficient use of land” (see Goal 14), while assuring that citizens are involved in the planning process and items related to future housing, economic development, transportation, and the natural landscape are adequately addressed.

The proposed code revisions have been drafted with this planning framework in mind. Key findings related to the proposed changes are addressed below:

Goal 1. Citizen Participation. Goal 1 of the Oregon State Planning Goals looks “to develop a citizen involvement program that ensures the opportunity for citizens to be involved in all phases of the planning process.” This goal is implemented by the Citizen Involvement Element of the Comprehensive Plan, Subchapter 11 of the Independence Development Codes and the city’s communication and community engagement efforts.

Several methods were used to provide information and to encourage individuals to be engaged in this project. The city:

- Held two walking tours to look at city precedents for the code changes.
- Held two joint City Council/Planning Commission work sessions.
- Prepared project fact sheets that were posted on the city’s website and distributed during Planning Commission and City Council meetings.
- Shot and aired a video explaining the draft code changes. According to data from the social media platforms, the video was viewed more than 3,500 times on Facebook, 594 times on Instagram, and 127 times on YouTube.
- Presented information about the code changes in the lobby of the Independence Civic Center on large format presentation boards that were on display for extended periods over the course of the project.

In addition to this outreach, the city offered notice about the changes on its website, newsletter, and Facebook page, and posted notice on the State Department of Land Conservation and Development “PAPA” website and in the Polk County Itemizer-Observer.

The proposed changes were also discussed by the Independence Planning Commission in work sessions at several points throughout the project and were heard at a public hearing before the Independence Planning Commission on June 15. The City Council will consider the proposal at a public hearing on July 14.

Given these considerations, individuals have had and will have several opportunities to learn about the proposed code changes and to be involved in the process. This goal has been met during the planning process and will continue to be achieved during the adoption hearings period.

Goal 2. Land Use Planning. Goal 2 of the Oregon Planning Goals looks “to establish a land use planning process and policy framework as a basis for all decisions and actions related to use of land and to assure an adequate factual base for such decisions and actions.” In Independence, this goal is implemented by the Land Use Element of the Independence Comprehensive Plan, which seeks “to encourage efficient land use, maintain land use designations appropriate to the character of Independence and meet future land use needs.”

The draft code associated with the More Housing, Same (Great) Neighborhood project supports this framework by seeking to modify standards to best anticipate the housing needs identified in Independence (through documents such as the Housing Needs Analysis and Housing Production Strategy), while assuring that new development effectively supports the character of Independence.

The amendments would:

1. Expand the allowed housing types permitted in residential zones.
2. Slightly reduce the minimum lot size required.
3. Tweak the residential design standards to ensure the standards adequately address the additional types of uses that may be constructed.

Additionally, the standards would include new requirements for activities such as cottage clusters and middle housing land divisions that are not currently addressed within the code

Given these considerations, the code changes would establish a clear and objective planning process and policy framework that would serve as a basis for all decisions and actions related to the use of land, and assure that needs identified for housing are addressed in a manner that taps the development potential of existing neighborhoods, while remaining respectful of the character of Independence. This goal has been achieved.

Goal 10: Housing. Goal 10 of the Oregon State Planning Goals seeks “to provide for the housing needs of citizens of the state.” This goal is implemented in Independence through the Comprehensive Plan goal “to ensure everyone the opportunity to live in safe, affordable, healthy housing and to provide a choice of housing types, densities, and locations.”

The proposed code amendments support these goals by offering more potential options for people to provide and live in safe, affordable, and healthy housing. As proposed, the standards primarily seek to achieve two things – a slight reduction in the required minimum lot size and an increase the types of uses that are allowed on a given lot – which together will allow landowners more opportunities to create new units on their property. This flexibility should ultimately promote more housing in Independence.

To ensure that the new units respect the character of the community, the proposed changes would also modify the existing residential design standards to address all potential housing types that may be constructed. Standards such as revised parking and window requirements, as well as revised standards for the screening of items such as garbage, are included within the draft.

Given these considerations, the proposed draft effectively balances the encouragement of development that provides for the housing needs of citizens of the state and while assuring that the housing respects the qualities of Independence. This goal is achieved.

Goal 14: Urbanization. Goal 14 of the Oregon State Planning Goals looks “to provide for an orderly and efficient transition from rural to urban land use, to accommodate urban population and urban employment inside urban growth boundaries, to ensure efficient use of land, and to provide for livable communities.” This goal is implemented through the Intergovernmental Agreement between Polk County and the City of Independence Regarding the Urban Growth Boundary, the Urbanization Element of the Independence Comprehensive Plan, and the Independence Development Code.

The proposed amendments to Independence Development Code support this planning framework. The draft changes would:

- Promote flexibility in how a person may use their land – encouraging further development in certain portions of the community.
- Make wise use of existing facilities such as water and sewer facilities and roadways that are in place and could serve future development.

Additionally, the changes would help promote development that meets the density targets agreed upon inside of the city limits and limit the demand for urban-style development (and the need for urban services) outside of the city. The proposed changes would promote the efficient use of land, while assuring that future development is well designed and supportive of the character of Independence.

Given these considerations, Goal 14 would be achieved.

The proposed changes effectively balance considerations about land use, housing and urbanization. While the City Council may elect to make further revisions to the draft following the public hearing, the proposed code change generally achieves the Oregon State Planning Goals and the goals of the Independence Comprehensive Plan.

VI. STAFF FINDINGS – INDEPENDENCE DEVELOPMENT CODE

In addition to the Oregon State Planning Goals and the goals and policies of the Independence Comprehensive Plan, the proposed changes are required to conform with the Independence Development Code.

Subchapter 10: General Provisions

...

10.040 Amendment of Development Code

Any amendment of the text of this development code shall be accomplished by ordinance of the City Council. Proposals for such amendments shall be submitted to the Planning Commission for public hearing. The Planning Commission shall submit to the City Council its written recommendation regarding the proposed amendment. Such recommendation shall be submitted to the City Council within 30 days of the Planning Commission's action on the proposed amendment. Notice shall also be provided to state land use agencies in accordance with statutory requirements. This is a Type IV action – See 11.002 (D).

Staff Response: The Independence Planning Commission held a Public Hearing on the changes associated with More Housing, Same (Great) Neighborhood project on June 15, 2026. Following the hearing, the Commission forwarded a recommendation of approval on the changes to the Independence City Council.

The City Council will consider the proposed changes at a public hearing at their meeting on July 14. The Council will be given a draft of an ordinance to potentially adopt the changes at the meeting. Given the process, this standard will be met.

...

Subchapter 11: Administrative Provisions

11.002 Application Types and Review Procedures

All development permits and land use actions are processed under the City's administrative procedures. There are four types of actions, each with its own procedures.

...

D. Type IV Action

A Type IV action is a legislative review in which the City considers and enacts or amends laws and policies. Private parties may request a Type IV action; however, it must be initiated by the Planning Commission, or City Council. The City Council makes the final, local decision. Sections 11.025 and 11.030 list the notice and hearing requirements.

1. Amendments and Revisions of the Comprehensive Plan
2. City Plan Document Adoption, e.g. Water System Plan

3. Zoning Code Amendments

Staff Response: Staff has reviewed the amendment as a Type IV – Legislative Review, which was originally initiated by staff and the Independence Planning Commission based on the findings of the Independence Housing Production Strategy. This standard has been met.

11.015 General Provisions

In order to provide for citizen review of the planning process and the orderly keeping of records of actions relating to this Ordinance, the City shall ensure that the following measures are maintained and available for public review.

...

Staff Response: Staff has taken appropriate steps to ensure compliance with the standards in Independence Development Code Section 11.015, including publishing a notice of the changes in the Polk County Itemizer-Observer, writing a staff report for the revisions, and keeping a file for the proposal. This standard has been achieved.

11.025 Notice of Public Hearings

...

B. Legislative Hearings (Type IV). Notice of Public Hearing by the Planning Commission or City Council relating to any legislative action shall be published in a newspaper of general circulation a minimum of 10 days prior to the date of the hearing. Notice shall be provided to the Department of Land Conservation and Development in conformance with DLCD rules prior to the first evidentiary hearing by the City for any legislative action.

Staff Response: Staff sent notice of the changes to the Oregon Department of Land Conservation and Development on April 28, 2026, and included information about the changes on the City of Independence Planning Department website and social media. Staff additionally published notice of the Public Hearings before the Planning Commission and the City Council in the Polk County Itemizer-Observer on June 3, 2026. This standard has been met.



to **Fred Evander and Shawn Irvine, City of Independence**

cc **Melissa Ahrens and Ryan Marquardt, DLCD**

from **Matt Hastie, and Meg Grzybowski, MIG**

re **Final Draft Adoption-Ready Code Updates (Task 4.6)**
Independence Infill Code Update

date **April 21, 2026**

Introduction

The Independence Infill Code Update project is focused on updating Independence's residential development standards, including the design guidelines and standards, to increase opportunities for building a wide range of housing types and sizes. Overall, the project aims to:

- Update standards related to allowed housing types, lot sizes and densities.
- Address standards related to required public improvements.
- Create graphics that help illustrate standards and how they will be applied in Independence.
- Ensure new or revised standards for housing are clear and objective.
- Improve policy equity, consistency and simplification.

Code Amendments Overview

The consultant team conducted a detailed review of the Independence Development Code (“Code”) to identify initial recommendations for code updates. Overall, the findings of the audit were related to general code usability and structure as it applies to housing, City staff identified code issues, and findings pertaining to the clear and objective nature of standards related to housing development. The subchapters listed below represent the highest priority changes to the code:

- **Subchapter 13:** Ensure definitions related to housing are consistent with state model code and applicable state statutes.
- **Subchapter 17:** Update use table to allow a greater variety of housing types in existing zones; consider adding housing types that would be new for Independence like cottage clusters.
- **Subchapter 18:** Update lot development standards (density, setback, etc.) to allow for a broader range of housing types in each zone.
- **Subchapter 19:** Create a menu-based approach for basic design standards to encourage high-quality residential design while simplifying the development application process.
- **Subchapters 20-22:** Ensure all standards are clear and objective.
- **Subchapter 73:** Update parking standards to align with housing types and community need.

- **Subchapter 90:** Ensure utility, road, and other improvements standards are clear and objective and meet the City’s level of service targets, as needed or required by state law; allow for a discretionary path that incorporates negotiation with City Public Works staff to identify appropriate improvement standards in situations where the City’s current standards cannot be met. Identify steps needed to ensure compliance with state Middle Housing Land Division requirements.

The list above is not an exhaustive overview of the recommended code updates. The following section includes detailed code update recommendations for all applicable code subchapters and sections.

Draft Code Update

Proposed Code modifications are presented in underline/~~strikeout~~ legislative amendment format, where underlined text indicates new text, and strikeout indicates existing, adopted text recommended for removal. Text that is double underline or ~~double strikeout~~ shows existing code text that was moved to a new location in the code update. Proposed amendments are organized under existing Code chapters/sections. A description and summary of the proposed updates are provided in the gray text boxes for each section. In addition, specific “discussion items” may be included where the project team is seeking specific input from the City Council (see “City Council Discussion Item”). Other Code text may be included for context and reference, otherwise the only sections that are shown are those that have recommended amendments.

Subchapter 11

Section 11.002: Applications and Review Procedures

All development permits and land use actions are processed under the City's administrative procedures. There are four types of actions, each with its own procedures.

[...]

E. Middle Housing Land Divisions.

Middle Housing Land Divisions shall be processed in accordance with the procedures described in Section 90.115 of this code. Approval of a Middle Housing Land Division constitutes approval of development but is not considered to be a land use or limited land use decision.

Subchapter 13: Definitions

Housing type definitions have been updated to reflect state statutes and development related definitions have been added or consolidated in order to make it easier for applicants to find and understand terms.

Definitions will be reorganized and inserted into Subchapter 13 in alphabetical order in subsequent drafts of these code updates.

Housing Type Definitions

- Accessory Dwelling Unit (ADU)
 - “Accessory Dwelling Unit” means an interior, attached, or detached residential structure that is used in connection with, or that is accessory to, a primary dwelling.
- Apartment
 - ~~“Apartment” means a dwelling unit that is part of an apartment house.~~
- Apartment house
 - ~~“Apartment House” means three or more dwelling units within the same building or sharing one or more common walls on one lot or parcel and designed for occupancy by three or more families living independently of each other. (Same as dwelling, MULTIPLE-FAMILY.)~~
- Common Courtyard
 - “Common courtyard” means a common area for use by residents of a cottage cluster. A common courtyard may function as a community yard. Hard and soft landscape features may be included in a common courtyard, such as pedestrian walkways, lawn, groundcover, trees, shrubs, patios, benches, or gazebos.
- Cottage
 - “Cottage” means an individual, detached dwelling unit that is part of a cottage cluster.
- Cottage Cluster
 - “Cottage cluster” means a grouping of no fewer than five detached or attached dwelling units per parcel, located on a single lot or parcel that includes a common courtyard. Cottage clusters that also meet the definition of “manufactured dwelling park” or “mobile home park” may be subject to additional requirements, pursuant to ORS 446.003 through 446.140.
- Cottage Cluster Project
 - “Cottage cluster project” means a development site with one or more cottage clusters. Each cottage cluster as part of a cottage cluster project must have its own common courtyard.
- Dwelling Unit
 - ~~“Dwelling Unit” means one or more habitable rooms occupied or intended or designed to be occupied by one family and having facilities for living, sleeping, cooking, and eating; such definition shall not include a hotel, motel, single room occupancy, campground, or recreational vehicle.~~ means a building, or a portion of a building, that has independent living facilities including provisions for sleeping, cooking, and sanitation, and that is designed for residential occupancy by a group of people. Buildings with more than one set of cooking facilities are considered to contain multiple dwelling units or accessory dwelling units, as applicable, unless the additional cooking facilities are clearly accessory to the primary use, such as an outdoor grill or wet bar. This definition shall not include a hotel, motel, single room occupancy unit, campground, or recreational vehicle.
- Dwelling, Accessory
 - ~~“Dwelling, Accessory” means a single dwelling unit, either attached or detached, that is a subordinate use on the same lot with any single-family dwelling unit.~~

- Dwelling, Single-Family Unit
 - "Dwelling, Single-Family Unit" means a detached structure on a lot or parcel that is comprised of a single dwelling unit. Detached single-unit dwellings may be constructed off site, e.g., manufactured homes or prefabricated dwellings. means a single detached dwelling unit designed exclusively for occupancy by one family.
- Dwelling, Townhouse
 - "Dwelling, Townhouse" means a single-family unit structure, which is attached on one or more sides to another single family unit structure, and so designed that each individual dwelling unit is located upon a separate lot or parcel.
- Dwelling, Two-Family (Duplex)
 - "Dwelling, Two-Family (Duplex)" means two dwelling units sharing one or more common walls on one lot or parcel two attached or detached dwellings in any configuration on a lot or parcel, other than a lot or parcel created by a middle housing land division.
- Dwelling, Triplex
 - "Dwelling, Triplex" means 3 attached or detached dwelling units in any configuration on a lot or parcel.
- Dwelling, Quadplex
 - "Quadplex" means 4 attached or detached dwelling units in any configuration on a lot or parcel.
- Dwelling, Multiple-family
 - "Dwelling, Multiple-Family Unit" means three-five or more dwelling units within the same building or sharing one or more common walls on one lot or parcel, excluding cottage cluster developments, and designed for occupancy by three or more families living independently of each other. (Same as APARTMENT HOUSE.)
- Shared trash storage facility
 - "Shared trash storage facility" means an enclosure used to store trash and/or recycling materials for more than one dwelling unit.

Historic Preservation Definitions

- "Contributing Resource," for the purpose of Subchapter 59 of this code, means a building, Site, or object, originally constructed within the applicable Period of Significance that retains and exhibits significant integrity (location, design, setting, materials, workmanship, feeling, and association) to convey a sense of history. These properties strengthen the historic integrity of an existing or potential historic district, as indicated on the Local Historic Register.
- "Demolition" means the intentional destruction of all or a part of a building or structure.
- "District" or "Historic District" means an area designated pursuant to Subchapter 59 of this code which includes buildings, properties or sites of historical or architectural significance. National Historic District means a District listed on the National Register of Historic Places. Local Historic District means a District listed on the Local Historic Register. Certain Resources may be designated within both Local and National Historic Districts.

- “Historic Preservation Commission” means the body of appointed officials established in Independence Municipal Code (IMC) Section 2-260. For purposes of review procedures under this Subchapter, the Historic Preservation Commission replaces the Planning Commission as the initial review body.
- “Historic Preservation Officer” means the city official responsible for the administration of this code.
- “Historic Residential Overlay” means a portion of a historic district, defined on a map that has been adopted by the City of Independence which is typified by residential dwellings. The residential standards for new construction apply to the area, even if a commercial use or multifamily dwelling is proposed within the structure.
- “Independence National Historic District” means the District designated on the National Register of Historic Places through the 1989 Record of Designation, as shown on City of Independence official zoning map.
- “Listed Resource” means an individual historic resource, which has not been designated as part of a larger district, which has been placed on the Local Historic Register.
- “Local Historic Register” means the list of historic Resources officially recognized by the City of Independence as important in its history and afforded protection under this subchapter.
- “National Register of Historic Places” or “National Register” means the nation’s official list of buildings, Sites, objects, and districts that are important for the nation’s history and maintained by the National Park Service in Washington, D.C. The list includes “national register resources” as designated by OAR 660-023-0200(8).
- “Noncontributing Resource” means a building, Site, or object that does not retain or exhibit sufficient integrity (location, design, setting, materials, workmanship, feeling and association) to contribute to an existing or potential historic District in its current condition. Noncontributing Resources may include “historic Noncontributing Resources,” which are historic, and “out-of-period Noncontributing Resources,” which are not considered historic. By virtue of their location within a historic district, Noncontributing Resources are nonetheless subject to the requirements of this subchapter.
- “Period of Significance” means the span of time when a Resource or District attained its significance to meet the local or National Register Criteria.
- “Record of Designation” means the official document that describes how a resource meets the criteria for listing in the Independence Local Historic Register. For properties listed in the Independence National Historic District, the Record of Designation includes the 1989 designation document for the district, and subsequent updates to the designations approved by the State Historic Preservation Office and the National Park Service.
- “Relocation” means the movement of a Resource from its current location.
- “Resource” means a building, Site, object, or district that is listed in the Local Historic Register. A Resource may also be called a “Landmark.”
- “Site,” for the purpose of Subchapter 59 of this code, means the location of a significant event, prehistoric or historic occupation or activity, or a building, whether standing, ruined, or vanished, where the location itself possesses historic, cultural, or archeological value regardless of any existing building or object.

Subchapter 17: Allowed Uses in Residential Zones

ALLOWED USES	ZONE			
	RS	RM	RH	MX
Single-Family dwelling, with a floor area of not less than 1,000 square feet Dwelling, Single Unit	P	P	P	P
Accessory Dwelling Unit	P ¹	P ¹	P ¹	
Two-family dwelling (duplex) Dwelling, Duplex	P	P	P	P
Medium-density residential structure such as a townhouse or row houses, as part of a subdivision or planned unit development Dwelling, Townhouse (up to 4 attached townhouses per structure)	P ²	P	P	P
Dwelling, Triplex or Quadplex	P	P	P	P ²
Dwelling, Quadplex	P	P	P	P
Cottage Cluster Development		P	P	P
Multi-family buildings, including apartment houses, courtyard apartments and garden apartments Dwelling, Multi-Unit			P	P
Manufactured Dwelling Park, in accordance with the provisions of Subchapter 61		CU	CU	
Single room occupancy use, subject to the requirements in ORS 197A.430	P	P	P	P
Dormitory			P	
Fraternity, sorority, or student house			P	
Residential home, as defined by this ordinance	P	P	P	
Residential facility, as defined in this ordinance	CU	P	P	
Nursing home			P	
Planned unit development	CU	CU	CU	CU
Parking area or structure for a multi-family dwelling		P	P	
Accessory uses and structures ³²	P	P	P	P

...

Notes:

1. Permitted in conjunction with single-unit dwellings.
- ~~2. Allowance is limited to a maximum of two attached townhouse or rowhouse units.~~
- ~~3. Permitted without a subsequent Site Design Review so long as the lot for the triplex or quadplex was identified, reviewed, and approved by the Planning Commission at the time of the underlying subdivision application.~~
- ~~4. Must meet parking and access requirements of Subchapter 73.~~
 2. Accessory uses allowed in residential zones include:

- a. Customary residential accessory buildings and structures for private use, such as a pergola, greenhouse, hobby shop, patio, porch, deck, wood shed, shelter for domestic pets of the resident, fence, and fallout shelter;
- b. Private garage, as defined in this ordinance;
- c. Parking area for one commercial vehicle having a gross vehicle weight less than 20,000 pounds;
- d. Parking or storage area for a boat, camper, trailer, or recreational vehicle of the residents;
- e. Swimming pool for private use;
- f. Guest house or quarters not in the main building, when such house or quarters are dependent upon the main building for either kitchen or bathroom facilities or both and are not used for residential purposes;
- ~~g. Accessory dwelling units~~

Subchapter 18: Density, Area, and Dimension Requirements in Residential Zones

DENSITY AND DIMENSION STANDARDS

ZONE

		RS	RM	RH	MX
Density		8	12	20	
Minimum Lot Area					
	Detached Single Unit	4,800 sf	4,800 sf	4,800 sf	N/A ¹
	Townhouses/Rowhouses	2,500 2,400 sf	2,500 2,400 sf	2,500 1,800 sf	2,500 1,800 sf ¹
	Duplex, Triplex, Quadplex (average per unit)	2,400 sf	2,400 sf	1,800 sf	1,800 sf ¹
	Cottage Cluster Development	NA			
	Multiple Family Unit Dwellings	N/A	N/A	N/A	N/A ¹
	All Other	5,000 4,800 sf	5,000 4,800 sf	5,000 4,800 sf	None
Lot Frontage		25	25	25	
Minimum Lot Width					
	Townhouses/Rowhouses	25-20 ft	25-20 ft	25-20 ft	20 ft
	Multiple Unit Dwellings	N/A	N/A	N/A	6 ft/unit min 30 ft/unit max
	All Other	50 N/A	50 N/A	50 N/A	35 ft min 100 ft max
Minimum Setbacks					
-Primary Structures					
	Front	15-10 ft	10 ft	5 ft	10 ft
	Side	5 ft (10 ft on Corner Lot)			
	Rear	15-10 ft	15-10 ft	15-10 ft	None
	Alley (Side or Rear)	5 ft	5 ft	5 ft	5 ft
-Attached Garages					

		RS	RM	RH	MX
	Front Garage entrances facing a public street access (driveway length)	19 ft (and 4 feet behind front façade)			
	Other	Same as primary structure			
	Other	1 ft	1 ft	1 ft	
-Detached Garages					
	Front	40 ft	40 ft	40 ft	N/A
	Side (Corner/Alley)	5 ft	5 ft	5 ft	
	Side (Interior)	0	0	0	
	Rear (Interior Lot)	0	0	0	N/A
	Rear (Abutting a Street or Alley)	1 ft	1 ft	1 ft	N/A
	Rear (Corner lot or Other)	Same as Primary Structure			
-Detached Accessory Structures Other than Garages and Fences					
	Front	Same as Primary Structure			
	Side and Rear	5 ft	5 ft	5 ft	N/A
Maximum Lot Coverage					
		40	40	40	40
	Single Unit Dwellings	40%	40%	45%	40%
	Multiple Unit Development	N/A	N/A	60%	70%
	All other Residential Development	45%	45%	50%	50%
	Non-residential development	40%	40%	45%	None
Maximum Height					
	Residential Uses	35 ft	35 ft	45 ft	35 ft
	Church/Public Service Buildings	45 ft	45 ft	45 ft	45 ft
	Other Primary Structure	35 ft	35 ft	45 ft	35 ft
	Accessory Building	15 (or, if primary building is multiple stories, the lesser of the height of the primary building or 25 feet)			

Notes:

1. The average density of residential development in the MX zone must be at least 9 units per acre.

Subchapter 19: Residential Design Standards**Section 19.005: Residential Design Standards**

A. Purpose.

The purpose of the residential design standards is to:

- Establish a base for the quality of the design of new homes;
- Foster pedestrian activity and community interaction;
- Promote the historic residential development patterns found in the Independence Historic District;
- Promote community safety for neighborhood streets and front yards by providing “eyes on the street”; and
- Enhance community livability through the creation of attractive and well-designed housing and streetscapes.

For more information, see Appendix 3: Residential Development Standards, City of Independence (2009). Note: Information contained in Appendix 3 is for information purposes only. When a conflict exists between Appendix 3 and the Independence Development Code, standards contained in the Independence Development Code shall apply.

B. Applicability.

- a. This section is applicable to:
 - i. All newly constructed residential dwellings except manufactured homes located in manufactured home parks.
 - ii. Projects that propose to expand, remodel or alter an existing structure. The standards shall only apply to the portion of the building that will be changed. Provided that if a proposal seeks to continue a feature on the existing building such as the window orientation or style, roof dimension, or siding, the relevant standard may be waived.
- b. The section is not applicable to:
 - i. Normal repair of a building.
- c. For developments permitted before January 2, 2033, per ORS 197A.400, detached single-unit, duplex, triplex, quadplex, townhouse and cottage cluster developments with 20 or more units are exempt from any residential design standard that is intended to preserve the desired character, architectural expression, decoration or aesthetic quality of new homes, including standards regulating the following elements. All other design and siting standards in this code shall apply to the dwellings.
 - i. facade materials, colors or patterns;
 - ii. roof decoration, form or materials;
 - iii. accessories, materials or finishes for entry doors or garages;
 - iv. window elements such as trim, shutters or grids;
 - v. fence type, design or finishes;
 - vi. architectural details, such as ornaments, railings, cornices and columns;
 - vii. size and design of porches or balconies;
 - viii. variety of design or floorplan; or
 - ix. front or back yard area landscaping materials or vegetation.

This section is applicable to:

- ~~All newly constructed residential dwellings except manufactured homes located in manufactured home parks.~~
- ~~Projects that propose to expand;~~

remodel or alter an existing structure. The standards shall only apply to the portion of the building that will be changed. Provided that if a proposal seeks to continue a feature on the existing building such as the window orientation or style, roof dimension, or siding, the relevant standard may be waived.

The section is not applicable to:

- Normal repair of a building.

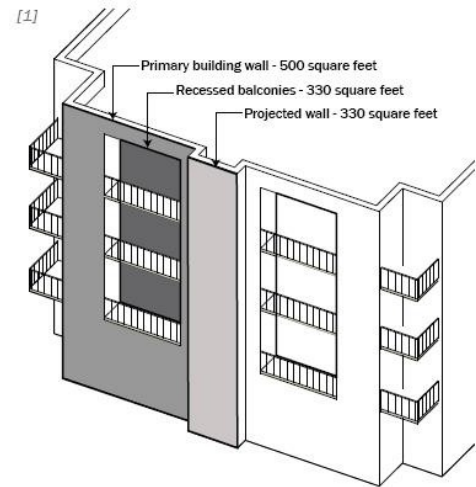


Street Facing Facade. [1] Attached garages on multi-dwelling units should not exceed 50% of the total building length as viewed from the street. [2] The maximum number of detached garages for attached or multi-family units is 4 attached garages that are a maximum of 24 feet wide each.

C. Large Building Elevation

The front elevation of buildings with over 500 square feet of surface area shall be divided into distinct planes consisting of 500 square feet or less. This can be achieved by:

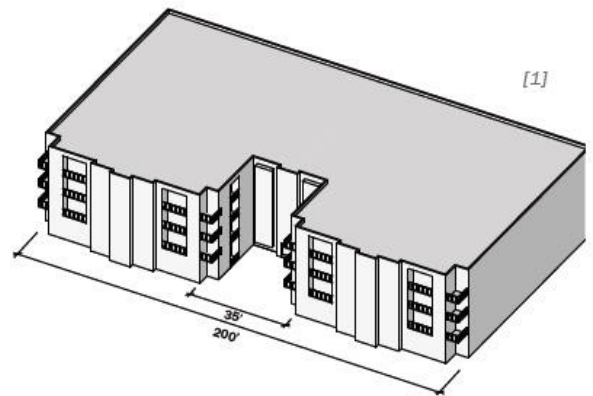
1. Incorporating elements such as a porch or a dormer into the wall plane.
2. Recessing the building a minimum of two (2) feet over ~~six~~ a distance of six (6) feet.
(6) feet.
3. Providing a bay window that extends a minimum of two (2) feet from the primary street-facing facade.



Large Building Elevation. [1] The front elevation of buildings with street-facing facades greater than 500 square feet should carve the building face into smaller, distinct planes, which can be accomplished by [2] incorporating a porch or dormer into the wall plan or [3] recessing the building a minimum of 2 feet over 6 feet.

D. Building Length

1. The maximum building length for multiple-dwelling buildings that face the street shall be 100 feet. This maximum length can increase to 200 feet if a courtyard, portal, or other shared open space is provided in order to create a break in the building wall. This open space shall be a minimum of 35 feet in width and depth.
2. The maximum building length for row houses shall not exceed four (4) units, or 100 feet (from end-wall to end-wall), whichever is less.



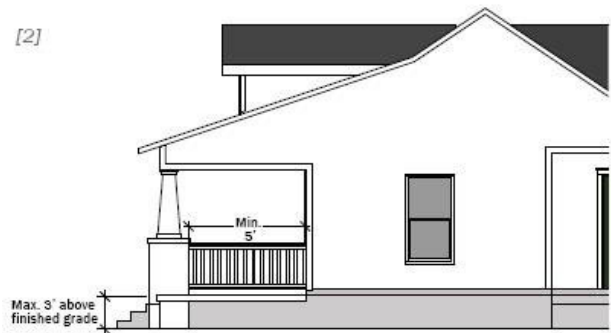
Building Length. In order to control the bulk of buildings and maintain a sense of pedestrian safety and intrigue [1] the maximum building length for multi-dwelling buildings shall be 100 feet, which can increase to 200 feet if a break is provided that is a minimum of 35 feet deep and wide [2] A break can be a portal or space between buildings or [3] a courtyard that provides a transition from the public realm to the private realm.

E. Main Entrance

1. Buildings shall have their primary pedestrian orientation and pedestrian entrance(s) oriented to the street that serves the project site.
2. If a proposal seeks to construct a duplex, townhouse, ~~triplex, quadplex or multifamily~~ multi-unit structure and the project is situated on two streets, the project shall orient ~~one or more~~ units to each street. Provided that, the units may be oriented to the same street, if the parking is accessed off the other street.
3. Primary pedestrian entrance(s) shall connect to the sidewalk via a straight path that is a minimum of five (5) feet wide. Where there is a continuous paved connection between the sidewalk and the front entrance, and if the driveway is within 20-feet of the front door, the driveway may be used to meet this standard.

~~Triples, quadplexes, and multiple-family~~ unit building entrances may include entrances to individual units, lobby entrances, or breezeway/courtyard entrances (i.e., to a cluster of units).

Alternatively, a building may have its entrance oriented to a side yard when a direct pedestrian walkway, a minimum of five (5) feet wide, is provided between the building entrance and the street. In this case, at least one entrance shall be



Main Entrance. Buildings should have [1] front doors that face the street and connect to the sidewalk via a 5 foot wide path at a minimum [2] Porches should be an extension of the living space and be at a minimum 5 feet clear in depth.

provided not more than 20 feet from the closest sidewalk or street.

Porches and stoops shall not be constructed more than three (3) feet above the finished exterior grade (except if the dwelling is in a designated floodplain).

Porches and stoops shall be a minimum of 25 square feet in area and five (5) feet deep, clear from column face to the face of the primary facade to allow for handicap access.

4. For triplex, quadplex, and multi-family unit buildings, ~~direct~~ pedestrian connections shall be created between the front doors of all buildings and the street-facing sidewalk. These connections shall ~~be meet well lit and landscaped, preferably using some type of ADA accessible permeable paver or material be paved with a~~ material that meets ADA accessibility standards.

F. Vehicular Access and Garages

1. Vehicular Access

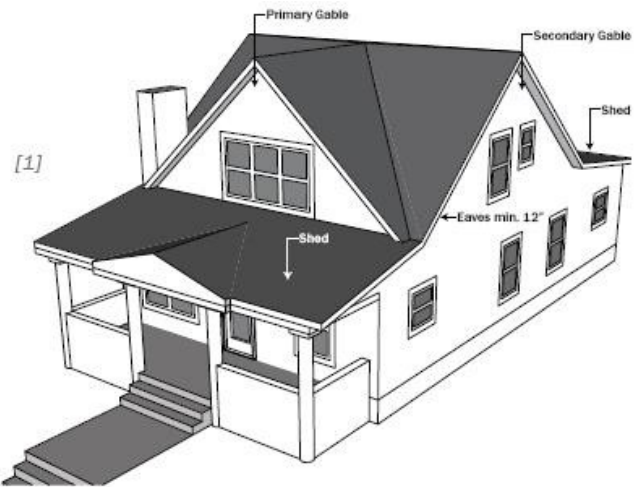
- a. When a project is proposed on a corner lot along an arterial or collector road, the parking garage shall be accessed off the lower classified street or an adjacent alley, unless the applicant demonstrates ~~to the satisfaction of the Public Works Director (per~~ consistent with the Public Works Design Standards) that the access via the lower classified street or alley is not possible.
- b. Townhomes, rowhouses, ~~and~~ duplexes, triplexes, quadplexes and other configurations of more than two dwelling units on a lot ~~receiving access directly from a public or private street~~ shall comply with all of the following standards, ~~in order to minimize interruption of adjacent sidewalks by driveway entrances, slow traffic, improve appearance of the streets, and minimize paved surfaces for better storm water management.:~~
 - i. Where an alley serves a lot, the required parking shall be taken from the alley. Provided that, parking may occur via a current driveway if one exists.
 - ii. When a property is a corner lot, at least 50 percent of

- the required parking shall be accessed off the side of the lot with the largest frontage measurement.
- iii. Surface parking shall not exceed 50 percent of the lot dimension along any street frontage. The calculation of the parking dimension shall include the width of any driveways.
 - iv. Adjacent units shall share one driveway when individual driveways would otherwise be separated by less than 20 feet (i.e., the width of one on-street parking space). When a driveway serves more than one lot, the developer shall record an access and maintenance easement/agreement to benefit each lot, before building permit issuance.
2. When garages face the street, they shall be recessed behind the façade by a minimum of 4 feet.
3. ~~2-~~Any street-facing attached garage ~~on duplex, triplex, quadplex, townhouse, or multiple-dwelling units~~ shall not exceed 50% percent of the overall building length as viewed from the street. For example, a 24-foot-wide unit may have one 12-foot-wide recessed garage facing the street.
4. ~~3-~~The maximum number of detached garages for attached or multiple-dwelling units is four (4) attached garages of a maximum width of 24 feet each (corresponding to a two-car garage).
5. ~~4-~~Detached car ports are allowed provided that:
- a. They meet all standards for garages.
 - b. ~~a-~~They do not exceed the overall lot coverage requirement.
 - c. ~~b-~~They have a capacity of no more than eight (8) vehicles.

G. Roof Forms

For pitched or hipped roof residential buildings:

1. Except for manufactured dwellings, the primary roof shall incorporate a minimum 4/12 roof pitch. Lower roof pitches are allowed on porches.
2. In order to reinforce the pedestrian realm, roof forms shall consist of a primary gable or hip roof with one of the following additional roof forms oriented to the street:
 - a. A secondary gable of equal or smaller size that is oriented to the street and extends from the primary roof form.
 - b. Two or more smaller dormers or a single large dormer that is oriented to the street and extends from the primary roof form.
 - c. A covered front porch that encompasses a minimum of 50% of the street facing living space.
3. All roof eaves (overhangs) shall be a minimum of 12 inches wide.
4. Window(s), trimmed vent(s), changes in siding material, knee braces, or a thick



~~frieze board along the roofline or some other type of decorative element~~ shall be incorporated into the gable. For homes set on a corner lot, these features shall also be incorporated when a gable is oriented to the secondary street.

Roof Forms. *[1] Roof pitches less than 4 over 12 are prohibited and roof forms will consist of more than a single large roof form [2] Gables shall be decorated with window(s), trim or a vent [3] Roof eaves will project at a minimum 12 inches.*

H. Exterior Siding and Cladding

1. The following siding and cladding materials shall be allowed outright and must be used on all sides of the dwelling and accessory structures:
 - a. Horizontal wood or cementitious siding that has a maximum of 7 inches in width revealed. Horizontal siding or banding with a reveal exceeding 7 inches may be used for secondary purposes.
 - b. Wood or cementitious shingles that have a maximum of 12 inches in width revealed.
 - c. Board and batten vertical siding.
 - d. Brick or stone veneer.
2. In order to promote high-quality buildings that will be maintained for generations, the following materials shall be prohibited:
 - a. T-111 or similar sheet materials.
 - b. Plastic or Vinyl. This requirement does not apply to trim materials.



Exterior Siding and Cladding. [1] Wood or cementitious siding that has a maximum of 7 inches in width revealed and [2] wood or cementitious shingles that have a maximum of 12 inches in width revealed are allowed outright along with board and batten vertical siding and brick or stone veneer.

I. Required Street and Alley Windows

1. All detached single-family dwellings, townhouses, rowhouses, ~~and~~ duplexes, triplexes, quadplexes, and cottage cluster dwellings shall have vertically-oriented windows along required street and alley facades. Square or horizontal windows shall be formed by combining multiple window sashes into groupings. Transom windows and other windows placed above a door or window for ornamental or decorative purposes are exempt from this requirement.
2. Windows shall occupy a minimum of ~~15%~~ the alley and street-facing facades shown in Table 19.005-1:

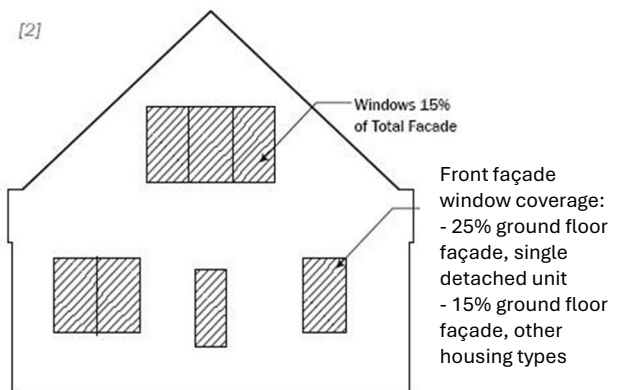
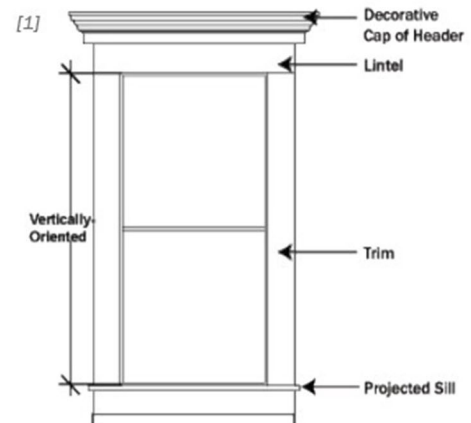


Table 19.005-1 – Street and Alley Façade Window Requirements¹

	Front – Ground Floor Living Façade Area Façade² (Percent)	Side – Ground Floor Living Façade Area² for Corner Lots (Percent)	Front or Side – Overall Façade Area³	Rear – Ground Floor Living Area and Total Façade Area
<u>Detached, Single- Unit Building</u>	<u>25</u>	<u>15</u>	<u>15</u>	<u>0</u>
<u>Other Development</u>	<u>15</u>	<u>15</u>	<u>15</u>	<u>0</u>

¹ Front or side window requirements only apply to streets and alleys. No windows are required on the rear of a structure so long as the required windows are provided on the front and sides of the structure.

² Ground floor living façade area is the length of the home facing the street or alley multiplied by the height of the first floor. The area does not include any area included in a garage.

³ Overall facade area is the length of the home facing the street or alley multiplied by the height of the structure. The area does not include any areas included in a triangle created by a sloped roof.

Examples of the location of required windows are provided in Figure 19.005-1

Figure 19.005-01

- ~~3. For detached housing, a minimum of 25% of the ground floor living area façade that faces the street (defined as the first habitable floor level of a building directly accessible from the exterior finished grade) shall consist of windows. This can include windows in the front door.~~
- ~~4. 3. 4. Structures set on a corner lot must have windows on at least 15% of the ground floor living area façade that faces the secondary street. The windows must meet the requirements of IDC 19.005(I)(45).~~
- ~~5. 4. The following types of windows are shall be prohibited along street and alley facing facades:~~
 - a. Horizontal slider windows.
 - b. Windows that use “mirror” or reflective glass.
- ~~6. 5. All windows on the street and alley-facing façades shall incorporate all of the following elements:~~
 - a. A decorative header/cap.
 - b. Continuous trim.
 - c. Projected windowsill.

~~7. J. Non-Required Windows. All non-required street facing windows shall incorporate continuous trim.~~

~~K~~J. Doors

Doors shall be made of wood, metal-clad wood, metal, or cast fiberglass, provided that the material reflects a traditional wood door and can be painted.

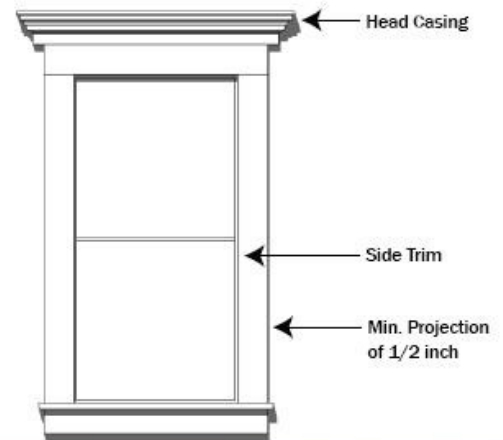


Doors. All residential doorways should face the street in order to connect the interior of the residence with the sidewalk and street in order to foster a more inviting and safe pedestrian environment.

Trim

1. All required street and alley facing windows and doors shall have side trim and head casings. Windows shall also have a projected or articulated windowsill.
2. All non-~~required~~ ~~street facing~~ windows shall have continuous trim.
3. Trim shall be a minimum of 3½ inches wide and project no less than a ½ an inch from the wall.

[1]



[2]



Trim. [1] All street-facing windows and doors shall have side trim and head casings [2] Trim shall be at a minimum 3½ inches wide and project no less than ½ an inch from the wall.

L.M. Foundations

1. Concrete block, poured in place concrete, or brick shall be allowed as foundation material on all residential types, provided that the foundation material is no more than three (3) feet above the street facing finished grade (except if the dwelling is in a designated floodplain).



[1]

2. All street facing concrete block and poured in place concrete foundations shall be landscaped with a continuous line of a range of planting materials that are a minimum of 50% site obscuring and three (3) feet high at maturity.



[2]

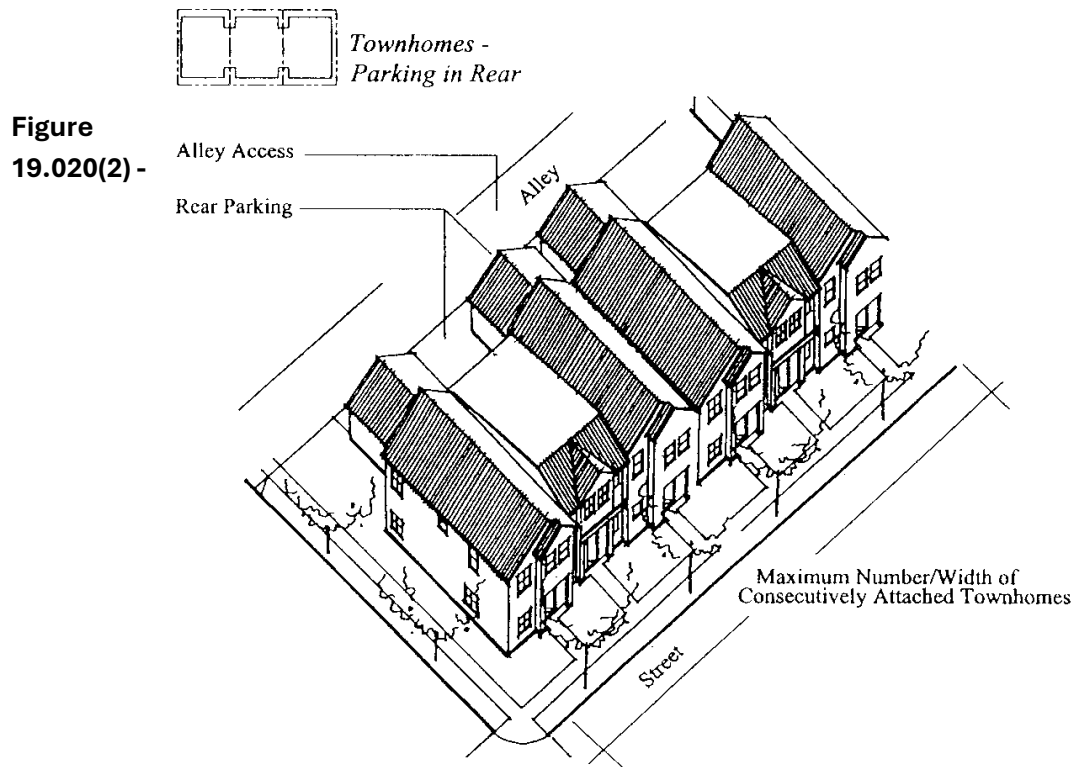
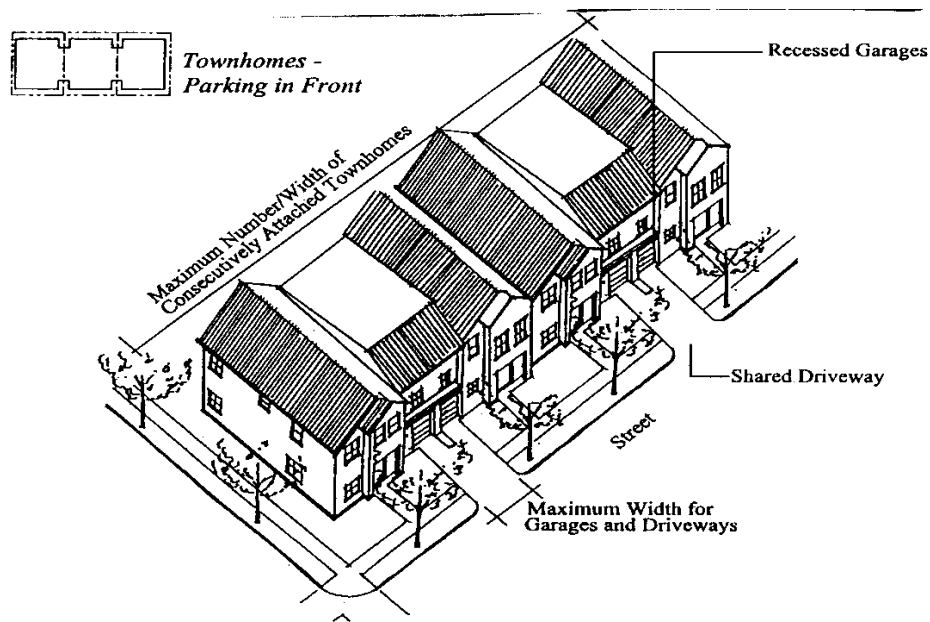
[3]

Exposed foundations or front porches can be sheathed with wood siding (clapboard) as an extension of the primary façade.

Foundations. Allowed foundation materials include concrete block, poured in place concrete, and brick [1] Concrete block and poured in place concrete should be landscaped with a continuous materials that obscure the foundation [2] These planting materials should be 50% obscuring and 3 feet high at maturity [3] The landscaped area should be 3 feet deep and covered with ground cover where not planted with site planting materials.

Section 19.020: Special Standards for Certain Uses

- A. ~~Single-family Unit~~ Attached Townhomes, Rowhouses, ~~Triplexes and Quadplexes~~. ~~Single-family unit~~ attached housing (townhome units on individual lots), rowhouse, ~~and duplex triplex and quadplex~~ developments shall comply with the standards in 1-34, below. The standards are intended to control development scale; avoid or minimize impacts associated with traffic, parking, and design compatibility; and ensure management and maintenance of common areas.
1. Building Mass Supplemental Standard. The maximum number and width of consecutively attached townhomes (i.e., with attached walls at property line) shall not exceed four (4) units, or 100 feet (from end-wall to end-wall), whichever is less.
 2. Provision of Alleys. Townhome, rowhouse and duplex subdivisions (4 or more lots) may receive vehicle access from a rear alley. Proposed new ~~a~~Alley(s) shall be created at the time of subdivision approval. Alleys are not required when existing development patterns or topography make construction of an alley impracticable (See #3 for standards). As necessary, the city shall require dedication of right-of-way or easements and construction of pathways between townhome lots (e.g., between building breaks).

Figure 19.020 (1) - Townhomes With Alley Access**Townhomes With Street Access**

3. ~~Street Access Developments.~~ Townhomes, rowhouses, and duplexes receiving access directly from a public or private street shall comply with all of the following standards, in order to minimize interruption of adjacent sidewalks by driveway entrances, slow traffic, improve appearance of the streets, and minimize paved surfaces for better storm water management.:

a. ~~When garages face the street, they shall be recessed behind the front elevation (i.e., living area or covered front porch) by a minimum of 4 feet.~~

b. ~~The maximum allowable driveway width facing the street is 24 feet per dwelling unit. The maximum combined garage width per unit is 50 percent of the total building width. For example, a 24-foot wide unit may have one 12-foot wide recessed garage facing the street.~~

c. ~~Two adjacent garages shall share one driveway when individual driveways would otherwise be separated by less than 20 feet (i.e., the width of one on-street parking space). When a driveway serves more than one lot, the developer shall record an access and maintenance easement/agreement to benefit each lot, before building permit issuance.~~

43. Common Areas. “Common areas” (e.g., landscaping in private tracts, shared driveways, private alleys, and similar uses) shall be maintained by a homeowners association or other legal entity. A homeowners association may also be responsible for exterior building maintenance. A copy of any applicable covenants, restrictions and conditions shall be recorded and provided to the city before building permit approval.

- B. Multiple-unit housing. Additional standards for ~~multifamily~~ multi-unit housing are listed in the applicable underlying zone.

Subchapter 21: Medium-Density Residential (RM) Zone**Section 21.065: Development Standards for Multiple-Family Unit Development**

[...]

- C. Screening. All exterior garbage collection areas, recycling areas, and mechanical equipment shall be screened ~~with a sight obscuring fence, wall and/or sufficient landscaping which meets to meet~~ the standards of Section 54.010(C) of the Independence Development Code. ~~Unightly~~ Garbage collection areas, recycling areas and mechanical equipment shall be located away from the street.
- ~~D. Recreation Area. Each lot having a multiple-family unit residential building on it shall have at least 300 square feet of recreation area per dwelling unit. The required recreation area can be located within the required front or rear yards. The required recreation area shall be planted with. Recreation areas that are provided as shared areas for multiple units shall include a combination of the following amenities: or otherwise developed and landscaped in a manner suitable for pedestrian traffic and recreation.~~
- E. ~~D.~~ Access. Access points to property from a street shall be located to minimize traffic congestion, ~~and maximum effort shall be made to and~~ avoid directing traffic into residential areas. Existing access roads and access points shall ~~be used to the maximum extent possible to serve the greatest number of uses, comply with the Public Works Design Standards.~~ All access roads and driveways shall be surfaced with asphaltic concrete or similar permanent surfacing.

Subchapter 22: High-Density Residential (RH) Zone**Section 22.065: Development Standards for Multiple-Family Unit Development**

[...]

- C. Screening. All exterior garbage collection areas, recycling areas, and mechanical equipment shall be screened ~~with a sight obscuring fence, wall and/or sufficient landscaping which meets to meet~~ the standards of Section 54.010(C) of the Independence Development Code. ~~Unightly~~ Garbage collection areas, recycling areas and mechanical equipment shall be located away from the street. ~~Shared storage facilities for trash and recycling receptacles that are located within 20 feet of a street lot line or a lot line abutting residential property shall meet the following standards:~~
- D. Recreation Area. Each lot having a multiple-family unit residential building on it shall have at least 300 square feet of recreation area per dwelling unit. The required recreation area can be located within the required front or rear yards. ~~The required recreation area and shall be planted with~~ include a combination of planted grass and hardscape areas. ~~Hardscape areas shall not account for more than 50% of the total area.~~ Recreation areas that are provided as shared areas for multiple units shall include a combination of the following amenities: ~~or otherwise developed and landscaped in a manner suitable for pedestrian traffic and recreation.~~

- a. Outdoor seating.
 - b. Small play structures or nature play structures.
 - c. Planted grass areas.
- E. Access. Access points to property from a street shall be located to minimize traffic congestion, ~~and maximum effort shall be made to~~ and avoid directing traffic into residential areas. Existing access roads and access points shall ~~be used to the maximum extent possible to serve the greatest number of uses, comply with the Public Works Design Standards.~~ All access roads and driveways shall be surfaced with asphaltic concrete or similar permanent surfacing.

Subchapter 23: Mixed Density Residential (MX) Zone

Section 23.010: Density

To achieve balance and integration of a range of housing types, sizes, and densities, the Mixed Density Residential (MX) Zone relies on two criteria.

- A. The intent of the MX Zone is to achieve a minimum average density of nine (9) dwelling units per net acre of residential land, while allowing a mix of lot sizes and densities. Net acres of residential land means the total site area devoted to residential uses, not including the area of streets, other rights-of-way to be dedicated to the public, or protected wetland or riparian areas. Net acres does include any area to be devoted to the trail/stormwater/drainage corridors located along the edges of the planning area and adjacent to riparian and wetland areas or corridors.
- B. To reflect the demand for higher-density housing within the region, at least 15 percent of the units must be either in multiple-family or attached single-family structures.

Section 23.025: Building Setbacks

Move standards to table in Subchapter 18.

Section 23.030: Density, Area and Dimension Requirements

Move standards to table in Subchapter 18.

Section 23.035: Building Height

Move standards to table in Subchapter 18.

Section 23.065: Development Standards for Multiple-Family Development

- A. ~~Multiple-family unit housing. Multiple-family unit housing is allowed per the Site Design Review process within the Mixed Residential (MX) Zone. Multiple-family housing means housing that provides three (3) or more dwellings on an individual lot. New multiple-family unit developments shall comply with all of the following standards:~~
 - 1. Common open space standard. Inclusive of required setback yards, a minimum of 15 percent of the site area shall be designated and permanently ~~reserved as~~ reserved as usable common open space in developments ~~that are at least three (3)~~

- ~~acres in size~~ with more than ~~4~~20 multiple-family unit or attached single-family unit dwellings as specified by Subsection 23.010(B). The site area is defined as the lot or parcel on which the development is planned, after subtracting any required dedication of street right-of-way and other land for public purposes (e.g., public park or school grounds, etc.). Sensitive lands and historic buildings or landmarks open to the public and designated by the Comprehensive Plan may be counted toward meeting the common open space requirements.
2. Private open space standard. Private open space areas shall be required for ground-floor and upper-floor housing units based on all of the following standards:
 - a. A minimum of 50 percent of all ground-floor housing units shall have front or rear patios or decks measuring at least 48 square feet. Ground-floor housing means the housing unit entrance (front or rear) is within 5 feet of the finished ground elevation (i.e., after grading and landscaping);
 - b. A minimum of 50 percent of all upper-floor housing units shall have balconies or porches measuring at least 24 square feet. Upper-floor housing means housing units that are more than 5 feet above the finished grade; and
 - c. Private open space areas shall be oriented toward common open space areas and away from adjacent single-unit family residences, trash receptacles, parking and drives to the greatest extent practicable.
 3. Exemptions. Exemptions to the common open space standard may be granted for the land area associated with the first 20 units of a larger project when these developments are within one-quarter mile (measured walking distance) of a public park; and there is a direct, accessible (i.e., Americans With Disabilities Act-compliant), ~~lighted~~, and maintained pedestrian trail or sidewalk between the site and the park. An exemption shall be granted only when the nearby park provides active recreation areas such as play fields; children's play area, sports courts, walking/fitness course, or similar facilities.
 4. Landscaping. All development is subject to the landscaping provisions in Subchapter 54. Recreation areas may be included as part of the required landscaping.
 5. Screening. All exterior garbage collection areas, recycling areas, and mechanical equipment shall be screened ~~with a sight-obscuring fence, wall and/or sufficient landscaping which meets to meet~~ the standards of Section 54.010(C) of the Independence Development Code. ~~Unightly~~ Garbage collection areas, recycling areas and mechanical equipment shall be located away from the street.
 6. Signs. Signs shall be subject to the provisions of Subchapter 58.

Subchapter 34: Downtown Riverfront Zone

Section 34.050: ~~Duplex, Triplex, Quadplex, Townhomes, Rowhouses and Multifamily Multiple-Unit Standards~~

- A. ~~Single-family Attached Townhomes, Rowhouses, and Triplexes, Quadplexes, and Townhouses~~

- B. ~~Single-family attached housing (townhome units on individual lots), and rowhouse~~ Triplex, quadplex, and townhouse developments shall comply with the standards in 1-4, below. The standards are intended to control development scale; avoid or minimize impacts associated with traffic, parking, and design compatibility; and ensure management and maintenance of common areas.

1. ~~Windows. All detached single-family dwellings, triplexes, quadplexes, and townhouses, rowhouses~~ shall have vertically-oriented windows. Square or horizontal windows shall be formed by combining multiple window sashes into groupings. Transom windows, and other windows placed above a door or window for ornamental or decorative purposes are exempt from this requirement.
2. ~~Building Mass Supplemental Standard. Within the Downtown Riverfront Zoning District, the maximum number and width of consecutively attached townhomes (i.e., with attached walls at property line) shall not exceed four(4) units, or 120 feet (from end-wall to end-wall), whichever is less.~~
3. ~~Townhome, rowhouse subdivisions (4 or more lots) may receive vehicle access from a rear alley. Alley(s) shall be created at the time of subdivision approval. As necessary, the city shall require dedication of right- of-way or easements and construction of pathways between townhome lots (e.g., between building breaks).~~
4. ~~Street Access Developments. Triplexes, quadplexes, and t~~ Townhomes receiving access directly from a public or private street shall comply with all of the following standards, in order to minimize interruption of adjacent sidewalks by driveway entrances, slow traffic, improve appearance of the streets, and minimize paved surfaces for better stormwater management.
 - a. When garages face the street, they shall be recessed behind the front elevation (i.e., living area or covered front porch) by a minimum of 4 feet.
 - b. The maximum allowable driveway width facing the street ~~is 24 feet per dwelling unit shall comply with the Public Works Design Standards.~~ The maximum combined garage width per unit is 50 percent of the total building width. For example, a 24-foot-wide unit may have one 12-foot wide recessed garage facing the street.
 - c. Two adjacent garages shall share one driveway when individual driveways would otherwise be separated by less than 20 feet (i.e., the width of one on-street parking space). When a driveway serves more than one lot, the developer shall record an access and maintenance easement/agreement to benefit each lot, before building permit issuance.
5. ~~Common Areas. "Common areas" (e.g., landscaping in private tracts, shared driveways, private alleys, and similar uses) shall be maintained by a homeowners association or other legal entity. A homeowners association may also be responsible for exterior building maintenance. A copy of any applicable covenants, restrictions and conditions shall be recorded and provided to the city before building permit approval.~~

B. ~~Multiple-family~~ Unit housing.

~~Multiple-family housing means housing that provides three (3) or more dwellings on an individual lot. New multiple-family unit developments shall comply with all of the following standards:~~

- ~~1. Common open space standard. Inclusive of required setback yards, a minimum of 15 percent of the site area shall be designated and permanently reserved as usable common open space in developments that are at least three (3) acres in size with more than 10 multiple-family or attached single-family dwellings. The site area is defined as the lot or parcel on which the development is planned, after subtracting any required dedication of street right-of-way and other land for public purposes (e.g., public park or school grounds, etc.). Sensitive lands and historic buildings or landmarks open to the public and designated by the Comprehensive Plan may be counted toward meeting the common open space requirements.~~
2. 1. Private open space standard. Private open space areas shall be required for ground-floor and upper-floor housing units based on all of the following standards:
 - a. A minimum of 50 percent of all ground-floor housing units shall have front or rear patios or decks measuring at least 48 square feet. Ground-floor housing means the housing unit entrance (front or rear) is within 5 feet of the finished ground elevation (i.e., after grading and landscaping);
 - b. A minimum of 50 percent of all upper-floor housing units shall have balconies or porches measuring at least 24 square feet. Upper floor housing means housing units that are more than 5 feet above the finished grade; and
 - c. Private open space areas shall be oriented toward common open space areas and away from adjacent single-unit family residences, trash receptacles, parking and drives to the greatest extent practicable.
- ~~3. Exemptions. Exemptions to the common open space standard may be granted for multiple-unit developments of up to 10 units. Exemptions may be granted for the first 20 units of a larger project when these developments are within one-quarter mile (measured walking distance) of a public park; and there is a direct, accessible (i.e., Americans With Disabilities Act-compliant), lighted, and maintained pedestrian trail or sidewalk between the site and the park. An exemption shall be granted only when the nearby park provides active recreation areas such as play fields; children's play area, sports courts, walking/fitness course, or similar facilities.~~
4. 2. Landscaping. All development is subject to the landscaping provisions in Subchapter 54, except as amended in subsection 34.055(B). Recreation areas may be included as part of the required landscaping.
5. 3. Screening. All exterior garbage collection areas, recycling areas, and mechanical equipment shall be screened with a sight obscuring fence, wall and/or sufficient landscaping which meets to meet the standards of Section 54.010(C) of the Independence Development Code. ~~Unightly~~ Garbage collection areas, recycling areas and mechanical equipment shall be located away from the street.

5. 4. Design Review. All new developments and expansion of an existing development shall be subject to the Site Design Review procedures of Subchapter 80.

Section 34.055: Additional Development Standards

[...]

C. Access. Access points to property from a street shall be consolidated and located to minimize traffic congestion, ~~and maximum effort shall be made to avoid directing traffic into residential areas.~~ Existing ~~a~~ Access roads and access points shall ~~be used to the maximum extent possible to serve the greatest number of users~~ comply with the Public Works Design Standards. All access roads and driveways shall be surfaced with asphaltic concrete or similar permanent surfacing.

Subchapter 54: Buffering, Screening, Landscape and Ash Creek Setback Requirements

Section 54.005: Applicability

- A. ~~All subject properties developed development within the city, except for single-unit dwellings or duplexes in residential zones, are is required to be buffered, screened and landscaped in accordance with the provisions of this Subchapter. All planting materials, species, sizes and installation details shall be in substantial conformance with the Independence Urban Forestry Management Plan. The requirements of this subchapter are in addition to any yard setback requirements or other requirements contained in the zoning or city code.~~ Development shall mean land use, limited land use, building permit, or development permit applications of any kind or the erection, or construction of buildings, structures, parking lots and streets and roads in all zones.
- B. ~~All planting materials, species, sizes and installation details shall be in substantial conformance with the Independence Urban Forestry Management Plan. The requirements of this subchapter are in addition to any yard setback requirements or other requirements contained in the zoning or city code.~~ Development shall mean land use, limited land use, building permit, or development permit applications of any kind or the erection, construction or exterior remodeling of buildings, structures, parking lots and streets and roads in all zones, except for single-family dwellings or duplexes in residential zones.

[...]

Section 54.010: Buffering and Screening Requirements

[...]

- C. Screening shall be used to eliminate or reduce the visual impacts of the following:
1. service areas and facilities, including garbage and waste disposal containers, recycling bins and loading areas;
 2. outdoor storage and outdoor display areas;
 3. parking areas of 6 or more vehicles for a ~~multiple-family unit,~~ mixed-use or commercial development, when the parking is directly adjacent to a single-unit

- ~~family~~ home, duplex, townhouse, or residential zone and the screening can be used to screen the adjacent residential use from the parking area;
4. parking areas for 30 or more vehicles for industrial uses;
 5. at and above-grade electrical and mechanical equipment, such as transformers, heat pumps, and air conditioners; and
 6. any other area or use as required by this Ordinance.
- D. Screening of shared storage facilities for trash and recycling receptacles that serve more than one dwelling and all outdoor storage facilities for trash and recycling for commercial and industrial uses may shall be accomplished by the use of sight-obscuring plant materials (generally evergreens), earth berms, walls, fences, building parapets, building placement or other design techniques. meet the following standards:
1. The storage facility shall be screened by a wall, solid fence, or evergreen hedge. The screen must be at least 4 feet in height and located no more than 3 feet from the storage facility.
 2. The storage facility must be separated from residences on abutting properties and from the street lot line by at least 5 feet.
 3. The storage facility shall not be located between the front lot line and a structure. The facility shall be located in an alley where one exists.
- E. Other screening required under this section shall meet the following standards:
1. Any facility or feature that requires screening, other than those listed in 54.010(D) shall be screened from view from residences and neighboring streets by a wall, solid fence, or evergreen hedge that is of a minimum height of at least one foot taller than the facility or feature being screened. Solar collecting panels are exempt from this requirement.
- F. ~~E-~~When a required screen or buffer is adjacent to a street, the required fence structures shall be located so that the landscaped portion of the buffer is oriented toward the right-of-way.
- G. ~~F.~~ ~~All mechanical equipment on roofs shall be screened when abutting a residentially designated property or an arterial street. Screening shall obscure mechanical equipment at elevation. Solar collecting panels are exempt from this requirement.~~

[...]

Section 54.105: Ash Creek Setbacks Required

- A. There shall be a 25' greenway setback required along the banks of Ash Creek for all development except middle housing development (triplex, quadplex, cottage clusters, and townhomes). The 25' shall begin at the top of the bank or at the high water mark, whichever is higher. There shall be no development within the required setbacks. Middle housing shall have a 100' setback, beginning at the top of the bank or at the high water mark, whichever is higher.

Section 54.205: Landscaping Requirements

- A. Site Landscaping Standards

1. Multiple-family-unit residential developments or dwelling structures containing ~~three (3)~~ five (5) or more units ~~and are not cottage cluster development:~~

[...]

Subchapter 59: Historic Preservation

Section 59.40: Definitions

Words, phrases and terms used in this subchapter shall have the following meanings:

~~“Contributing Resource” means a building, Site, or object, originally constructed within the applicable Period of Significance that retains and exhibits significant integrity (location, design, setting, materials, workmanship, feeling, and association) to convey a sense of history. These properties strengthen the historic integrity of an existing or potential historic district, as indicated on the Local Historic Register.~~

~~“Demolition” means the intentional destruction of all or a part of a building or structure.~~

~~“District” means an area designated pursuant to this Chapter which includes buildings, properties or sites of historical or architectural significance. National Historic District means a District listed on the National Register of Historic Places. Local Historic District means a District listed on the Local Historic Register. Certain Resources may be designated within both Local and National Historic Districts.~~

~~“Height” means the height of a Building, as defined in Independence Development Code (IDC) Subchapter 13. Height includes foundation walls, porch roofs, and main roofs.~~

~~“Historic Preservation Commission” means the body of appointed officials established in Independence Municipal Code (IMC) Section 2-260. For purposes of review procedures under this Subchapter, the Historic Preservation Commission replaces the Planning Commission as the initial review body.~~

~~“Historic Preservation Officer” means the city official responsible for the administration of this code.~~

~~“Historic Residential Overlay” means a portion of a historic district, defined on a map that has been adopted by the City of Independence which is typified by residential dwellings. The residential standards for new construction apply to the area, even if a commercial use or multifamily dwelling is proposed within the structure.~~

~~“Independence National Historic District” means the District designated on the National Register of Historic Places through the 1989 Record of Designation, as shown on City of Independence official zoning map.~~

~~“Listed Resource” means an individual historic resource, which has not been designated as part of a larger district, which has been placed on the Local Historic Register.~~

~~“Local Historic Register” means the list of historic Resources officially recognized by the City of Independence as important in its history and afforded protection under this subchapter.~~

~~“National Register of Historic Places” or “National Register” means the nation’s official list of buildings, Sites, objects, and districts that are important for the nation’s history and maintained by the National Park Service in Washington, D.C. The list includes “national register resources” as designated by OAR 660-023-0200(8).~~

~~“Noncontributing Resource” means a building, Site, or object that does not retain or exhibit sufficient integrity (location, design, setting, materials, workmanship, feeling and association) to contribute to an existing or potential historic District in its current condition. Noncontributing Resources may include “historic Noncontributing Resources,” which are historic, and “out-of-period Noncontributing Resources,” which are not considered historic. By virtue of their location within a historic district, Noncontributing Resources are nonetheless subject to the requirements of this subchapter.~~

~~“Period of Significance” means the span of time when a Resource or District attained its significance to meet the local or National Register Criteria.~~

~~“Record of Designation” means the official document that describes how a resource meets the criteria for listing in the Independence Local Historic Register. For properties listed in the Independence National Historic District, the Record of Designation includes the 1989 designation document for the district, and subsequent updates to the designations approved by the State Historic Preservation Office and the National Park Service.~~

~~“Relocation” means the movement of a Resource from its current location.~~

~~“Resource” means a building, Site, object, or district that is listed in the Local Historic Register. A Resource may also be called a “Landmark.”~~

~~“Site” means the location of a significant event, prehistoric or historic occupation or activity, or a building, whether standing, ruined, or vanished, where the location itself possesses historic, cultural, or archeological value regardless of any existing building or object.~~

Subchapter 73: Parking

Section 73.010: Required Number of Parking Spaces

A. Residential Uses	Minimum Number of Spaces Required
1. All residential zones Single-Unit Dwellings and Duplexes	1 space per unit/3 spaces per unit (maximum)

<u>2. Triplex and Quadplex</u>	<u>1 space per unit</u>
<u>3. Townhouses</u>	<u>1 space per unit</u>
<u>4. Cottage Cluster Development</u>	<u>1 space per unit</u>
2-5. Multiple-family unit or attached dwellings	1 space per unit
3-6. Residential unit in a mixed-use building	1 space per unit
<u>4.7. Single room occupancy use</u>	1 space for every 3 single room occupancy units
<u>8. Accessory Dwelling Units</u>	<u>No parking spaces required.</u> <u>Maximum 1 space per unit.</u>

Subchapter 74: Accessory Structures

Section 74.005: General Provisions Regarding Accessory Uses

Accessory uses, including accessory dwelling units, shall comply with all requirements for the principal use except when specifically modified by this section.

[...]

Section 74.010: Specific Standards for Accessory Dwelling Units

- B. Accessory dwelling units shall be subject to the following criteria:
 - 1. One accessory dwelling unit is allowed per legal building lot as a subordinate use in conjunction with any detached single-unit ~~family~~ structure.
 - 2. Accessory dwelling units are required to meet the applicable Residential Design Standards, except as modified below:
 - a. If an accessory dwelling unit is oriented to a street or an alley, the structure is required to have windows on 15 percent on the front of the building (rather than the 25 percent required in IDC 19.005(I)).
 - b. If an accessory dwelling is set behind a building and is not adjacent to a street or alley, no minimum window requirements apply.
 - 3. No off-street parking is required for an accessory dwelling unit.
 - 4. Accessory dwelling units shall not be more than 800 square feet in size, excluding any related garage area that is constructed for the use. All accessory dwelling units shall be permanently affixed to the ground.

5. Where an accessory dwelling unit is proposed inside or attached to a single-family unit residence, only one entrance to the main building is permitted in the front of the principal residence. A separate entrance for the accessory unit shall be located off the side or the rear of the building.
6. Accessory dwelling units shall meet all technical code standards including building, electrical, fire, plumbing, and other applicable code requirements.
7. An accessory dwelling unit and the primary structure on the lot shall ~~have a be~~ served by a single water meter, and the water bill for the primary structure and the accessory dwelling units shall be in the name of the property owner.
8. System Development Charges shall be charged ~~at the same level as required for a second unit in a duplex.~~ per the adopted system development charge methodology.
9. Addressing for an accessory dwelling unit shall be approved by the City of Independence.

Subchapter 75: General Development Standards

Section 75.030: Average Setback from Street

- ~~A.—Every building in the RS Zone shall be set back from the front lot line at least 15 feet, except where the average setback of other buildings on the same side of the street is less than 15 feet.~~
- ~~B.—The average setback shall be found by measuring the distance from the front lot line to the closest part of the foundation for all dwellings which are within 200 feet of the subject property and which adjoin the same side of the street as that abutting the subject property. Buildings closer than 10 feet or farther than 20 feet from the front lot line shall not be counted in determining average setback.~~
- ~~C.—When other sections of this ordinance or any other ordinance require a greater setback than is specified in this section.~~

Section 75.060: Zero-Side-Yard-(Townhouse)-Dwelling Units

~~Zero side yard townhouse~~ Townhouse units permitted in residential zones or authorized in approved subdivisions or Planned Unit Developments shall meet the following use and development standards:

- A. Number of attached units. The number of townhouse units constructed as an adjoining structure shall not be more than four (4) dwelling units, each on a lot held in separate ownership. More than one such structure may be allowed per subdivision or planned unit development.
- ~~B.—Yards adjacent to a street. This Section does not relieve the requirements of this Ordinance for yards adjacent to a street.~~
- ~~C.~~ B. Maintenance easement. As a condition of issuance of a permit for any building having an exterior wall contiguous to a property line, the applicant shall furnish an easement from the owner of the property adjacent to said wall providing for ingress, egress, and use of such adjacent property for the purpose of maintaining, repairing, and

replacing the building. Said easement shall be appurtenant to the property on which the building is located and shall be approved as to form by the City Attorney and shall be recorded with Polk County prior to issuance of the permit.

(NEW SECTION) Section 75.070: Cottage Cluster Developments

- A. Siting Standards. The siting standards in the table below apply to the development of a Cottage Cluster on a lot.

Siting Standards - Cottage Cluster	
Minimum Number of Cottages per Cottage Cluster	5 cottages
Maximum Number of Cottages per Cottage Cluster	8 cottages
Average Cottage Size. Based on average floor area of all cottages and community buildings within the cottage cluster.	1,400sf or less
Average Cottage Footprint	
• Average of cottages with height of 15 feet or less	1,400 sf or less
• Average of cottages with height over 15 feet	900 sf or less
Maximum Building/Structure Height	25 ft
Minimum Site Perimeter Setbacks	Same as underlying zone.
Maximum Lot Coverage	45%
Minimum Required Open Space - Courtyard	150 sf per cottage
Vehicle Parking	See Section 73.010.
Areas Owned in Common Common areas must be maintained by a homeowners association or other legal entity. Such legal entity may also be responsible for exterior building maintenance. A copy of any applicable covenants, restrictions and conditions must be recorded and provided to the city prior to issuance of a building permit.	

B. Design Standards

1. Cottage orientation. Cottages must be clustered around a common courtyard as demonstrated by meeting the following standards:
 - a. Each cottage within a cluster must have a main entrance that is directly connected to the common courtyard by a pedestrian walkway.
 - b. A minimum of 50 percent of cottages within a cluster must:
 1. Be within 10 feet from the common courtyard, measured from the façade of the cottage that includes the main entrance to the nearest edge of the common courtyard; and
 2. Have a main entrance that either faces the common courtyard or is no more than 20 feet from the common courtyard.

- c. Exceptions. An existing dwelling included within a cottage cluster may be excluded from the calculation of cottages oriented toward the common courtyard at the applicant's option.
- 2. Common Courtyard Design Standards. Each cottage cluster must share a common courtyard that meets the following standards:
 - a. The common courtyard must be a single, contiguous piece.
 - b. Cottages must abut the common courtyard on at least two sides of the courtyard.
 - c. The common courtyard must be a minimum of 15 feet wide at its narrowest dimension and must meet the minimum required open space area standard in the table in Section 75.070(A).
 - d. The common courtyard shall be developed with a mix of landscaping, lawn area, pedestrian walkways, and/or paved courtyard area, and may also include recreational amenities. Impervious elements of the common courtyard shall not exceed 75 percent of the total common courtyard area.
 - e. Pedestrian walkways must be included in a common courtyard. Walkways that are contiguous to a courtyard shall count toward the courtyard's minimum dimension and area. Parking areas, required setbacks, and driveways do not qualify as part of a common courtyard.
- 3. Community Buildings. Cottage cluster projects may include community buildings for the shared use of residents that provide space for accessory uses such as community meeting rooms, guest housing, exercise rooms, day care, or community eating areas. Community buildings must meet the following standards:
 - a. Each cottage cluster is permitted one community building, which shall count towards the maximum average floor area, pursuant to the table in Section 75.070 (A).
 - b. If a community building meets the definition of a dwelling unit and has a footprint that exceeds the maximum footprint in the table in Section 75.070 (A) and/or would exceed the maximum number of cottages in a cottage cluster, a covenant must be recorded against the property stating that the structure is not a legal dwelling unit and will not be used as a primary dwelling.
- 4. Pedestrian Access.
 - a. An accessible pedestrian walkway must be provided that connects the main entrance of each cottage to the following:
 - 1. The common courtyard;
 - 2. Shared parking areas;
 - 3. Community buildings; and
 - 4. Sidewalks in public rights-of-way abutting the lot or rights-of-way if there are no sidewalks.
 - b. The walkway must be hard-surfaced and a minimum of 5 feet wide.
- 5. Windows and Doors. Standard. Cottages that face a street or alley lot line must meet the following standards:

- a. The front façade must have a minimum of 25 percent windows or pedestrian entrance doors.
 - b. Alley facing façade must have a minimum of 15 percent windows or pedestrian entrance doors.
 - c. All other street-facing facades must have a minimum of 15 percent windows or pedestrian entrance doors.
 - d. Exceptions. The following facades are exempt from these standards:
 1. Facades separated from the street lot line by a dwelling or buildable lot.
6. Parking Design.
 - a. Parking location and access. Parking areas shall meet the standards of Section 19.020.
 - b. Clustered parking. Off-street parking may be arranged in clusters, subject to the following standards:
 1. Cottage cluster projects with fewer than 16 cottages are permitted parking clusters of not more than 5 contiguous spaces.
 2. Cottage cluster projects with 16 cottages or more are permitted parking clusters of not more than 8 contiguous spaces.
 3. Parking clusters must be separated from other spaces by at least 4 feet of landscaping.
 4. Clustered parking areas may be covered.
 - c. Screening. Landscaping, fencing, or walls at least 3 feet tall shall separate clustered parking areas and parking structures from common courtyards and public streets.
 - d. Garages and carports.
 1. Individual attached garages up to 200 square feet shall be exempted from the calculation of maximum building footprint for cottages.
 2. Individual detached garages must not exceed 400 square feet in floor area.
 3. Garage doors for attached and detached individual garages must not exceed 20 feet in width.
7. Accessory Structures.
 - a. Accessory structures must not exceed 400 square feet in floor area.
 - b. Accessory structures must not be located between a cottage and common open space or courtyard.
8. Existing Structures. On a lot to be used for a cottage cluster project, an existing detached single-unit dwelling on the same lot at the time of proposed development of the cottage cluster may remain within the cottage cluster project area under the following conditions:
 - a. The existing dwelling may be nonconforming with respect to the requirements of this code.
 - b. The existing dwelling may be expanded up to the maximum height or the maximum building footprint in Section 75.070 (A); however, existing

dwellings that exceed the maximum height and/or footprint of this code may not be expanded.

- c. The floor area of the existing dwelling shall not count towards the average cottage size of a cottage cluster.

- 9. Trash Storage. Shared trash storage facilities for trash and recycling receptacles as defined in Chapter 13 of the IDC shall meet the screening standards of 54.010(C).

Subchapter 90: Subdivision Regulations**Section 90.40.015 Filing an Application for a Minor Partition Action.**

The City Manager or designee shall examine each application to ascertain if the appropriate forms have been completed, the appropriate fees have been paid and if all required documents and information have been submitted. Three copies of a sketch map 18 by 24 inches in size containing the date, north point, scale and sufficient description to define the location and boundaries of the parcel to be partitioned shall be submitted to the City Manager or designee along with the following information:

- A. The name and address of the owner of record and of the person who prepared the map.
- B. The names and addresses as compiled from the most recent county property tax assessment roll of all property owners within 100 feet of the entire contiguous site for which the application is made. Notice shall also be provided to any neighborhood or community organization recognized by the governing body and whose boundaries include the site.
- C. The approximate acreage of the parcel under a single ownership or, if more than one ownership is involved, the total contiguous acreage of all landowners directly involved in the minor partition.
- D. For land adjacent to and within the parcel to be partitioned, the locations, names and existing widths of all streets and easements of way; location, width and purpose of all other existing easements; and location and size of sewer and water lines, drainage ways and power poles.
- E. Outline, location and setback dimensions to property lines of existing buildings to remain in place.
- F. Outline, location, approximate date of original construction and dimensions of existing building and other structures to be removed.
- G. Lot layout, showing size and relationship to existing or proposed streets and utility easements.
- ~~H. Such additional information as required by the City Manager or designee.~~

Section 90.40.025: Standards for Minor Partition Requests.

The City Manager or designee may approve the minor partition application upon a finding that:

- A. The proposed division complies with the requirements for its submittal, all requirements of the Comprehensive Plan, the intent and purposes of this Chapter and all other applicable laws and regulations;
- B. The proposed division is not contrary to previous conditions imposed upon the use or development of the subject parcel by the Planning Commission; and

- C. The proposed division is consistent with the extension of existing or planned City improvements such as streets and has dedicated necessary rights-of-way and easements for the improvements.
- ~~D. The City Manager or designee may require dedication of land and easements and may specify conditions or modifications in the sketch plan necessary to carry out the City's Comprehensive Plan standards, land use regulations and other applicable legal requirements. In no event, however, shall the City Manager or designee require greater dedications or conditions than could be required if the parcel were subdivided.~~
- E. D. If the parcel of land to be partitioned exceeds five acres and within a year is being partitioned into more than two parcels, any one of which is less than one acre, full compliance with all requirements for subdivisions ~~may be~~ is required ~~if the City Manager or designee should determine that the entire parcel being partitioned is in the process of being divided into small parcels.~~

Section 90.80: Improvements

Section 90.80.005: Improvement Requirements

The following improvements are summarily required in subdivision and major partitions, and may be applied to minor partitions as conditions for approval and shall be installed at the expense of the subdivider. Applicants may choose to follow the general/discretionary standards track or the Clear and Objective standards track, where offered, in the standards below:

- A. Water Supply. Lots within a subdivision shall be served by ~~a an adequate~~ city water supply system conforming to ~~city specifications~~ Public Works Design Standards. ~~Testing of new water lines is required using city approved methods. Required water mains and service lines shall be installed prior to the curbing and paving of new streets in all new subdivisions or partitions.~~
- B. Sewage. All lots shall be served by ~~an adequate~~ a city sewage disposal system conforming to ~~city specifications~~ Public Works Design Standards. ~~The materials and methods of construction of any sewer line shall provide for a water-tight system. Testing of new sewer lines is required using city approved methods.~~
- C. Drainage. Such grading shall be performed and drainage facilities installed conforming to ~~city specifications~~ Public Works Design Standards. ~~as is necessary to provide property drainage within the subdivision and other affected areas in order to assure healthful, convenient conditions for the residents of the subdivision and for the general public. Drainage facilities in the subdivision shall be connected to drainage ways or storm sewers outside the subdivision. Dikes and pumping systems shall be installed if necessary to protect the subdivision against flooding or other inundation. All drainage improvements must conform to Subchapter 80, Storm Water Management Requirements and applicable State and Federal laws.~~
- D. Streets.
 - 1. General/Discretionary Standard: The subdivider shall grade and improve streets in the subdivision and the extension of such streets to the paving line of existing streets with which such streets intersect in accordance with ~~city specifications~~

Public Works Design Standards. The paving line of existing streets shall be "saw-cut" to provide the most stable joint with the new street construction. Treatment of the joint created at this point will conform with general road construction standards. Section design will be based on an on-site soils investigation, report and recommendation by a licensed geotechnical foundation engineer. The road sub-base, base and asphalt overlay shall be tested for compaction requirements outlined in the engineer's report or as recommended by the city.

2. Clear and Objective Standards:
 - a. Wherever existing streets are within, adjacent to, or provide access to a property proposed for subdivision or partition, those existing streets must be improved to the standards of Public Works Design Standards.
 - b. The subdivision or partition shall provide for the continuation of the principal streets existing in the adjoining subdivision or partition when adjoining property which is not subdivided, and such streets shall be of a width not less than the minimum requirements for streets set forth in Public Works Design Standards.
 - c. During consideration of the tentative plan for the subdivision or partition, the Public Works Director, shall determine whether improvements to existing streets adjacent to or within the tract, are necessary to meet the Public Works Design Standards. If so determined, such improvements shall be required as a condition of approval for the tentative plan.
- E. Pedestrian Ways. Sidewalks shown on the street sections shall be installed as located on those sections as a result of the subdivision or major partition. The date of sidewalk installation shall conform with the procedures outlined in Subsection 90.90.105.
- F. Bikeways. Bikeways consistent with the Independence-Monmouth Bicycle Master Plan and the Independence Transportation System Plan shall be installed in accordance with City standards Public Works Design Standards.
- G. Monuments. Monuments shall be installed in accordance with Public Works Design Standards and with the requirements of the Oregon Revised Statutes.
- H. Service Utilities.
 1. General/Discretionary Standard: Before approval shall be given of any plat or plan of any subdivision, the subdivider shall provide for the installation of all service utilities in underground conduits and for easements therefor in the manner as hereby set forth and subject to the conditions set forth in this ordinance. The city may require installation of said utilities to any boundary line of the parcel being divided as to provide for the orderly extension of utilities or future development.
 2. Clear and Objective Standard: All permanent utility services to lots or parcels in a subdivision or partition shall be provided from underground facilities. The subdivision or partition shall:
 - a. Obtain a permit from the City for placement of all underground utilities;
 - b. Make all necessary arrangements with the utility companies and other persons or corporations affected by the installation of such underground utilities in accordance with the rules and regulations of the State Public Utility Commission; and

- c. The city shall require installation of said utilities to any boundary line of the parcel being divided as to provide for the orderly extension of utilities or future development.
- I. Above-Ground Utility Prohibited. In all new subdivisions in the City of Independence hereafter approved by the Commission it shall be unlawful for any service utility or utilities to be installed or used above the surface of the ground except on a temporary basis upon a special permit issued by the Building Official, but no use under such a special permit shall extend for a total period of more than six months from the date of issue of the first permit therefore. All new street light poles shall be metal. The developer is responsible for any initial cost for such poles (one time fee and concrete footings). The developer will contact and coordinate this work with the appropriate utility.
- J. Manner of Installation.
 - 1. General/Discretionary Standard: All service utilities installed as herein provided shall be installed at a depth and in the manner conforming to city specifications.
 - 2. Clear and Objective Standard: All service utilities shall be installed in public utility easements prior to the surfacing of such streets.
- K. Acceptance of Public Improvements. Acceptance of all public improvements will comply with ~~Section V – Acceptance Policies of the City of Independence Specifications and Standards for Public Works Construction~~ the City of Independence Public Works Standards.
- L. Middle Housing Land Divisions. For middle housing developments where a Middle Housing Land Division is proposed, the following conditions shall be met.
 - 1. Sidewalks are required for the parent lot and any child lots with street frontage.
 - 2. Each resulting dwelling unit shall be served by a separate water service line and sewer service line.
 - 3. Individual water service lines shall be connected to a public water main located either in the public right-of-way (ROW) or in a public easement on private property subject to the following conditions:
 - a. The public water main is constructed to the City’s Public Works Design Standards.
 - b. Future repair or replacement of the public water main will be the responsibility of the City of Independence.
 - c. If located in a public easement, the dimensions and location of the easement shall be approved by Public Works.
 - 4. Individual sewer service lines shall be connected to a public sewer main located either in the public right-of-way (ROW) or in a public utility easement on private property subject to the following conditions:
 - a. The public sewer main is constructed to the City’s Public Works Design Standards.
 - b. Future repair or replacement of the public sewer main will be the responsibility of the City of Independence.
 - c. If located in a public easement, the dimensions and location of the easement shall be approved by Public Works.

5. Public utility easements shall comply with the Public Works Design Standards.

Section 90.80.010: Improvement Procedures

~~In addition to other requirements, All improvements shall conform to the requirements of this ordinance and improvement standards or specifications adopted by the City and shall be installed in accordance with the following procedure: the Public Works Design Standards.~~

- A. Work shall not be commenced until plans have been reviewed for adequacy and approved by the City ~~and the developer enters into a development agreement with the City.~~ For evaluation of the subdivision proposal, the engineering plans will be required before approval of the final map or plat. All plans shall be prepared in accordance with ~~acceptable engineering standards by a registered engineer, licensed to practice in the State of Oregon~~ the Public Works Design Standards. The fee for engineering plan review shall be set by the City Council.
- B. Work shall not be commenced until the city has been notified in advance, and if work has been discontinued for any reason it shall not be resumed until the city has been notified. A pre-construction meeting with the city is required prior to any construction activity, including material storage and mobilization of equipment to the site.
- C. Required improvements shall be inspected by ~~and constructed to the satisfaction of the city to ensure they meet the Public Works Design Standards. The city may require changes in typical sections and details if unusual conditions arising during construction warrant such change in the public interest.~~ The cost of improvement plan review and inspection will be paid by the developer in accordance with ~~90.60.075.24(L).(1). the fee schedule set by the City Council. The fee for construction inspection shall be set by the City Council.~~ The developer shall submit cost estimates for such improvements to the City for review and approval. The cost estimates must be prepared and stamped by a licensed engineer, registered in the State of Oregon.
- D. Underground utilities, television cables, telephone lines, sanitary sewers and storm drains installed in streets by the subdivider shall be constructed prior to the surfacing of the streets. Stubs for service connections for underground utilities, television cable, telephone lines, and sanitary sewers shall be placed to lengths that will avoid the need to disturb street improvements when service connections are made.
- E. ~~Two (2) copies and one (1) reproducible copy of the plans showing public improvements a~~ As-builts shall be filed with the ~~city~~ Public Works Department in compliance with the Public Works Standards by the subdivider/developer or ~~his~~ their agent upon completion of the improvements.

Section 90.80.015: Specifications for Improvements

~~Specifications for improvements shall be adopted by or under authority of city ordinance.~~

Section 90.90: Design and Development Standards

90.90.005 Principles of Acceptability.

Subdivisions and major partitions shall conform to any development plans and shall take into consideration tentative plans made in anticipation thereof. Subdivisions and major partitions shall conform to the requirements of state law and the standards established by this chapter.

90.90.10 Streets

- A. General. The location, width, and grade of streets, bikeways and pedestrian facilities shall be considered in their relation to existing and planned streets, bikeways and pedestrian facilities, to topographical conditions, to public convenience and safety, and to the proposed use of the land to be served by the streets. All streets, bikeways and pedestrian facilities shall connect to other said facilities within the development and to existing and planned streets, bikeways, and pedestrian facilities outside the development. Where location is not shown in the Independence Transportation System Plan, Public Works Design Standards, or another a development plan, the arrangement of streets in a subdivision shall either: provide for the continuation or appropriate projection of existing and planned streets, bikeways and pedestrian facilities in surrounding areas.
- ~~1.—Provide for the continuation or appropriate projection of existing and planned streets, bikeways and pedestrian facilities in surrounding areas; or~~
 - ~~2.—Conform to a plan for the neighborhood approved or adopted by the Planning Commission to meet a particular situation where topographical or other conditions make continuance or conformance to existing streets, bikeways and pedestrian facilities impractical.~~
- B. Widths of street rights-of-way and paving design for streets shall ~~not be less than those set forth in the table below. The street section shall be designed in accordance with Subsection 90.80.005-D: comply with the Public Works Design Standards. Provided that S~~ streets within the Southwest Independence Concept Plan area shall be designed in accordance with the street cross sections provided in the Southwest Independence Concept Plan, except when modified by the Independence Transportation System Plan. Where applicable, the street cross-sections provided in the Southwest Independence Concept Plan supersede any conflicting standards in this section. Engineering staff may make exceptions to the standards based on individual site conditions.
- C. The width of street rights-of-way ~~provided in the table below~~ shall comply with the Public Works Design Standards and be the minimum widths of rights-of-way for streets existing along and adjacent to any boundary of the subdivision or partition which is the natural or planned continuation of the alignment of the existing or proposed streets, and the applicant shall dedicate additional rights-of-way, as determined by the City ~~in accordance with such table,~~ for any such adjacent street where the existing width of rights-of-way for such street is less than the minimum in said table.
- D. Street Standards: See Public Works Design Standards for right of way, street lanes, bike lanes, planter strip, and sidewalk widths.
- E. Slope Easements. Slope easements shall be dedicated in accordance with ~~specifications adopted by the City Council:~~ the Public Works Design Standards.

- F. Reserve Strips or Block. The City may require the land divider to create a reserve block controlling the access to a street, said block to be placed under the jurisdiction of the ~~Council~~ City to:
1. ~~To p~~ Prevent access to abutting land at the end of a street in order to assure the proper extension of the street pattern and the orderly development of land lying beyond the street.
 2. ~~To p~~ Prevent access to the side of a street on the side where additional width is required to meet the right-of-way standards provided in the above table.
 3. ~~To p~~ Prevent access to land abutting a street of the partition or subdivision, but not within the partition or subdivision itself.
 4. ~~To p~~ Prevent access to land unsuitable for building development.
- G. Alignment. As far as practical, streets shall be in alignment with existing streets by continuations of the center lines thereof. Staggered street alignment resulting in "T" intersections shall, ~~wherever practical, leave a minimum distance of 200 feet between the center lines of streets having approximately the same direction and otherwise shall not be less than 125 feet~~ comply with the Public Works Design Standards.
- H. Future Extension of Streets. Where necessary to give access to or permit a satisfactory future subdivision of adjoining land, streets shall be extended to the boundary of the subdivision and the resulting dead-end streets may be approved without a turnaround. Reserve strips or blocks may be required to preserve the objectives of street extensions.
- I. Intersections of Streets:
1. Angles: ~~Streets shall intersect one another at an angle as near to the right angle as is practicable considering topography of the area and previous adjacent layout. Where not practicable, the right-of-way and street paving within the acute angle shall have a minimum of 30 feet centerline radius where such angle is not less than 60 degrees. In the case of streets intersecting at an angle of less than 60 degrees, then of such minimum as the City may determine in accordance with the purpose of Section 90.10.010 of this chapter.~~ Angles of street intersections shall comply with the Public Works Design Standards.
 2. Offsets: ~~Opposing intersections shall be designed so that no offset dangerous to the traveling public is created. Intersections on arterial streets should be separated by at least 500 feet; and in no case shall there be an offset of less than:~~
 - a. ~~(250 feet) on a minor arterial street. To the greatest extent possible the City shall also encourage consolidation of curb cuts and access points on arterial streets.~~
 - b. ~~(125 feet) on local and collector streets.~~

Opposing intersections shall be designed in compliance with the Public Works Design Standards to ensure that no offset creates dangerous conditions for the traveling public.

3. Collector and Residential Lot Access to Arterials and Collectors: When residential development abuts an existing or proposed arterial or collector street, lot access shall connect to internal local streets or alleys and comply with the Public Works Design Standards.

~~When a residential development abuts an existing or proposed arterial or collector, the Planning Commission shall require that access to such streets be limited by one of the following means:~~

- ~~a. — The lots of the development back onto the arterial or collector and front onto a parallel local street.~~
 - ~~b. — A series of cul-de-sacs, U-shaped streets, shared driveways, or short loops entered from and designed generally at right angles to the arterial or collector street and where no lots derive direct access to the arterial or collector street.~~
 - ~~c. — Lots that would only have access to an arterial or collector shall be restricted to the collector street.~~
- J. Topography. The layout of streets shall ~~give suitable recognition to surrounding topographical conditions~~ be in accordance with the purpose of Section 90.10.010 of this chapter and comply with the Public Works Design Standards.
 - K. Future Extension of Streets. Where the subdivision or partition is adjacent to land likely to be divided in the future, streets shall continue through boundary lines to provide for the orderly division of such adjacent land or the transportation and access needs of the community.
 - L. Existing Streets. Whenever existing streets adjacent to or within a tract are of inadequate width with regard to right-of-way and/or roadway pavement, additional right-of-way and/or roadway pavement shall be provided by the developer(s) at the time of subdivision.
 - M. Cul-de-sac. The use of cul-de-sacs is discouraged and may only be approved upon a showing by the applicant that there are unusual or unique circumstances that justify the cul-de-sac ~~There shall be no cul-de-sacs more than 400-200 feet long or serving more than 20 single-family dwellings. Each cul-de-sac shall have a circular end with a minimum diameter of right-of-way width and paving as shown in the table in this subchapter. The use of cul-de-sacs shall be discouraged and may only be approved upon a showing by the applicant of unusual or unique circumstances justifying the cul-de-sac. A public access way connecting two (2) cul-de-sacs shall be required consistent with the standards for public accessways in Section 90.90.015(D).~~

For purposes of this section, “unusual or unique circumstances” exist when one of the following conditions prevent a required street connection:

1. Slopes are equal to or greater than 12 percent;
2. A wetland or other water body is present which cannot be bridged or crossed; or
3. Existing development on adjacent property prevents a street connection.

- When cul-de-sacs are used, each cul-de-sac shall comply with the Public Works Design Standards. There shall be no cul-de-sacs more than 400 feet in length or serving more than 20 single-unit dwellings.
- A public access way shall be required to connect two (2) adjoining cul-de-sacs consistent with the standards for public accessways in Section 90.90.015(D).
- N. Street Names. Streets that are in alignment with existing named streets shall bear the names of such existing streets. Names for streets that are not in alignment with existing streets are subject to approval by the City of Independence, Planning Commission, and need written approval by the Polk County Fire District #1 and the Independence Police Department, and shall not unnecessarily duplicate or resemble the name of any existing or platted street in the City.
- O. Grades and Curves. ~~Grades shall not exceed six percent on arterials, 10 percent on collector streets, or 12 percent on all other streets. Centerline radii on curves shall not be less than 300 feet on arterials, or 230 feet on all other streets and shall be to an even 10 feet. Where existing conditions, particularly the topography, make it otherwise impractical to provide buildable lots, the Planning Commission may accept steeper grades and sharper curves. In flat areas allowance shall be made for finished street grades having a minimum slope, preferably, of at least 0.33 percent. and curves shall comply with the Public Works Design Standards.~~
- P. Streets Adjacent to Railroad Rights-of-Way. Wherever the proposed subdivision contains or is adjacent to a railroad right-of-way, provision may be required for a street approximately parallel to and on each side of such right-of-way at a distance suitable for the appropriate use of the land between the streets and the railroad. The distance shall be determined with due consideration at cross streets of the minimum distance required for approach grades to a future grade separation and to provide sufficient depth to allow screen planting along the railroad right-of-way.
- Q. Marginal Access Streets. Where a subdivision abuts or contains an existing or proposed arterial street, the Planning Commission may require marginal access streets, reverse frontage lots with suitable depth, screen planting contained in a non-access reservation along the rear or side property line, or other treatment necessary for adequate protection or residential properties and to afford separation of through and local traffic. Access shall comply with 90.90.010(10)C of this section.
- R. Alleys. Alleys shall be provided in commercial and industrial districts, and residential developments per 90.90.010(V), unless other permanent provisions of access to off-street parking and loading facilities are approved by the Planning Commission. The corners of alley intersections shall have a radius of not less than 12 feet.
1. Dedication. The Planning Commission may require adequate and proper alleys to be dedicated to the public by the land divider of such design and in such location as necessary to provide for the access needs of the subdivision or partition in accordance with the purpose of Section 90.10.010 of this chapter.
 2. Width. Width of right-of-way and paving design for alleys shall ~~be not less than 20 feet.~~ comply with the Public Works Design Standards. Slope easements shall be

- dedicated in accordance with specifications in the Public Works Design Standards, adopted by the City Council.
3. Corner Cut-Offs. Where two alleys intersect, 10 feet corner cut-offs shall be provided.
 4. Grades and Curves. Grades and curves shall comply with the Public Works Design Standards, not exceed 12 percent on alleys, and centerline radii on curves shall be not less than 100 feet.
 5. Other Requirements. All provisions and requirements with respect to streets in this subchapter shall apply to alleys the same in all respects as if the word "street" or "streets" therein appear as the word "alley" or "alleys" respectively.
- S. Street trees are required in all new subdivisions in the amount of one tree for every 35 feet of street frontage. Species, size, location and installation construction will conform to the Independence Urban Forestry Management Plan, as adopted by the City Council and shall comply with the Public Works Design Standards. Street trees shall be installed prior to final plat approval or as allowed by an agreement with the City Manager or designee. Temporary irrigation may be required at the time of installation and shall ~~will~~ be maintained by the developer as long as required by dry/hot weather conditions.
- T. Mail Boxes. Plans for mail boxes to be used, including type and location, shall be approved by the Independence Postmaster.
- U. Paving, strip, and signage. All street plans shall include all required street signs, traffic control signs, and pavement striping. ~~All pavement striping shall use a heat tape process. The developer shall furnish and install these items to city standards. in accordance with the Public Works Design Standards.~~
- V. Access Management. New access to arterials and collectors shall be limited. Shared or consolidated access shall be required for development or land divisions adjacent to these facilities unless demonstrated to be unfeasible.
1. Number of Access Points. All proposed development shall have access to a public right-of-way. Spacing requirements for access points and intersections on arterials and collector streets shall comply with the Public Works Design Standards and the Transportation System Plan. ~~be as shown in the following two tables:~~
[...]
 2. The distance between access points shall be measured from the centerline of the proposed driveway or roadway to the centerline of the nearest adjacent roadway or driveway.
 3. Frontage on Service Roads and Common Drives or Use of Alleys.
 - a. Projects proposed on arterials shall include a frontage or service road or use an alley and shall take access from the frontage road facility rather than the arterial. ~~Frontage road design shall conform to ODOT standards.~~ This access requirement may be met through the use of interconnecting parking lots which abut the arterial.
 - b. Adjacent uses may share a common driveway provided that appropriate access easements are granted between and among property owners.

4. Alternative Designs. Where natural features or spacing of existing driveways and roadways cause the foregoing access requirements to be physically unfeasible, alternate designs ~~may shall be approved~~ reviewed in accordance with the Public Works Design Standards.
 5. Access to Residential Lots. All lots in a proposed residential subdivision shall have frontage on and access from a local ~~or collector~~ street ~~or alley~~.
- W. Bicycle Requirements. Bike lanes or shared bike lanes shall be provided during the construction, reconstruction, or relocation of arterial and collector streets. Design and construction of bikeways, or other public paths shall conform to the requirements of the Public Works Design Standards. ~~American Association of State Highway and Transportation Officials (AASHTO) as revised and adopted in the “Oregon Bicycle and Pedestrian Plan”.~~
- X. Pedestrian Requirements.
1. Sidewalk shall be constructed along all arterial, collector, and local service streets.
 2. The design and construction of sidewalks and other public paths shall conform to the requirements of the Public Works Design Standards. ~~“Oregon Bicycle and Pedestrian Plan”, ADA requirements, and City of Monmouth standards.~~
- Y. Accessways. Where required:
1. Accessways shall be located to provide a reasonably direct connection between likely pedestrian and cyclist destinations. A reasonably direct connection is a route which minimizes out-of-direction travel for most of the people likely to use the multiple-use path considering terrain, safety, and likely destinations.
 2. The design and construction of accessways shall conform to the requirements of the “Oregon Bicycle and Pedestrian Plan”, ADA requirements, and City of Independence standards.
- Z. Lighting. ~~No illumination of pathways that are off street or in riparian areas shall be allowed, unless otherwise allowed by the Independence Public Works Director. Lighting of sidewalks along roadways shall comply with the Public Works Design Standards and IESNA Lighting Standards. Illumination of all sidewalks and bicycle paths will be provided in conjunction with all new development. Adequacy of the lighting plan will be consistent with AASHTO standards and approved by the City Manager or designee. Metal street light poles with concrete bases are required.~~

(NEW SECTION) Section 90.115 Middle Housing Land Divisions.

A Middle Housing Land Division (MHL D) is a partition or subdivision of a lot or parcel on which middle housing is developed or proposed. MHL Ds are regulated by this Code and ORS 92.031. The purpose of an MHL D is to provide a simplified and expedited process for subdividing or partitioning lots with middle housing so that each unit is on a separate property, which enables the units to be sold and owned individually.

- A. Applicability. MHL Ds are available in zoning districts where middle housing is permitted under this Code. Middle housing development that is eligible for an MHL D may consist of:

1. A single duplex, triplex, quadplex, cottage cluster, or structure containing townhouses;
 2. Any retained or rehabilitated existing units on the lot or parcel that is part of the middle housing development.
 3. An MHL D creates two (2) or more lots or parcels from a single parent lot on which middle housing is developed or proposed. After a MHL D is completed, the resulting lots or parcels are “child lots” or “middle housing lots.” The approved development is still subject to the requirements and development standards that applied to the parent lot prior to the MHL D. In addition, the resulting development is still defined as and subject to the development standards that apply to the original middle housing type after an MHL D is completed (e.g., a duplex that undergoes an MHL D does not become a townhouse development; the structure and property are still subject to requirements/standards for a duplex).
- B. Application Timing and Sequencing.
1. An application for an MHL D shall be filed with the City and accompanied by the appropriate fee. It shall be the applicant’s responsibility to submit a complete application that addresses the review criteria of this Section.
 2. An application for a tentative plan for an MHL D may be submitted before, after, or at the same time as the submission of an application for building permits for the middle housing.
 3. An application for a tentative plan for an MHL D may be submitted at the same time as an application for a standard subdivision or partition. The standard land division would create the parent lot(s), and the MHL D would further subdivide the lot(s) into middle housing child lots.
 4. An application of one or more than one MHL D submitted at the same time as an application for a standard subdivision or partition will be consolidated into a single application subject to the procedural requirements for the standard subdivision or partition.
 5. Within the same calendar year as an original partition that was not an MHL D, one or more of the resulting vacant parcels may be further partitioned into 3 or fewer parcels through an MHL D.
 6. Approval of the creation of MHL D parent lots does not constitute approval of a MHL D on such lots unless all of the requirements of Section 90.115 are satisfied.
- C. Tentative Plan Approval Criteria. Approval of a tentative plan for an MHL D will be granted if the City Planning Official finds that the applicant has met all of the criteria in Subsections (1) through (6), below. The City’s standard tentative plan approval criteria do not apply.
1. The middle housing development, including all existing and proposed structures, complies with:
 - a. The Oregon Residential Specialty Code; and
 - b. The middle housing regulations applicable to the parent lot, including, but not limited to the provisions in this Code.
 2. Exactly one dwelling unit will be located on each resulting child lot except for:
 - a. Lots, parcels, or tracts used as common areas, on which no dwelling units will be permitted; or
 - b. Lots or parcels with an existing detached single-unit dwelling and accessory dwelling unit or an existing duplex, as allowed under Subchapter 17. Such

existing units shall be considered a single middle housing unit for the purposes of the MHL.

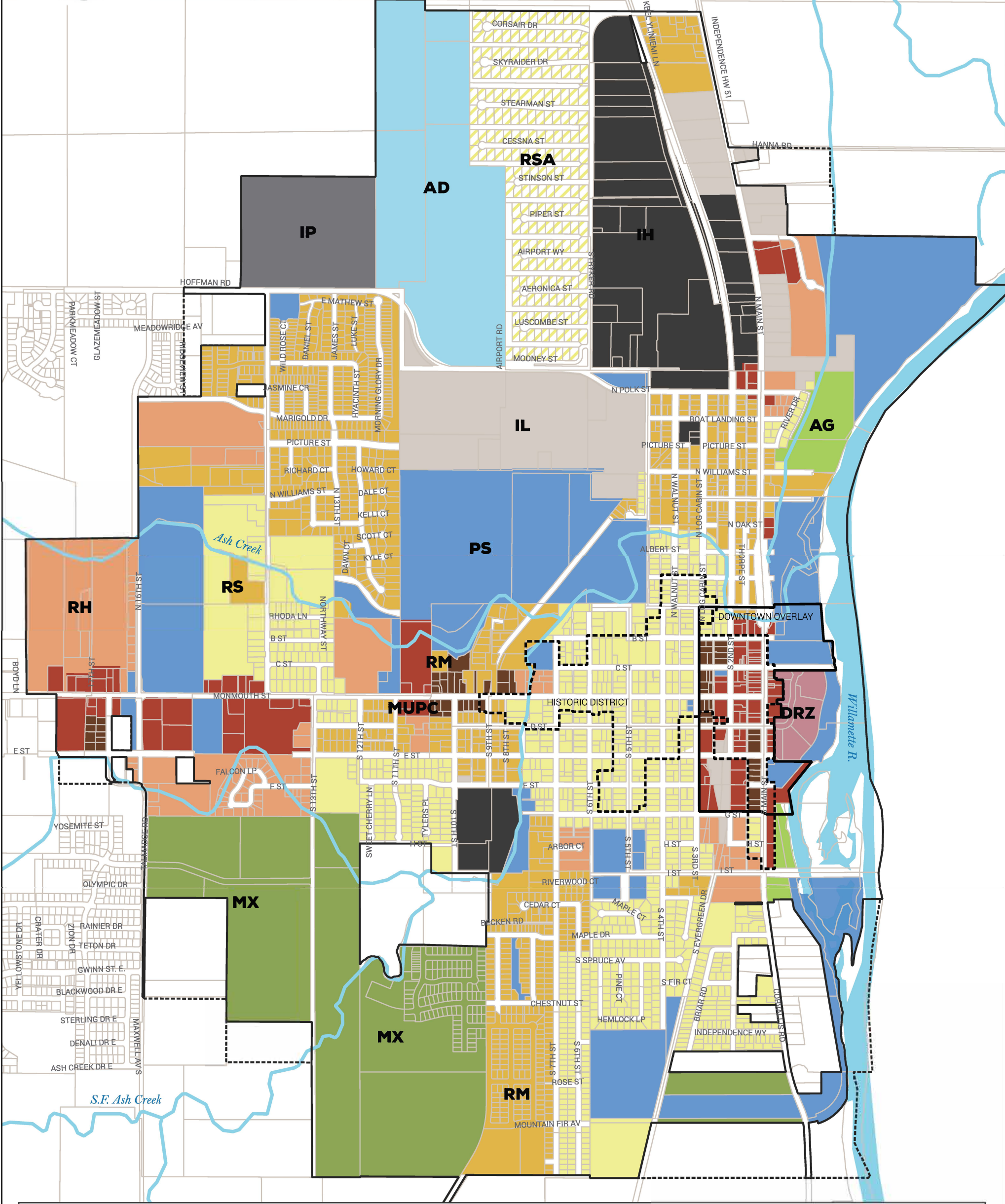
3. Utility service connections will be provided for each child lot and associated dwelling as described in Section 90.80.005 of this Code.
 4. Easements will be provided as necessary for each dwelling unit on the site for:
 - a. Locating, accessing, replacing, and servicing all utilities;
 - b. Pedestrian access from each dwelling unit to a private or public road;
 - c. Access to any common use areas or shared building elements; and
 - d. Access to any dedicated driveways or parking.
 5. Buildings or structures on a resulting child lot will comply with applicable building code provisions.
 6. Where a resulting child lot abuts a street that does not meet City standards, street frontage improvements will be constructed and, if necessary, additional right-of-way will be dedicated, pursuant to requirements of Sections 90.80 and 90.90 of this ordinance and consistent with the Public Works Design Standards.
- D. Tentative Plan Submittal Requirements. An application for an MHL tentative plan shall include the following:
1. The boundaries, dimensions, and area of the lot;
 2. The location, width, and names of all proposed streets, flag lot accessways, and public accessways, including those abutting the perimeter of the lot;
 3. The location and use of all existing and proposed buildings and accessory structures on the lot, indicating the distance of such buildings and accessory structures to all property lines and adjacent on-site structures and identification of any that will be removed;
 4. The location of all existing and proposed off-street parking and vehicle use areas;
 5. The location of all existing or proposed public utility connections for each dwelling unit, demonstrating compliance with approval criterion 90.115 (C) and with Sections 90.80 and 90.90;
 6. Existing or proposed easements necessary for each dwelling unit on the plan, demonstrating compliance with the criterion in Section 90.115(C)..
 7. A description of the manner in which the proposed land division will satisfy the approval criteria in Section 90.115(C).
 8. Copies of approved building permits or building permit applications, or comparable information necessary to demonstrate compliance with building code standards, and an accompanying site plan demonstrating compliance with criteria in Section 90.115(C).
- E. Tentative Plan Conditions of Approval. The City may attach conditions of approval of a tentative plan for an MHL to:
1. Prohibit further division of the resulting child lots.
 2. Require that a notation appear on the final plat indicating:
 - a. The approval was given under ORS 92.031.
 - b. The type of middle housing approved on the subject site and noting that the middle housing type shall not be altered by the MHL (e.g., a duplex that undergoes an MHL does not become another type of middle housing or a single family detached home; the structure and property are still subject to requirements/standards for a duplex).
 - c. Accessory dwelling units are not permitted on resulting child lots.

3. The City may require that all public improvements and site improvements needed to satisfy approval criteria in Section (C) and the applicable standards of the City's code are constructed or guaranteed prior to the approval and signing of the final plat for the development.
 4. The preliminary approval of an MHL D is void if and only if a final MHL D plat is not recorded within 3 years of the preliminary approval.
- F. Tentative Plan Procedure. An application for a MHL D can utilize the following procedures:
1. Expedited Procedure. Unless the applicant requests to use the City's standard land division procedure or a MHL D is submitted concurrent with a standard subdivision (and is requested to be reviewed concurrent with the subdivision), the City shall apply the procedure used for an Expedited Land Division, as provided below and in ORS 197.365. A decision for an MHL D processed under ORS 197.365 is not subject to the requirements of ORS 197.797.
 - a. The City Planning Official shall make a decision to approve or deny the application and shall provide notice of the decision to the applicant within 63 days of receiving a completed application, as described in ORS 227.178. Notice shall not be provided to any other person.
 - b. The MHL D review process does not include a hearing and the City does not accept public comment from third parties.
 - c. The City shall issue a written determination of compliance or noncompliance with the approval criteria in Subsection (C). An approval may include conditions of approval pursuant to Subsection (E) to ensure that the application meets all applicable requirements.
 - d. The written determination shall include a summary statement explaining the determination, and an explanation of the applicant's right to appeal the determination under ORS 197.830 to 197.855.
 - e. The applicant shall pay a fee according to the City's fee schedule.
 - f. Only the applicant may appeal a decision for an MHL D processed as an Expedited Land Division made under this section.
 2. Standard Procedure. If requested by the applicant as an alternative to use of the Expedited Procedure described in subsection (a) above or a MHL D is submitted at the same time as an application for a standard subdivision or partition (and the applicant requests a concurrent review), the City shall review an MHL D under the same procedure that applies to a standard land division.
- G. Final Plat Requirements. An application for an MHL D final plat shall meet the City's requirements and approval criteria that apply to a standard subdivision or partition final plat per Subsection 90.60.075.



CITY OF INDEPENDENCE

Zoning Map



LEGEND

ZONE

- Low-Density Residential (RS)
- Medium-Density Residential (RM)
- High-Density Residential (RH)
- Residential Single-Family Airpark Overlay (RSA)
- Mixed Residential (MX)
- Mixed-Use Pedestrian Friendly Commercial (MUPC)

- MUPC-Transitional (MUPC-T)
- Downtown Riverfront Zone (DRZ)
- Light Industrial (IL)
- Heavy Industrial (IH)
- Industrial Park (IP)
- Airport District (AD)
- Agricultural (AG)

- Public Service (PS)
- City Limits
- Urban Growth Boundary
- Downtown Overlay
- Historic District

EXHIBIT B

Section 11.002 Applications and Review Procedures

All development permits and land use actions are processed under the City's administrative procedures. There are four types of actions, each with its own procedures.

A. Type I Action

A Type I action is a ministerial action reviewed by staff based on clear and objective standards. Clear and objective conditions may be placed on the decision, and notice of the decision is sent to the applicant and any interested party who requests a copy of the decision. Appeal is to the Planning Commission. The following actions are processed under the Type I procedure:

1. Lot Line Adjustment
2. Floodplain Permit
3. Site Design Review
4. Minor Partition
5. Administrative Variance
6. Willamette Greenway Administrative Review
7. Downtown Overlay Design Standards Review
8. Home Occupation.

B. Type II Action

A Type II action is a quasi-judicial review in which the Planning Commission applies a mix of objective and subjective standards that allow considerable discretion. Public notice is provided pursuant to Section 11.025. A public hearing is required for Type II actions unless otherwise specified. Appeal of a Type II decision is to the City Council. The following actions are processed under the Type II procedure:

1. Variance, including Floodplain Variances
2. Conditional Use Permit
3. Major Partition
4. Subdivision
5. Planned Unit Development
6. Similar Use Determination
7. Downtown Overlay Design Guidelines Review
8. Site Design Review applications for commercial/industrial developments with more than 40,000 square feet of total gross floor area.

C. Type III Action

A Type III action is a quasi-judicial process in which the City Council applies a mix of objective and subjective standards, and makes the final, local decision. The Planning Commission plays an advisory role. Public notice is provided and, except as noted in subsection (4), public hearings are held before both the Planning Commission and City Council. Sections 11.025 and 11.030 list the notice and hearing requirements. Appeal of the decision is to the Land Use Board of Appeals (LUBA). The following actions are processed under a Type III procedure:

1. Zone Change
2. Comprehensive Plan Map Amendment
3. Annexation and Zone Change when requested concurrent with one another.
The City Council reviews such a request without review or recommendation by the Planning Commission.

D. Type IV Action

A Type IV action is a legislative review in which the City considers and enacts or amends laws and policies. Private parties may request a Type IV action; however, it must be initiated by the Planning Commission, or City Council. The City Council makes the final, local decision. Sections 11.025 and 11.030 list the notice and hearing requirements.

1. Amendments and Revisions of the Comprehensive Plan
2. City Plan Document Adoption, e.g. Water System Plan
3. Zoning Code Amendments

E. Middle Housing Land Divisions.

Middle Housing Land Divisions shall be processed in accordance with the procedures described in Section 90.115 of this code. Approval of a Middle Housing Land Division constitutes approval of development but is not considered to be a land use or limited land use decision.

EXHIBIT C

Section 13.050: Historic Preservation Definitions

CONTRIBUTING RESOURCE

“Contributing Resource,” for the purpose of Subchapter 59 of this code, means a building, Site, or object, originally constructed within the applicable Period of Significance that retains and exhibits significant integrity (location, design, setting, materials, workmanship, feeling, and association) to convey a sense of history. These properties strengthen the historic integrity of an existing or potential historic district, as indicated on the Local Historic Register.

DEMOLITION

“Demolition” means the intentional destruction of all or a part of a building or structure.

DISTRICT

“District” or “Historic District” means an area designated pursuant to Subchapter 59 of this code which includes buildings, properties or sites of historical or architectural significance. National Historic District means a District listed on the National Register of Historic Places. Local Historic District means a District listed on the Local Historic Register. Certain Resources may be designated within both Local and National Historic Districts.

HISTORIC PRESERVATION COMMISSION

“Historic Preservation Commission” means the body of appointed officials established in Independence Municipal Code (IMC) Section 2-260. For purposes of review procedures under this Subchapter, the Historic Preservation Commission replaces the Planning Commission as the initial review body.

HISTORIC PRESERVATION OFFICER

“Historic Preservation Officer” means the city official responsible for the administration of this code.

HISTORIC RESIDENTIAL OVERLAY

“Historic Residential Overlay” means a portion of a historic district, defined on a map that has been adopted by the City of Independence which is typified by residential dwellings. The residential standards for new construction apply to the area, even if a commercial use or multifamily dwelling is proposed within the structure.

INDEPENDENCE NATIONAL HISTORIC DISTRICT

“Independence National Historic District” means the District designated on the National Register of Historic Places through the 1989 Record of Designation, as shown on City of Independence official zoning map.

LISTED RESOURCE

“Listed Resource” means an individual historic resource, which has not been designated as part of a larger district, which has been placed on the Local Historic Register.

LOCAL HISTORIC REGISTER

“Local Historic Register” means the list of historic Resources officially recognized by the City of Independence as important in its history and afforded protection under this subchapter.

NATIONAL REGISTER OF HISTORIC PLACES

“National Register of Historic Places” or “National Register” means the nation’s official list of buildings, Sites, objects, and districts that are important for the nation’s history and maintained by the National Park Service in Washington, D.C. The list includes “national register resources” as designated by OAR 660-023-0200(8).

NONCONTRIBUTING RESOURCE

“Noncontributing Resource” means a building, Site, or object that does not retain or exhibit sufficient integrity (location, design, setting, materials, workmanship, feeling and association) to contribute to an existing or potential historic District in its current condition. Noncontributing Resources may include “historic Noncontributing Resources,” which are historic, and “out-of-period Noncontributing Resources,” which are not considered historic. By virtue of their location within a historic district, Noncontributing Resources are nonetheless subject to the requirements of this subchapter.

PERIOD OF SIGNIFICANCE

“Period of Significance” means the span of time when a Resource or District attained its significance to meet the local or National Register Criteria.

RECORD OF DESIGNATION

“Record of Designation” means the official document that describes how a resource meets the criteria for listing in the Independence Local Historic Register. For properties listed in the Independence National Historic District, the Record of Designation includes the 1989 designation document for the district, and subsequent updates to the designations approved by the State Historic Preservation Office and the National Park Service.

RELOCATION

“Relocation” means the movement of a Resource from its current location.

RESOURCE

“Resource” means a building, Site, object, or district that is listed in the Local Historic Register. A Resource may also be called a “Landmark.”

SITE

“Site,” for the purpose of Subchapter 59 of this code, means the location of a significant event, prehistoric or historic occupation or activity, or a building, whether standing, ruined, or vanished, where the location itself possesses historic, cultural, or archeological value regardless of any existing building or object.

EXHIBIT D

Subchapter 17: Allowed Uses in Residential Zones

ALLOWED USES	ZONE			
	RS	RM	RH	MX
RESIDENTIAL USES				
Dwelling, Single-Unit	P	P	P	P
Accessory Dwelling Unit	P ¹	P ¹	P ¹	
Dwelling, Duplex	P	P	P	P
Dwelling, Townhouse (up to 4 attached townhouses per structure)	P	P	P	P
Dwelling, Triplex	P	P	P	P
Dwelling, Quadplex	P	P	P	P
Cottage Cluster Development		P	P	P
Dwelling, Multi-Unit			P	P
Manufactured Dwelling Park, in accordance with the provisions of Subchapter 61		CU	CU	
Single room occupancy use, subject to the requirements in ORS 197A.430	P	P	P	P
Dormitory			P	
Fraternity, sorority, or student house			P	
Residential home, as defined by this ordinance	P	P	P	
Residential facility, as defined in this ordinance	CU	P	P	
Nursing home			P	
Planned unit development	CU	CU	CU	CU
Parking area or structure for a multi-family dwelling		P	P	
Accessory uses and structures ²	P	P	P	P
PUBLIC/QUASI-PUBLIC USE				
Structure or facility necessary for the City or for a public utility to provide service within the City. Such structures shall include, but not be limited to: construction, operation, maintenance, or repair of electric service meters, lines, transformers, and poles; natural gas lines; telephone lines and poles; water and sewer lines; streets, pathways and sidewalks; including any project identified in the Transportation System Plan.	P	P	P	P
Buildings and structures operated by a governmental agency or by a public utility and necessary for public service. Such facilities shall include, but not be limited to fire stations, libraries, electrical substations, and water storage tanks. Such facilities shall not include commercial plants for the generating of electrical power.	CU	CU	CU	CU

Church	CU	CU	CU	CU
Community or neighborhood club building, swimming pool, and other allied facilities owned and operated by a nonprofit community club for the improvement of the neighborhood or recreation of the members.	CU	CU	CU	CU
Garden, orchard, or crop cultivation provided that only the occasional sale or trading of plants and produce grown on the premises shall be permitted. No cattle, horses, other livestock, poultry, or farm animals may be maintained in this zone.	P	P	P	P
Playground or park.	P	P	P	P
School (elementary, junior high, high school).	CU	CU	CU	CU
LIMITED BUSINESS				
Child care facility, as defined by this ordinance, complying with ORS 657A.030 and 657A.250 to 657A.460.	P	P	P	P
Day-Care Home, as defined in this ordinance.		P	P	
Home occupation	P	P	P	P
Barber shop, provided that no assistants are employed.	CU	CU	CU	
Beauty shop, provided that no assistants are employed.	CU	CU	CU	
Bed and breakfast establishment.	CU	CU	P	CU
Medical Marijuana Grow Site.	P	P	P	
Office having a maximum floor area of 2,000 square feet or less				P ³
Retail, except drive-through facilities and vehicle servicing/repair having a maximum floor area of 2,000 square feet or less				P ³

Notes:

P = Permitted use; CU = Conditional Use

1. Permitted in conjunction with single-unit dwellings.
2. Accessory uses allowed in residential zones include:
 - a. Customary residential accessory buildings and structures for private use, such as a pergola, greenhouse, hobby shop, patio, porch, deck, wood shed, shelter for domestic pets of the resident, fence, and fallout shelter;
 - b. Private garage, as defined in this ordinance;
 - c. Parking area for one commercial vehicle having a gross vehicle weight less than 20,000 pounds;
 - d. Parking or storage area for a boat, camper, trailer, or recreational vehicle of the residents;
 - e. Swimming pool for private use;
 - f. Guest house or quarters not in the main building, when such house or quarters are dependent upon the main building for either kitchen or bathroom facilities or both and are not used for residential purposes;
3. If sought, subject to Neighborhood Commercial Overlay provisions in Subchapter 47.

EXHIBIT E

Subchapter 18: Density, Area, and Dimension Requirements in Residential Zones

DENSITY AND DIMENSION STANDARDS¹

ZONE

		RS	RM	RH	MX
Minimum Lot Area					
	Detached Single-Unit	4,800 sf	4,800 sf	4,800 sf	N/A ²
	Townhouses/Rowhouses	2,400 sf	2,400 sf	1,800 sf	1,800 sf ²
	Duplex, Triplex, Quadplex (average per unit)	2,400 sf	2,400 sf	1,800 sf	1,800 sf ²
	Cottage Cluster Development	NA			
	Multiple-Unit Dwellings	N/A	N/A	N/A	N/A ²
	All Other	4,800 sf	4,800 sf	4,800 sf	None
Minimum Lot Width					
	Townhouses/Rowhouses	20 ft	20 ft	20 ft	20 ft
	Multiple-Unit Dwellings	N/A	N/A	N/A	6 ft/unit min 30 ft/unit max
	All Other	N/A	N/A	N/A	35 ft min 100 ft max
Minimum Setbacks					
-Primary Structures					
	Front	10 ft	10 ft	5 ft	10 ft
	Side	5 ft (10 ft on Corner Lot)			
	Rear	10 ft	10 ft	10 ft	None
	Alley (Side or Rear)	5 ft	5 ft	5 ft	5 ft
-Attached Garages					
	Garage entrances facing a public street access (driveway length)	19 ft (and 4 feet behind façade) ³			
	Other	Same as primary structure			
-Detached Garages					
	Front	40 ft	40 ft	40 ft	N/A
	Side (Corner/Alley)	5 ft	5 ft	5 ft	N/A
	Side (Interior)	0	0	0	N/A
	Rear (Interior Lot)	0	0	0	N/A
	Rear (Abutting a Street or Alley)	1 ft	1 ft	1 ft	N/A
	Rear (Corner lot or Other)	Same as Primary Structure			

		RS	RM	RH	MX
-Detached Accessory Structures Other than Garages and Fences					
	Front	Same as Primary Structure			
	Side and Rear	5 ft	5 ft	5 ft	N/A
Maximum Lot Coverage					
	Single-Unit Dwellings	40%	40%	45%	40%
	Multiple-Unit Development	N/A	N/A	60%	70%
	All other Residential Development	45%	45%	50%	50%
	Non-residential development	40%	40%	45%	None
Maximum Height					
	Residential Uses	35 ft	35 ft	45 ft	35 ft
	Church/Public Service Buildings	45 ft	45 ft	45 ft	45 ft
	Other Primary Structure	35 ft	35 ft	45 ft	35 ft
	Accessory Building	15 ft (or, if primary building is multiple stories, the lesser of the height of the primary building or 25 feet)			

Notes:

1. Larger setbacks may be required as a result of the building code
2. The average density of residential development in the MX zone must be at least 9 units per acre.
3. May be modified per the provisions for garages in front of buildings in IDC 74.005(B)(2).

EXHIBIT F

Subchapter 19: Residential Design Standards

Section 19.005 Residential Design Standards

A. Purpose.

The purpose of the residential design standards is to:

1. Establish a base for the quality of the design of new homes;
2. Foster pedestrian activity and community interaction;
3. Promote the historic residential development patterns found in the Independence Historic District;
4. Promote community safety for neighborhood streets and front yards by providing “eyes on the street”; and
5. Enhance community livability through the creation of attractive and well-designed housing and streetscapes.

For more information, see Appendix 3: Residential Development Standards, City of Independence (2009). Note: Information contained in Appendix 3 is for information purposes only. When a conflict exists between Appendix 3 and the Independence Development Code, standards contained in the Independence Development Code shall apply.

B. Applicability.

- a. This section is applicable to:
 - i. All newly constructed residential dwellings except manufactured homes located in manufactured home parks.
 - ii. Projects that propose to expand, remodel or alter an existing structure. The standards shall only apply to



Street Facing Facade. [1] Attached garages on multi-dwelling units should not exceed 50% of the total building length as viewed from the street. [2] The maximum number of detached garages for attached or multi-family units is 4 attached garages that are a maximum of 24 feet wide each.

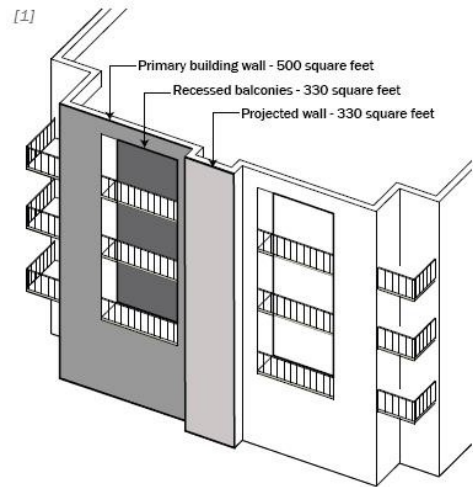
the portion of the building that will be changed. Provided that if a proposal seeks to continue a feature on the existing building such as the window orientation or style, roof dimension, or siding, the relevant standard may be waived.

- b. The section is not applicable to:
 - i. Normal repair of a building.
- c. For developments permitted before January 2, 2033, per ORS 197A.400, detached single-unit, duplex, triplex, quadplex, townhouse and cottage cluster developments with 20 or more units are exempt from any residential design standard that is intended to preserve the desired character, architectural expression, decoration or aesthetic quality of new homes, including standards regulating the following elements. All other design and siting standards in this code shall apply to the dwellings.
 - i. facade materials, colors or patterns;
 - ii. roof decoration, form or materials;
 - iii. accessories, materials or finishes for entry doors or garages;
 - iv. window elements such as trim, shutters or grids;
 - v. fence type, design or finishes;
 - vi. architectural details, such as ornaments, railings, cornices and columns;
 - vii. size and design of porches or balconies;
 - viii. variety of design or floorplan; or
 - ix. front or back yard area landscaping materials or vegetation.

C. Large Building Elevation

The front elevation of buildings with over 500 square feet of surface area shall be divided into distinct planes consisting of 500 square feet or less. This can be achieved by:

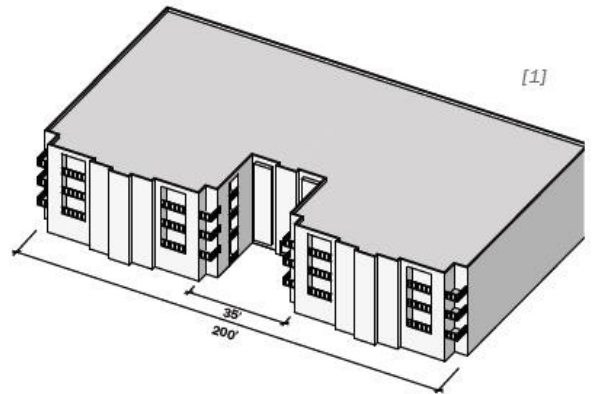
1. Incorporating elements such as a porch or a dormer into the wall plane.
2. Recessing the building a minimum of two (2) feet over a distance of six (6) feet.
3. Providing a bay window that extends a minimum of two (2) feet from the primary street-facing facade.



Large Building Elevation. [1] The front elevation of buildings with street-facing facades greater than 500 square feet should carve the building face into smaller, distinct planes, which can be accomplished by [2] incorporating a porch or dormer into the wall plane or [3] recessing the building a minimum of 2 feet over 6 feet.

D. Building Length

1. The maximum building length for multiple-dwelling buildings that face the street shall be 100 feet. This maximum length can increase to 200 feet if a courtyard, portal, or other shared open space is provided in order to create a break in the building wall. This open space shall be a minimum of 35 feet in width and depth.
2. The maximum building length for row houses shall not exceed four (4) units, or 100 feet (from end-wall to end-wall), whichever is less.



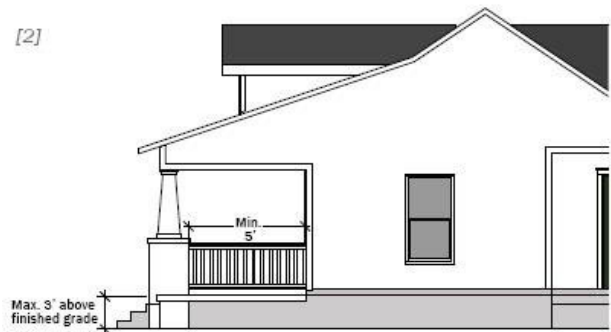
Building Length. In order to control the bulk of buildings and maintain a sense of pedestrian safety and intrigue [1] the maximum building length for multi-dwelling buildings shall be 100 feet, which can increase to 200 feet if a break is provided that is a minimum of 35 feet deep and wide [2] A break can be a portal or space between buildings or [3] a courtyard that provides a transition from the public realm to the private realm.

E. Main Entrance

1. Buildings shall have their primary pedestrian orientation and pedestrian entrance(s) oriented to the street that serves the project site.
2. If a proposal seeks to construct a duplex, townhouse, triplex, quadplex or multi-unit structure and the project is situated on two streets, the project shall orient one or more units to each street. Provided that, the units may be oriented to the same street, if the parking is accessed off the other street.
3. Primary pedestrian entrance(s) shall connect to the sidewalk via a straight path that is a minimum of five (5) feet wide. Where there is a continuous paved connection between the sidewalk and the front entrance, and if the driveway is within 20 feet of the front door, the driveway may be used to meet this standard.

Triplex, quadplex, and multiple-unit building entrances may include entrances to individual units, lobby entrances, or breezeway/courtyard entrances (i.e., to a cluster of units).

Alternatively, a building may have its entrance oriented to a side yard when a direct pedestrian walkway, a minimum of five (5) feet wide, is provided between the building entrance and the street. In



Main Entrance. Buildings should have [1] front doors that face the street and connect to the sidewalk via a 5 foot wide path at a minimum [2] Porches should be an extension of the living space and be at a minimum 5 feet clear in depth.

this case, at least one entrance shall be provided not more than 20 feet from the closest sidewalk or street.

4. Porches and stoops shall not be constructed more than three (3) feet above the finished exterior grade (except if the dwelling is in a designated floodplain). Porches and stoops shall be a minimum of 25 square feet in area and five (5) feet deep, clear from column face to the face of the primary facade to allow for handicap access.
5. For triplex, quadplex, and multi-unit buildings, pedestrian connections shall be created between the front doors of all buildings and the street-facing sidewalk. These connections shall be paved with a material that meets ADA accessibility standards.

F. Vehicular Access and Garages

1. Vehicular Access

- a. When a project is proposed on a corner lot along an arterial or collector road, the parking shall be accessed off the lower classified street or an adjacent alley, unless the applicant demonstrates consistent with the Public Works Design Standards that the access via the lower classified street or alley is not possible.
- b. Townhomes, rowhouses, duplexes, triplexes, quadplexes and other configurations of more than two dwelling units on a lot shall comply with all of the following standards:
 - i. Where an alley serves a lot, the required parking shall be taken from the alley. Provided that, parking may occur via a current driveway if one exists.
 - ii. When a property is a corner lot, at least 50 percent of the required parking shall be accessed off the side of the lot with the largest frontage measurement.
 - iii. Surface parking shall not exceed 50 percent of the lot dimension along any street frontage. The calculation of the parking dimension shall include the width of any driveways.
 - iv. Adjacent units shall share one driveway when individual driveways would otherwise be separated by less than 20 feet (i.e., the width of one on-street

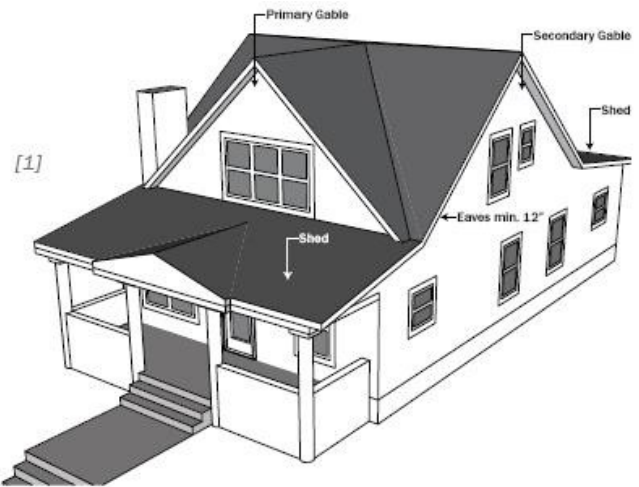
parking space). When a driveway serves more than one lot, the developer shall record an access and maintenance easement/agreement to benefit each lot, before building permit issuance.

2. When garages face the street, they shall be recessed behind the façade by a minimum of 4 feet.
3. Any street-facing attached garage shall not exceed 50 percent of the overall building length as viewed from the street. For example, a 24-foot-wide unit may have one 12-foot-wide recessed garage facing the street.
4. The maximum number of detached garages for attached or multiple-dwelling units is four (4) attached garages of a maximum width of 24 feet each (corresponding to a two-car garage).
5. Detached car ports are allowed provided that:
 - a. They meet all standards for garages.
 - b. They do not exceed the overall lot coverage requirement.
 - c. They have a capacity of no more than eight (8) vehicles.

G. Roof Forms

For pitched or hipped roof residential buildings:

1. Except for manufactured dwellings, the primary roof shall incorporate a minimum 4/12 roof pitch. Lower roof pitches are allowed on porches.
2. In order to reinforce the pedestrian realm, roof forms shall consist of a primary gable or hip roof with one of the following additional roof forms oriented to the street:
 - a. A secondary gable of equal or smaller size that is oriented to the street and extends from the primary roof form.
 - b. Two or more smaller dormers or a single large dormer that is oriented to the street and extends from the primary roof form.
 - c. A covered front porch that encompasses a minimum of 50% of the street facing living space.
3. All roof eaves (overhangs) shall be a minimum of 12 inches wide.
4. Window(s), trimmed vent(s), changes in siding material, knee braces, or a thick



frieze board along the roofline shall be incorporated into the gable. For homes set on a corner lot, these features shall also be incorporated when a gable is oriented to the secondary street.

Roof Forms. [1] Roof pitches less than 4 over 12 are prohibited and roof forms will consist of more than a single large roof form [2] Gables shall be decorated with window(s), trim or a vent [3] Roof eaves will project at a minimum 12 inches.

H. Exterior Siding and Cladding

1. The following siding and cladding materials shall be allowed outright and must be used on all sides of the dwelling and accessory structures:

- a. Horizontal wood or cementitious siding that has a maximum of 7 inches in width revealed. Horizontal siding or banding with a reveal exceeding 7 inches may be used for secondary purposes.
- b. Wood or cementitious shingles that have a maximum of 12 inches in width revealed.
- c. Board and batten vertical siding.
- d. Brick or stone veneer.



[1]



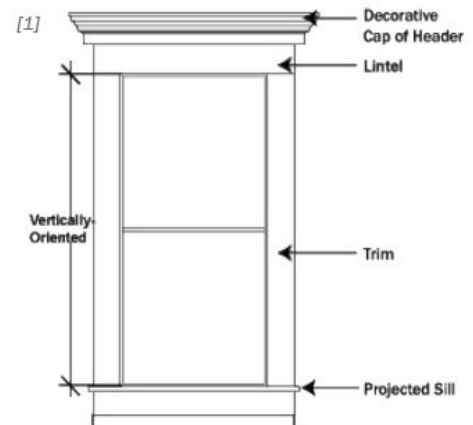
[2]

Exterior Siding and Cladding. [1] Wood or cementitious siding that has a maximum of 7 inches in width revealed and [2] wood or cementitious shingles that have a maximum of 12 inches in width revealed are allowed outright along with board and batten vertical siding and brick or stone veneer.

2. In order to promote high-quality buildings that will be maintained for generations, the following materials shall be prohibited:
 - a. T-111 or similar sheet materials.
 - b. Plastic or Vinyl. This requirement does not apply to trim materials.

I. Required Street and Alley Windows

1. All detached single-unit dwellings, townhouses, rowhouses, duplexes, triplexes, quadplexes, and cottage cluster dwellings shall have vertically-oriented windows along required street and alley facades. Square or horizontal windows shall be formed by combining multiple window sashes into groupings. Transom windows and other windows placed above a door or window for ornamental or decorative purposes are exempt from this requirement.



2. Windows shall occupy a minimum of the alley and street-facing facades shown in Table 19.005-1:

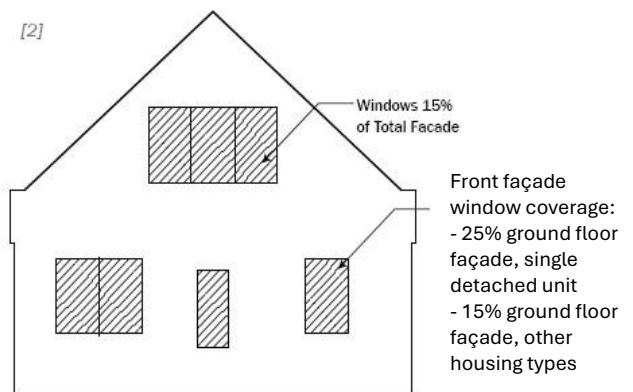


Table 19.005-1 – Street and Alley Façade Window Requirements¹

	Front – Ground Floor Living Façade Area Façade ² (Percent)	Side – Ground Floor Living Façade Area ² for Corner Lots (Percent)	Front or Side – Overall Façade Area ³	Rear – Ground Floor Living Area and Total Façade Area
Detached, Single- Unit Building	25	15	15	0
Other Development	15	15	15	0

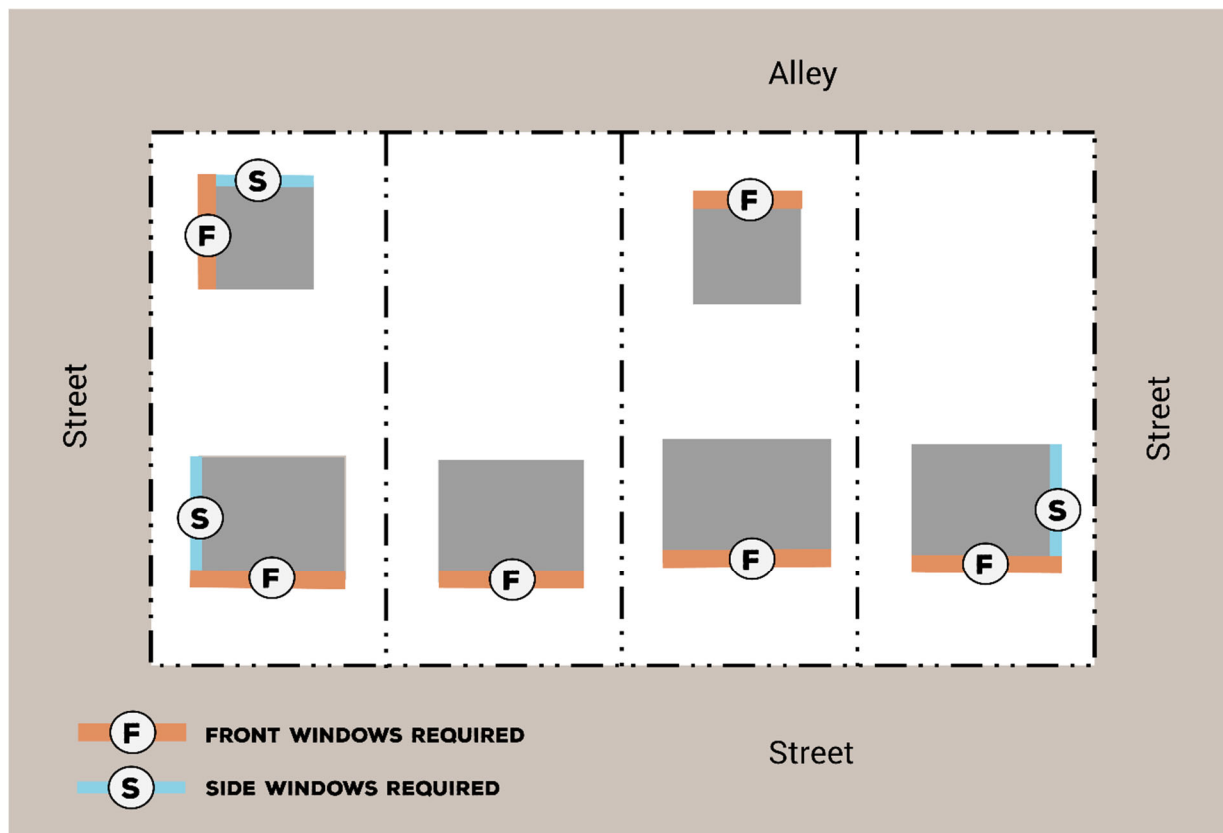
¹ Front or side window requirements only apply to streets and alleys. No windows are required on the rear of a structure so long as the required windows are provided on the front and sides of the structure.

² Ground floor living façade area is the length of the home facing the street or alley multiplied by the height of the first floor. The area does not include any area included in a garage.

³ Overall facade area is the length of the home facing the street or alley multiplied by the height of the structure. The area does not include any areas included in a triangle created by a sloped roof.

Examples of the location of required windows are provided in Figure 19.005-1

Figure 19.005-01



3. The windows must meet the requirements of IDC 19.005(l)(5).
4. The following types of windows are prohibited along street and alley facing facades:
 - a. Horizontal slider windows.
 - b. Windows that use “mirror” or reflective glass.
5. All windows on the street and alley-facing façades shall incorporate all of the following elements:
 - a. A decorative header/cap.
 - b. Continuous trim.
 - c. Projected windowsill.

J. Non-Required Windows. All non-required windows shall incorporate continuous trim.

K. Doors

Doors shall be made of wood, metal-clad wood, metal, or cast fiberglass, provided that the material reflects a traditional wood door and can be painted.

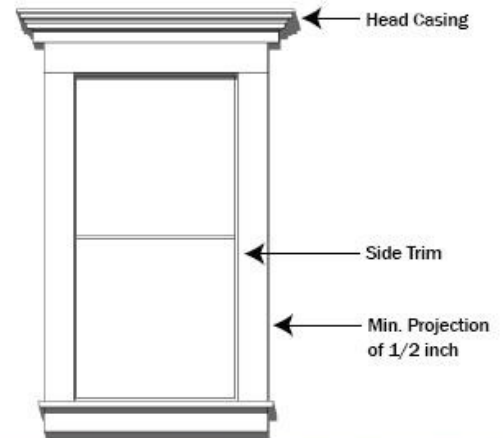


Doors. All residential doorways should face the street in order to connect the interior of the residence with the sidewalk and street in order to foster a more inviting and safe pedestrian environment.

L. Trim

1. All required street and alley facing windows and doors shall have side trim and head casings. Windows shall also have a projected or articulated windowsill.
2. All non-required windows shall have continuous trim.
3. Trim shall be a minimum of 3 ½ inches wide and project no less than a ½ an inch from the wall.

[1]



[2]



Trim. [1] All street-facing windows and doors shall have side trim and head casings [2] Trim shall be at a minimum 3½ inches wide and project no less than ½ an inch from the wall.

M. Foundations

1. Concrete block, poured in place concrete, or brick shall be allowed as foundation material on all residential types, provided that the foundation material is no more than three (3) feet above the street facing finished grade (except if the dwelling is in a designated floodplain).



[1]

2. All street facing concrete block and poured in place concrete foundations shall be landscaped with a continuous line of planting materials that are a minimum of 50% site obscuring and three (3) feet high at maturity.



[2]

[3]

Exposed foundations or front porches can be sheathed with wood siding (clapboard) as an extension of the primary façade.

Foundations. Allowed foundation materials include concrete block, poured in place concrete, and brick [1] Concrete block and poured in place concrete should be landscaped with a continuous materials that obscure the foundation [2] These planting materials should be 50% obscuring and 3 feet high at maturity [3] The landscaped area should be 3 feet deep and covered with ground cover where not planted with site planting materials.

Section 19.020

Special Standards for Certain Uses

- A. Single-Unit Attached Townhomes, Rowhouses, Triplexes and Quadplexes. Single-unit attached housing (townhome units on individual lots), rowhouse, triplex and quadplex developments shall comply with the standards in 1-3, below. The standards are intended to control development scale; avoid or minimize impacts associated with traffic, parking, and design compatibility; and ensure management and maintenance of common areas.
1. Building Mass Supplemental Standard. The maximum number and width of consecutively attached townhomes (i.e., with attached walls at property line) shall not exceed four (4) units, or 100 feet (from end-wall to end-wall), whichever is less.
 2. Provision of Alleys. Townhome, rowhouse and duplex subdivisions (4 or more lots) may receive vehicle access from a rear alley. Proposed new alley(s) shall be created at the time of subdivision approval. Alleys are not required when existing development patterns or topography make construction of an alley impracticable (See #3 for standards). As necessary, the city shall require dedication of right-of-way or easements and construction of pathways between townhome lots (e.g., between building breaks).

Figure 19.020 (1) - Townhomes With Alley Access

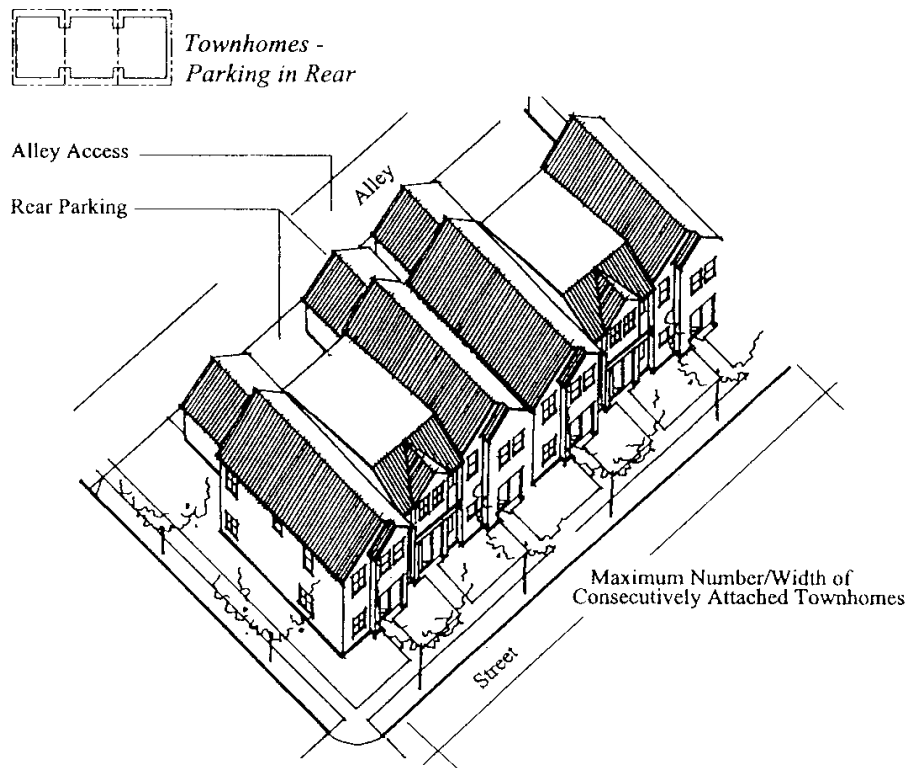
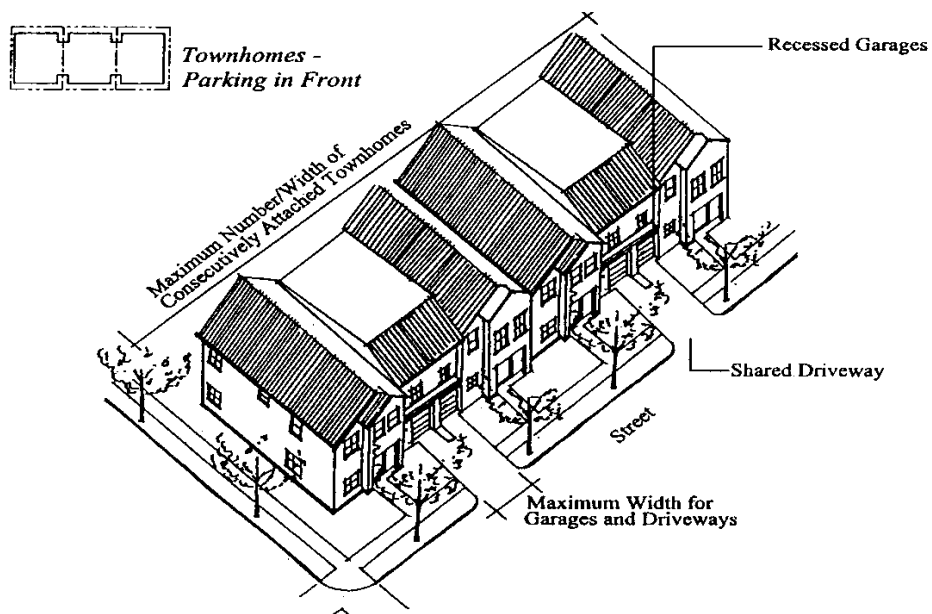


Figure 19.020(2) - Townhomes With Street Access



3. Common Areas. “Common areas” (e.g., landscaping in private tracts, shared driveways, private alleys, and similar uses) shall be maintained by a homeowners association or other legal entity. A homeowners association may also be responsible for exterior building maintenance. A copy of any applicable covenants, restrictions and conditions shall be recorded and provided to the city before building permit approval.

- B. Multiple-unit housing. Additional standards for multi-unit housing are listed in the applicable underlying zone.

EXHIBIT G

Section 21.065: Development Standards for Multiple-Unit Development

- A. Signs. Signs shall be subject to the provisions of Subchapter 58.
- B. Landscaping. All development is subject to the landscaping provisions in Subchapter 54. Recreation areas may be included as part of the required landscaping.
- C. Screening. All exterior garbage collection areas, recycling areas, and mechanical equipment shall be screened to meet the standards of Section 54.010(C) of the Independence Development Code. Garbage collection areas, recycling areas and mechanical equipment shall be located away from the street.
- D. Access. Access points to property from a street shall be located to minimize traffic congestion and avoid directing traffic into residential areas. Existing access roads and access points shall comply with the Public Works Design Standards. All access roads and driveways shall be surfaced with asphaltic concrete or similar permanent surfacing.

EXHIBIT H

Section 22.065: Development Standards for Multiple-Unit Development

All multiple-unit residential developments in the RH Zone shall comply with the following specific standards:

- A. Signs. Signs shall be subject to the provisions of Subchapter 58.
- B. Landscaping. All development is subject to the landscaping provisions in Subchapter 54. Recreation areas may be included as part of the required landscaping.
- C. Screening. All exterior garbage collection areas, recycling areas, and mechanical equipment shall be screened to meet the standards of Section 54.010(C) of the Independence Development Code. Garbage collection areas, recycling areas and mechanical equipment shall be located away from the street.
- D. Recreation Area. Each lot having a multiple-unit residential building on it shall have at least 300 square feet of recreation area per dwelling unit. The required recreation area can be located within the required front or rear yards and shall include a combination of planted grass and hardscape areas. Hardscape areas shall not account for more than 50% of the total area. Recreation areas that are provided as shared areas for multiple units shall include a combination of the following amenities:
 - a. Outdoor seating.
 - b. Small play structures or nature play structures.
 - c. Planted grass areas.
- E. Access. Access points to property from a street shall be located to minimize traffic congestion and avoid directing traffic into residential areas. Existing access roads and access points shall comply with the Public Works Design Standards. All access roads and driveways shall be surfaced with asphaltic concrete or similar permanent surfacing.

EXHIBIT I

SUBCHAPTER 23: MIXED DENSITY RESIDENTIAL (MX) ZONE

23.005 Purpose

The purpose of the Mixed Density (MX) Residential Zone is to allow a creative mixture of housing styles and types available to citizens of diverse ages and incomes. Development in the MX Zone should provide a coordinated and attractive living environment that responds to local conditions and emphasizes a range of good circulation opportunities for walking, bicycling, and driving personal vehicles. The MX Zone is also intended to implement the Southwest Independence Concept Plan and the Central Talmadge Plan, where applicable. Consistency with the Southwest Independence Concept Plan and Central Talmadge Plan will be established through the Master Plan requirement during the annexation process.

23.010 Density

To achieve balance and integration of a range of housing types, sizes, and densities, the Mixed Density Residential (MX) Zone relies on two criteria.

- A. The intent of the MX Zone is to achieve a minimum average density of nine (9) dwelling units per net acre of residential land, while allowing a mix of lot sizes and densities. Net acres of residential land means the total site area devoted to residential uses, not including the area of streets, other rights-of-way to be dedicated to the public, or protected wetland or riparian areas. Net acres does include any area to be devoted to the trail/stormwater/drainage corridors located along the edges of the planning area and adjacent to riparian and wetland areas or corridors.
- B. To reflect the demand for higher-density housing within the region, at least 15 percent of the units must be either in multiple-unit or attached single-unit structures.

23.015 Permitted and Conditional Uses

Allowed permitted and conditional uses within the Mixed Density Residential Zone are presented in Subchapter 17. Uses not allowed within the matrix are considered to be prohibited, except as provided in Section 10.050.

23.021 Prohibited Uses

The following uses are prohibited in the MX Zone:

- A. Medical Marijuana Grow Site.
- B. Medical Marijuana Dispensary.
- C. Medical Marijuana Processing Site.
- D. Recreational Marijuana Producer.

- E. Recreational Marijuana Processor.
- F. Recreational Marijuana Retailer.
- G. Recreational Marijuana Wholesaler.
- H. Marijuana Research Facility.
- I. Marijuana Testing Laboratory.

23.055 Off-Street Parking

- A. Number of Spaces Required. The required number of parking spaces shall be as specified in Subchapter 73.
- B. Parking Types Allowed.
 - 1. Garage. A garage is allowed subject to the design and setback requirements of the zone.
 - 2. Carport.
 - a. If an attached carport is proposed, the structure shall meet the setback and applicable design requirements for an attached garage.
 - b. If a detached carport is proposed, the structure shall meet the design and setbacks for detached garages, provided that the side yard setback shall be at least five (5) feet.
 - 3. No Carport or Garage. Where a garage or carport is not proposed, two paved, 10 by 20-foot off-street parking spaces are required for each single-family dwelling or duplex unit.
- C. Width of Paving. In no instance shall a paved portion of the front or side yard exceed more than 50 percent of the lot width.

23.060 Residential Design Standards

Design standards for residential uses in the Mixed-Density Residential Zone are presented in Subchapter 19.

23.065 Development Standards for Multiple-Family Development

- A. Multiple-unit housing. Multiple-unit housing is allowed per the Site Design Review process within the Mixed Residential (MX) Zone. New multiple-unit developments shall comply with all of the following standards:
 - 1. Common open space standard. Inclusive of required setback yards, a minimum of 15 percent of the site area shall be designated and permanently reserved as usable common open space in developments with more than 20 multiple-unit or attached

single-unit dwellings as specified by Subsection 23.010(B). The site area is defined as the lot or parcel on which the development is planned, after subtracting any required dedication of street right-of-way and other land for public purposes (e.g., public park or school grounds, etc.). Sensitive lands and historic buildings or landmarks open to the public and designated by the Comprehensive Plan may be counted toward meeting the common open space requirements.

2. Private open space standard. Private open space areas shall be required for ground-floor and upper-floor housing units based on all of the following standards:
 - a. A minimum of 50 percent of all ground-floor housing units shall have front or rear patios or decks measuring at least 48 square feet. Ground-floor housing means the housing unit entrance (front or rear) is within 5 feet of the finished ground elevation (i.e., after grading and landscaping);
 - b. A minimum of 50 percent of all upper-floor housing units shall have balconies or porches measuring at least 24 square feet. Upper-floor housing means housing units that are more than 5 feet above the finished grade; and
 - c. Private open space areas shall be oriented toward common open space areas and away from adjacent single-unit residences, trash receptacles, parking and drives to the greatest extent practicable.
3. Exemptions. Exemptions to the common open space standard may be granted for the land area associated with the first 20 units of a larger project when the developments are within one-quarter mile (measured walking distance) of a public park; and there is a direct, accessible (i.e., Americans With Disabilities Act-compliant), and maintained pedestrian trail or sidewalk between the site and the park. An exemption shall be granted only when the nearby park provides active recreation areas such as play fields; children's play area, sports courts, walking/fitness course, or similar facilities.
4. Landscaping. All development is subject to the landscaping provisions in Subchapter 54. Recreation areas may be included as part of the required landscaping.
5. Screening. All exterior garbage collection areas, recycling areas, and mechanical equipment shall be screened to meet the standards of Section 54.010(C) of the Independence Development Code. Garbage collection areas, recycling areas and mechanical equipment shall be located away from the street.
6. Signs. Signs shall be subject to the provisions of Subchapter 58.

23.070 Reference to Additional Standards

Additional or alternative use and development standards may be found in the following chapters:

- | | |
|---|---------------|
| A. Flood Damage Prevention | Subchapter 51 |
| B. Willamette Greenway Development District | Subchapter 52 |
| C. Buffering/Screening/Landscape/Ash Creek Setbacks | Subchapter 54 |

D. Planned Unit Developments	Subchapter 60
E. Manufactured Dwellings	Subchapter 61
F. Home Occupations	Subchapter 72
G. Parking	Subchapter 73
H. Accessory Structures	Subchapter 74
I. General Development Standards	Subchapter 75

Section 34.050: Triplex, Quadplex, Townhomes Multiple-Unit Standards

A. Triplexes, Quadplexes, and Townhouses

Triplex, quadplex, and townhouse developments shall comply with the standards in 1-4, below. The standards are intended to control development scale; avoid or minimize impacts associated with traffic, parking, and design compatibility; and ensure management and maintenance of common areas.

1. Windows. All triplexes, quadplexes, and townhouses shall have vertically-oriented windows. Square or horizontal windows shall be formed by combining multiple window sashes into groupings. Transom windows, and other windows placed above a door or window for ornamental or decorative purposes are exempt from this requirement.
2. Building Mass Supplemental Standard. Within the Downtown Riverfront Zoning District, the maximum number and width of consecutively attached townhomes (i.e., with attached walls at property line) shall not exceed four(4) units, or 120 feet (from end-wall to end-wall), whichever is less.
3. Townhome subdivisions (4 or more lots) may receive vehicle access from a rear alley. Alley(s) shall be created at the time of subdivision approval. As necessary, the city shall require dedication of right-of-way or easements and construction of pathways between townhome lots (e.g., between building breaks).
4. Street Access Developments. Triplexes, quadplexes, and townhomes receiving access directly from a public or private street shall comply with all of the following standards, in order to minimize interruption of adjacent sidewalks by driveway entrances, slow traffic, improve appearance of the streets, and minimize paved surfaces for better stormwater management.
 - a. When garages face the street, they shall be recessed behind the front elevation (i.e., living area or covered front porch) by a minimum of 4 feet.
 - b. The maximum allowable driveway width facing the street per dwelling unit shall comply with the Public Works Design Standards. The maximum combined garage width per unit is 50 percent of the total building width. For example, a 24-foot-wide unit may have one 12-foot wide recessed garage facing the street.
 - c. Two adjacent garages shall share one driveway when individual driveways would otherwise be separated by less than 20 feet (i.e., the width of one on-street parking space). When a driveway serves more than one lot, the developer shall record an access and maintenance easement/agreement to benefit each lot, before building permit issuance.
5. Common Areas. "Common areas" (e.g., landscaping in private tracts, shared driveways, private alleys, and similar uses) shall be maintained by a homeowners association or other legal entity. A homeowners association may also be responsible for exterior building maintenance. A copy of any applicable covenants,

restrictions and conditions shall be recorded and provided to the city before building permit approval.

B. Multiple-Unit housing.

New multiple-unit developments shall comply with all of the following standards:

1. Private open space standard. Private open space areas shall be required for ground-floor and upper-floor housing units based on all of the following standards:
 - a. A minimum of 50 percent of all ground-floor housing units shall have front or rear patios or decks measuring at least 48 square feet. Ground-floor housing means the housing unit entrance (front or rear) is within 5 feet of the finished ground elevation (i.e., after grading and landscaping);
 - b. A minimum of 50 percent of all upper-floor housing units shall have balconies or porches measuring at least 24 square feet. Upper floor housing means housing units that are more than 5 feet above the finished grade; and
 - c. Private open space areas shall be oriented toward common open space areas and away from adjacent single-unit residences, trash receptacles, parking and drives to the greatest extent practicable.
2. Landscaping. All development is subject to the landscaping provisions in Subchapter 54, except as amended in subsection 34.055(B). Recreation areas may be included as part of the required landscaping.
3. Screening. All exterior garbage collection areas, recycling areas, and mechanical equipment shall be screened to meet the standards of Section 54.010(C) of the Independence Development Code. Garbage collection areas, recycling areas and mechanical equipment shall be located away from the street.
4. Design Review. All new developments and expansion of an existing development shall be subject to the Site Design Review procedures of Subchapter 80.

EXHIBIT K

Section 34.055: Additional Development Standards

In addition to the standards described above, all developments in the Downtown Riverfront Zone shall comply with the following specific standards:

- A. Signs. Signs shall be subject to the provisions of Subchapter 58 as amended below.
 - 1. Projecting signs may be up to 45 feet above the floor level at the main entry into the building for lodging uses.
 - 2. Supporting structure for signage may be exposed if it is of an architecturally designed quality.
- B. Landscaping. All development is subject to the landscaping provisions in Subchapter 54 as amended below:
 - 1. Subchapter 34 shall identify where buffering and screening is required and the size of each element. Subchapter 54 governs the requirements for buffering and screening where required.
 - 2. Subchapter 34 shall govern setback requirements.
 - 3. Subchapter 34 shall govern lot coverage and minimum/maximum landscape area requirements.
 - 4. Subchapter 34 shall govern the minimum number and placement of trees required.
- C. Access. Access points to property from a street shall be consolidated and located to minimize traffic congestion. Access roads and access points shall comply with the Public Works Design Standards. All access roads and driveways shall be surfaced with asphaltic concrete or similar permanent surfacing.

Section 54.005: Applicability

- A. All development within the city, except for single-unit dwellings or duplexes in residential zones, is required to be buffered, screened and landscaped in accordance with the provisions of this Subchapter. Development shall mean land use, limited land use, building permit, or development permit applications of any kind or the erection, or construction of buildings, structures, parking lots and streets and roads in all zones.
- B. All planting materials, species, sizes and installation details shall be in substantial conformance with the Independence Urban Forestry Management Plan. The requirements of this subchapter are in addition to any yard setback requirements or other requirements contained in the zoning or city code.
- C. Maintenance. Property owners are required to maintain the buffered, screened or landscaped areas including necessary watering, weeding, pruning, and mowing. Trees and shrubs may be trimmed or removed for health or safety reasons but shall be replaced with suitable landscaping materials.
- D. Irrigation. All landscaped areas shall be irrigated by an underground system except for dwelling structures containing less than four units or unless a licensed landscape architect certifies that the landscaping will likely survive without irrigation. Suitable watering facilities or irrigation systems must be included in or near all planted areas.
- E. Site Improvements. The property owner is responsible for the maintenance of the site improvements including re-stripping parking stalls and ensuring the preservation of the clear vision area.
- F. Submission of landscape plans. Landscape plans, including any required buffering and screening, shall be submitted and reviewed as part of the Site Design Review application process (see Subchapter 80).
- G. Alternative Plans. The requirements of this ordinance may be reduced or eliminated when the following alternative means of providing the required landscaping exist:
 - 1. Existing Screening. Where the abutting use has provided buffering in compliance with this section, no further buffering or screening need be provided.
 - 2. In lieu of these standards, the property owner may submit a detailed plan and specifications for landscaping and screening, as part of a Site Design Review application, including plantings, fences, walls, walks and other features designed to afford the degree of desired buffering. The city shall review the alternative plan based on standards contained in this subchapter.
- H. Permit Issuance.
 - 1. Occupancy permits may be issued prior to the complete installation of all required landscaping if security equal to 120% of the cost of plant materials and labor as determined by the approval authority is filed with the city assuring such installation within a time specified by the City, but not exceeding six months after occupancy.
 - 2. Security may consist of a faithful performance bond payable to the city, cash, certified check, time certificate, or deposit, or assignment of savings account and the form shall meet with approval of the City Attorney.

3. If the installation of the landscaping is not completed within the period specified by the City, the security may be used by the city to complete the installation. Upon completion of the installation, any portion of the remaining security deposited with the city shall be returned. The final landscape inspection shall be made prior to any security being returned. Any portions of the plan not installed, not properly installed, or not properly maintained shall cause the inspection to be postponed until the project is completed or cause the security to be used by the city.

Section 54.010: Buffering and Screening Requirements

A. A buffer consists of a horizontal distance adjacent to the property line, which may only be occupied by screening, utilities and landscaping materials.

B. Buffering shall be used to mitigate adverse visual impacts, dust, noise or pollution, and to provide for compatibility between dissimilar adjoining uses. Where buffering is determined to be necessary, one of the following buffering alternatives shall be employed:

1. Planting Area: Width not less than fifteen (15) feet, planted with the following materials:

- a. at least one row of deciduous or evergreen trees staggered and spaced not more than fifteen (15) feet apart;
- b. at least one row of evergreen shrubs which will grow to form a continuous hedge at least five (5) feet in height within one (1) year of planting; and
- c. lawn, low-growing evergreen shrubs or evergreen ground cover covering the balance of the area.

2. Berm Plus Planting Area: Width not less than ten (10) feet, developed in accordance with the following standards:

- a. Berm form should not slope more than forty (40) percent (1:2.5) on the side away from the area screened from view. The slope for the other side (screened area) may vary.
- b. A dense evergreen hedge shall be located so as to most effectively buffer the proposed use.

3. Wall Plus Planting Area: Width must not be less than five (5) feet developed in accordance with the following standards:

- a. a masonry wall or fence not less than five (5) feet in height; and
- b. lawn, low-growing evergreen shrubs, and evergreen ground cover covering the balance of the area.

4. Other methods which produce an adequate buffer considering the nature of the impacts to be mitigated, may be used, as approved by the Planning Commission.

C. Screening shall be used to eliminate or reduce the visual impacts of the following:

1. service areas and facilities, including garbage and waste disposal containers, recycling bins and loading areas;
2. outdoor storage and outdoor display areas;

3. parking areas of 6 or more vehicles for a multiple-unit, mixed-use or commercial development, when the parking is directly adjacent to a single-unit home, duplex, townhouse, or residential zone and the screening can be used to screen the adjacent residential use from the parking area;
 4. parking areas for 30 or more vehicles for industrial uses;
 5. at and above-grade electrical and mechanical equipment, such as transformers, heat pumps, and air conditioners; and
 6. any other area or use as required by this Ordinance.
- D. Screening of shared storage facilities for trash and recycling receptacles that serve more than one dwelling and all outdoor storage facilities for trash and recycling for commercial and industrial uses shall meet the following standards:
1. The storage facility shall be screened by a wall, solid fence, or evergreen hedge. The screen must be at least 4 feet in height and located no more than 3 feet from the storage facility.
 2. The storage facility must be separated from residences on abutting properties and from the street lot line by at least 5 feet.
 3. The storage facility shall not be located between the front lot line and a structure. The facility shall be located in an alley where one exists.
- E. Other screening required under this section shall meet the following standards:
1. Any facility or feature that requires screening, other than those listed in 54.010(D) shall be screened from view from residences and neighboring streets by a wall, solid fence, or evergreen hedge that is of a minimum height of at least one foot taller than the facility or feature being screened. Solar collecting panels are exempt from this requirement.
- F. When a required screen or buffer is adjacent to a street, the required fence structures shall be located so that the landscaped portion of the buffer is oriented toward the right-of-way.

EXHIBIT N

Section 54.105: Ash Creek Setback Required

- A. There shall be a 25' greenway setback required along the banks of Ash Creek for all development except middle housing development (triplex, quadplex, cottage clusters, and townhomes). The 25' shall begin at the top of the bank or at the high-water mark, whichever is higher. There shall be no development within the required setbacks. Middle housing shall have a 100' setback, beginning at the top of the bank or at the high-water mark, whichever is higher.
- B. Development for the purposes of this Subsection 54.105 means to construct or alter a structure, to erect a fence, to conduct a mining operation, to conduct filing, grading, paving, excavation or drilling operations, to make a physical change in the use of land, or to create or terminate rights of access. Development does not include placement of public or private bridges.
- C. There shall be no affirmative duty to plant trees, shrubs or vegetation along said setback, although property owners shall be liable for nuisances created in any failure to maintain their property in a manner so as not to interfere with the health, safety and general welfare of the general public.
- D. Nothing in this subsection shall prevent landscaping; reasonable emergency procedures necessary for the safety or protection of property; maintenance and repair usual and necessary for the continuation of an existing use; or repair or maintenance of existing structure, provided that such activities are conducted in conjunction with uses already existing on the



Site Landscaping. [1] A minimum of 15% of the site for commercial, industrial and mixed use developments should be landscaped. A minimum of 20% of the site for multi-family developments should be landscaped. [2] Up to one-third of the landscape may be hardscape such as a walkway, plaza, or small gathering area [3] Whenever possible, stormwater detention and retention facilities should be incorporated into the landscape.

same property and that they are accomplished in a manner compatible with the purpose of this subsection.

- E. This subsection does not give the general public any rights of access across private property that does not otherwise already exist or may hereafter be granted by said private property owners.

EXHIBIT O

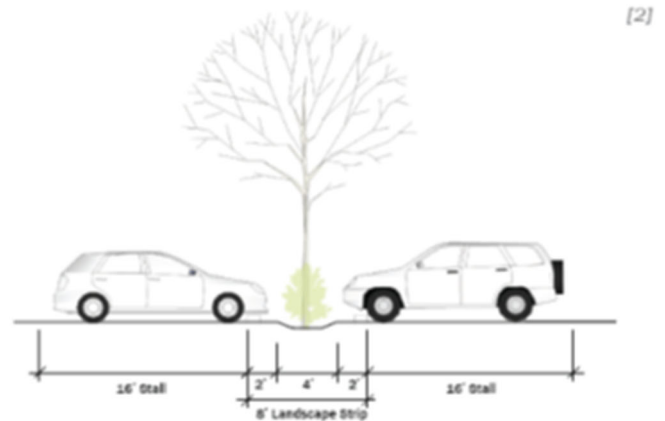
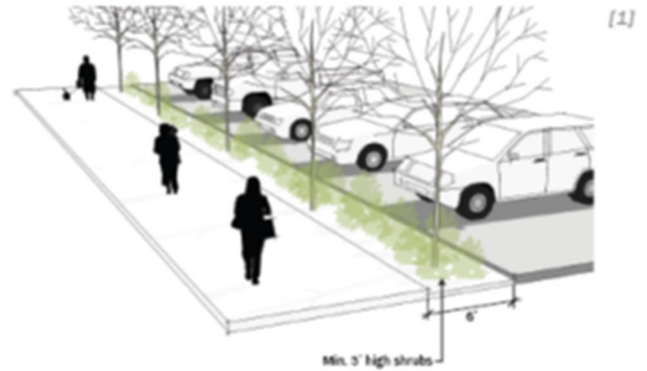
Section 54.205: Landscaping Requirements

The following areas shall be landscaped in accordance with the requirements listed below. These requirements may be used in conjunction with the buffering and screening requirements listed in 54.010 above. The requirements in this subsection are not applicable to manufactured dwelling parks, which are regulated by Subchapter 61 of the Independence Development Code.

A. Site Landscaping Standards

1. Multiple-unit residential developments or dwelling structures containing five (5) or more units and are not cottage cluster development:

- a. A minimum of 20% of the gross site shall be landscaped. Landscaped areas may include ground cover, shrubs and trees for foundation planting, entrance plantings, parking island and perimeter plants.
- b. Each ground level unit, excluding manufactured homes, shall have an accessible outdoor private space of not less than 48 square feet in area. The area shall be enclosed, screened or otherwise designed to provide privacy for unit residents.
- c. The standard in IDC 54.205(A)(1)(a) shall



Off-Street Parking Lot Landscaping. Parking lot appearance and functionality can be improved by [1] a minimum perimeter setback of 6 feet with ground cover, shade trees, and shrubs that are a minimum of 3 feet high [2] internal landscaping strips that are a minimum of 8 feet wide [3] and stormwater detention and retention landscaping that reduces run-off while also providing a buffer between parking and pedestrians.

not apply in the Mixed-Use Pedestrian Friendly Commercial Zones or the Downtown Riverfront Zone.

2. Commercial, Industrial and Mixed-Use Developments:
 - a. A minimum of 15% of the gross site area is required to be landscaped.
 - b. The standard in IDC 54.205(A)(2)(a) shall not apply in the Mixed-Use Pedestrian Friendly Commercial Zones or the Downtown Riverfront Zone.
 3. Landscape Requirements. For developments that require a set percentage of the site to be landscaped:
 - a. Landscaping shall be provided in the form of a dedicated landscape zone that has at a minimum a rate of one (1) tree and three (3) shrubs per every 400 square feet of contiguous open space. Remaining area within the 400 square foot open space area shall be planted with ground cover, including grass, that fills the area after three (3) years.
 - b. Up to 30% of the landscaping requirement for the site may be dedicated to hardscape – walkways, plazas and small gathering areas. Every attempt shall be made to use permeable materials such as grasscrete, gravel, or previous asphalt.
 4. Requirements for Additions.
 - a. Any addition to or expansion of an existing structure that falls within the standards in IDC 54.205(A) shall provide landscaping for the addition. To determine the amount of landscaping necessary, the applicant shall calculate the total area that will be covered by new impervious surfaces (whether parking spaces, loading areas or building footprint) and multiply the total by the proportion of landscaping required.
 - b. Landscaping to be installed for an addition or expansion may be spread over the entire site (original and addition or expansion projects) with the approval of the City.
- B. Parking Lot Landscaping Standards. Parking lots that contain over ten (10) parking spaces are required to use curbed islands and landscape strips consisting of plantings therein to break up parking areas. The following landscape standards shall apply to off-street parking lots:
1. Perimeter landscaping
 - a. In all parking lots a minimum perimeter of six (6) feet shall be landscaped within the front and side yard setbacks to buffer the parking lot. Provided that, for parking lots with 20 or fewer parking spaces, the perimeter landscaping shall only be required next to an adjacent street. The six (6) foot wide strip shall be landscaped with:
 - i. Noninvasive ground cover (including grass),
 - ii. Shrubs that are a minimum of three (3) feet high after two (2) years and form a continuous screen, and

- iii. Approved street trees that are a minimum a 2.5” caliper and are planted at a rate of one (1) every 25 feet.
 - b. A three (3) foot high wall or planter constructed of either concrete or masonry may be substituted for ground cover or shrubs to screen the sidewalk from parking.
- 2. Interior landscaping.

In parking lots that have more than ten (10) parking spaces, there shall be a minimum of 150 square feet of landscaping per every ten (10) spaces that includes two (2) shade trees for every ten (10) spaces. Any extra landscaping used along the perimeter of a parking lot or used for parking lot screening (per IDC 54.010(C)) can be used to help meet this requirement.

EXHIBIT P

Section 73.010: Required Number of Parking Spaces

A. RESIDENTIAL USES¹: 1. Single-Unit Dwellings and Duplexes 2. Triplex and Quadplex 3. Townhouses 4. Cottage Cluster Development 5. Multiple-unit Dwellings 6. Residential unit in a mixed-use building 7. Single room occupancy use 8. Accessory Dwelling Unit	<u>NUMBER OF SPACES REQUIRED</u> 1 space per unit/ 3 spaces per unit (maximum) 1 space per unit 1 space per unit 1 space per unit 1 space per unit 1 space per unit 1 space for every 3 single room occupancy units No parking spaces required. Maximum 1 space per unit.
B. INSTITUTIONS: 1. Welfare or correctional institution 2. Convalescent hospital, nursing home, sanitarium, rest home, home for the aged. 3. Hospital 4. Child care facilities 5. The uses listed above in the Downtown Overlay Zone or Downtown Riverfront Zone	<u>NUMBER OF SPACES REQUIRED</u> One (1) space per five beds for patients or inmates. One (1) space per two beds for patients or residents. Two (2) spaces per patient bed. Zero (0) spaces No minimum parking requirement.

¹ For residential uses, off-street parking includes the garage or carport area.

C. PLACES OF PUBLIC ASSEMBLY 1. Church 2. Library; reading room 3. Elementary or Junior High school 4. High School 5. College; commercial school for adults 6. Other auditoriums; meeting room 7. Place of public assembly without fixed seats 8. The uses listed above in the Downtown Overlay Zone or Downtown Riverfront Zone	NUMBER OF SPACES REQUIRED One (1) space per four seats or eight (8) feet of bench length in the main auditorium. One (1) space per 400 square feet of floor area, plus one (1) space per two employees. One and one-half (1 1/2) spaces per classroom, plus one (1) space per administrative employee. One and one-half (1 1/2) spaces per classroom, plus one (1) space per administrative employee, plus one (1) space for each six students. One and one-half (1 1/2) spaces per in classroom, plus one (1) space per five students the school is designed to accommodate. One (1) space per four seats or eight (8) feet of bench length. One (1) space per 100 square feet. No minimum parking requirement.
D. COMMERCIAL 1. All retail and service-oriented commercial uses. 2. Restaurants and bars. 3. Lodging 4. The uses listed in (D)(1) and (D)(2) in the Downtown Overlay Zone or Downtown Riverfront Zone	NUMBER OF SPACES REQUIRED One (1) space per 500 square feet. One (1) space per 250 square feet. One (1) stall per unit plus two (2) visitor parking stalls No minimum parking requirement.
E. INDUSTRIAL	NUMBER OF SPACES REQUIRED

1. Industrial uses, except warehousing.	One (1) space per 700 square feet gross floor area.
2. Warehousing	One (1) space per 1,000 square feet of gross floor area.
3. Public utilities (gas, water, telephone, etc.), not including business offices.	One (1) space per two employees on the largest shift, plus one (1) space per company vehicle; a minimum of two (2) spaces is required.
4. The uses listed above in the Downtown Overlay Zone and Downtown Riverfront Zone	No minimum parking requirement.
F. OTHER The number of parking spaces required for buildings and uses not specifically listed in this section shall be determined by the Planning Commission.	

Section 74.010: Specific Standards for Accessory Dwelling Units

- A. Accessory dwelling units shall be subject to the following criteria:
1. One accessory dwelling unit is allowed per legal building lot as a subordinate use in conjunction with any detached single-unit structure.
 2. Accessory dwelling units are required to meet the applicable Residential Design Standards, except as modified below:
 - a. If an accessory dwelling unit is oriented to a street or an alley, the structure is required to have windows on 15 percent on the front of the building (rather than the 25 percent required in IDC 19.005(l)).
 - b. If an accessory dwelling is set behind a building and is not adjacent to a street or alley, no minimum window requirements apply.
 3. No off-street parking is required for an accessory dwelling unit.
 4. Accessory dwelling units shall not be more than 800 square feet in size, excluding any related garage area that is constructed for the use. All accessory dwelling units shall be permanently affixed to the ground.
 5. Where an accessory dwelling unit is proposed inside or attached to a single-unit residence, only one entrance to the main building is permitted in the front of the principal residence. A separate entrance for the accessory unit shall be located off the side or the rear of the building.
 6. Accessory dwelling units shall meet all technical code standards including building, electrical, fire, plumbing, and other applicable code requirements.
 7. An accessory dwelling unit and the primary structure on the lot shall be served by a single water meter. The water bill for the primary structure and the accessory dwelling unit shall be in the name of the property owner.
 8. System Development Charges shall be per the adopted system development charge methodology.
 9. Addressing for an accessory dwelling unit shall be approved by the City of Independence.

EXHIBIT R

Section 75.060: Townhouse Dwelling Units

Townhouse units permitted in residential zones or authorized in approved subdivisions or Planned Unit Developments shall meet the following use and development standards:

- A. Number of attached units. The number of townhouse units constructed as an adjoining structure shall not be more than four (4) dwelling units, each on a lot held in separate ownership. More than one such structure may be allowed per subdivision or planned unit development.
- B. Maintenance easement. As a condition of issuance of a permit for any building having an exterior wall contiguous to a property line, the applicant shall furnish an easement from the owner of the property adjacent to said wall providing for ingress, egress, and use of such adjacent property for the purpose of maintaining, repairing, and replacing the building. Said easement shall be appurtenant to the property on which the building is located and shall be approved as to form by the City Attorney and shall be recorded with Polk County prior to issuance of the permit.

EXHIBIT S

Section 75.070: Cottage Cluster Developments

- A. Siting Standards. The siting standards in the table below apply to the development of a Cottage Cluster on a lot.

Siting Standards - Cottage Cluster	
Minimum Number of Cottages per Cottage Cluster	5 cottages
Maximum Number of Cottages per Cottage Cluster	8 cottages
Average Cottage Size. Based on average floor area of all cottages and community buildings within the cottage cluster.	1,400sf or less
Average Cottage Footprint	
• Average of cottages with height of 15 feet or less	1,400 sf or less
• Average of cottages with height over 15 feet	900 sf or less
Maximum Building/Structure Height	25 ft
Minimum Site Perimeter Setbacks	Same as underlying zone.
Maximum Lot Coverage	45%
Minimum Required Open Space - Courtyard	150 sf per cottage
Vehicle Parking	See Section 73.010.
Areas Owned in Common Common areas must be maintained by a homeowners association or other legal entity. Such legal entity may also be responsible for exterior building maintenance. A copy of any applicable covenants, restrictions and conditions must be recorded and provided to the city prior to issuance of a building permit.	

B. Design Standards

1. Cottage orientation. Cottages must be clustered around a common courtyard as demonstrated by meeting the following standards:
 - a. Each cottage within a cluster must have a main entrance that is directly connected to the common courtyard by a pedestrian walkway.
 - b. A minimum of 50 percent of cottages within a cluster must:
 1. Be within 10 feet from the common courtyard, measured from the façade of the cottage that includes the main entrance to the nearest edge of the common courtyard; and
 2. Have a main entrance that either faces the common courtyard or is no more than 20 feet from the common courtyard.
 - c. Exceptions. An existing dwelling included within a cottage cluster may be excluded from the calculation of cottages oriented toward the common courtyard at the applicant's option.

2. Common Courtyard Design Standards. Each cottage cluster must share a common courtyard that meets the following standards:
 - a. The common courtyard must be a single, contiguous piece.
 - b. Cottages must abut the common courtyard on at least two sides of the courtyard.
 - c. The common courtyard must be a minimum of 15 feet wide at its narrowest dimension and must meet the minimum required open space area standard in the table in Section 75.070(A).
 - d. The common courtyard shall be developed with a mix of landscaping, lawn area, pedestrian walkways, and/or paved courtyard area, and may also include recreational amenities. Impervious elements of the common courtyard shall not exceed 75 percent of the total common courtyard area.
 - e. Pedestrian walkways must be included in a common courtyard. Walkways that are contiguous to a courtyard shall count toward the courtyard's minimum dimension and area. Parking areas, required setbacks, and driveways do not qualify as part of a common courtyard.
3. Community Buildings. Cottage cluster projects may include community buildings for the shared use of residents that provide space for accessory uses such as community meeting rooms, guest housing, exercise rooms, day care, or community eating areas. Community buildings must meet the following standards:
 - a. Each cottage cluster is permitted one community building, which shall count towards the maximum average floor area, pursuant to the table in Section 75.070 (A).
 - b. If a community building meets the definition of a dwelling unit and has a footprint that exceeds the maximum footprint in the table in Section 75.070 (A) and/or would exceed the maximum number of cottages in a cottage cluster, a covenant must be recorded against the property stating that the structure is not a legal dwelling unit and will not be used as a primary dwelling.
4. Pedestrian Access.
 - a. An accessible pedestrian walkway must be provided that connects the main entrance of each cottage to the following:
 1. The common courtyard;
 2. Shared parking areas;
 3. Community buildings; and
 4. Sidewalks in public rights-of-way abutting the lot or rights-of-way if there are no sidewalks.
 - b. The walkway must be hard-surfaced and a minimum of 5 feet wide.
5. Windows and Doors. Standard. Cottages that face a street or alley lot line must meet the following standards:
 - a. The front façade must have a minimum of 25 percent windows or pedestrian entrance doors.

- b. Alley facing façade must have a minimum of 15 percent windows or pedestrian entrance doors.
 - c. All other street-facing facades must have a minimum of 15 percent windows or pedestrian entrance doors.
 - d. Exceptions. The following facades are exempt from these standards:
 - 1. Facades separated from the street lot line by a dwelling or buildable lot.
- 6. Parking Design.
 - a. Parking location and access. Parking areas shall meet the standards of Section 19.020.
 - b. Clustered parking. Off-street parking may be arranged in clusters, subject to the following standards:
 - 1. Cottage cluster projects with fewer than 16 cottages are permitted parking clusters of not more than 5 contiguous spaces.
 - 2. Cottage cluster projects with 16 cottages or more are permitted parking clusters of not more than 8 contiguous spaces.
 - 3. Parking clusters must be separated from other spaces by at least 4 feet of landscaping.
 - 4. Clustered parking areas may be covered.
 - c. Screening. Landscaping, fencing, or walls at least 3 feet tall shall separate clustered parking areas and parking structures from common courtyards and public streets.
 - d. Garages and carports.
 - 1. Individual attached garages up to 200 square feet shall be exempted from the calculation of maximum building footprint for cottages.
 - 2. Individual detached garages must not exceed 400 square feet in floor area.
 - 3. Garage doors for attached and detached individual garages must not exceed 20 feet in width.
- 7. Accessory Structures.
 - a. Accessory structures must not exceed 400 square feet in floor area.
 - b. Accessory structures must not be located between a cottage and common open space or courtyard.
- 8. Existing Structures. On a lot to be used for a cottage cluster project, an existing detached single-unit dwelling on the same lot at the time of proposed development of the cottage cluster may remain within the cottage cluster project area under the following conditions:
 - a. The existing dwelling may be nonconforming with respect to the requirements of this code.
 - b. The existing dwelling may be expanded up to the maximum height or the maximum building footprint in Section 75.070 (A); however, existing dwellings that exceed the maximum height and/or footprint of this code may not be expanded.

- c. The floor area of the existing dwelling shall not count towards the average cottage size of a cottage cluster.
- 9. Trash Storage. Shared trash storage facilities for trash and recycling receptacles as defined in Chapter 13 of the IDC shall meet the screening standards of 54.010(C).

EXHIBIT T

Section 90.40.015 Filing an Application for a Minor Partition Action.

The City Manager or designee shall examine each application to ascertain if the appropriate forms have been completed, the appropriate fees have been paid and if all required documents and information have been submitted. Three copies of a sketch map 18 by 24 inches in size containing the date, north point, scale and sufficient description to define the location and boundaries of the parcel to be partitioned shall be submitted to the City Manager or designee along with the following information:

- A. The name and address of the owner of record and of the person who prepared the map.
- B. The names and addresses as compiled from the most recent county property tax assessment roll of all property owners within 100 feet of the entire contiguous site for which the application is made. Notice shall also be provided to any neighborhood or community organization recognized by the governing body and whose boundaries include the site.
- C. The approximate acreage of the parcel under a single ownership or, if more than one ownership is involved, the total contiguous acreage of all landowners directly involved in the minor partition.
- D. For land adjacent to and within the parcel to be partitioned, the locations, names and existing widths of all streets and easements of way; location, width and purpose of all other existing easements; and location and size of sewer and water lines, drainage ways and power poles.
- E. Outline, location and setback dimensions to property lines of existing buildings to remain in place.
- F. Outline, location, approximate date of original construction and dimensions of existing building and other structures to be removed.
- G. Lot layout, showing size and relationship to existing or proposed streets and utility easements.

EXHIBIT U

Section 90.40.025: Standards for Minor Partition Requests.

The City Manager or designee may approve the minor partition application upon a finding that:

- A. The proposed division complies with the requirements for its submittal, all requirements of the Comprehensive Plan, the intent and purposes of this Chapter and all other applicable laws and regulations;
- B. The proposed division is not contrary to previous conditions imposed upon the use or development of the subject parcel by the Planning Commission; and
- C. The proposed division is consistent with the extension of existing or planned City improvements such as streets and has dedicated necessary rights-of-way and easements for the improvements.
- D. If the parcel of land to be partitioned exceeds five acres and within a year is being partitioned into more than two parcels, any one of which is less than one acre, full compliance with all requirements for subdivisions is required if the entire parcel being partitioned is in the process of being divided into small parcels.

Subchapter 90.80: Improvements

Section 90.80.005: Improvement Requirements

The following improvements are summarily required in subdivision and major partitions, and may be applied to minor partitions as conditions for approval and shall be installed at the expense of the subdivider. Applicants may choose to follow the general/discretionary standards track or the Clear and Objective standards track, where offered, in the standards below:

- A. Water Supply. Lots within a subdivision shall be served by a city water supply system conforming to Public Works Design Standards.
- B. Sewage. All lots shall be served by a city sewage disposal system conforming to Public Works Design Standards.
- C. Drainage. Such grading shall be performed and drainage facilities installed conforming to Public Works Design Standards.
- D. Streets.
 - 1. General/Discretionary Standard: The subdivider shall grade and improve streets in the subdivision and the extension of such streets to the paving line of existing streets with which such streets intersect in accordance with Public Works Design Standards.
 - 2. Clear and Objective Standards:
 - a. Wherever existing streets are within, adjacent to, or provide access to a property proposed for subdivision or partition, those existing streets must be improved to the standards of Public Works Design Standards.
 - b. The subdivision or partition shall provide for the continuation of the principal streets existing in the adjoining subdivision or partition when adjoining property which is not subdivided, and such streets shall be of a width not less than the minimum requirements for streets set forth in Public Works Design Standards.
 - c. During consideration of the tentative plan for the subdivision or partition, the Public Works Director, shall determine whether improvements to existing streets adjacent to or within the tract, are necessary to meet the Public Works Design Standards. If so determined, such improvements shall be required as a condition of approval for the tentative plan.
- E. Pedestrian Ways. Sidewalks shown on the street sections shall be installed as located on those sections as a result of the subdivision or major partition. The date of sidewalk installation shall conform with the procedures outlined in Subsection 90.90.105.
- F. Bikeways. Bikeways consistent with the Independence Transportation System Plan shall be installed in accordance with Public Works Design Standards.
- G. Monuments. Monuments shall be installed in accordance with Public Works Design Standards and with the requirements of the Oregon Revised Statutes.
- H. Service Utilities.

1. General/Discretionary Standard: Before approval shall be given of any plat or plan of any subdivision, the subdivider shall provide for the installation of all service utilities in underground conduits and for easements therefore in the manner as hereby set forth and subject to the conditions set forth in this ordinance.
 2. Clear and Objective Standard: All permanent utility services to lots or parcels in a subdivision or partition shall be provided from underground facilities. The subdivision or partition shall:
 - a. Obtain a permit from the City for placement of all underground utilities;
 - b. Make all necessary arrangements with the utility companies and other persons or corporations affected by the installation of such underground utilities in accordance with the rules and regulations of the State Public Utility Commission; and
 - c. The city shall require installation of said utilities to any boundary line of the parcel being divided as to provide for the orderly extension of utilities or future development.
- I. Above-Ground Utility Prohibited. In all new subdivisions in the City of Independence hereafter approved by the Commission it shall be unlawful for any service utility or utilities to be installed or used above the surface of the ground except on a temporary basis upon a special permit issued by the Building Official, but no use under such a special permit shall extend for a total period of more than six months from the date of issue of the first permit therefore. All new street light poles shall be metal. The developer is responsible for any initial cost for such poles (one time fee and concrete footings). The developer will contact and coordinate this work with the appropriate utility.
- J. Manner of Installation.
1. General/Discretionary Standard: All service utilities installed as herein provided shall be installed at a depth and in the manner conforming to city specifications.
 2. Clear and Objective Standard: All service utilities shall be installed in public utility easements prior to the surfacing of such streets.
- K. Acceptance of Public Improvements. Acceptance of all public improvements will comply with the City of Independence Public Works Standards.
- L. Middle Housing Land Divisions. For middle housing developments where a Middle Housing Land Division is proposed, the following conditions shall be met.
1. Sidewalks are required for the parent lot and any child lots with street frontage.
 2. Each resulting dwelling unit shall be served by a separate water service line and sewer service line.
 3. Individual water service lines shall be connected to a public water main located either in the public right-of-way (ROW) or in a public easement on private property subject to the following conditions:
 - a. The public water main is constructed to the City's Public Works Design Standards.
 - b. Future repair or replacement of the public water main will be the responsibility of the City of Independence.

- c. If located in a public easement, the dimensions and location of the easement shall be approved by Public Works.
- 4. Individual sewer service lines shall be connected to a public sewer main located either in the public right-of-way (ROW) or in a public utility easement on private property subject to the following conditions:
 - a. The public sewer main is constructed to the City's Public Works Design Standards.
 - b. Future repair or replacement of the public sewer main will be the responsibility of the City of Independence.
 - c. If located in a public easement, the dimensions and location of the easement shall be approved by Public Works.
- 5. Public utility easements shall comply with the Public Works Design Standards.

Section 90.80.010: Improvement Procedures

All improvements shall conform to the requirements of this ordinance and the Public Works Design Standards.

- A. Work shall not be commenced until plans have been reviewed for adequacy and approved by the City and the developer enters into a development agreement with the City. For evaluation of the subdivision proposal, the engineering plans will be required before approval of the final map or plat. All plans shall be prepared in accordance with the Public Works Design Standards. The fee for engineering plan review shall be set by the City Council.
- B. Work shall not be commenced until the city has been notified in advance, and if work has been discontinued for any reason it shall not be resumed until the city has been notified. A pre-construction meeting with the city is required prior to any construction activity, including material storage and mobilization of equipment to the site.
- C. Required improvements shall be inspected by the city to ensure they meet the Public Works Design Standards. The cost of improvement plan review and inspection will be paid by the developer in accordance with the fee schedule set by the City Council. The developer shall submit cost estimates for such improvements to the City for review and approval. The cost estimates must be prepared and stamped by a licensed engineer, registered in the State of Oregon.
- D. Underground utilities, television cables, telephone lines, sanitary sewers and storm drains installed in streets by the subdivider shall be constructed prior to the surfacing of the streets. Stubs for service connections for underground utilities, television cable, telephone lines, and sanitary sewers shall be placed to lengths that will avoid the need to disturb street improvements when service connections are made.
- E. As-builts shall be filed with the Public Works Department in compliance with the Public Works Standards by the subdivider/developer or their agent upon completion of the improvements.

Section 90.90.010: Streets

- A. General. The location, width, and grade of streets, bikeways and pedestrian facilities shall be considered in their relation to existing and planned streets, bikeways and pedestrian facilities, to topographical conditions, to public convenience and safety, and to the proposed use of the land to be served by the streets. All streets, bikeways and pedestrian facilities shall connect to other said facilities within the development and to existing and planned streets, bikeways, and pedestrian facilities outside the development. Where location is not shown in the Independence Transportation System Plan, Public Works Design Standards, or another development plan, the arrangement of streets in a subdivision shall provide for the continuation or appropriate projection of existing and planned streets, bikeways and pedestrian facilities in surrounding areas.
- B. Widths of street rights-of-way and paving design for streets shall comply with the Public Works Design Standards. Provided that streets within the Southwest Independence Concept Plan area shall be designed in accordance with the street cross sections provided in the Southwest Independence Concept Plan, except when modified by the Independence Transportation System Plan. Engineering staff may make exceptions to the standards based on individual site conditions.
- C. The width of street rights-of-way shall comply with the Public Works Design Standards and be the minimum widths of rights-of-way for streets existing along and adjacent to any boundary of the subdivision or partition which is the natural or planned continuation of the alignment of the existing or proposed streets, and the applicant shall dedicate additional rights-of-way, as determined by the City for any such adjacent street where the existing width of rights-of-way for such street is less than the minimum in said table.
- D. Street Standards: See Public Works Design Standards for right of way, street lanes, bike lanes, planter strip, and sidewalk widths.
- E. Slope Easements. Slope easements shall be dedicated in accordance with the Public Works Design Standards.
- F. Reserve Strips or Block. The City may require the land divider to create a reserve block controlling the access to a street, said block to be placed under the jurisdiction of the City to:
 - 1. Prevent access to abutting land at the end of a street in order to assure the proper extension of the street pattern and the orderly development of land lying beyond the street.
 - 2. Prevent access to the side of a street on the side where additional width is required to meet the right-of-way standards provided in the above table.
 - 3. Prevent access to land abutting a street of the partition or subdivision, but not within the partition or subdivision itself.
 - 4. Prevent access to land unsuitable for building development.
- G. Alignment. As far as practical, streets shall be in alignment with existing streets by continuations of the center lines thereof. Staggered street alignment resulting in "T" intersections shall comply with the Public Works Design Standards.

H. Future Extension of Streets. Where necessary to give access to or permit a satisfactory future subdivision of adjoining land, streets shall be extended to the boundary of the subdivision and the resulting dead-end streets may be approved without a turnaround. Reserve strips or blocks may be required to preserve the objectives of street extensions.

I. Intersections of Streets:

1. Angles: Angles of street intersections shall comply with the Public Works Design Standards.
2. Offsets: Opposing intersections shall be designed in compliance with the Public Works Design Standards to ensure that no offset creates dangerous conditions for the traveling public.
3. Collector and Residential Lot Access to Arterials and Collectors: When residential development abuts an existing or proposed arterial or collector street, lot access shall connect to internal local streets or alleys and comply with the Public Works Design Standards.

J. Topography. The layout of streets shall be in accordance with Section 90.10.010 of this chapter and comply with the Public Works Design Standards.

K. Future Extension of Streets. Where the subdivision or partition is adjacent to land likely to be divided in the future, streets shall continue through boundary lines to provide for the orderly division of such adjacent land or the transportation and access needs of the community.

L. Existing Streets. Whenever existing streets adjacent to or within a tract are of inadequate width with regard to right-of-way and/or roadway pavement, additional right-of-way and/or roadway pavement shall be provided by the developer(s) at the time of subdivision.

M. Cul-de-sac. The use of cul-de-sacs is discouraged and may only be approved upon a showing by the applicant that there are unusual or unique circumstances that justify the cul-de-sac.

For purposes of this section, “unusual or unique circumstances” exist when one of the following conditions prevent a required street connection:

1. Slopes are equal to or greater than 12 percent;
2. A wetland or other water body is present which cannot be bridged or crossed; or
3. Existing development on adjacent property prevents a street connection.

When cul-de-sacs are used, each cul-de-sac shall comply with the Public Works Design Standards. There shall be no cul-de-sacs more than 400 feet in length or serving more than 20 single-unit dwellings.

A public access way shall be required to connect two (2) adjoining cul-de-sacs consistent with the standards for public accessways in Section 90.90.015(D).

- N. **Street Names.** Streets that are in alignment with existing named streets shall bear the names of such existing streets. Names for streets that are not in alignment with existing streets are subject to approval by the City of Independence, need written approval by the Polk County Fire District #1 and the Independence Police Department, and shall not unnecessarily duplicate or resemble the name of any existing or platted street in the City.
- O. **Grades and Curves.** Grades and curves shall comply with the Public Works Design Standards.
- P. **Streets Adjacent to Railroad Rights-of-Way.** Wherever the proposed subdivision contains or is adjacent to a railroad right-of-way, provision may be required for a street approximately parallel to and on each side of such right-of-way at a distance suitable for the appropriate use of the land between the streets and the railroad. The distance shall be determined with due consideration at cross streets of the minimum distance required for approach grades to a future grade separation and to provide sufficient depth to allow screen planting along the railroad right-of-way.
- Q. **Marginal Access Streets.** Where a subdivision abuts or contains an existing or proposed arterial street, the Planning Commission may require marginal access streets, reverse frontage lots with suitable depth, screen planting contained in a non-access reservation along the rear or side property line, or other treatment necessary for adequate protection or residential properties and to afford separation of through and local traffic. Access shall comply with 90.90.010(10)C of this section.
- R. **Alleys.** Alleys shall be provided in commercial and industrial districts, and residential developments per IDC 90.90.010(V), unless other permanent provisions of access to off-street parking and loading facilities are approved by the Planning Commission. The corners of alley intersections shall have a radius of not less than 12 feet.
 - 1. **Dedication.** The Planning Commission may require adequate and proper alleys to be dedicated to the public by the land divider of such design and in such location as necessary to provide for the access needs of the subdivision or partition in accordance with the purpose of Section 90.10.010 of this chapter.
 - 2. **Width.** Width of right-of-way and paving design for alleys shall comply with the Public Works Design Standards. Slope easements shall be dedicated in accordance with specifications in the Public Works Design Standards.
 - 3. **Corner Cut-Offs.** Where two alleys intersect, 10 feet corner cut-offs shall be provided.
 - 4. **Grades and Curves.** Grades and curves shall comply with the Public Works Design Standards.
 - 5. **Other Requirements.** All provisions and requirements with respect to streets in this subchapter shall apply to alleys the same in all respects as if the word "street" or "streets" therein appear as the word "alley" or "alleys" respectively.
- S. **Street trees** are required in all new subdivisions in the amount of one tree for every 35 feet of street frontage. Species, size, location and installation construction will conform to the Independence Urban Forestry Management Plan, as adopted by the City Council and shall comply with the Public Works Design Standards. Street trees shall be installed prior to final plat approval or as allowed by an agreement with the City

Manager or designee. Temporary irrigation may be required at the time of installation and shall be maintained by the developer as long as required by dry/hot weather conditions.

- T. Mail Boxes. Plans for mail boxes to be used, including type and location, shall be approved by the Independence Postmaster.
- U. Paving, strip, and signage. All street plans shall include all required street signs, traffic control signs, and pavement striping in accordance with the Public Works Design Standards.
- V. Access Management. New access to arterials and collectors shall be limited. Shared or consolidated access shall be required for development or land divisions adjacent to these facilities unless demonstrated to be unfeasible.
 - 1. Number of Access Points. All proposed development shall have access to a public right-of-way. Spacing requirements for access points and intersections on arterials and collector streets shall comply with the Public Works Design Standards and the Transportation System Plan.
 - 2. The distance between access points shall be measured from the centerline of the proposed driveway or roadway to the centerline of the nearest adjacent roadway or driveway.
 - 3. Frontage on Service Roads and Common Drives or Use of Alleys.
 - a. Projects proposed on arterials shall include a frontage or service road or use an alley and shall take access from the facility rather than the arterial. This access requirement may be met through the use of interconnecting parking lots which abut the arterial.
 - b. Adjacent uses may share a common driveway provided that appropriate access easements are granted between and among property owners.
 - 4. Alternative Designs. Where natural features or spacing of existing driveways and roadways cause the foregoing access requirements to be physically unfeasible, alternate designs shall be reviewed in accordance with the Public Works Design Standards.
 - 5. Access to Residential Lots. All lots in a proposed residential subdivision shall have frontage on and access from a local street or alley.
- W. Bicycle Requirements. Bike lanes or shared bike lanes shall be provided during the construction, reconstruction, or relocation of arterial and collector streets. Design and construction of bikeways, or other public paths shall conform to the requirements of the Public Works Design Standards.
- X. Pedestrian Requirements.
 - 1. Sidewalk shall be constructed along all arterial, collector, and local service streets.
 - 2. The design and construction of sidewalks and other public paths shall conform to the requirements of the Public Works Design Standards.
- Y. Accessways. Where required:
 - 1. Accessways shall be located to provide a reasonably direct connection between likely pedestrian and cyclist destinations. A reasonably direct connection is a route which minimizes out-of-direction travel for most of the people likely to use the multiple-use path considering terrain, safety, and likely destinations.

2. The design and construction of accessways shall conform to the requirements of the “Oregon Bicycle and Pedestrian Plan”, ADA requirements, and City of Independence standards.
- Z. Lighting. No illumination of pathways that are off street or in riparian areas shall be allowed, unless otherwise allowed by the Independence Public Works Director. Lighting of sidewalks along roadways shall comply with the Public Works Design Standards and IESNA Lighting Standards.

Section 90.115 Middle Housing Land Divisions.

A Middle Housing Land Division (MHLDD) is a partition or subdivision of a lot or parcel on which middle housing is developed or proposed. MHLDDs are regulated by this Code and ORS 92.031. The purpose of an MHLDD is to provide a simplified and expedited process for subdividing or partitioning lots with middle housing so that each unit is on a separate property, which enables the units to be sold and owned individually.

- A. Applicability. MHLDDs are available in zoning districts where middle housing is permitted under this Code. Middle housing development that is eligible for an MHLDD may consist of:
 - 1. A single duplex, triplex, quadplex, cottage cluster, or structure containing townhouses;
 - 2. Any retained or rehabilitated existing units on the lot or parcel that is part of the middle housing development.
 - 3. An MHLDD creates two (2) or more lots or parcels from a single parent lot on which middle housing is developed or proposed. After a MHLDD is completed, the resulting lots or parcels are “child lots” or “middle housing lots.” The approved development is still subject to the requirements and development standards that applied to the parent lot prior to the MHLDD. In addition, the resulting development is still defined as and subject to the development standards that apply to the original middle housing type after an MHLDD is completed (e.g., a duplex that undergoes an MHLDD does not become a townhouse development; the structure and property are still subject to requirements/standards for a duplex).
- B. Application Timing and Sequencing.
 - 1. An application for an MHLDD shall be filed with the City and accompanied by the appropriate fee. It shall be the applicant’s responsibility to submit a complete application that addresses the review criteria of this Section.
 - 2. An application for a tentative plan for an MHLDD may be submitted before, after, or at the same time as the submission of an application for building permits for the middle housing.
 - 3. An application for a tentative plan for an MHLDD may be submitted at the same time as an application for a standard subdivision or partition. The standard land division would create the parent lot(s), and the MHLDD would further subdivide the lot(s) into middle housing child lots.
 - 4. An application of one or more than one MHLDD submitted at the same time as an application for a standard subdivision or partition will be consolidated into a single application subject to the procedural requirements for the standard subdivision or partition.
 - 5. Within the same calendar year as an original partition that was not an MHLDD, one or more of the resulting vacant parcels may be further partitioned into 3 or fewer parcels through an MHLDD.
 - 6. Approval of the creation of MHLDD parent lots does not constitute approval of a MHLDD on such lots unless all of the requirements of Section 90.115 are satisfied.
- C. Tentative Plan Approval Criteria. Approval of a tentative plan for an MHLDD will be granted if the City Planning Official finds that the applicant has met all of the criteria in

Subsections (1) through (6), below. The City's standard tentative plan approval criteria do not apply.

1. The middle housing development, including all existing and proposed structures, complies with:
 - a. The Oregon Residential Specialty Code; and
 - b. The middle housing regulations applicable to the parent lot, including, but not limited to the provisions in this Code.
 2. Exactly one dwelling unit will be located on each resulting child lot except for:
 - a. Lots, parcels, or tracts used as common areas, on which no dwelling units will be permitted; or
 - b. Lots or parcels with an existing detached single-unit dwelling and accessory dwelling unit or an existing duplex, as allowed under Subchapter 17. Such existing units shall be considered a single middle housing unit for the purposes of the MHL.
 3. Utility service connections will be provided for each child lot and associated dwelling as described in Section 90.80.005 of this Code.
 4. Easements will be provided as necessary for each dwelling unit on the site for:
 - a. Locating, accessing, replacing, and servicing all utilities;
 - b. Pedestrian access from each dwelling unit to a private or public road;
 - c. Access to any common use areas or shared building elements; and
 - d. Access to any dedicated driveways or parking.
 5. Buildings or structures on a resulting child lot will comply with applicable building code provisions.
 6. Where a resulting child lot abuts a street that does not meet City standards, street frontage improvements will be constructed and, if necessary, additional right-of-way will be dedicated, pursuant to requirements of Sections 90.80 and 90.90 of this ordinance and consistent with the Public Works Design Standards.
- D. Tentative Plan Submittal Requirements. An application for an MHL tentative plan shall include the following:
1. The boundaries, dimensions, and area of the lot;
 2. The location, width, and names of all proposed streets, flag lot accessways, and public accessways, including those abutting the perimeter of the lot;
 3. The location and use of all existing and proposed buildings and accessory structures on the lot, indicating the distance of such buildings and accessory structures to all property lines and adjacent on-site structures and identification of any that will be removed;
 4. The location of all existing and proposed off-street parking and vehicle use areas;
 5. The location of all existing or proposed public utility connections for each dwelling unit, demonstrating compliance with approval criterion 90.115 (C) and with Sections 90.80 and 90.90;
 6. Existing or proposed easements necessary for each dwelling unit on the plan, demonstrating compliance with the criterion in Section 90.115(C).
 7. A description of the manner in which the proposed land division will satisfy the approval criteria in Section 90.115(C).
 8. Copies of approved building permits or building permit applications, or comparable information necessary to demonstrate compliance with building code standards, and an accompanying site plan demonstrating compliance with criteria in Section 90.115(C).

- E. Tentative Plan Conditions of Approval. The City may attach conditions of approval of a tentative plan for an MHL D to:
1. Prohibit further division of the resulting child lots.
 2. Require that a notation appear on the final plat indicating:
 - a. The approval was given under ORS 92.031.
 - b. The type of middle housing approved on the subject site and noting that the middle housing type shall not be altered by the MHL D (e.g., a duplex that undergoes an MHL D does not become another type of middle housing or a single family detached home; the structure and property are still subject to requirements/standards for a duplex).
 - c. Accessory dwelling units are not permitted on resulting child lots.
 3. The City may require that all public improvements and site improvements needed to satisfy approval criteria in Section (C) and the applicable standards of the City's code are constructed or guaranteed prior to the approval and signing of the final plat for the development.
 4. The preliminary approval of an MHL D is void if and only if a final MHL D plat is not recorded within 3 years of the preliminary approval.
- F. Tentative Plan Procedure. An application for a MHL D can utilize the following procedures:
1. Expedited Procedure. Unless the applicant requests to use the City's standard land division procedure or a MHL D is submitted concurrent with a standard subdivision (and is requested to be reviewed concurrent with the subdivision), the City shall apply the procedure used for an Expedited Land Division, as provided below and in ORS 197.365. A decision for an MHL D processed under ORS 197.365 is not subject to the requirements of ORS 197.797.
 - a. The City Planning Official shall make a decision to approve or deny the application and shall provide notice of the decision to the applicant within 63 days of receiving a completed application, as described in ORS 227.178. Notice shall not be provided to any other person.
 - b. The MHL D review process does not include a hearing and the City does not accept public comment from third parties.
 - c. The City shall issue a written determination of compliance or noncompliance with the approval criteria in Subsection (C). An approval may include conditions of approval pursuant to Subsection (E) to ensure that the application meets all applicable requirements.
 - d. The written determination shall include a summary statement explaining the determination. and an explanation of the applicant's right to appeal the determination under ORS 197.830 to 197.855.
 - e. The applicant shall pay a fee according to the City's fee schedule.
 - f. Only the applicant may appeal a decision for an MHL D processed as an Expedited Land Division made under this section.
 2. Standard Procedure. If requested by the applicant as an alternative to use of the Expedited Procedure described in subsection (a) above or a MHL D is submitted at the same time as an application for a standard subdivision or partition (and the applicant requests a concurrent review), the City shall review an MHL D under the same procedure that applies to a standard land division.

- G. Final Plat Requirements. An application for an MHL final plat shall meet the City's requirements and approval criteria that apply to a standard subdivision or partition final plat per Subsection 90.60.075.

Agenda Item 7.4

Q3 Financials (Carey)



CITY OF INDEPENDENCE MEMORANDUM

TO: Mayor and City Council
FROM: Amanda Carey, Finance Director
MEETING DATE: July 14, 2026
SUBJECT: Finance Report – Q3 2025-26

☒ Information Only

☐ Action Requested

Statement of Issue:

To keep the City Council apprised of the City's financial condition and changes therein, the Finance Department provides quarterly reports comprised of budgetary statements and highlights and trends regarding financial impacts of recent Council actions. This report covers the third quarter of the 2025-26 fiscal year.

Background:

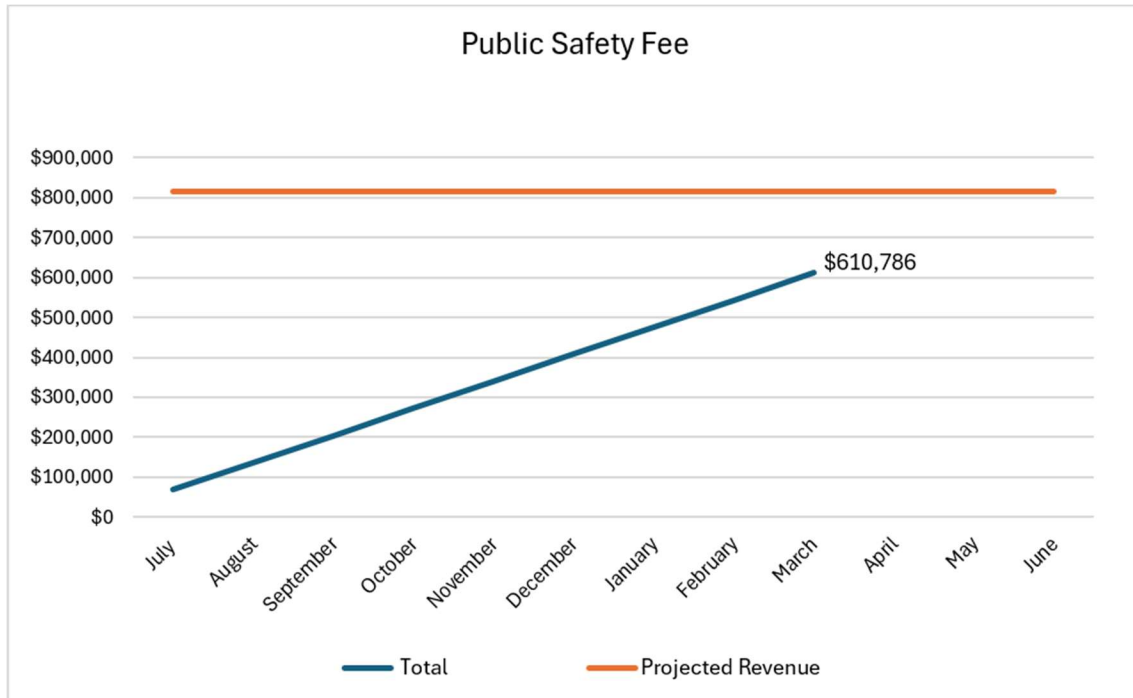
Attached for the Council's information and review is a short summary or dashboard reflecting the financial results and impacts of recent Council actions, including a brief narrative and supporting charts or graphs to help visualize trends or anomalies in the information as appropriate.

Also attached for review are reports reflecting budgeted and actual revenues and expenditures for each City fund. Variances noted in these reports highlight the difference between what is budgeted and what has been received or expended. All significant variances are reviewed by Finance Department staff and may result in corrective action through either a journal entry or an adjustment to the budget being brought to the Council.

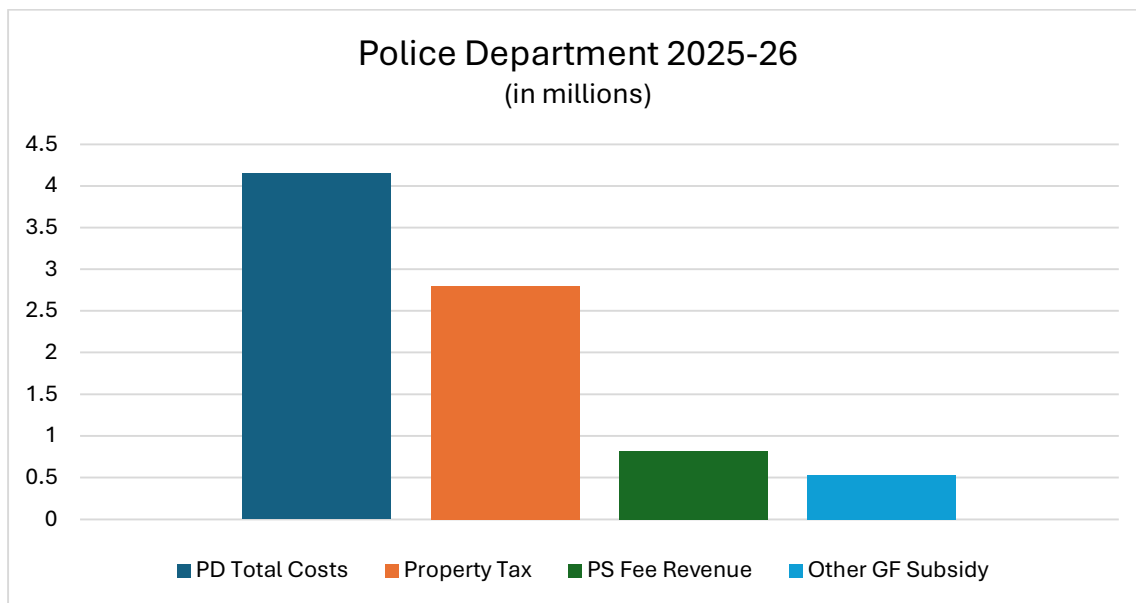
During fiscal year 2025-26, the Finance Department experienced nearly a complete staff turnover. As a result, much of the accounting work throughout the year was delayed or required correction to properly reflect revenues and expenditures in the budgeted departments and accounts. Journal entry work to correct the accounting of expenditures has been performed throughout the year. Final accounting will be fully reflected in the upcoming fourth-quarter financial statements and reporting.

Public Safety Fee

City staff monitors the Public Safety Fee administered through the utility bills. The fee was reduced to \$17/month effective July 1, 2025. The projected revenue to the City's Police Department for 2025-26 is \$816,000. Collections through the third quarter of fiscal year 2025-26 total \$610,786.



The Police Department's operating costs budgeted for fiscal year 2025-26 are approximately \$4.15 million. General Fund property tax revenue is estimated at \$2.8 million, which combined with the Public Safety Fee total of \$816 thousand results in a remaining subsidy from the General Fund of around \$534 thousand for fiscal year 2025-26.

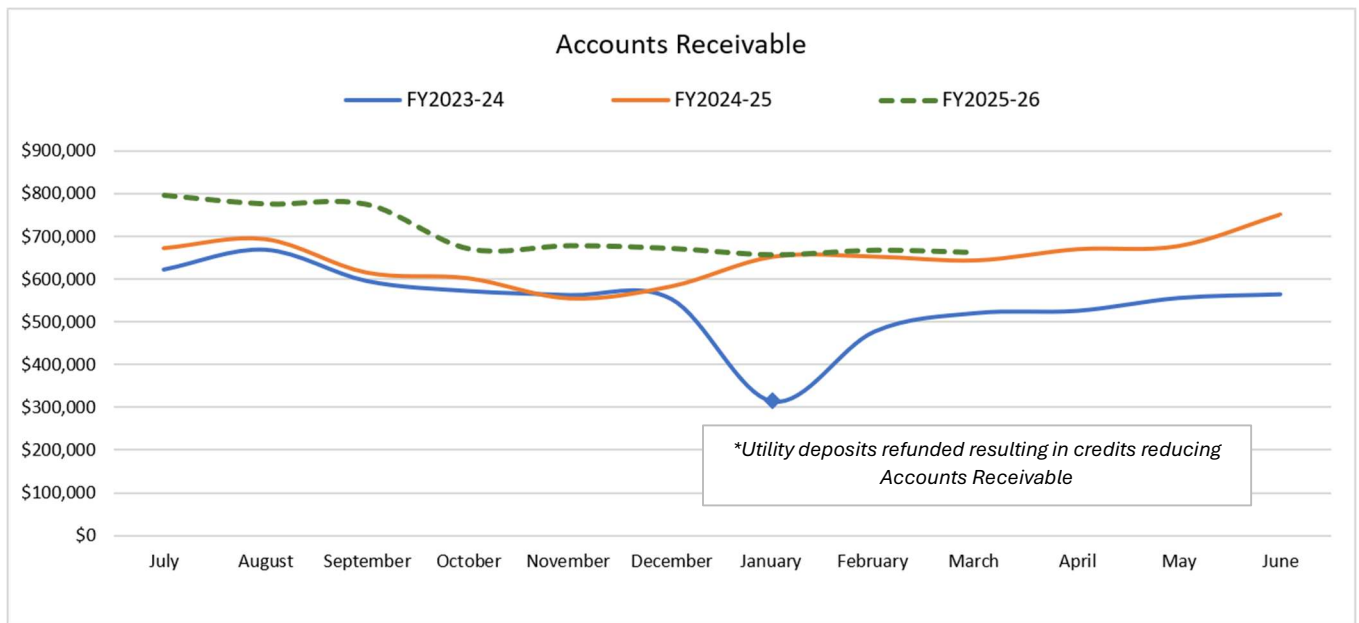


Utility Rate Revenues

As of January 1, 2025, the city implemented a tiered rate structure for water usage to encourage conservation and more fairly allocate water costs among high-usage accounts. Since that time, we have seen an increase in the amounts billed and accounts receivable overall. Ratios of current to delinquent balances remain steady.

The table below highlights utility billing and collection statistics over the last six months.

Month	Accounts Recievable	Billed	Collections %	AR % Current
July 2025	796,531	728,853	93%	88%
August 2025	776,123	689,056	103%	86%
September 2025	775,009	691,814	100%	86%
October 2025	670,516	597,220	117%	85%
November 2025	677,818	581,209	99%	82%
December 2025	671,340	598,260	101%	85%
January 2026	656,296	581,289	102%	85%
February 2026	667,064	576,791	98%	83%
March 2026	661,533	583,656	101%	85%



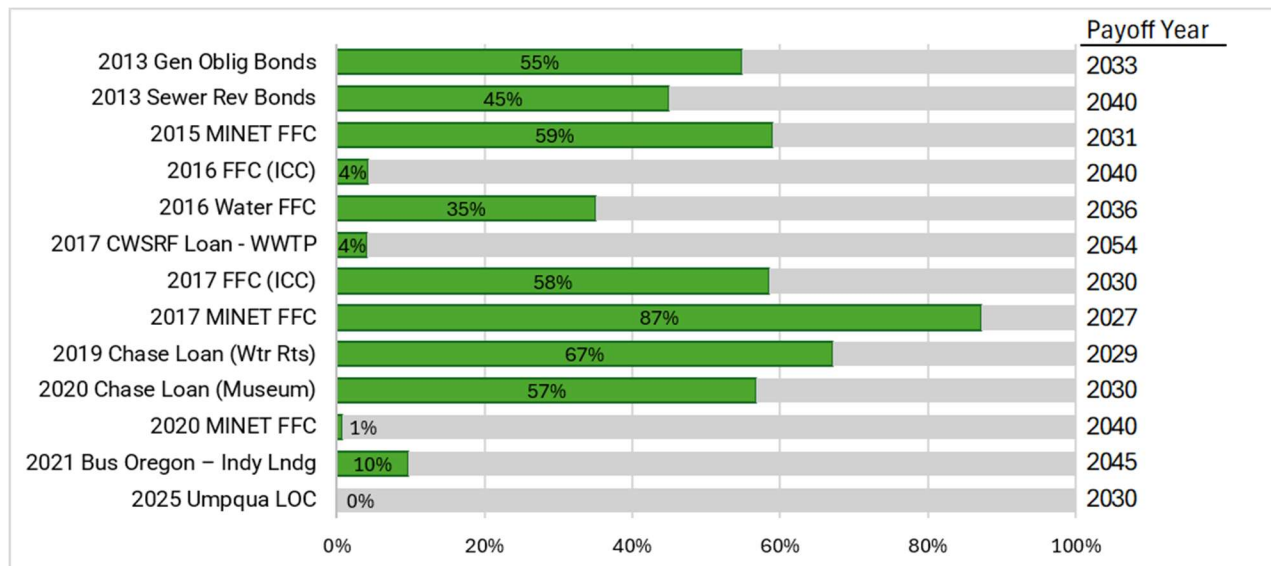
The chart above illustrates the monthly utility accounts receivable over the fiscal year-to-date compared to the two previous fiscal years. Collections exceeded amounts billed in January and March. Overall, collections and accounts receivable remain stable, with no significant increase in delinquent accounts. The Finance team continues to monitor utility billing and collections trends monthly.

Debt Summary

The City continues to make all scheduled principal and interest payments on outstanding debt obligations. On most obligations, the principal is paid annually, and interest is paid semi-annually.

The table below provides a summary of outstanding debt, including original issue amount, principal, and interest payments for the 2025-26 fiscal year, and balance outstanding as of the end of this fiscal year.

Description	Original Amount	2025-26 Principal	2025-26 Interest	Balance 6/30/2026
2013 Gen Oblig Bonds	\$5,255,000	\$290,000	\$111,719	\$2,370,000
2013 Sewer Rev Bonds	2,900,000	90,000	52,250	1,595,000
2015 MINET FFC	4,145,000	250,000	72,850	1,700,000
2016 Water FFC	1,185,000	65,000	25,050	770,000
2016 FFC (ICC)	8,070,000	40,000	294,806	7,720,000
2017 FFC (ICC)	4,035,000	430,000	84,200	1,675,000
2017 MINET FFC	2,160,000	315,000	19,450	275,000
2019 Chase Loan (Wtr Rts)	800,000	83,092	9,164	262,870
2020 Chase Loan (Museum)	650,000	66,711	6,375	280,665
2020 MINET FFC	4,780,000	35,000	143,050	4,745,000
2021 Bus Oregon – Indy Lndg	2,904,580	96,574	76,957	2,622,758
2017 CWSRF Loan - WWTP	6,810,429	1,745,661	127,830	6,528,416
2025 Umpqua LOC	7,500,000	0	11,344	500,000



The chart above shows the percentage paid to date for all debt obligations, as well as the year of final maturity/payoff year. Six of the City's thirteen debt obligations are scheduled to be paid in full within the next five years. Additionally, the two outstanding debt obligations in the City's Water Fund are budgeted to be paid off early in the FY2026-27 budget, resulting in interest savings of approximately \$110,000.

Four payments remain on the Museum Building loan, and the 2017 MINET FFC obligations will be paid off in fiscal year 2026-27. There are three remaining payments on the Water Rights Loan.

The question has been asked why there are multiple MINET obligations listed. There was originally a single MINET bond issued by the City of Independence. That original issue allowed refinancing of portions of the original debt on certain dates specified in the bond documents. The city exercised those refinancing options at different times (2015, 2017, and 2020) to take advantage of favorable interest rates and provide for savings over the remaining life of the bonds. Each of those refinancings became a separate issue for purposes of accounting and reporting for the debt.

Urban Renewal Agency Interfund Loans

There are several outstanding interfund loans between the Urban Renewal Projects Fund and other city funds. Each loan has scheduled annual or semi-annual payments of principal and interest until fully paid off. The following table shows the annual payments due on each loan, the outstanding amounts at the end of the 2025-26 fiscal year, and the year each loan will be paid off.

URA loan payable to:	Year of Loan	Beginning Year of Repayment	2025-26 Payment	Loan Balance 6/30/2026	Final Maturity
General Fund	FY 2017-18	FY 2025-26	\$200,000	\$3,783,251	2034-35
General Fund	FY 2018-19	FY 2023-24	2,204	4,375	2027-28
Econ Dev Loan Fund	FY 2017-18	FY 2020-21	14,465	14,393	2026-27
Econ Dev Loan Fund	FY 2018-19	FY 2021-22	14,501	28,784	2027-28
Sewer Fund	FY 2017-18	FY 2020-21	14,465	14,393	2026-27
Sewer Fund	FY 2018-19	FY 2021-22	29,001	57,572	2027-28
Trans SDC Fund	FY 2018-19	FY 2023-24	95,460	189,500	2027-28
Trans SDC Fund	FY 2020-21	FY 2022-23	45,392	207,881	2030-31
Water SDC Fund	FY 2018-19	FY 2023-24	6,566	13,036	2027-28
Water SDC Fund	FY 2020-21	FY 2022-23	34,417	157,617	2030-31
Sewer SDC Fund	FY 2018-19	FY 2023-24	9,866	19,584	2027-28
Sewer SDC Fund	FY 2020-21	FY 2022-23	51,853	237,473	2030-31
Storm SDC Fund	FY 2018-19	FY 2023-24	3,863	7,670	2027-28
Storm SDC Fund	FY 2020-21	FY 2022-23	979	4,480	2030-31
Parks SDC Fund	FY 2020-21	FY 2022-23	62,023	284,050	2030-31

The repayment schedule for the URA loan from the General Fund was adjusted based on anticipated cash flows within the URA.

MINET Receivable

As of June 30, 2025, the City has recorded a receivable from MINET totaling \$7,865,000. For external financial reporting, in accordance with Generally Accepted Accounting Principles (GAAP), the City maintains an allowance for doubtful accounts in the same amount. This allowance was originally established due to concerns about MINET's ability to meet its obligations. No amounts have been written off as uncollectible.

Since the renegotiated repayment schedule was implemented, MINET has made all scheduled payments to the City. We have budgeted to receive the next payment as scheduled in FY 2026-27.

CITY OF INDEPENDENCE
COMBINED CASH INVESTMENT
MARCH 31, 2026

COMBINED CASH ACCOUNTS

999-00-10111	CASH - UMPQUA CHECKING	40,555.84
999-00-10120	CASH - LGIP - STATE OF OREGON	21,857,419.60
TOTAL COMBINED CASH		21,897,975.44
999-00-10210	CASH CLEARING - ACCOUNTS REC	1,636.84
999-00-10220	CASH CLEARING - MUNI COURT	(175.00)
999-00-10230	CASH CLEARING - UTILITIES	299.48
999-00-10240	CASH CLEARING - COMMUNITY DEVE	(4,950.00)
999-00-10250	CASH CLEARING - BUSINESS LICEN	(105.00)
999-00-10101	CASH BY FUND	(21,894,681.76)
TOTAL UNALLOCATED CASH		.00

CASH ALLOCATION RECONCILIATION

100	ALLOCATION TO GENERAL FUND	561,050.02
215	ALLOCATION TO FACILITIES & VEHICL	1,242,450.15
220	ALLOCATION TO STREET FUND	584,244.68
230	ALLOCATION TO ECONOMIC DEVELO	1,623,611.47
235	ALLOCATION TO TOURISM & EVENTS	(164,469.07)
240	ALLOCATION TO GRANT PROGRAMS	5,590,711.38
255	ALLOCATION TO INFORMATION SERV	(.40)
310	ALLOCATION TO GO BOND FUND	411,840.51
330	ALLOCATION TO SPECIAL ASSESMEN	21,452.81
341	ALLOCATION TO URBAN RENEWAL D	843,211.94
360	ALLOCATION TO MINET DEBT SERVIC	5,932.65
420	ALLOCATION TO STREET SDC FUND	1,205,165.41
425	ALLOCATION TO PARKS CAPITAL RES	22,075.34
430	ALLOCATION TO PARKS SDC FUND	442,147.75
435	ALLOCATION TO CAPITAL PROJECTS	1,068,662.84
441	ALLOCATION TO URBAN RENEWAL P	(735,597.42)
510	ALLOCATION TO SEWER FUND	3,305,119.08
515	ALLOCATION TO SEWER SDC FUND	830,831.78
530	ALLOCATION TO WATER FUND	3,877,418.34
535	ALLOCATION TO WATER SDC FUND	449,953.64
540	ALLOCATION TO STORM DRAIN FUND	379,325.58
545	ALLOCATION TO STORM DRAIN SDC	329,543.28
TOTAL ALLOCATIONS TO OTHER FUN		21,894,681.76
ALLOCATION FROM COMBINED CASH		(21,894,681.76)
ZERO PROOF IF ALLOCATIONS BALA		.00

CITY OF INDEPENDENCE

BALANCE SHEET

MARCH 31, 2026

GENERAL FUND

ASSETS

100-00-10101	CASH BY FUND	561,050.02	
100-00-10111	CASH - UMPQUA CHECKING	2,091.41	
100-00-10112	CASH - UMPQUA CONSTRUCTI	9,791.61	
100-00-10115	CASH - ASSET FORFEITURE	7,910.74	
100-00-10116	CASH - XPRESS CHECKING	865,457.51	
100-00-10120	CASH - LGIP - STATE OF OREG	21,366.13	
100-00-10130	PETTY CASH	636.17	
100-00-12111	PROPERTY TAXES RECEIVABL	113,585.63	
100-00-12120	ACCOUNTS RECEIVABLE	471,749.26	
100-00-12121	ACCOUNTS RECEIVABLE- BUSI	75,016.73	
100-00-12123	COURT UNAPPLIED PAYMENTS	(861.15)	
100-00-12124	LEASE RECEIVABLE	1,825.20	
100-00-12130	PREPAID EXPENSE	46,607.09	
100-00-13441	INTERFUND LOAN TO URBAN R	.03	
	TOTAL ASSETS		2,176,226.38

LIABILITIES AND EQUITY

CITY OF INDEPENDENCE

BALANCE SHEET

MARCH 31, 2026

GENERAL FUND

<u>LIABILITIES</u>		
100-00-21110	ACCOUNTS PAYABLE	14,100.68
100-00-21200	WAGES PAYABLE	69,676.00
100-00-21320	DEFERRED COMP WITHHELD P	30.50
100-00-21330	CAFE WITHHELD PAYABLE	3.80
100-00-21340	LEMLA WITHHELD PAYABLE	(6.00)
100-00-21361	STATE ASSESSMENTS PAYABL	320.18
100-00-21362	COUNTY ASSESSMENTS PAYA	257.24
100-00-21363	SCFAASSESSMENTS PAYABLE	(36.00)
100-00-21370	UNION DUES WITHHELD PAYAB	2,029.96
100-00-21390	MISC PAYROLL DEDUCTIONS P	(1,124.20)
100-00-21400	BENEFITS PAYABLE	600.00
100-00-21410	PERS PAYABLE	26,192.96
100-00-21421	HEALTH INSURANCE PAYABLE	13,751.60
100-00-21422	DENTAL INSURANCE PAYABLE	1,229.10
100-00-21423	LIFE INSURANCE PAYABLE	65.26
100-00-21424	LTD INSURANCE PAYABLE	47.10
100-00-21430	WORKERS COMP PAYABLE	(79.20)
100-00-21440	MSA VEBA PAYABLE	146.80
100-00-21510	STATE INCOME TAX WITHHELD	(.05)
100-00-21520	FEDERAL INCOME TAX WITHHE	(6,690.32)
100-00-21530	FICA PAYABLE	1,114.99
100-00-21540	SUTA PAYABLE	67.99
100-00-21550	FUTA PAYABLE	6,341.97
100-00-21560	OR PAID LEAVE PAYABLE	(924.00)
100-00-21612	UTILITY ROUNDING PROGRAM	5.63
100-00-21620	DEVELOPER DEPOSITS	187,432.86
100-00-21630	BUILDING PERMIT SURCHARG	5,225.68
100-00-21650	BAIL / COURT DEPOSIT	1,563.00
100-00-21660	RESTITUTION PAYABLE	240.00
100-00-22630	DEFERRED INFLOW - LEASES	1,318.10
100-00-22700	PERS LIABILITY RESERVE	(.32)
100-00-25300	DEFERRED/UNEARNED REVEN	315,928.41
TOTAL LIABILITIES		638,829.72
<u>FUND EQUITY</u>		
100-00-32400	ASSIGNED FUND BALANCE	327,210.30
100-00-32500	UNASSIGNED FUND BALANCE	1,033,840.91
100-00-35000	GAAP ADJUSTMENTS	.03
REVENUE OVER EXPENDITUR	176,345.42	
BALANCE - CURRENT DATE	176,345.42	
TOTAL FUND EQUITY		1,537,396.66
TOTAL LIABILITIES AND EQUITY		2,176,226.38

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GENERAL FUND					
	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
<u>ADMINISTRATION</u>					
100-11-41110	PROPERTY TAXES - CURRENT	53,630.48	2,670,913.03	2,746,000.00	75,086.97 97.3
100-11-41120	PROPERTY TAXES - PRIOR	4,553.47	51,911.51	40,000.00 (	11,911.51) 129.8
100-11-41130	PAYMENT IN LIEU OF TAX	18,108.50	18,108.50	18,000.00 (	108.50) 100.6
100-11-41410	FRANCHISE FEE - ELECTRICITY	44,436.07	409,237.22	515,000.00	105,762.78 79.5
100-11-41420	FRANCHISE FEE - NATURAL GAS	.00	127,070.14	120,000.00 (	7,070.14) 105.9
100-11-41430	FRANCHISE FEE - SOLID WASTE	10,935.08	98,260.82	124,000.00	25,739.18 79.2
100-11-41440	FRANCHISE FEE - TELEPHONE	.00	106,431.86	30,000.00 (	76,431.86) 354.8
100-11-41450	FRANCHISE - CABLE	325.27	13,986.66	22,000.00	8,013.34 63.6
100-11-41460	FRANCHISE FEES - DATA	.00	66,646.98	70,000.00	3,353.02 95.2
100-11-41620	MARIJUANA TAX - LOCAL	16,360.39	50,389.74	25,000.00 (	25,389.74) 201.6
100-11-42210	STATE LIQUOR TAX	10,370.43	145,108.74	160,000.00	14,891.26 90.7
100-11-42220	STATE CIGARETTE TAX	386.71	4,685.90	6,000.00	1,314.10 78.1
100-11-42240	STATE MARIJUANA TAX	4,771.29	14,123.74	15,000.00	876.26 94.2
100-11-42250	STATE REVENUE SHARING	.00	83,485.76	110,000.00	26,514.24 75.9
100-11-43200	LICENSES, PERMITS & FEES	35.00	1,460.00	1,000.00 (	460.00) 146.0
100-11-43201	LIQUOR LICENSES	460.00	1,340.00	1,500.00	160.00 89.3
100-11-43202	BUSINESS LICENSES	65.00	400.00	2,500.00	2,100.00 16.0
100-11-44100	CHARGES FOR SERVICES	423.48	111,964.56	.00 (	111,964.56) .0
100-11-44110	LIEN SEARCH FEES	575.00	3,750.00	3,000.00 (	750.00) 125.0
100-11-45200	CASH DONATIONS - UNDESIGNATED	(286.73)	1,123.27	.00 (	1,123.27) .0
100-11-46100	INTEREST INCOME	5,207.67	32,411.55	50,000.00	17,588.45 64.8
100-11-46613	SDC ADMIN FEE	.00 (	504.00)	5,000.00	5,504.00 (10.1)
100-11-46650	ADMIN TECHNOLOGY FEE	.00	287.06	1,000.00	712.94 28.7
100-11-47400	REFUNDS & REIMBURSEMENTS	(1,628.59)	13,788.02	.00 (	13,788.02) .0
100-11-47600	SALE OF CAPITAL ASSETS	.00	.00	250,000.00	250,000.00 .0
100-11-47800	CASH OVER/SHORT	.00 (	16.00)	.00	16.00 .0
100-11-47900	OTHER REVENUE	12.00	9,473.51	5,000.00 (	4,473.51) 189.5
100-11-48130	INTERFUND LOAN REPAYMENT - PRI	.00	86,154.00	204,000.00	117,846.00 42.2
100-11-48230	INTERFUND LOAN REPAYMENT- INTE	.00	116,050.00	.00 (	116,050.00) .0
100-11-49230	TRANSFERS IN - ED LOAN FUND	.00 (	841,784.00)	841,784.00	1,683,568.00 (100.0)
100-11-49510	TRANSFER IN - SEWER	16,446.99	148,279.74	202,300.00	54,020.26 73.3
100-11-49530	TRANSFER IN - WATER	15,044.27	488,126.45	423,296.00 (	64,830.45) 115.3
100-11-49540	TRANSFER IN - STORM	4,088.65	36,892.17	49,200.00	12,307.83 75.0
TOTAL ADMINISTRATION		204,320.43	4,069,556.93	6,040,580.00	1,971,023.07 67.4
<u>BUILDING INSPECTION</u>					
100-15-43231	BUILDING PERMITS	1,940.50	15,667.96	120,000.00	104,332.04 13.1
100-15-43232	MECHANICAL PERMITS	282.30	6,671.50	8,000.00	1,328.50 83.4
100-15-43233	PLUMBING PERMITS	869.25	8,109.25	20,000.00	11,890.75 40.6
100-15-43234	SIGN PERMITS	.00	975.00	100.00 (	875.00) 975.0
100-15-43235	FIRE & LIFE PERMITS	.00	1,260.20	21,000.00	19,739.80 6.0
100-15-43237	FENCE PERMITS	.00	175.00	.00 (	175.00) .0
100-15-43253	PLAN CHECK FEES	1,262.91	7,447.78	48,000.00	40,552.22 15.5
100-15-46650	BUILDINGTECHNOLOGY FEE	176.60	1,391.60	3,520.00	2,128.40 39.5
TOTAL BUILDING INSPECTION		4,531.56	41,698.29	220,620.00	178,921.71 18.9

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

		GENERAL FUND				
		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
<u>INFORMATION SERVICES (IT)</u>						
100-18-44100	CHARGES FOR SERVICES	14,750.00	30,833.00	170,000.00	139,167.00	18.1
	TOTAL INFORMATION SERVICES (IT)	14,750.00	30,833.00	170,000.00	139,167.00	18.1
<u>POLICE</u>						
100-21-42190	FEDERAL GRANTS	.00	(950.00)	.00	950.00	.0
100-21-42330	CENTRAL SCHOOL DISTR./SRO	.00	124,623.09	120,000.00	(4,623.09)	103.9
100-21-43154	IMPOUNDS & FORFEITURES	.07	.60	100.00	99.40	.6
100-21-43203	DOG LICENSES	1,207.00	6,311.00	9,000.00	2,689.00	70.1
100-21-43210	PUBLIC SAFETY FEE	67,881.00	610,786.40	816,000.00	205,213.60	74.9
100-21-43251	POUND FEES	70.00	140.00	1,000.00	860.00	14.0
100-21-43252	UIV IMPOUND FEE	55.00	1,130.00	.00	(1,130.00)	.0
100-21-44100	CHARGES FOR SERVICES	622.00	29,653.23	40,000.00	10,346.77	74.1
100-21-47400	RETURN TO WORK PROGRAM	.00	35.00	.00	(35.00)	.0
100-21-47900	OTHER REVENUE	1,812.56	2,479.45	3,000.00	520.55	82.7
	TOTAL POLICE	71,647.63	774,208.77	989,100.00	214,891.23	78.3
<u>MUNICIPAL COURT</u>						
100-22-42310	MUNICIPAL COURT	.00	35.00	.00	(35.00)	.0
100-22-43000	FINES, LICENSES & FEES	969.47	2,509.93	2,400.00	(109.93)	104.6
100-22-43101	COURT FINES	910.37	5,185.63	10,000.00	4,814.37	51.9
100-22-43151	TRAFFIC FINES	14,897.39	66,001.37	70,000.00	3,998.63	94.3
	TOTAL MUNICIPAL COURT	16,777.23	73,731.93	82,400.00	8,668.07	89.5
<u>ECONOMIC DEVELOPMENT</u>						
100-41-42000	INTERGOVERNMENTAL REVENUES	.00	72,447.54	.00	(72,447.54)	.0
	TOTAL ECONOMIC DEVELOPMENT	.00	72,447.54	.00	(72,447.54)	.0
<u>COMMUNITY DEVELOPMENT</u>						
100-45-43254	DEVELOPMENT FEES	.00	.00	10,000.00	10,000.00	.0
100-45-43256	PLANNING FEES	.00	7,410.00	.00	(7,410.00)	.0
100-45-47900	OTHER REVENUE	.00	2,835.00	.00	(2,835.00)	.0
	TOTAL COMMUNITY DEVELOPMENT	.00	10,245.00	10,000.00	(245.00)	102.5

GENERAL FUND

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CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GENERAL FUND					
	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>ADMINISTRATION</u>					
100-11-51100 SALARIES & WAGES	9,574.60	87,431.38	71,000.00	(16,431.38)	123.1
100-11-52100 EMPLOYEE BENEFITS	5,817.96	54,111.87	46,000.00	(8,111.87)	117.6
100-11-52300 WORKERS COMPENSATION PREMIU	.00	4.29	.00	(4.29)	.0
100-11-61150 REPAIRS & MAINTENANCE - EQUIP	.00	2,120.33	.00	(2,120.33)	.0
100-11-61200 RENT & LEASE PAYMENTS	953.49	3,757.75	5,000.00	1,242.25	75.2
100-11-61300 PROPERTY TAXES PAID	.00	5,523.19	6,000.00	476.81	92.1
100-11-61510 UTILITIES - ELECTRIC	745.56	6,789.65	12,000.00	5,210.35	56.6
100-11-61520 UTILITIES - GARBAGE	18.95	154.73	250.00	95.27	61.9
100-11-61530 UTILITIES - GAS	17.18	124.45	250.00	125.55	49.8
100-11-61540 UTILITIES - TELEPHONE/FAX	269.61	1,878.13	3,500.00	1,621.87	53.7
100-11-61810 INSURANCE - PROPERTY	.00	995.57	1,600.00	604.43	62.2
100-11-61820 INSURANCE - GENERAL LIABILITY	.00	3,617.86	6,000.00	2,382.14	60.3
100-11-61830 INSURANCE - AUTO	.00	1,911.71	4,000.00	2,088.29	47.8
100-11-62110 POSTAGE	.00	345.32	1,000.00	654.68	34.5
100-11-62120 GENERAL OFFICE SUPPLIES	79.20	834.20	2,000.00	1,165.80	41.7
100-11-62201 GENERAL OPERATING SUPPLIES	43.38	3,171.95	500.00	(2,671.95)	634.4
100-11-62221 FUEL	.00	190.82	.00	(190.82)	.0
100-11-62291 OTHER OPERATING SUPPLIES	.00	150.00	5,000.00	4,850.00	3.0
100-11-63100 CONTRACT & PROFESSIONAL SERVI	.00	4,150.00	.00	(4,150.00)	.0
100-11-63110 LEGAL	1,086.50	18,868.00	10,000.00	(8,868.00)	188.7
100-11-63130 ACCOUNTING	10,100.00	54,600.00	45,000.00	(9,600.00)	121.3
100-11-63190 OTHER CONTRACT & PROFESSIONAL	39.76	4,140.60	20,000.00	15,859.40	20.7
100-11-63210 LICENSES & PERMITS	.00	.00	2,000.00	2,000.00	.0
100-11-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	4,331.23	37,463.86	36,000.00	(1,463.86)	104.1
100-11-63300 ADVERTISING & PROMOTION	.00	.00	500.00	500.00	.0
100-11-64000 TRAVEL & TRAINING	1,757.39	4,187.10	10,000.00	5,812.90	41.9
100-11-66130 MAYOR & CITY COUNCIL	1,013.56	11,085.30	8,000.00	(3,085.30)	138.6
100-11-66140 CITY MANAGER	160.79	1,129.34	2,000.00	870.66	56.5
100-11-66530 COMMUNITY SUPPORT	.00	2,000.00	2,000.00	.00	100.0
TOTAL ADMINISTRATION	36,009.16	310,737.40	299,600.00	(11,137.40)	103.7

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

		GENERAL FUND				
		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
100-12-51100	SALARIES & WAGES	2,379.23	26,113.01	60,000.00	33,886.99	43.5
100-12-52100	EMPLOYEE BENEFITS	1,173.43	11,273.84	47,000.00	35,726.16	24.0
100-12-52300	WORKERS COMPENSATION PREMIU	.00	3.48	.00	(3.48)	.0
100-12-61150	REPAIRS & MAINTENANCE - EQUIP	.00	.00	500.00	500.00	.0
100-12-61200	RENT & LEASE PAYMENTS	917.77	4,866.06	18,000.00	13,133.94	27.0
100-12-61510	UTILITIES - ELECTRIC	.00	8,058.78	15,000.00	6,941.22	53.7
100-12-61520	UTILITIES - GARBAGE	25.27	206.33	300.00	93.67	68.8
100-12-61530	UTILITIES - GAS	22.90	165.91	300.00	134.09	55.3
100-12-61540	UTILITIES - TELEPHONE/FAX	1,205.24	2,829.36	6,400.00	3,570.64	44.2
100-12-61810	INSURANCE- PROPERTY	.00	703.98	1,500.00	796.02	46.9
100-12-61820	INSURANCE - GENERAL LIABILITY	.00	1,998.30	3,500.00	1,501.70	57.1
100-12-62110	POSTAGE	.00	468.64	2,500.00	2,031.36	18.8
100-12-62120	GENERAL OFFICE SUPPLIES	273.21	1,545.61	2,000.00	454.39	77.3
100-12-62291	OTHER OPERATING SUPPLIES	.00	519.00	.00	(519.00)	.0
100-12-63110	LEGAL	.00	.00	500.00	500.00	.0
100-12-63190	OTHER CONTRACT & PROFESSIONAL	.00	4,754.69	10,000.00	5,245.31	47.6
100-12-63220	DUES, MEMBERSHIPS & SUBSCRIPTI	1,738.85	19,465.97	22,000.00	2,534.03	88.5
100-12-63240	BANK FEES	549.37	6,324.16	8,500.00	2,175.84	74.4
100-12-64000	TRAVEL & TRAINING	38.84	4,216.12	7,500.00	3,283.88	56.2
TOTAL DEPARTMENT 12		8,324.11	93,513.24	205,500.00	111,986.76	45.5
100-13-51100	SALARIES & WAGES	4,038.71	38,421.14	46,000.00	7,578.86	83.5
100-13-52100	EMPLOYEE BENEFITS	2,688.16	24,090.29	34,000.00	9,909.71	70.9
100-13-52300	WORKERS COMPENSATION PREMIU	.00	1.30	.00	(1.30)	.0
100-13-61200	RENT & LEASE PAYMENTS	138.00	343.79	500.00	156.21	68.8
100-13-61510	UTILITIES - ELECTRIC	248.52	2,263.22	3,300.00	1,036.78	68.6
100-13-61520	UTILITIES - GARBAGE	6.32	51.60	78.00	26.40	66.2
100-13-61530	UTILITIES - GAS	5.73	41.49	90.00	48.51	46.1
100-13-61540	UTILITIES - TELEPHONE/FAX	72.36	665.40	2,000.00	1,334.60	33.3
100-13-61810	INSURANCE- PROPERTY	.00	170.91	480.00	309.09	35.6
100-13-61820	INSURANCE - GENERAL LIABILITY	.00	579.05	1,379.00	799.95	42.0
100-13-62110	POSTAGE	.00	.00	75.00	75.00	.0
100-13-62120	GENERAL OFFICE SUPPLIES	16.00	263.45	900.00	636.55	29.3
100-13-62291	OTHER OPERATING SUPPLIES	51.97	394.57	700.00	305.43	56.4
100-13-63110	LEGAL	2,667.50	8,045.50	13,000.00	4,954.50	61.9
100-13-63190	OTHER CONTRACT & PROFESSIONAL	.00	78.88	2,000.00	1,921.12	3.9
100-13-63220	DUES, MEMBERSHIPS & SUBSCRIPTI	565.36	8,055.75	9,000.00	944.25	89.5
100-13-63300	ADVERTISING AND PROMOTION	.00	.00	400.00	400.00	.0
100-13-64000	TRAVEL & TRAINING	2,332.75	5,116.74	4,000.00	(1,116.74)	127.9
100-13-65900	OTHER PROGRAMS & EVENTS EXPE	.00	216.73	1,000.00	783.27	21.7
100-13-66110	EMPLOYEE RECOGNITION	.00	2,219.36	3,000.00	780.64	74.0
100-13-66120	RECRUITING	40.83	6,792.21	21,500.00	14,707.79	31.6
TOTAL DEPARTMENT 13		12,872.21	97,811.38	143,402.00	45,590.62	68.2

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GENERAL FUND					
	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>BUILDING INSPECTION</u>					
100-15-51100 SALARIES & WAGES	10,345.85	94,306.43	128,000.00	33,693.57	73.7
100-15-52100 BENEFITS	7,234.78	64,940.83	86,000.00	21,059.17	75.5
100-15-52300 WORKERS COMPENSATION PREMIU	.00	11.27	.00	(11.27)	.0
100-15-61160 REPAIRS & MAINTENANCE-VEHICLES	.00	.00	2,000.00	2,000.00	.0
100-15-61200 RENT & LEASE PAYMENTS	285.71	718.55	700.00	(18.55)	102.7
100-15-61510 UTILITIES - ELECTRIC	372.78	3,394.83	5,000.00	1,605.17	67.9
100-15-61520 UTILITIES - GARBAGE	9.47	77.33	90.00	12.67	85.9
100-15-61530 UTILITIES - GAS	8.59	62.21	90.00	27.79	69.1
100-15-61540 UTILITIES - TELEPHONE/FAX	108.67	958.17	1,250.00	291.83	76.7
100-15-61810 INSURANCE - PROPERTY	.00	610.39	1,400.00	789.61	43.6
100-15-61820 INSURANCE - GENERAL LIABILITY	.00	1,445.44	3,500.00	2,054.56	41.3
100-15-61830 INSURANCE - AUTO	.00	476.52	1,000.00	523.48	47.7
100-15-62110 POSTAGE	.00	41.51	70.00	28.49	59.3
100-15-62120 GENERAL OFFICE SUPPLIES	24.01	178.44	500.00	321.56	35.7
100-15-62221 FUEL	45.92	235.33	750.00	514.67	31.4
100-15-63110 LEGAL FEES	.00	.00	2,000.00	2,000.00	.0
100-15-63190 OTHER CONTRACT & PROFESSIONAL	.00	78.88	.00	(78.88)	.0
100-15-63210 LICENSES & PERMITS	125.00	125.00	300.00	175.00	41.7
100-15-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	658.72	6,641.69	6,900.00	258.31	96.3
100-15-63240 BANK FEES	.00	.00	6,000.00	6,000.00	.0
100-15-64000 TRAVEL & TRAINING	.00	577.52	2,000.00	1,422.48	28.9
TOTAL BUILDING INSPECTION	19,219.50	174,880.34	247,550.00	72,669.66	70.6
<u>INFORMATION SERVICES (IT)</u>					
100-18-51100 SALARIES & WAGES	11,386.02	92,314.66	129,000.00	36,685.34	71.6
100-18-52100 EMPLOYEE BENEFITS	6,516.96	53,549.72	87,000.00	33,450.28	61.6
100-18-52300 WORKERS COMPENSATION PREMIU	.00	10.63	.00	(10.63)	.0
100-18-61150 REPAIRS & MAINTENANCE - EQUIPM	.00	1,234.94	3,000.00	1,765.06	41.2
100-18-61200 RENT & LEASE PAYMENTS	78.88	284.67	473.00	188.33	60.2
100-18-61510 UTILITIES - ELECTRIC	372.78	3,394.83	5,661.00	2,266.17	60.0
100-18-61520 UTILITIES - GARBAGE	9.47	77.33	120.00	42.67	64.4
100-18-61530 UTILITIES - GAS	8.59	62.21	120.00	57.79	51.8
100-18-61540 UTILITIES - TELEPHONE/FAX	441.86	2,929.03	6,500.00	3,570.97	45.1
100-18-61810 INSURANCE-PROPERTY	.00	264.50	910.00	645.50	29.1
100-18-61820 INSURANCE - GENERAL LIABILITY	.00	934.47	1,816.00	881.53	51.5
100-18-62120 GENERAL OFFICE SUPPLIES	24.01	200.99	300.00	99.01	67.0
100-18-62201 GENERAL OPERATING SUPPLIES	.00	95.65	500.00	404.35	19.1
100-18-62202 SMALL TOOLS & EQUIPMENT	.00	31,854.57	34,000.00	2,145.43	93.7
100-18-63190 OTHER CONTRACT & PROFESSIONAL	.00	78.88	1,200.00	1,121.12	6.6
100-18-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	139.30	9,391.20	10,000.00	608.80	93.9
100-18-64000 TRAVEL & TRAINING	(75.00)	724.00	2,000.00	1,276.00	36.2
TOTAL INFORMATION SERVICES (IT)	18,902.87	197,402.28	282,600.00	85,197.72	69.9

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GENERAL FUND

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>JANITORIAL</u>					
100-19-51100 SALARIES & WAGES	3,200.89	35,298.88	40,000.00	4,701.12	88.3
100-19-52100 EMPLOYEE BENEFITS	1,203.21	12,706.59	15,000.00	2,293.41	84.7
100-19-52300 WORKERS COMPENSATION PREMIU	.00	15.23	.00	(15.23)	.0
100-19-61150 REPAIRS MAINTENANCE- EQUIPMEN	.00	.00	500.00	500.00	.0
100-19-61450 UTILITIES TELEPHONE/FAX	.00	.00	800.00	800.00	.0
100-19-61540 UTILITIES - TELEPHONE/FAX	32.75	306.11	.00	(306.11)	.0
100-19-61810 INSURANCE- PROPERTY	.00	292.99	975.00	682.01	30.1
100-19-61820 INSURANCE - GENERAL LIABILITY	.00	748.52	2,001.00	1,252.48	37.4
100-19-62120 GENERAL OFFICE SUPPLIES	.00	93.97	200.00	106.03	47.0
100-19-62201 GENERAL OPERATING SUPPLIES	1,287.91	4,069.29	8,000.00	3,930.71	50.9
100-19-62291 OTHER OPERATING SUPPLIES	.00	.00	50.00	50.00	.0
100-19-63190 OTHER CONTRACT & PROFESSIONAL	59.12	842.12	4,000.00	3,157.88	21.1
100-19-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	183.68	1,749.14	2,000.00	250.86	87.5
TOTAL JANITORIAL	5,967.56	56,122.84	73,526.00	17,403.16	76.3

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GENERAL FUND					
	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>POLICE</u>					
100-21-51100 SALARIES & WAGES	132,020.75	1,285,956.99	1,991,000.00	705,043.01	64.6
100-21-52100 EMPLOYEE BENEFITS	94,029.87	860,926.62	1,388,000.00	527,073.38	62.0
100-21-52300 WORKERS COMPENSATION PREMIU	.00	1,444.90	.00	(1,444.90)	.0
100-21-61150 REPAIRS & MAINTENANCE - EQUI	.00	5,884.30	10,400.00	4,515.70	56.6
100-21-61200 RENT & LEASE PAYMENTS	1,635.41	6,060.39	7,275.00	1,214.61	83.3
100-21-61510 UTILITIES - ELECTRIC	4,721.89	43,001.10	72,000.00	28,998.90	59.7
100-21-61520 UTILITIES - GARBAGE	120.00	1,052.82	1,500.00	447.18	70.2
100-21-61530 UTILITIES - GAS	108.78	788.11	2,400.00	1,611.89	32.8
100-21-61540 UTILITIES - TELEPHONE/FAX	2,269.85	19,821.48	34,750.00	14,928.52	57.0
100-21-61810 INSURANCE - PROPERTY	.00	9,796.40	9,970.00	173.60	98.3
100-21-61820 INSURANCE - GENERAL LIABILITY	.00	75,049.58	77,606.00	2,556.42	96.7
100-21-61830 INSURANCE - AUTO	.00	26,538.47	27,667.00	1,128.53	95.9
100-21-62110 POSTAGE	15.60	1,607.96	3,200.00	1,592.04	50.3
100-21-62120 GENERAL OFFICE SUPPLIES	248.81	3,068.97	9,960.00	6,891.03	30.8
100-21-62201 GENERAL OPERATING SUPPLIES	603.31	4,880.91	12,500.00	7,619.09	39.1
100-21-62202 SMALL TOOLS & EQUIPMENT	.00	8,910.33	10,500.00	1,589.67	84.9
100-21-62221 FUEL	2,791.02	19,481.36	33,000.00	13,518.64	59.0
100-21-62222 UNIFORMS	102.58	9,532.48	20,840.00	11,307.52	45.7
100-21-62223 AMMUNITION	.00	3,664.86	7,275.00	3,610.14	50.4
100-21-62224 SPECIAL INVESTIGATIONS	19.35	537.32	6,000.00	5,462.68	9.0
100-21-62291 OTHER OPERATING SUPPLIES	26.38	945.16	3,500.00	2,554.84	27.0
100-21-63110 LEGAL	106.00	583.00	4,000.00	3,417.00	14.6
100-21-63160 COMMUNICATIONS 911	42,246.12	118,512.61	156,380.00	37,867.39	75.8
100-21-63170 COMMUNICATION SERVICES	.00	26,777.41	87,573.00	60,795.59	30.6
100-21-63190 OTHER CONTRACT & PROFESSIONAL	135.00	3,821.42	11,850.00	8,028.58	32.3
100-21-63210 LICENSES & PERMITS	.00	.00	1,200.00	1,200.00	.0
100-21-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	12,429.77	60,517.15	70,575.00	10,057.85	85.8
100-21-63270 SOFTWARE SUBSCRIPTIONS	.00	30,460.71	36,795.00	6,334.29	82.8
100-21-63300 ADVERTISING & PROMOTION	.00	.00	750.00	750.00	.0
100-21-64000 TRAVEL & TRAINING	1,428.37	14,101.87	19,000.00	4,898.13	74.2
100-21-65200 POLICE PROGRAMMING EXPENSE	1,194.66	5,628.70	16,800.00	11,171.30	33.5
100-21-66120 RECRUITMENT EXPENSE	.00	2,990.98	16,250.00	13,259.02	18.4
100-21-66530 COMMUNITY SUPPORT	149.50	1,495.50	5,700.00	4,204.50	26.2
100-21-66590 OTHER MISCELLANEOUS EXPENSES	12.19	257.85	.00	(257.85)	.0
TOTAL POLICE	296,415.21	2,654,097.71	4,156,216.00	1,502,118.29	63.9

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GENERAL FUND					
	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>MUNICIPAL COURT</u>					
100-22-51100 SALARIES & WAGES	1,714.86	15,242.42	23,000.00	7,757.58	66.3
100-22-52100 EMPLOYEE BENEFITS	886.17	7,784.22	13,000.00	5,215.78	59.9
100-22-52300 WORKERS COMPENSATION PREMIU	.00	.11	.00	(.11)	.0
100-22-61200 RENT & LEASE PAYMENTS	23.68	142.08	.00	(142.08)	.0
100-22-61540 UTILITIES - TELEPHONE/FAX	36.15	301.78	2,000.00	1,698.22	15.1
100-22-61810 INSURANCE - PROPERTY	.00	101.73	500.00	398.27	20.4
100-22-61820 INSURANCE - GENERAL LIABILITY	.00	483.01	1,500.00	1,016.99	32.2
100-22-62110 POSTAGE	.00	1,166.33	1,500.00	333.67	77.8
100-22-62120 GENERAL OFFICE SUPPLIES	7.23	141.43	400.00	258.57	35.4
100-22-62291 OTHER OPERATION SUPPLIES	.00	.00	100.00	100.00	.0
100-22-63100 CONTRACT & PROFESSIONAL SERVI	.00	187.55	.00	(187.55)	.0
100-22-63110 LEGAL	.00	640.00	2,000.00	1,360.00	32.0
100-22-63120 JUDGE	750.00	6,750.00	12,000.00	5,250.00	56.3
100-22-63190 OTHER CONTRACT & PROFESSIONAL	189.00	1,881.00	3,000.00	1,119.00	62.7
100-22-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	85.87	441.11	1,500.00	1,058.89	29.4
100-22-64000 TRAVEL & TRAINING	130.00	1,063.20	2,000.00	936.80	53.2
TOTAL MUNICIPAL COURT	3,822.96	36,325.97	62,500.00	26,174.03	58.1
<u>ECONOMIC DEVELOPMENT</u>					
100-41-51100 SALARIES & WAGES	2,950.71	26,528.42	13,000.00	(13,528.42)	204.1
100-41-52100 EMPLOYEE BENEFITS	1,807.19	16,393.43	9,000.00	(7,393.43)	182.2
100-41-52300 WORKERS COMPENSATION PREMIU	.00	2.28	.00	(2.28)	.0
100-41-61200 RENT & LEASE PAYMENTS	138.00	343.79	.00	(343.79)	.0
100-41-61510 UTILITIES - ELECTRIC	248.52	2,263.22	2,800.00	536.78	80.8
100-41-61520 UTILITIES - GARBAGE	6.32	51.60	150.00	98.40	34.4
100-41-61530 UTILITIES - GAS	5.73	41.49	150.00	108.51	27.7
100-41-61540 UTILITIES - TELEPHONE/FAX	133.27	1,262.41	3,050.00	1,787.59	41.4
100-41-61810 INSURANCE - PROPERTY	.00	40.69	700.00	659.31	5.8
100-41-61820 INSURANCE - GENERAL LIABILITY	.00	623.76	1,400.00	776.24	44.6
100-41-62110 POSTAGE	.00	3.72	.00	(3.72)	.0
100-41-62120 GENERAL OFFICE SUPPLIES	16.00	138.24	200.00	61.76	69.1
100-41-62201 GENERAL OPERATING SUPPLIES	.00	7.44	.00	(7.44)	.0
100-41-62291 OTHER OPERATING SUPPLIES	.00	51.48	100.00	48.52	51.5
100-41-63190 OTHER CONTRACT & PROFESSIONAL	.00	78.88	60,000.00	59,921.12	.1
100-41-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	188.06	4,031.52	9,200.00	5,168.48	43.8
100-41-64000 TRAINING & TRAVEL	80.00	744.44	1,000.00	255.56	74.4
100-41-65900 OTHER PROGRAMS & EVENTS EXPE	311.64	661.64	750.00	88.36	88.2
TOTAL ECONOMIC DEVELOPMENT	5,885.44	53,268.45	101,500.00	48,231.55	52.5

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GENERAL FUND

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>COMMUNITY DEVELOPMENT</u>					
100-45-51100 SALARIES & WAGES	8,656.67	77,274.60	118,000.00	40,725.40	65.5
100-45-52100 EMPLOYEE BENEFITS	5,597.71	50,491.47	84,000.00	33,508.53	60.1
100-45-52300 WORKERS COMPENSATION PREMIU	.00	1.42	.00	(1.42)	.0
100-45-61200 RENT & LEASE PAYMENTS	185.82	719.85	700.00	(19.85)	102.8
100-45-61510 UTILITIES - ELECTRIC	248.52	2,263.22	4,000.00	1,736.78	56.6
100-45-61520 UTILITIES - GARBAGE	6.32	51.60	200.00	148.40	25.8
100-45-61530 UTILITIES - GAS	5.73	41.49	200.00	158.51	20.8
100-45-61540 UTILITIES - TELEPHONE/FAX	36.15	339.85	650.00	310.15	52.3
100-45-61810 INSURANCE - PROPERTY	.00	459.83	500.00	40.17	92.0
100-45-61820 INSURANCE - GENERAL LIABILITY	.00	980.14	1,500.00	519.86	65.3
100-45-62110 POSTAGE	.00	303.28	1,500.00	1,196.72	20.2
100-45-62120 GENERAL OFFICE SUPPLIES	27.51	297.98	500.00	202.02	59.6
100-45-62202 SMALL TOOLS & EQUIPMENT	.00	49.99	.00	(49.99)	.0
100-45-62291 OTHER OPERATING SUPPLIES	.00	.00	500.00	500.00	.0
100-45-63110 PROFESSIONAL SERVICES - LEGAL	450.50	9,488.10	.00	(9,488.10)	.0
100-45-63140 ENGINEERING	.00	.00	25,000.00	25,000.00	.0
100-45-63180 NUSIANCE ABATEMENT SERVICES	.00	.00	2,000.00	2,000.00	.0
100-45-63190 OTHER CONTRACT & PROFESSIONAL	.00	78.88	10,000.00	9,921.12	.8
100-45-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	217.01	4,014.77	5,500.00	1,485.23	73.0
100-45-63300 ADVERTISING & PROMOTIONS	.00	1,357.21	1,500.00	142.79	90.5
100-45-64000 TRAVEL & TRAINING	.00	946.96	1,500.00	553.04	63.1
TOTAL COMMUNITY DEVELOPMENT	15,431.94	149,160.64	257,750.00	108,589.36	57.9

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GENERAL FUND					
	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
100-50-51100 SALARIES & WAGES	5,349.56	122,354.64	309,000.00	186,645.36	39.6
100-50-52100 EMPLOYEE BENEFITS	3,224.81	67,102.36	201,000.00	133,897.64	33.4
100-50-52300 WORKERS COMP PREMIUM	.00	124.05	.00	(124.05)	.0
100-50-61150 REPAIRS AND MAINTENANCE - EQUI	.00	.00	1,000.00	1,000.00	.0
100-50-61200 RENT & LEASE PAYMENTS	408.54	3,782.94	7,500.00	3,717.06	50.4
100-50-61510 UTILITIES - ELECTRIC	1,428.94	13,245.23	14,000.00	754.77	94.6
100-50-61520 UTILITIES - GARBAGE	159.43	1,275.44	1,500.00	224.56	85.0
100-50-61530 UTILITIES - GAS	1,628.01	7,839.64	4,000.00	(3,839.64)	196.0
100-50-61540 UTILITIES - TELEPHONE/FAX	175.26	1,886.61	2,500.00	613.39	75.5
100-50-61810 INSURANCE - PROPERTY	.00	17,034.67	15,000.00	(2,034.67)	113.6
100-50-61820 INSURANCE - GENERAL LIABILITY	.00	5,331.05	1,700.00	(3,631.05)	313.6
100-50-62110 POSTAGE	8.50	584.59	700.00	115.41	83.5
100-50-62120 GENERAL OFFICE SUPPLIES	282.35	2,036.13	7,000.00	4,963.87	29.1
100-50-62201 GENERAL OPERATING SUPPLIES	179.47	466.53	1,000.00	533.47	46.7
100-50-62202 SMALL TOOLS & EQUIPMENT	.00	1,075.32	1,000.00	(75.32)	107.5
100-50-62251 CIRCULATION - AV MATERIALS	.00	116.79	.00	(116.79)	.0
100-50-62252 CIRCULATION - BOOKS	.00	108.42	.00	(108.42)	.0
100-50-62254 CIRCULATION - PERIODICALS/SUBS	873.11	963.11	1,000.00	36.89	96.3
100-50-62257 EXHIBIT DEVELOPMENT & MAINTENA	.00	4,944.61	2,500.00	(2,444.61)	197.8
100-50-62291 OTHER OPERATING SUPPLIES	489.80	659.80	750.00	90.20	88.0
100-50-63160 SECURITY	.00	.00	500.00	500.00	.0
100-50-63190 OTHER CONTRACT & PROFESSIONAL	.00	.00	24,000.00	24,000.00	.0
100-50-63220 DUES, MEMBERSHIPS & SUBSCRIPT	2,328.61	11,870.07	16,500.00	4,629.93	71.9
100-50-63240 BANK FEES	9.01	87.53	200.00	112.47	43.8
100-50-63250 OVERDUE CHARGES, FINES & FEES	.00	.00	350.00	350.00	.0
100-50-63300 ADVERTISING & PROMOTION	.00	.00	300.00	300.00	.0
100-50-64000 TRAVEL & TRAINING	174.19	2,271.21	3,300.00	1,028.79	68.8
100-50-65900 OTHER PROGRAMS & EVENTS EXPE	.00	340.00	.00	(340.00)	.0
TOTAL DEPARTMENT 50	16,719.59	265,500.74	616,300.00	350,799.26	43.1
LIBRARY					
100-51-51100 SALARIES & WAGES	22,742.12	157,635.74	.00	(157,635.74)	.0
100-51-52100 EMPLOYEE BENEFITS	13,468.67	89,054.29	.00	(89,054.29)	.0
100-51-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	.00	36.42	.00	(36.42)	.0
100-51-63240 BANK FEES	.00	11.38	.00	(11.38)	.0
TOTAL LIBRARY	36,210.79	246,737.83	.00	(246,737.83)	.0
MUSEUM					
100-52-51100 SALARIES & WAGES	1,610.00	15,820.00	.00	(15,820.00)	.0
100-52-52100 EMPLOYEE BENEFITS	603.52	3,978.77	.00	(3,978.77)	.0
100-52-61100 REPAIRS AND MAINTENANCE	.00	(5,230.00)	.00	5,230.00	.0
100-52-62120 GENERAL OFFICE SUPPLIES	.00	44.19	.00	(44.19)	.0
100-52-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	.00	19.92	.00	(19.92)	.0
TOTAL MUSEUM	2,213.52	14,632.88	.00	(14,632.88)	.0

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GENERAL FUND					
	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>PARKS</u>					
100-53-51100 SALARIES & WAGES	7,867.85	75,862.93	103,000.00	27,137.07	73.7
100-53-52100 EMPLOYEE BENEFITS	5,596.77	53,042.11	75,000.00	21,957.89	70.7
100-53-52300 WORKERS COMPENSATION PREMIU	.00	9.34	.00	(9.34)	.0
100-53-61120 REPAIRS AND MAINTENANCE - BUIL	343.90	8,002.94	11,000.00	2,997.06	72.8
100-53-61150 REPAIRS AND MAINTENANCE - EQUI	1,270.97	3,841.90	8,300.00	4,458.10	46.3
100-53-61160 REPAIRS AND MAINTENANCE - VEHI	525.90	1,138.88	3,500.00	2,361.12	32.5
100-53-61170 REPAIRS & MAINTENANCE - LAND &	1,174.40	3,664.99	20,000.00	16,335.01	18.3
100-53-61510 UTILITIES - ELECTRIC	1,477.29	12,873.79	16,000.00	3,126.21	80.5
100-53-61520 UTILITIES - GARBAGE	203.79	997.98	3,500.00	2,502.02	28.5
100-53-61540 UTILITIES - TELEPHONE/FAX	3.40	352.33	3,000.00	2,647.67	11.7
100-53-61550 UTILITIES-WATER	385.81	20,723.98	23,500.00	2,776.02	88.2
100-53-61810 INSURANCE - PROPERTY	.00	6,102.73	6,100.00	(2.73)	100.0
100-53-61820 INSURANCE - GENERAL LIABILITY	.00	1,729.38	3,100.00	1,370.62	55.8
100-53-61830 INSURANCE - AUTO	.00	101.91	3,000.00	2,898.09	3.4
100-53-62120 GENERAL OFFICE SUPPLIES	5.38	465.96	1,100.00	634.04	42.4
100-53-62201 GENERAL OPERATION SUPPLIES	390.52	10,285.05	55,000.00	44,714.95	18.7
100-53-62221 FUEL	370.89	3,773.66	6,300.00	2,526.34	59.9
100-53-62222 UNIFORMS	26.49	1,581.07	1,400.00	(181.07)	112.9
100-53-62291 OTHER OPERATING SUPPLIES	.00	208.85	1,500.00	1,291.15	13.9
100-53-63190 OTHER CONTRACT & PROFESSIONAL	3,646.24	36,073.54	71,500.00	35,426.46	50.5
100-53-63210 LICENSES & PERMITS	.00	133.00	100.00	(33.00)	133.0
100-53-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	419.75	587.36	800.00	212.64	73.4
100-53-64000 TRAVEL & TRAINING	.00	.00	600.00	600.00	.0
TOTAL PARKS	23,709.35	241,553.68	417,300.00	175,746.32	57.9
<u>POOL</u>					
100-54-61510 UTILITIES - ELECTRIC	38.94	253.24	.00	(253.24)	.0
TOTAL POOL	38.94	253.24	.00	(253.24)	.0
<u>NONDEPARTMENTAL</u>					
100-81-81110 LOAN/BOND PAYMENTS - PRINCIPAL	.00	66,711.00	67,000.00	289.00	99.6
100-81-81210 LOAN/BOND PAYMENTS - INTEREST	.00	3,525.87	6,400.00	2,874.13	55.1
100-81-85215 TRANSFER TO BUILDING REPAIR/RE	.00	170,433.00	170,433.00	.00	100.0
100-81-85341 TRANSFER TO URBAN RENEWAL DEB	17,687.50	159,187.50	212,250.00	53,062.50	75.0
100-81-88000 CONTINGENCY	.00	.00	764,207.00	764,207.00	.0
TOTAL NONDEPARTMENTAL	17,687.50	399,857.37	1,220,290.00	820,432.63	32.8
TOTAL FUND EXPENDITURES	519,430.65	4,991,855.99	8,084,034.00	3,092,178.01	61.8
NET REVENUE OVER EXPENDITURES	(189,381.00)	176,345.42	(476,334.00)	(652,679.42)	37.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

FACILITIES & VEHICLE REPAIR/RE

ASSETS

215-00-10101	CASH BY FUND	1,242,450.15	
215-00-12120	ACCOUNTS RECEIVABLE	(2,484.36)	
215-00-12130	PREPAID EXPENSE	915.12	
	TOTAL ASSETS		1,240,880.91

LIABILITIES AND EQUITY

LIABILITIES

215-00-21110	ACCOUNTS PAYABLE	613.09	
215-00-21200	WAGES PAYABLE	1,922.00	
215-00-21390	MISC PAYROLL DEDUCTIONS P	1,144.85	
215-00-21410	PERS PAYABLE	560.20	
215-00-21421	HEALTH INSURANCE PAYABLE	422.30	
215-00-21422	DENTAL INSURANCE PAYABLE	32.30	
215-00-21424	LTD INSURANCE PAYABLE	1.20	
215-00-21430	WORKERS COMP PAYABLE	(1,185.54)	
215-00-21530	FICA PAYABLE	146.50	
215-00-21540	SUTA PAYABLE	1.80	
215-00-21560	OR PAID LEAVE PAYABLE	76.41	
	TOTAL LIABILITIES		3,735.11

FUND EQUITY

215-00-32200	RESTRICTED FUND BALANCE	1,170,277.95	
	REVENUE OVER EXPENDITUR	66,867.85	
	BALANCE - CURRENT DATE	66,867.85	
	TOTAL FUND EQUITY		1,237,145.80
	TOTAL LIABILITIES AND EQUITY		1,240,880.91

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

FACILITIES & VEHICLE REPAIR/RE

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>SOURCE 00</u>					
215-00-40001	BEGINNING FUND BALANCE	.00	.00	1,024,067.00	1,024,067.00	.0
	TOTAL SOURCE 00	.00	.00	1,024,067.00	1,024,067.00	.0
	<u>ADMINISTRATION</u>					
215-11-46100	INTEREST INCOME	4,247.84	36,336.80	60,000.00	23,663.20	60.6
215-11-49100	TRANSFERS IN- GENERAL FUND	.00	170,433.00	170,433.00	.00	100.0
215-11-49540	TRANSFERS IN- STROM DRAIN FUND	.00	50,000.00	50,000.00	.00	100.0
	TOTAL ADMINISTRATION	4,247.84	256,769.80	280,433.00	23,663.20	91.6
	TOTAL FUND REVENUE	4,247.84	256,769.80	1,304,500.00	1,047,730.20	19.7

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

FACILITIES & VEHICLE REPAIR/RE

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>ADMINISTRATION</u>					
215-11-51100 SALARIES & WAGES	5,914.07	54,799.53	94,000.00	39,200.47	58.3
215-11-52100 EMPLOYEE BENEFITS	3,836.70	35,727.22	60,000.00	24,272.78	59.6
215-11-52300 WORKERS COMPENSATION PREMIU	.00	21.96	.00	(21.96)	.0
215-11-61120 REPAIRS & MAINTENANCE - BUILD	5,453.50	52,504.52	51,500.00	(1,004.52)	102.0
215-11-61160 REPAIRS & MAINTENANCE - VEH	1,022.98	12,841.59	22,000.00	9,158.41	58.4
215-11-61540 UTILITIES - TELEPHONE/FAX	115.68	1,015.14	1,700.00	684.86	59.7
215-11-61810 INSURANCE- PROPERTY	.00	378.44	1,200.00	821.56	31.5
215-11-61820 INSURANCE - GENERAL LIABILITY	.00	1,108.80	1,600.00	491.20	69.3
215-11-62120 GENERAL OFFICE SUPPLIES	.00	.00	500.00	500.00	.0
215-11-62201 GENERAL OPERATING SUPPLIES	.00	.00	1,000.00	1,000.00	.0
215-11-62221 FUEL	.00	346.35	3,000.00	2,653.65	11.6
215-11-62291 OTHER OPERATING SUPPLIES	.00	.00	500.00	500.00	.0
215-11-63140 ENGINEERING	.00	.00	500.00	500.00	.0
215-11-63190 OTHER CONTRACT & PROFESSIONAL	2,040.03	27,418.04	72,400.00	44,981.96	37.9
215-11-63210 LICENSES & PERMITS	.00	.00	500.00	500.00	.0
215-11-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	183.24	2,948.82	12,100.00	9,151.18	24.4
215-11-64000 TRAVEL & TRAINING	.00	633.59	2,000.00	1,366.41	31.7
215-11-66530 GRANTS, DONATIONS & SPONSOR	17.55	157.95	.00	(157.95)	.0
215-11-87220 RESERVE FOR FUTURE USE - STR	.00	.00	270,000.00	270,000.00	.0
215-11-87510 RESERVE FOR FUTURE USE - SEW	.00	.00	250,000.00	250,000.00	.0
215-11-87530 RESERVE FOR FUTURE USE - WAT	.00	.00	250,000.00	250,000.00	.0
215-11-87540 RESERVE FOR FUTURE USE - STRM	.00	.00	210,000.00	210,000.00	.0
TOTAL ADMINISTRATION	18,583.75	189,901.95	1,304,500.00	1,114,598.05	14.6
TOTAL FUND EXPENDITURES	18,583.75	189,901.95	1,304,500.00	1,114,598.05	14.6
NET REVENUE OVER EXPENDITURES	(14,335.91)	66,867.85	.00	(66,867.85)	.0

CITY OF INDEPENDENCE

BALANCE SHEET

MARCH 31, 2026

STREET FUND

ASSETS

220-00-10101	CASH BY FUND	584,244.68	
220-00-10111	CASH - UMPQUA CHECKING	111.54	
220-00-12120	ACCOUNTS RECEIVABLE	72,809.94	
220-00-12130	PREPAID EXPENSE	2,710.02	
	TOTAL ASSETS		659,876.18

LIABILITIES AND EQUITYLIABILITIES

220-00-21110	ACCOUNTS PAYABLE	3,827.25	
220-00-21200	WAGES PAYABLE	10,042.00	
220-00-21320	DEFERRED COMP WITHHELD P	50.40	
220-00-21370	UNION DUES WITHHELD PAYAB	2,563.10	
220-00-21390	MISC PAYROLL DEDUCTIONS P	238.35	
220-00-21410	PERS PAYABLE	2,918.90	
220-00-21421	HEALTH INSURANCE PAYABLE	2,240.10	
220-00-21422	DENTAL INSURANCE PAYABLE	180.80	
220-00-21423	LIFE INSURANCE PAYABLE	35.28	
220-00-21424	LTD INSURANCE PAYABLE	6.50	
220-00-21430	WORKERS COMP PAYABLE	(11.73)	
220-00-21440	MSA VEBA PAYABLE	(.40)	
220-00-21530	FICA PAYABLE	866.48	
220-00-21540	SUTA PAYABLE	10.32	
220-00-21550	FUTA PAYABLE	462.57	
220-00-21560	OR PAID LEAVE PAYABLE	348.16	
	TOTAL LIABILITIES		23,778.08

FUND EQUITY

220-00-32400	ASSIGNED FUND BALANCE	10,588.98	
220-00-32500	UNASSIGNED FUND BALANCE	777,282.40	
	REVENUE OVER EXPENDITUR	(151,773.28)	
	BALANCE - CURRENT DATE	(151,773.28)	
	TOTAL FUND EQUITY		636,098.10
	TOTAL LIABILITIES AND EQUITY		659,876.18

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

		STREET FUND				
		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>STREETS</u>					
220-31-40001	BEGINNING FUND BALANCE	.00	.00	638,349.00	638,349.00	.0
220-31-42230	STATE GAS TAX	69,225.77	563,043.28	820,000.00	256,956.72	68.7
220-31-43280	RIGHT OF WAY PERMIT	.00	.00	1,000.00	1,000.00	.0
220-31-44100	CHARGES FOR SERVICES	17.70	1,286.70	50,000.00	48,713.30	2.6
220-31-46100	INTEREST INCOME	1,977.78	20,340.27	24,000.00	3,659.73	84.8
220-31-47900	OTHER REVENUE	.00	113.05	.00	(113.05)	.0
	TOTAL STREETS	71,221.25	584,783.30	1,533,349.00	948,565.70	38.1
	TOTAL FUND REVENUE	71,221.25	584,783.30	1,533,349.00	948,565.70	38.1

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

		STREET FUND				
		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
STREETS						
220-31-51100	SALARIES & WAGES	33,368.67	308,812.99	402,000.00	93,187.01	76.8
220-31-52100	EMPLOYEE BENEFITS	21,157.29	193,996.70	288,000.00	94,003.30	67.4
220-31-52300	WORKERS COMPENSATION PREMIU	.00	601.43	.00	(601.43)	.0
220-31-61110	REPAIRS & MAINTENANCE - INFRAS	250.19	25,945.47	120,000.00	94,054.53	21.6
220-31-61120	REPAIRS & MAINTENANCE - BUILDI	298.88	431.39	2,500.00	2,068.61	17.3
220-31-61150	REPAIRS AND MAINTENANCE - EQUI	15,936.58	29,731.92	33,900.00	4,168.08	87.7
220-31-61160	REPAIRS AND MAINTENANCE - VEHI	251.33	1,205.03	5,500.00	4,294.97	21.9
220-31-61190	REPAIRS & MAINTENANCE - OTHER	.00	13,045.17	17,500.00	4,454.83	74.5
220-31-61200	RENT & LEASE PAYMENTS	310.99	1,326.09	1,900.00	573.91	69.8
220-31-61510	UTILITIES - ELECTRIC	7,509.61	60,061.51	98,000.00	37,938.49	61.3
220-31-61520	UTILITIES - GARBAGE	88.53	1,504.05	7,900.00	6,395.95	19.0
220-31-61530	UTILITIES- GAS	2.86	20.74	200.00	179.26	10.4
220-31-61540	UTILITIES - TELEPHONE/FAX	404.95	3,508.70	4,800.00	1,291.30	73.1
220-31-61810	INSURANCE - PROPERTY	.00	10,118.79	5,500.00	(4,618.79)	184.0
220-31-61820	INSURANCE - GENERAL LIABILITY	.00	9,048.91	7,600.00	(1,448.91)	119.1
220-31-61830	INSURANCE - AUTO	.00	4,595.54	3,600.00	(995.54)	127.7
220-31-62120	GENERAL OFFICE SUPPLIES	86.87	1,046.79	1,800.00	753.21	58.2
220-31-62201	GENERAL OPERATING SUPPLIES	77.36	346.81	2,000.00	1,653.19	17.3
220-31-62221	FUEL	370.89	3,902.05	6,300.00	2,397.95	61.9
220-31-62222	UNIFORMS	47.51	1,578.17	2,200.00	621.83	71.7
220-31-62231	TRAFFIC SIGNS & PAINT	152.12	30,953.28	48,000.00	17,046.72	64.5
220-31-62291	OTHER OPERATING SUPPLIES	47.05	349.39	1,000.00	650.61	34.9
220-31-63110	LEGAL	397.50	2,650.00	10,000.00	7,350.00	26.5
220-31-63130	ACCOUNTING	.00	4,000.00	4,000.00	.00	100.0
220-31-63140	ENGINEERING	547.49	1,464.67	68,000.00	66,535.33	2.2
220-31-63190	OTHER CONTRACT & PROFESSIONAL	56.38	10,469.06	30,300.00	19,830.94	34.6
220-31-63210	LICENSES & PERMITS	91.00	149.00	500.00	351.00	29.8
220-31-63220	DUES, MEMBERSHIPS & SUBSCRIPTI	3,474.25	11,907.49	19,900.00	7,992.51	59.8
220-31-64000	TRAVEL & TRAINING	115.00	1,885.44	4,600.00	2,714.56	41.0
220-31-74000	EQUIPMENT	.00	1,900.00	2,000.00	100.00	95.0
220-31-87220	CAPITAL ASSET REPLACEMENT RESE	.00	.00	67,000.00	67,000.00	.0
220-31-88000	CONTINGENCY	.00	.00	266,849.00	266,849.00	.0
TOTAL STREETS		85,043.30	736,556.58	1,533,349.00	796,792.42	48.0
TOTAL FUND EXPENDITURES		85,043.30	736,556.58	1,533,349.00	796,792.42	48.0
NET REVENUE OVER EXPENDITURES		(13,822.05)	(151,773.28)	.00	151,773.28	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

ECONOMIC DEVELOPMENT LOAN FUND

<u>ASSETS</u>			
230-00-10101	CASH BY FUND	1,623,611.47	
230-00-12510	LOAN RECEIVABLE	46,461.51	
230-00-13000	INTERFUND LOAN RECEIVABLE	.29	
	TOTAL ASSETS		1,670,073.27
<u>LIABILITIES AND EQUITY</u>			
<u>LIABILITIES</u>			
230-00-25300	DEFERRED/UNEARNED REVENUE	46,461.51	
	TOTAL LIABILITIES		46,461.51
<u>FUND EQUITY</u>			
230-00-32500	UNASSIGNED FUND BALANCE	757,968.74	
230-00-35000	GAAP ADJUSTMENTS	.29	
	REVENUE OVER EXPENDITURE	865,642.73	
	BALANCE - CURRENT DATE	865,642.73	
	TOTAL FUND EQUITY		1,623,611.76
	TOTAL LIABILITIES AND EQUITY		1,670,073.27

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

ECONOMIC DEVELOPMENT LOAN FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>ECONOMIC DEVELOPMENT</u>					
230-41-40001	BEGINNING FUND BALANCE	.00	.00	903,318.00	903,318.00	.0
230-41-46100	INTEREST INCOME	5,301.48	33,812.52	15,000.00	(18,812.52)	225.4
230-41-47900	OTHER REVENUE	.00	220.00	.00	(220.00)	.0
230-41-48110	LOAN REPAYMENT - PRINCIPAL	1,206.69	10,860.21	.00	(10,860.21)	.0
230-41-48130	INTERFUND LOAN REPAYMENT - PRI	.00	28,607.00	28,966.00	359.00	98.8
230-41-48230	INTERFUND LOAN REPAYMENT - INT	.00	359.00	.00	(359.00)	.0
230-41-48500	ECONOMIC DEVELOPMENT LOAN	.00	.00	14,500.00	14,500.00	.0
	TOTAL ECONOMIC DEVELOPMENT	6,508.17	73,858.73	961,784.00	887,925.27	7.7
	TOTAL FUND REVENUE	6,508.17	73,858.73	961,784.00	887,925.27	7.7

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

ECONOMIC DEVELOPMENT LOAN FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
	<u>ECONOMIC DEVELOPMENT</u>					
230-41-66520	ECONOMIC DEVELOPMENT LOAN	.00	50,000.00	100,000.00	50,000.00	50.0
230-41-66530	GRANTS, DONATION & SPONSORSHI	.00	.00	20,000.00	20,000.00	.0
230-41-85100	TRANSFERS OUT - GENERAL FUND	.00	(841,784.00)	841,784.00	1,683,568.00	(100.0)
	TOTAL ECONOMIC DEVELOPMENT	.00	(791,784.00)	961,784.00	1,753,568.00	(82.3)
	TOTAL FUND EXPENDITURES	.00	(791,784.00)	961,784.00	1,753,568.00	(82.3)
	NET REVENUE OVER EXPENDITURES	6,508.17	865,642.73	.00	(865,642.73)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

TOURISM & EVENTS FUND

ASSETS

235-00-10101	CASH BY FUND	(	164,469.07)	
235-00-10111	CASH - UMPQUA CHECKING	(	2,853.61)	
235-00-12120	ACCOUNTS RECEIVABLE		30,388.15	
235-00-12130	PREPAID EXPENSE		28,045.57	
	TOTAL ASSETS			(108,888.96)

LIABILITIES AND EQUITY

LIABILITIES

235-00-21110	ACCOUNTS PAYABLE		227.14	
235-00-21200	WAGES PAYABLE		5,701.00	
235-00-21330	CAFE WITHHELD PAYABLE		1.20	
235-00-21390	MISC PAYROLL DEDUCTIONS P		658.42	
235-00-21410	PERS PAYABLE		1,506.93	
235-00-21421	HEALTH INSURANCE PAYABLE		1,635.30	
235-00-21422	DENTAL INSURANCE PAYABLE		153.50	
235-00-21423	LIFE INSURANCE PAYABLE		.90	
235-00-21424	LTD INSURANCE PAYABLE		3.50	
235-00-21430	WORKERS COMP PAYABLE	(	9.07)	
235-00-21440	MSA VEBA PAYABLE	(	.30)	
235-00-21520	FEDERAL INCOME TAX WITHHE	(	131.83)	
235-00-21530	FICA PAYABLE		1,017.23	
235-00-21540	SUTA PAYABLE		4.10	
235-00-21560	OR PAID LEAVE PAYABLE		354.33	
235-00-21640	CLEANING & SECURITY DEPOS		400.00	
	TOTAL LIABILITIES			11,522.35

FUND EQUITY

235-00-32200	RESTRICTED FUND BALANCE	(	40,677.86)	
235-00-32400	ASSIGNED FUND BALANCE		4,933.79	
	REVENUE OVER EXPENDITUR	(	84,667.24)	
	BALANCE - CURRENT DATE	(	84,667.24)	
	TOTAL FUND EQUITY			(120,411.31)
	TOTAL LIABILITIES AND EQUITY			(108,888.96)

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

TOURISM & EVENTS FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>TOURISM & EVENTS</u>					
235-55-40001	BEGINNING FUND BALANCE	.00	.00	68,110.00	68,110.00	.0
235-55-41610	LODGING TAX	11,041.34	182,750.55	200,000.00	17,249.45	91.4
235-55-47204	RENT - PARKS USE	100.00	(345.00)	.00	345.00	.0
235-55-47205	RENT - STAGE	.00	450.00	.00	(450.00)	.0
235-55-47311	INDEPENDENCE DAYS REVENUE	.00	168,017.06	56,000.00	(112,017.06)	300.0
235-55-47314	SUMMER SERIES REVENUE	.00	57,169.25	82,000.00	24,830.75	69.7
235-55-47900	OTHER REVENUE	300.00	5,900.00	.00	(5,900.00)	.0
	<u>TOTAL TOURISM & EVENTS</u>	<u>11,441.34</u>	<u>413,941.86</u>	<u>406,110.00</u>	<u>(7,831.86)</u>	<u>101.9</u>
	 <u>TOTAL FUND REVENUE</u>	 <u>11,441.34</u>	 <u>413,941.86</u>	 <u>406,110.00</u>	 <u>(7,831.86)</u>	 <u>101.9</u>

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

TOURISM & EVENTS FUND

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>TOURISM & EVENTS</u>					
235-55-51100 SALARIES & WAGES	12,054.31	148,678.07	61,000.00	(87,678.07)	243.7
235-55-52100 EMPLOYEE BENEFITS	8,215.28	100,977.68	44,000.00	(56,977.68)	229.5
235-55-52300 WORKERS COMPENSATION PREMIU	.00	.87	.00	(.87)	.0
235-55-61540 UTILITIES - TELEPHONE/FAX	32.75	728.54	1,000.00	271.46	72.9
235-55-61810 INSURANCE - PROPERTY	.00	1,754.36	600.00	(1,154.36)	292.4
235-55-61820 INSURANCE - GENERAL LIABILITY	.00	2,011.76	2,500.00	488.24	80.5
235-55-61830 INSURANCE- AUTO	.00	.00	1,000.00	1,000.00	.0
235-55-62120 GENERAL OFFICE SUPPLIES	.00	(78.13)	100.00	178.13	(78.1)
235-55-62130 PRINTING	.00	.00	100.00	100.00	.0
235-55-62201 GENERAL OPERATING SUPPLIES	.00	.00	1,000.00	1,000.00	.0
235-55-62291 OTHER OPERATING SUPPLIES	.00	.00	200.00	200.00	.0
235-55-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	280.87	3,895.37	11,310.00	7,414.63	34.4
235-55-63300 ADVERTISING & PROMOTION	.00	335.22	5,000.00	4,664.78	6.7
235-55-64000 TRAVEL & TRAINING	.00	115.00	1,000.00	885.00	11.5
235-55-65110 INDEPENDENCE DAYS EXPENSE	.00	105,029.45	143,400.00	38,370.55	73.2
235-55-65130 WINTER EVENTS EXPENSE	.00	21,000.00	10,000.00	(11,000.00)	210.0
235-55-65140 SUMMER SERIES EXPENSE	20,325.00	101,452.13	93,400.00	(8,052.13)	108.6
235-55-65150 OTHER PARK EVENTS EXPENSE	.00	463.93	.00	(463.93)	.0
235-55-65900 OTHER PROGRAMS & EVENTS EXPE	8,054.00	12,173.30	30,000.00	17,826.70	40.6
235-55-66530 COMMUNITY SUPPORT	7.95	71.55	500.00	428.45	14.3
TOTAL TOURISM & EVENTS	48,970.16	498,609.10	406,110.00	(92,499.10)	122.8
TOTAL FUND EXPENDITURES	48,970.16	498,609.10	406,110.00	(92,499.10)	122.8
NET REVENUE OVER EXPENDITURES	(37,528.82)	(84,667.24)	.00	84,667.24	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

GRANT PROGRAMS FUND

<u>ASSETS</u>			
240-00-10101	CASH BY FUND	5,590,711.38	
240-00-10111	CASH - UMPQUA CHECKING	261.14	
240-00-12130	PREPAID EXPENSE	462,712.00	
	TOTAL ASSETS		6,053,684.52
<u>LIABILITIES AND EQUITY</u>			
<u>LIABILITIES</u>			
240-00-21110	ACCOUNTS PAYABLE	390.00	
240-00-21200	WAGES PAYABLE	(4,420.12)	
240-00-21430	WORKERS COMP PAYABLE	(.60)	
240-00-21560	OR PAID LEAVE PAYABLE	96.33	
240-00-25300	DEFERRED/UNEARNED REVENUE	637,688.00	
	TOTAL LIABILITIES		633,753.61
<u>FUND EQUITY</u>			
240-00-32400	ASSIGNED FUND BALANCE	255.32	
240-00-32500	UNASSIGNED FUND BALANCE	5,331,661.59	
	REVENUE OVER EXPENDITURE	88,014.00	
	BALANCE - CURRENT DATE	88,014.00	
	TOTAL FUND EQUITY		5,419,930.91
	TOTAL LIABILITIES AND EQUITY		6,053,684.52

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GRANT PROGRAMS FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>ADMINISTRATION</u>					
240-11-40001	BEGINNING FUND BALANCE	.00	.00	1,434,674.00	1,434,674.00	.0
240-11-42190	FEDERAL GRANTS	.00	.00	896,000.00	896,000.00	.0
240-11-42290	STATE GRANTS	.00	2,740.64	1,677,000.00	1,674,259.36	.2
240-11-46100	INTEREST INCOME	18,260.70	164,880.41	75,000.00	(89,880.41)	219.8
	TOTAL ADMINISTRATION	18,260.70	167,621.05	4,082,674.00	3,915,052.95	4.1
	<u>POLICE</u>					
240-21-42190	FEDERAL GRANTS	.00	10,087.83	14,250.00	4,162.17	70.8
240-21-42290	STATE GRANTS	1,822.06	5,549.88	.00	(5,549.88)	.0
240-21-45100	NONGOVERNMENTAL GRANTS	4,519.75	4,519.75	.00	(4,519.75)	.0
	TOTAL POLICE	6,341.81	20,157.46	14,250.00	(5,907.46)	141.5
	<u>SOURCE 31</u>					
240-31-42190	FEDERAL GRANTS	.00	78,000.00	.00	(78,000.00)	.0
	TOTAL SOURCE 31	.00	78,000.00	.00	(78,000.00)	.0
	<u>ECONOMIC DEVELOPMENT</u>					
240-41-45100	NON- GOV GRANTS	.00	2,478.29	.00	(2,478.29)	.0
	TOTAL ECONOMIC DEVELOPMENT	.00	2,478.29	.00	(2,478.29)	.0
	<u>COMMUNITY DEVELOPMENT</u>					
240-45-42290	STATE GRANTS	.00	3,535.15	.00	(3,535.15)	.0
	TOTAL COMMUNITY DEVELOPMENT	.00	3,535.15	.00	(3,535.15)	.0
	<u>LIBRARY</u>					
240-51-42290	STATE GRANTS	.00	1,690.00	.00	(1,690.00)	.0
240-51-45100	NON-GOVERNMENTAL GRANTS	.00	2,500.00	.00	(2,500.00)	.0
	TOTAL LIBRARY	.00	4,190.00	.00	(4,190.00)	.0
	<u>WASTEWATER</u>					
240-71-42290	STATE GRANTS	.00	20,000.00	.00	(20,000.00)	.0
	TOTAL WASTEWATER	.00	20,000.00	.00	(20,000.00)	.0

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GRANT PROGRAMS FUND

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
TOTAL FUND REVENUE	24,602.51	295,981.95	4,096,924.00	3,800,942.05	7.2

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GRANT PROGRAMS FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
	<u>ADMINISTRATION</u>					
240-11-63190	OTHER CONTRACT & PROFESSIONAL	8,300.00	33,200.00	99,600.00	66,400.00	33.3
	TOTAL ADMINISTRATION	8,300.00	33,200.00	99,600.00	66,400.00	33.3
	<u>POLICE</u>					
240-21-51100	SALARIES & WAGES	.00	.00	10,500.00	10,500.00	.0
240-21-62201	GENERAL OPERATING SUPPLIES	.00	.00	3,750.00	3,750.00	.0
	TOTAL POLICE	.00	.00	14,250.00	14,250.00	.0
	<u> </u>					
240-31-71500	CAPITAL EXPENSE- INFRASTRUCTUR	3,125.75	58,110.45	1,497,000.00	1,438,889.55	3.9
	TOTAL DEPARTMENT 31	3,125.75	58,110.45	1,497,000.00	1,438,889.55	3.9
	<u>ECONOMIC DEVELOPMENT</u>					
240-41-63190	OTHER CONTRACT & PROFESSIONAL	.00	114,370.15	.00	(114,370.15)	.0
240-41-66530	GRANTS, DONATION & SPONSORSHI	.00	.00	500,000.00	500,000.00	.0
	TOTAL ECONOMIC DEVELOPMENT	.00	114,370.15	500,000.00	385,629.85	22.9
	<u>COMMUNITY DEVELOPMENT</u>					
240-45-63190	PROFESSIONAL SERVICES - OTHER	141.72	275.07	136,000.00	135,724.93	.2
	TOTAL COMMUNITY DEVELOPMENT	141.72	275.07	136,000.00	135,724.93	.2
	<u>LIBRARY</u>					
240-51-62201	GENERAL OPERATING SUPPLIES	.00	2,012.28	.00	(2,012.28)	.0
	TOTAL LIBRARY	.00	2,012.28	.00	(2,012.28)	.0
	<u> </u>					
240-53-71500	CAPITAL EXPENSE- INFRASTRUCTUR	.00	.00	500,000.00	500,000.00	.0
	TOTAL DEPARTMENT 53	.00	.00	500,000.00	500,000.00	.0

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GRANT PROGRAMS FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
240-74-71500	WATER TREATMENT PLANT	.00	.00	440,000.00	440,000.00	.0
	TOTAL DEPARTMENT 74	.00	.00	440,000.00	440,000.00	.0
	NONDEPARTMENTAL					
240-81-88000	CONTINGENCY	.00	.00	910,074.00	910,074.00	.0
	TOTAL NONDEPARTMENTAL	.00	.00	910,074.00	910,074.00	.0
	TOTAL FUND EXPENDITURES	11,567.47	207,967.95	4,096,924.00	3,888,956.05	5.1
	NET REVENUE OVER EXPENDITURES	13,035.04	88,014.00	.00	(88,014.00)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

INFORMATION SERVICES EQUIP FUN

<u>ASSETS</u>		
255-00-10101	CASH BY FUND	(.40)
	TOTAL ASSETS	(.40)
<u>LIABILITIES AND EQUITY</u>		
<u>FUND EQUITY</u>		
255-00-32200	RESTRICTED FUND BALANCE	(.40)
	TOTAL FUND EQUITY	(.40)
	TOTAL LIABILITIES AND EQUITY	(.40)

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

GO BOND FUND

<u>ASSETS</u>			
310-00-10101	CASH BY FUND	411,840.51	
310-00-12111	PROPERTY TAXES RECEIVABL	9,381.85	
	TOTAL ASSETS		421,222.36
<u>LIABILITIES AND EQUITY</u>			
<u>LIABILITIES</u>			
310-00-25300	DEFERRED/UNEARNED REVEN	12,884.78	
	TOTAL LIABILITIES		12,884.78
<u>FUND EQUITY</u>			
310-00-32500	UNASSIGNED FUND BALANCE	77,105.94	
	REVENUE OVER EXPENDITUR	331,231.64	
	BALANCE - CURRENT DATE	331,231.64	
	TOTAL FUND EQUITY		408,337.58
	TOTAL LIABILITIES AND EQUITY		421,222.36

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

GO BOND FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>NONDEPARTMENTAL</u>					
310-81-40001	BEGINNING FUND BALANCE	.00	.00	70,500.00	70,500.00	.0
310-81-41110	PROPERTY TAXES - CURRENT	7,488.21	372,938.44	381,000.00	8,061.56	97.9
310-81-41120	PROPERTY TAXES - PRIOR	548.16	7,009.22	5,000.00	(2,009.22)	140.2
310-81-46100	INTEREST INCOME	1,309.93	7,143.04	4,000.00	(3,143.04)	178.6
	TOTAL NONDEPARTMENTAL	9,346.30	387,090.70	460,500.00	73,409.30	84.1
	TOTAL FUND REVENUE	9,346.30	387,090.70	460,500.00	73,409.30	84.1

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

		GO BOND FUND				
		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>NONDEPARTMENTAL</u>						
310-81-81110	LOAN/BOND PAYMENTS - PRINCIPAL	.00	.00	290,000.00	290,000.00	.0
310-81-81210	LOAN/BOND PAYMENTS - INTEREST	.00	55,859.06	112,000.00	56,140.94	49.9
310-81-89000	ENDING FUND BALANCE	.00	.00	58,500.00	58,500.00	.0
TOTAL NONDEPARTMENTAL		.00	55,859.06	460,500.00	404,640.94	12.1
TOTAL FUND EXPENDITURES		.00	55,859.06	460,500.00	404,640.94	12.1
NET REVENUE OVER EXPENDITURES		9,346.30	331,231.64	.00	(331,231.64)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

SPECIAL ASSESMENT LOAN FUND

<u>ASSETS</u>			
330-00-10101	CASH BY FUND	21,452.81	
330-00-12510	LOAN RECEIVABLE	18,896.58	
	TOTAL ASSETS		40,349.39
<u>LIABILITIES AND EQUITY</u>			
<u>LIABILITIES</u>			
330-00-25300	DEFERRED/UNEARNED REVENUE	18,896.58	
	TOTAL LIABILITIES		18,896.58
<u>FUND EQUITY</u>			
330-00-32500	UNASSIGNED FUND BALANCE	20,823.63	
	REVENUE OVER EXPENDITURE	629.18	
	BALANCE - CURRENT DATE	629.18	
	TOTAL FUND EQUITY		21,452.81
	TOTAL LIABILITIES AND EQUITY		40,349.39

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

SPECIAL ASSESMENT LOAN FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>NONDEPARTMENTAL</u>					
330-81-40001	BEGINNING FUND BALANCE	.00	.00	25,214.00	25,214.00	.0
330-81-41210	SPECIAL ASSESSMENTS -PRINCIPAL	.00	.00	3,500.00	3,500.00	.0
330-81-41220	SPECIAL ASSESSMENTS - INTEREST	.00	.00	600.00	600.00	.0
330-81-46100	INTEREST INCOME	70.21	629.18	750.00	120.82	83.9
	TOTAL NONDEPARTMENTAL	70.21	629.18	30,064.00	29,434.82	2.1
	TOTAL FUND REVENUE	70.21	629.18	30,064.00	29,434.82	2.1

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

SPECIAL ASSESMENT LOAN FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
	<u>NONDEPARTMENTAL</u>					
330-81-89000	ENDING FUND BALANCE	.00	.00	30,064.00	30,064.00	.0
	TOTAL NONDEPARTMENTAL	.00	.00	30,064.00	30,064.00	.0
	TOTAL FUND EXPENDITURES	.00	.00	30,064.00	30,064.00	.0
	NET REVENUE OVER EXPENDITURES	70.21	629.18	.00	(629.18)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

URBAN RENEWAL DEBT SERVICE FUN

<u>ASSETS</u>			
341-00-10101	CASH BY FUND	843,211.94	
341-00-12111	PROPERTY TAXES RECEIVABL	20,880.94	
	TOTAL ASSETS		864,092.88
<u>LIABILITIES AND EQUITY</u>			
<u>LIABILITIES</u>			
341-00-25300	DEFERRED/UNEARNED REVEN	17,812.92	
	TOTAL LIABILITIES		17,812.92
<u>FUND EQUITY</u>			
341-00-32500	UNASSIGNED FUND BALANCE	245,022.40	
	REVENUE OVER EXPENDITUR	601,257.56	
	BALANCE - CURRENT DATE	601,257.56	
	TOTAL FUND EQUITY		846,279.96
	TOTAL LIABILITIES AND EQUITY		864,092.88

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

URBAN RENEWAL DEBT SERVICE FUN

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>URBAN RENEWAL</u>					
341-61-40001	BEGINNING FUND BALANCE	.00	.00	217,032.00	217,032.00	.0
341-61-41110	PROPERTY TAXES - CURRENT	12,358.09	616,527.94	557,000.00	(59,527.94)	110.7
341-61-41120	PROPERTY TAXES - PRIOR	1,041.58	11,901.74	10,000.00	(1,901.74)	119.0
341-61-46100	INTEREST INCOME	2,731.95	16,885.64	10,000.00	(6,885.64)	168.9
341-61-49100	TRANSFER IN - GENERAL FUND	17,687.50	159,187.49	212,250.00	53,062.51	75.0
341-61-49510	TRANSFER IN - SEWER FUND	8,877.16	79,894.45	106,526.00	26,631.55	75.0
341-61-49530	TRANSFER IN - WATER FUND	8,877.17	79,894.53	106,526.00	26,631.47	75.0
	TOTAL URBAN RENEWAL	51,573.45	964,291.79	1,219,334.00	255,042.21	79.1
	TOTAL FUND REVENUE	51,573.45	964,291.79	1,219,334.00	255,042.21	79.1

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

URBAN RENEWAL DEBT SERVICE FUN

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
	<u>URBAN RENEWAL</u>					
341-61-81110	LOAN/BOND PAYMENTS - PRINCIPAL	.00	96,574.26	569,307.00	472,732.74	17.0
341-61-81210	LOAN/BOND PAYMENTS - INTEREST	.00	266,459.97	453,230.00	186,770.03	58.8
341-61-89000	ENDING FUND BALANCE	.00	.00	196,797.00	196,797.00	.0
	TOTAL URBAN RENEWAL	.00	363,034.23	1,219,334.00	856,299.77	29.8
	TOTAL FUND EXPENDITURES	.00	363,034.23	1,219,334.00	856,299.77	29.8
	NET REVENUE OVER EXPENDITURES	51,573.45	601,257.56	.00	(601,257.56)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

MINET DEBT SERVICE FUND

<u>ASSETS</u>			
360-00-10101	CASH BY FUND	5,932.65	
360-00-12510	LOAN RECEIVABLE	7,320,000.00	
	TOTAL ASSETS		7,325,932.65
<u>LIABILITIES AND EQUITY</u>			
<u>LIABILITIES</u>			
360-00-25300	DEFERRED/UNEARNED REVENUE	7,320,000.00	
	TOTAL LIABILITIES		7,320,000.00
<u>FUND EQUITY</u>			
360-00-32500	UNASSIGNED FUND BALANCE	3,186.63	
	REVENUE OVER EXPENDITURE	2,746.02	
	BALANCE - CURRENT DATE	2,746.02	
	TOTAL FUND EQUITY		5,932.65
	TOTAL LIABILITIES AND EQUITY		7,325,932.65

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

MINET DEBT SERVICE FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>NONDEPARTMENTAL</u>					
360-81-40001	BEGINNING FUND BALANCE	.00	.00	3,102.00	3,102.00	.0
360-81-46100	INTEREST INCOME	19.43	2,672.75	3,000.00	327.25	89.1
360-81-48110	LOAN REPAYMENT - PRINCIPAL	.00	.00	649,498.00	649,498.00	.0
360-81-48120	LOAN REPAYMENT - INTEREST	.00	81,250.00	.00	(81,250.00)	.0
	TOTAL NONDEPARTMENTAL	19.43	83,922.75	655,600.00	571,677.25	12.8
	TOTAL FUND REVENUE	19.43	83,922.75	655,600.00	571,677.25	12.8

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

MINET DEBT SERVICE FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
	<u>NONDEPARTMENTAL</u>					
360-81-81110	LOAN/BOND PAYMENTS - PRINCIPAL	.00	.00	565,000.00	565,000.00	.0
360-81-81210	LOAN/BOND PAYMENTS - INTEREST	.00	81,176.73	90,600.00	9,423.27	89.6
	TOTAL NONDEPARTMENTAL	.00	81,176.73	655,600.00	574,423.27	12.4
	TOTAL FUND EXPENDITURES	.00	81,176.73	655,600.00	574,423.27	12.4
	NET REVENUE OVER EXPENDITURES	19.43	2,746.02	.00	(2,746.02)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

STREET SDC FUND

<u>ASSETS</u>			
420-00-10101	CASH BY FUND	1,205,165.41	
420-00-12120	ACCOUNTS RECEIVABLE	2,558.36	
420-00-12510	LOANS RECEIVABLE	159,101.02	
	TOTAL ASSETS		1,366,824.79
<u>LIABILITIES AND EQUITY</u>			
<u>LIABILITIES</u>			
420-00-25300	DEFERRED/UNEARNED REVENUE	159,101.02	
	TOTAL LIABILITIES		159,101.02
<u>FUND EQUITY</u>			
420-00-32500	UNASSIGNED FUND BALANCE	1,035,710.34	
	REVENUE OVER EXPENDITURE	172,013.43	
	BALANCE - CURRENT DATE	172,013.43	
	TOTAL FUND EQUITY		1,207,723.77
	TOTAL LIABILITIES AND EQUITY		1,366,824.79

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

STREET SDC FUND

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
<u>STREETS</u>					
420-31-40001 BEGINNING FUND BALANCE	.00	.00	891,414.00	891,414.00	.0
420-31-44611 SDC - IMPROVEMENT	.00	.00	760,000.00	760,000.00	.0
420-31-44612 SDC REIMBURSEMENTS	.00	.00	21,200.00	21,200.00	.0
420-31-46100 INTEREST INCOME	3,944.51	31,161.43	50,000.00	18,838.57	62.3
420-31-48130 INTERFUND LOAN REPAYMENT - PRI	.00	132,057.00	140,852.00	8,795.00	93.8
420-31-48230 INTERFUND LOAN REPAYMENT - INT	.00	8,795.00	.00	(8,795.00)	.0
TOTAL STREETS	3,944.51	172,013.43	1,863,466.00	1,691,452.57	9.2
TOTAL FUND REVENUE	3,944.51	172,013.43	1,863,466.00	1,691,452.57	9.2

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

		STREET SDC FUND				
		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>STREETS</u>						
420-31-71400	ROADS	.00	.00	1,081,406.00	1,081,406.00	.0
420-31-88000	CONTINGENCY	.00	.00	782,060.00	782,060.00	.0
TOTAL STREETS		.00	.00	1,863,466.00	1,863,466.00	.0
TOTAL FUND EXPENDITURES		.00	.00	1,863,466.00	1,863,466.00	.0
NET REVENUE OVER EXPENDITURES		3,944.51	172,013.43	.00	(172,013.43)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

PARKS CAPITAL RESERVE FUND

<u>ASSETS</u>			
425-00-10101	CASH BY FUND	22,075.34	
TOTAL ASSETS			22,075.34
<u>LIABILITIES AND EQUITY</u>			
<u>FUND EQUITY</u>			
425-00-32200	RESTRICTED FUND BALANCE	37,581.83	
	REVENUE OVER EXPENDITUR	(15,506.49)	
	BALANCE - CURRENT DATE	(15,506.49)	
TOTAL FUND EQUITY			22,075.34
TOTAL LIABILITIES AND EQUITY			22,075.34

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

PARKS CAPITAL RESERVE FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>PARKS</u>					
425-53-40001	BEGINNING FUND BALANCE	.00	.00	65,344.00	65,344.00	.0
425-53-46100	INTEREST INCOME	77.36	1,041.51	1,000.00	(41.51)	104.2
	TOTAL PARKS	77.36	1,041.51	66,344.00	65,302.49	1.6
	TOTAL FUND REVENUE	77.36	1,041.51	66,344.00	65,302.49	1.6

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

PARKS CAPITAL RESERVE FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
	<u>PARKS</u>					
425-53-71000	INFRASTRUCTURE	.00	16,548.00	16,548.00	.00	100.0
425-53-87220	CAPITAL ASSET REPLACEMENT RESE	.00	.00	49,796.00	49,796.00	.0
	TOTAL PARKS	.00	16,548.00	66,344.00	49,796.00	24.9
	TOTAL FUND EXPENDITURES	.00	16,548.00	66,344.00	49,796.00	24.9
	NET REVENUE OVER EXPENDITURES	77.36	(15,506.49)	.00	15,506.49	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

PARKS SDC FUND

<u>ASSETS</u>			
430-00-10101	CASH BY FUND	442,147.75	
430-00-12120	ACCOUNTS RECEIVABLE	1,226.00	
430-00-12510	LOAN RECEIVABLE	9,251.98	
	TOTAL ASSETS		452,625.73
<u>LIABILITIES AND EQUITY</u>			
<u>LIABILITIES</u>			
430-00-21110	ACCOUNTS PAYABLE	19,149.67	
430-00-25300	DEFERRED/UNEARNED REVENUE	5,217.98	
	TOTAL LIABILITIES		24,367.65
<u>FUND EQUITY</u>			
430-00-32500	UNASSIGNED FUND BALANCE	418,829.23	
	REVENUE OVER EXPENDITURE	9,428.85	
	BALANCE - CURRENT DATE	9,428.85	
	TOTAL FUND EQUITY		428,258.08
	TOTAL LIABILITIES AND EQUITY		452,625.73

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

		PARKS SDC FUND				
		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
<u>PARKS</u>						
430-53-40001	BEGINNING FUND BALANCE	.00	.00	328,390.00	328,390.00	.0
430-53-44611	SDC IMPROVEMENTS	.00	.00	345,000.00	345,000.00	.0
430-53-46100	INTEREST INCOME	1,491.89	12,996.30	5,000.00	(7,996.30)	259.9
430-53-48130	INTERFUND LOAN REPAYMENT - PRI	.00	51,943.00	51,943.00	.00	100.0
430-53-48230	INTERFUND LOAN REPAYMENT - INT	.00	10,080.00	10,080.00	.00	100.0
TOTAL PARKS		1,491.89	75,019.30	740,413.00	665,393.70	10.1
TOTAL FUND REVENUE		1,491.89	75,019.30	740,413.00	665,393.70	10.1

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

		PARKS SDC FUND				
		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>PARKS</u>						
430-53-63140	ENGINEERING	23,569.67	65,590.45	200,000.00	134,409.55	32.8
430-53-88000	CONTINGENCY	.00	.00	540,413.00	540,413.00	.0
TOTAL PARKS		23,569.67	65,590.45	740,413.00	674,822.55	8.9
TOTAL FUND EXPENDITURES		23,569.67	65,590.45	740,413.00	674,822.55	8.9
NET REVENUE OVER EXPENDITURES		(22,077.78)	9,428.85	.00	(9,428.85)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

CAPITAL PROJECTS FUND

<u>ASSETS</u>			
435-00-10101	CASH BY FUND	1,068,662.84	
	TOTAL ASSETS		1,068,662.84
<u>LIABILITIES AND EQUITY</u>			
<u>LIABILITIES</u>			
435-00-21110	ACCOUNTS PAYABLE	17,120.00	
	TOTAL LIABILITIES		17,120.00
<u>FUND EQUITY</u>			
435-00-32500	UNASSIGNED FUND BALANCE	918,970.46	
	REVENUE OVER EXPENDITUR	132,572.38	
	BALANCE - CURRENT DATE	132,572.38	
	TOTAL FUND EQUITY		1,051,542.84
	TOTAL LIABILITIES AND EQUITY		1,068,662.84

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

CAPITAL PROJECTS FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>STREETS</u>					
435-31-40001	BEGINNING FUND BALANCE	.00	.00	815,152.00	815,152.00	.0
435-31-46100	INTEREST INCOME	3,088.26	27,662.13	5,000.00	(22,662.13)	553.2
435-31-47900	OTHER REVENUE	.00	125,114.00	.00	(125,114.00)	.0
	TOTAL STREETS	3,088.26	152,776.13	820,152.00	667,375.87	18.6
	TOTAL FUND REVENUE	3,088.26	152,776.13	820,152.00	667,375.87	18.6

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

CAPITAL PROJECTS FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
	<u>STREETS</u>					
435-31-71400	ROADS	17,120.00	20,203.75	820,152.00	799,948.25	2.5
	TOTAL STREETS	17,120.00	20,203.75	820,152.00	799,948.25	2.5
	TOTAL FUND EXPENDITURES	17,120.00	20,203.75	820,152.00	799,948.25	2.5
	NET REVENUE OVER EXPENDITURES	(14,031.74)	132,572.38	.00	(132,572.38)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

URBAN RENEWAL PROJECTS FUND

ASSETS

441-00-10101	CASH BY FUND	(	735,597.42)	
441-00-12111	PROPERTY TAXES RECEIVABL		25,521.65	
441-00-14010	PROPERTY HELD FOR RESALE		1,404,051.00	
	TOTAL ASSETS			693,975.23

LIABILITIES AND EQUITY

LIABILITIES

441-00-22210	LOAN/BOND PAYABLE		.16	
441-00-23000	INTERFUND LOAN PAYABLE	(	.42)	
441-00-25300	DEFERRED/UNEARNED REVEN		21,771.98	
	TOTAL LIABILITIES			21,771.72

FUND EQUITY

441-00-32500	UNASSIGNED FUND BALANCE		750,578.45	
441-00-35000	GAAP ADJUSTMENTS		.26	
	REVENUE OVER EXPENDITUR	(	78,375.20)	
	BALANCE - CURRENT DATE	(	78,375.20)	
	TOTAL FUND EQUITY			672,203.51
	TOTAL LIABILITIES AND EQUITY			693,975.23

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

URBAN RENEWAL PROJECTS FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>URBAN RENEWAL</u>					
441-61-40001	BEGINNING FUND BALANCE	.00	.00	743,281.00	743,281.00	.0
441-61-41110	PROPERTY TAXES - CURRENT	10,111.17	502,484.57	681,000.00	178,515.43	73.8
441-61-41120	PROPERTY TAXES - PRIOR	852.21	9,220.23	4,000.00	(5,220.23)	230.5
	TOTAL URBAN RENEWAL	<u>10,963.38</u>	<u>511,704.80</u>	<u>1,428,281.00</u>	<u>916,576.20</u>	<u>35.8</u>
	TOTAL FUND REVENUE	<u>10,963.38</u>	<u>511,704.80</u>	<u>1,428,281.00</u>	<u>916,576.20</u>	<u>35.8</u>

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

URBAN RENEWAL PROJECTS FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
	<u>URBAN RENEWAL</u>					
441-61-63190	OTHER CONTRACT & PROFESSIONAL	4,300.00	5,025.00	.00	(5,025.00)	.0
441-61-81130	INTERFUND CAPITAL PAYMENT - PR	.00	348,561.00	393,000.00	44,439.00	88.7
441-61-81230	INTERFUND LOAN PAYMENT- INTERE	.00	236,494.00	195,000.00	(41,494.00)	121.3
441-61-89000	ENDING FUND BALANCE	.00	.00	840,281.00	840,281.00	.0
	TOTAL URBAN RENEWAL	4,300.00	590,080.00	1,428,281.00	838,201.00	41.3
	TOTAL FUND EXPENDITURES	4,300.00	590,080.00	1,428,281.00	838,201.00	41.3
	NET REVENUE OVER EXPENDITURES	6,663.38	(78,375.20)	.00	78,375.20	.0

CITY OF INDEPENDENCE

BALANCE SHEET

MARCH 31, 2026

SEWER FUND

ASSETS

510-00-10101	CASH BY FUND	3,305,119.08	
510-00-10111	CASH - UMPQUA CHECKING	151.04	
510-00-12120	ACCOUNTS RECEIVABLE	260,104.21	
510-00-12122	UNBILLED UTILITIES	104,020.12	
510-00-12129	ALLOWANCE FOR BAD DEBT	.28	
510-00-12130	PREPAID EXPENSE	3,159.47	
510-00-14120	CONSTRUCTION IN PROGRES	(.33)	
510-00-14210	INFRASTRUCTURE	.40	
510-00-14220	BUILDINGS	.06	
510-00-14230	EQUIPMENT	.22	
510-00-14240	VEHICLES	.20	
510-00-14280	LEASE ASSET	.07	
510-00-14310	ACCUMULATED DEPRECIATION	.48	
510-00-14380	ACCUMULATED AMORTIZATION	.47	
TOTAL ASSETS			<u><u>3,672,555.77</u></u>

LIABILITIES AND EQUITYLIABILITIES

510-00-21110	ACCOUNTS PAYABLE	(1,700,083.15)	
510-00-21200	WAGES PAYABLE	13,389.00	
510-00-21320	DEFERRED COMP WITHHELD P	.40	
510-00-21330	CAFE WITHHELD PAYABLE	50.00	
510-00-21370	UNION DUES WITHHELD PAYAB	(1,142.75)	
510-00-21390	MISC PAYROLL DEDUCTIONS P	286.20	
510-00-21410	PERS PAYABLE	.20	
510-00-21421	HEALTH INSURANCE PAYABLE	3,990.20	
510-00-21422	DENTAL INSURANCE PAYABLE	2,857.20	
510-00-21423	LIFE INSURANCE PAYABLE	242.58	
510-00-21424	LTD INSURANCE PAYABLE	14.50	
510-00-21430	WORKERS COMP PAYABLE	(9.60)	
510-00-21440	MSA VEBA PAYABLE	3.20	
510-00-21530	FICA PAYABLE	98.88	
510-00-21540	SUTA PAYABLE	1,022.30	
510-00-21560	OR PAID LEAVE PAYABLE	1,213.44	
510-00-21820	ACCRUED COMPENSATED ABS	.20	
510-00-22230	LEASE PAYABLE	(.50)	
TOTAL LIABILITIES		(1,678,067.70)	

FUND EQUITY

510-00-31300	UNRESTRICTED NET POSITION	3,691,816.64	
510-00-32100	NON-SPENDABLE FUND BALAN	.22	
510-00-32400	ASSIGNED FUND BALANCE	(4,559.24)	
510-00-35000	GAAP ADJUSTMENTS	1.93	

REVENUE OVER EXPENDITUR 1,663,363.92

BALANCE - CURRENT DATE 1,663,363.92

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

SEWER FUND

TOTAL FUND EQUITY		5,350,623.47
TOTAL LIABILITIES AND EQUITY		
		3,672,555.77

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

SEWER FUND

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
<u>WASTEWATER</u>					
510-71-40001 BEGINNING FUND BALANCE	.00	.00	2,630,088.00	2,630,088.00	.0
510-71-44100 CHARGES FOR SERVICES	17.70	17.70	50,000.00	49,982.30	.0
510-71-44510 CONNECTION FEES	.00	.00	2,000.00	2,000.00	.0
510-71-44520 UTILITY BILLING	235,242.75	2,118,567.63	2,890,000.00	771,432.37	73.3
510-71-46100 INTEREST INCOME	8,999.90	84,004.99	25,000.00	(59,004.99)	336.0
510-71-47900 OTHER REVENUE	.00	.00	500.00	500.00	.0
510-71-48130 INTERFUND LOAN REPAYMENT - PRI	.00	42,891.00	43,466.00	575.00	98.7
510-71-48230 INTERFUND LOAN REPAYMENT - INT	.00	575.00	.00	(575.00)	.0
510-71-48500 LOAN/BOND PROCEEDS	.00	1,900,000.00	3,000,000.00	1,100,000.00	63.3
510-71-49515 TRANSFER IN - SEWER SDC FUND	.00	.00	26,500.00	26,500.00	.0
TOTAL WASTEWATER	244,260.35	4,146,056.32	8,667,554.00	4,521,497.68	47.8
TOTAL FUND REVENUE	244,260.35	4,146,056.32	8,667,554.00	4,521,497.68	47.8

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

SEWER FUND

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>WASTEWATER</u>					
510-71-51100 SALARIES & WAGES	43,678.28	414,594.69	545,000.00	130,405.31	76.1
510-71-52100 EMPLOYEE BENEFITS	27,487.72	255,264.86	384,000.00	128,735.14	66.5
510-71-52300 WORKERS COMPENSATION PREMIU	.00	617.04	.00	(617.04)	.0
510-71-61110 REPAIRS & MAINTENANCE - INFRAS	4,359.98	5,117.37	45,000.00	39,882.63	11.4
510-71-61120 REPAIRS AND MAINTENANCE - BUIL	293.87	479.78	16,500.00	16,020.22	2.9
510-71-61130 REPAIRS AND MAINTENANCE- PLANT	2,729.01	61,908.67	61,500.00	(408.67)	100.7
510-71-61140 REPAIRS AND MAINTENANCE-LIFT S	3,864.56	60,298.66	50,000.00	(10,298.66)	120.6
510-71-61150 REPAIRS AND MAINTENANCE - EQUI	14,485.53	25,070.38	31,400.00	6,329.62	79.8
510-71-61160 REPAIRS AND MAINTENANCE - VEHI	294.99	1,643.61	5,500.00	3,856.39	29.9
510-71-61170 REPAIRS AND MAINTENANCE - EFFL	.00	5,217.24	5,000.00	(217.24)	104.3
510-71-61200 RENT & LEASE PAYMENTS	443.79	2,122.92	2,200.00	77.08	96.5
510-71-61510 UTILITIES - ELECTRIC	5,098.83	40,396.56	74,200.00	33,803.44	54.4
510-71-61520 UTILITIES - GARBAGE	88.53	1,504.04	6,600.00	5,095.96	22.8
510-71-61530 UTILITIES- GAS	2.86	20.74	100.00	79.26	20.7
510-71-61540 UTILITIES - TELEPHONE/FAX	404.95	3,508.68	4,800.00	1,291.32	73.1
510-71-61810 INSURANCE - PROPERTY	.00	12,915.04	10,100.00	(2,815.04)	127.9
510-71-61820 INSURANCE - GENERAL LIABILITY	.00	11,864.88	9,800.00	(2,064.88)	121.1
510-71-61830 INSURANCE - AUTO	.00	2,523.54	3,600.00	1,076.46	70.1
510-71-62110 POSTAGE	263.90	5,749.03	7,800.00	2,050.97	73.7
510-71-62120 GENERAL OFFICE SUPPLIES	107.28	1,167.16	1,800.00	632.84	64.8
510-71-62201 GENERAL OPERATING SUPPLIES	73.66	642.08	3,500.00	2,857.92	18.4
510-71-62221 FUEL	463.61	5,163.84	7,900.00	2,736.16	65.4
510-71-62222 UNIFORMS	74.00	1,604.65	2,200.00	595.35	72.9
510-71-62261 CHEMICALS	6,322.09	21,615.34	31,500.00	9,884.66	68.6
510-71-62291 OTHER OPERATING SUPPLIES	47.05	319.76	3,000.00	2,680.24	10.7
510-71-63110 LEGAL	.00	5,841.50	10,000.00	4,158.50	58.4
510-71-63130 ACCOUNTING	.00	4,000.00	4,000.00	.00	100.0
510-71-63140 ENGINEERING	547.51	16,344.73	105,000.00	88,655.27	15.6
510-71-63150 LAB ANALYSIS	1,489.00	12,281.00	19,000.00	6,719.00	64.6
510-71-63190 OTHER CONTRACT & PROFESSIONAL	6,354.98	22,028.04	84,250.00	62,221.96	26.2
510-71-63210 LICENSES & PERMITS	4,412.20	6,566.42	6,500.00	(66.42)	101.0
510-71-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	3,474.89	12,332.31	21,125.00	8,792.69	58.4
510-71-63230 AGENT FEES	.00	.00	650.00	650.00	.0
510-71-63240 BANK FEES	1,214.27	11,668.43	15,000.00	3,331.57	77.8
510-71-64000 TRAVEL & TRAINING	195.27	1,691.94	4,600.00	2,908.06	36.8
510-71-71100 PLANT	870.93	740,756.60	3,073,800.00	2,333,043.40	24.1
510-71-71200 COLLECTION SYSTEM	127,966.40	274,555.70	2,155,860.00	1,881,304.30	12.7
510-71-74000 EQUIPMENT	.00	1,899.99	33,200.00	31,300.01	5.7
510-71-81110 LOAN/BOND PAYMENTS - PRINCIPAL	.00	94,003.00	278,673.00	184,670.00	33.7
510-71-81210 LOAN/BOND PAYMENTS - INTEREST	.00	109,218.00	186,417.00	77,199.00	58.6
510-71-85100 TRANSFER OUT	16,446.99	148,279.74	202,300.00	54,020.26	73.3
510-71-85341 TRANSFER OUT	8,877.16	79,894.44	106,526.00	26,631.56	75.0
510-71-87100 LOAN RESTRICTED RESERVES	.00	.00	461,453.00	461,453.00	.0
510-71-87220 CAPITAL ASSET REPLACEMENT RESE	.00	.00	94,000.00	94,000.00	.0
510-71-88000 CONTINGENCY	.00	.00	492,200.00	492,200.00	.0
TOTAL WASTEWATER	282,434.09	2,482,692.40	8,667,554.00	6,184,861.60	28.6

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

SEWER FUND

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
TOTAL FUND EXPENDITURES	282,434.09	2,482,692.40	8,667,554.00	6,184,861.60	28.6
NET REVENUE OVER EXPENDITURES	(38,173.74)	1,663,363.92	.00	(1,663,363.92)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

SEWER SDC FUND

<u>ASSETS</u>		
515-00-10101	CASH BY FUND	830,831.78
515-00-12120	ACCOUNTS RECEIVABLE	1,285.37
515-00-12510	LOAN RECEIVABLE	70,522.48
	TOTAL ASSETS	902,639.63
<u>LIABILITIES AND EQUITY</u>		
<u>LIABILITIES</u>		
515-00-21110	ACCOUNTS PAYABLE	19,230.62
515-00-25300	DEFERRED/UNEARNED REVENUE	70,522.00
	TOTAL LIABILITIES	89,752.62
<u>FUND EQUITY</u>		
515-00-31300	UNRESTRICTED NET POSITION	837,498.60
515-00-35000	GAAP ADJUSTMENT	.48
	REVENUE OVER EXPENDITURE ()	24,612.07
	BALANCE - CURRENT DATE ()	24,612.07
	TOTAL FUND EQUITY	812,887.01
	TOTAL LIABILITIES AND EQUITY	902,639.63

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

SEWER SDC FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>WASTEWATER</u>					
515-71-40001	BEGINNING FUND BALANCE	.00	.00	640,959.00	640,959.00	.0
515-71-44611	SDC IMPROVEMENT	.00	.00	664,975.00	664,975.00	.0
515-71-46100	INTEREST INCOME	2,852.09	26,270.45	5,000.00	(21,270.45)	525.4
515-71-48130	INTERFUND LOAN REPAYMENT - PRI	.00	53,145.00	61,719.00	8,574.00	86.1
515-71-48230	INTERFUND LOAN REPAYMENT - INT	.00	8,574.00	.00	(8,574.00)	.0
	TOTAL WASTEWATER	2,852.09	87,989.45	1,372,653.00	1,284,663.55	6.4
	TOTAL FUND REVENUE	2,852.09	87,989.45	1,372,653.00	1,284,663.55	6.4

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

		SEWER SDC FUND				
		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>WASTEWATER</u>						
515-71-71200	COLLECTION SYSTEM	19,405.22	112,601.52	678,500.00	565,898.48	16.6
515-71-85510	TRANSFER OUT	.00	.00	26,500.00	26,500.00	.0
515-71-88000	CONTINGENCY	.00	.00	667,653.00	667,653.00	.0
TOTAL WASTEWATER		19,405.22	112,601.52	1,372,653.00	1,260,051.48	8.2
TOTAL FUND EXPENDITURES		19,405.22	112,601.52	1,372,653.00	1,260,051.48	8.2
NET REVENUE OVER EXPENDITURES		(16,553.13)	(24,612.07)	.00	24,612.07	.0

CITY OF INDEPENDENCE

BALANCE SHEET

MARCH 31, 2026

WATER FUND

ASSETS

530-00-10101	CASH BY FUND	3,877,418.34	
530-00-10111	CASH- UMPQUA CHECKING	151.04	
530-00-10130	PETTY CASH	195.00	
530-00-12121	UTILITY ACCOUNTS RECEIVAB	237,605.53	
530-00-12122	UNBILLED UTILITIES	155,006.18	
530-00-12129	ALLOWANCE FOR BAD DEBT	.42	
530-00-12130	PREPAID EXPENSE	2,804.97	
530-00-12510	LOAN RECEIVABLE	4,174,870.72	
530-00-13000	INTERFUND LOAN RECEIVABLE	(.42)	
530-00-13900	ALLOWANCE FOR INTERFUND	(4,174,870.68)	
530-00-14110	LAND AND IMPROVEMENTS	.05	
530-00-14210	INFRASTRUCTURE	.01	
530-00-14220	BUILDINGS	.06	
530-00-14230	EQUIPMENT	(.31)	
530-00-14240	VEHICLES	.19	
530-00-14260	BOND PREMIUM/DISCOUNT	(.15)	
530-00-14280	LEASE ASSET	.07	
530-00-14310	ACCUMULATED DEPRECIATION	.09	
530-00-14380	ACCUMULATED AMORTIZATION	.47	
TOTAL ASSETS			4,273,181.58

LIABILITIES AND EQUITYLIABILITIES

530-00-21110	ACCOUNTS PAYABLE	253,287.65	
530-00-21200	WAGES PAYABLE	13,547.00	
530-00-21320	DEFERRED COMP WITHHELD P	59.70	
530-00-21370	UNION DUES WITHHELD PAYAB	(2,348.10)	
530-00-21390	MISC PAYROLL DEDUCTIONS P	262.24	
530-00-21410	PERS PAYABLE	4,021.70	
530-00-21421	HEALTH INSURANCE BENEFITS	2,855.20	
530-00-21422	DENTAL INSURANCE PAYABLE	223.20	
530-00-21423	LIFE INSURANCE PAYABLE	44.70	
530-00-21424	LTD INSURANCE PAYABLE	9.50	
530-00-21430	WORKERS COMP PAYABLE	(13.78)	
530-00-21440	MSA VEBA PAYABLE	.20	
530-00-21530	FICA PAYABLE	1,132.38	
530-00-21540	SUTA PAYABLE	13.30	
530-00-21560	OR PAID LEAVE PAYABLE	1,236.72	
530-00-21610	UTILITY DEPOSITS	18,098.11	
530-00-21820	ACCRUED COMPENSATED ABS	(.07)	
530-00-22230	LEASE PAYABLE	(.50)	
TOTAL LIABILITIES			292,429.15

FUND EQUITY

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

WATER FUND

530-00-31300	UNRESTRICTED NET POSITION	3,770,910.70	
530-00-32100	NON-SPENDABLE FUND BALAN	.13	
530-00-32400	ASSIGNED FUND BALANCE	(2,051.63)	
530-00-35000	GAAP ADJUSTMENTS	.96	
	REVENUE OVER EXPENDITUR	<u>211,892.27</u>	
	BALANCE - CURRENT DATE	<u>211,892.27</u>	
	TOTAL FUND EQUITY		<u>3,980,752.43</u>
	TOTAL LIABILITIES AND EQUITY		<u><u>4,273,181.58</u></u>

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

		WATER FUND				
		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
<u>WATER</u>						
530-74-40001	BEGINNING FUND BALANCE	.00	.00	2,695,689.00	2,695,689.00	.0
530-74-44100	CHARGES FOR SERVICES	17.70	2,555.95	50,000.00	47,444.05	5.1
530-74-44190	OTHER CHARGES FOR SERVICES	5,825.76	52,827.60	5,000.00	(47,827.60)	1056.6
530-74-44510	CONNECTION FEES	.00	(1,531.69)	5,000.00	6,531.69	(30.6)
530-74-44520	UTILITY BILLINGS	214,918.09	2,301,917.47	3,165,000.00	863,082.53	72.7
530-74-44529	UTILITY BILLING WRITE-OFF	.00	(293.28)	.00	293.28	.0
530-74-46100	INTEREST INCOME	12,039.59	107,144.07	25,000.00	(82,144.07)	428.6
530-74-47207	RENT - FLOW METERS	100.00	6,799.08	1,500.00	(5,299.08)	453.3
530-74-47900	OTHER REVENUE	.00	6,409.00	.00	(6,409.00)	.0
530-74-48500	LOAN/BOND PROCEEDS	.00	201,746.12	201,746.00	(.12)	100.0
TOTAL WATER		232,901.14	2,677,574.32	6,148,935.00	3,471,360.68	43.6
TOTAL FUND REVENUE		232,901.14	2,677,574.32	6,148,935.00	3,471,360.68	43.6

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

WATER FUND					
	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>WATER</u>					
530-74-51100 SALARIES & WAGES	43,863.46	417,110.42	550,000.00	132,889.58	75.8
530-74-52100 EMPLOYEE BENEFITS	27,602.59	257,417.21	384,000.00	126,582.79	67.0
530-74-52300 WORKERS COMPENSATION PREMIU	.00	617.05	.00	(617.05)	.0
530-74-61110 REPAIRS & MAINTENANCE - INFAST	3,976.90	42,572.67	50,000.00	7,427.33	85.2
530-74-61120 REPAIRS AND MAINTENANCE - BUIL	293.87	21,537.65	74,500.00	52,962.35	28.9
530-74-61150 REPAIRS AND MAINTENANCE - EQUI	44,717.70	95,697.50	125,900.00	30,202.50	76.0
530-74-61160 REPAIRS AND MAINTENANCE - VEHI	250.37	1,897.02	5,500.00	3,602.98	34.5
530-74-61200 RENT & LEASE PAYMENTS	422.40	1,994.58	2,000.00	5.42	99.7
530-74-61510 UTILITIES - ELECTRIC	9,153.07	73,888.51	112,000.00	38,111.49	66.0
530-74-61520 UTILITIES - GARBAGE	88.53	1,504.04	7,900.00	6,395.96	19.0
530-74-61530 UTILITIES- GAS	2.86	20.74	100.00	79.26	20.7
530-74-61540 UTILITIES - TELEPHONE/FAX	404.95	3,508.68	5,500.00	1,991.32	63.8
530-74-61810 INSURANCE - PROPERTY	.00	13,104.22	7,200.00	(5,904.22)	182.0
530-74-61820 INSURANCE - GENERAL LIABILITY	.00	7,648.11	8,200.00	551.89	93.3
530-74-61830 INSURANCE - AUTO	.00	2,523.54	600.00	(1,923.54)	420.6
530-74-62110 POSTAGE	1,760.40	4,669.52	9,800.00	5,130.48	47.7
530-74-62120 GENERAL OFFICE SUPPLIES	107.29	1,172.93	1,800.00	627.07	65.2
530-74-62201 GENERAL OPERATING SUPPLIES	73.66	1,459.34	1,500.00	40.66	97.3
530-74-62221 FUEL	463.61	5,222.73	7,900.00	2,677.27	66.1
530-74-62222 UNIFORMS	101.65	1,632.32	2,200.00	567.68	74.2
530-74-62261 CHEMICALS	193.55	15,620.31	25,000.00	9,379.69	62.5
530-74-62271 METERS	.00	183,078.84	185,000.00	1,921.16	99.0
530-74-62291 OTHER OPERATING SUPPLIES	84.93	1,137.57	2,500.00	1,362.43	45.5
530-74-63110 LEGAL	.00	53.00	10,000.00	9,947.00	.5
530-74-63130 ACCOUNTING	.00	4,000.00	4,000.00	.00	100.0
530-74-63140 ENGINEERING	2,324.01	26,447.83	110,000.00	83,552.17	24.0
530-74-63150 LAB ANALYSIS	1,325.00	8,957.00	19,400.00	10,443.00	46.2
530-74-63190 OTHER CONTRACT & PROFESSIONAL	5,471.06	40,986.37	89,250.00	48,263.63	45.9
530-74-63210 LICENSES & PERMITS	199.00	1,384.00	3,800.00	2,416.00	36.4
530-74-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	3,474.65	12,330.10	21,050.00	8,719.90	58.6
530-74-63230 AGENT FEES	.00	500.00	500.00	.00	100.0
530-74-63240 BANK FEES	2,023.80	19,447.37	20,000.00	552.63	97.2
530-74-64000 TRAVEL & TRAINING	115.00	1,522.31	4,600.00	3,077.69	33.1
530-74-66550 INTEREST EXPENSE	.00	66.62	500.00	433.38	13.3
530-74-71300 DISTRIBUTION SYSTEM	6,954.70	96,738.45	1,161,000.00	1,064,261.55	8.3
530-74-71500 WATER TREATMENT PLANT	245,125.29	496,210.58	1,671,275.00	1,175,064.42	29.7
530-74-74000 EQUIPMENT	.00	.00	20,800.00	20,800.00	.0
530-74-81110 LOAN/BOND PAYMENTS - PRINCIPAL	.00	.00	148,224.00	148,224.00	.0
530-74-81210 LOAN/BOND PAYMENTS - INTEREST	.00	33,981.94	37,732.00	3,750.06	90.1
530-74-85100 TRANSFER OUT	15,044.27	488,126.45	423,296.00	(64,830.45)	115.3
530-74-85341 TRANSFER OUT	8,877.17	79,894.53	106,526.00	26,631.47	75.0
530-74-87100 LOAN RESTRICTED RESERVES	.00	.00	25,000.00	25,000.00	.0
530-74-87220 CAPITAL ASSET REPLACEMENT RESE	.00	.00	74,000.00	74,000.00	.0
530-74-88000 CONTINGENCY	.00	.00	628,882.00	628,882.00	.0
TOTAL WATER	424,495.74	2,465,682.05	6,148,935.00	3,683,252.95	40.1
TOTAL FUND EXPENDITURES	424,495.74	2,465,682.05	6,148,935.00	3,683,252.95	40.1

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

WATER FUND

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
NET REVENUE OVER EXPENDITURES	(191,594.60)	211,892.27	.00	(211,892.27)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

WATER SDC FUND

ASSETS

535-00-10101	CASH BY FUND	449,953.64	
535-00-12120	ACCOUNTS RECEIVABLE	(644.25)	
535-00-12510	LOAN RECEIVABLE	61,369.28	
TOTAL ASSETS			510,678.67

LIABILITIES AND EQUITY

LIABILITIES

535-00-21110	ACCOUNTS PAYABLE	5,622.00	
535-00-25300	DEFERRED/UNEARNED REVEN	61,369.00	
TOTAL LIABILITIES			66,991.00

FUND EQUITY

535-00-31300	UNRESTRICTED NET POSITION	430,538.81	
535-00-35000	GAAP ADJUSTMENTS	.28	
REVENUE OVER EXPENDITUR		13,148.58	
BALANCE - CURRENT DATE		13,148.58	
TOTAL FUND EQUITY			443,687.67
TOTAL LIABILITIES AND EQUITY			510,678.67

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

WATER SDC FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>WATER</u>					
535-74-40001	BEGINNING FUND BALANCE	.00	.00	107,790.00	107,790.00	.0
535-74-44611	SDC IMPROVEMENT	.00	(10,068.00)	1,403,000.00	1,413,068.00	(.7)
535-74-46100	INTEREST INCOME	1,491.36	13,233.05	3,000.00	(10,233.05)	441.1
535-74-46612	SDC REIMBURSEMENT	.00	.00	58,600.00	58,600.00	.0
535-74-48130	INTERFUND LOAN PAYMENT - PRINC	.00	35,292.00	40,983.00	5,691.00	86.1
535-74-48230	INTERFUND LOAN REPAYMENT - INT	.00	5,691.00	.00	(5,691.00)	.0
	TOTAL WATER	1,491.36	44,148.05	1,613,373.00	1,569,224.95	2.7
	TOTAL FUND REVENUE	1,491.36	44,148.05	1,613,373.00	1,569,224.95	2.7

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

		WATER SDC FUND				
		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>WATER</u>						
535-74-71300	DISTRIBUTION SYSTEM	7,382.00	30,999.47	150,500.00	119,500.53	20.6
535-74-88000	CONTINGENCY	.00	.00	1,462,873.00	1,462,873.00	.0
TOTAL WATER		7,382.00	30,999.47	1,613,373.00	1,582,373.53	1.9
TOTAL FUND EXPENDITURES		7,382.00	30,999.47	1,613,373.00	1,582,373.53	1.9
NET REVENUE OVER EXPENDITURES		(5,890.64)	13,148.58	.00	(13,148.58)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

STORM DRAIN FUND

ASSETS

540-00-10101	CASH BY FUND	379,325.58	
540-00-10111	CASH - UMPQUA CHECKING	87.44	
540-00-12120	ACCOUNTS RECEIVABLE	89,511.52	
540-00-12122	UNBILLED UTILITIES	25,358.40	
540-00-12129	ALLOWANCE FOR BAD DEBT	.05	
540-00-12130	PREPAID EXPENSE	2,721.65	
540-00-14210	INRASTRUCTURE	(.40)	
540-00-14220	BUILDINGS	(.29)	
540-00-14230	EQUIPMENT	.13	
540-00-14240	VEHICLES	.16	
540-00-14280	LEASE ASSET	.07	
540-00-14310	ACCUMULATED DEPRECIATION	(.36)	
540-00-14380	ACCUMULATED AMORTIZATION	.47	
TOTAL ASSETS			497,004.42

LIABILITIES AND EQUITY

LIABILITIES

540-00-21110	ACCOUNTS PAYABLE	3,889.79	
540-00-21200	WAGES PAYABLE	11,254.92	
540-00-21320	DEFERRED COMP WITHHELD P	10.00	
540-00-21370	UNION DUES WITHHELD PAYAB	(358.21)	
540-00-21390	MISC PAYROLL DEDUCTIONS P	157.34	
540-00-21410	PERS PAYABLE	1,986.10	
540-00-21421	HEALTH INSURANCE PAYABLE	1,547.20	
540-00-21422	DENTAL INSURANCE PAYABLE	127.70	
540-00-21423	LIFE INSURANCE PAYABLE	24.26	
540-00-21424	LTD INSURANCE PAYABLE	5.40	
540-00-21430	WORKERS COMP PAYABLE	(8.56)	
540-00-21440	MSA VEBA PAYABLE	(.40)	
540-00-21530	FICA PAYABLE	592.23	
540-00-21540	SUTA PAYABLE	7.30	
540-00-21560	OR PAID LEAVE PAYABLE	630.85	
540-00-21820	ACCRUED COMPENSATED ABS	.13	
540-00-22230	LEASE PAYABLE	(.50)	
540-00-23000	INTERFUND LOAN PAYABLE	.25	
TOTAL LIABILITIES			19,865.80

FUND EQUITY

540-00-31300	UNRESTRICTED NET POSITION	472,675.45	
540-00-32100	NON-SPENDABLE FUND BALAN	.43	
540-00-32400	ASSIGNED FUND BALANCE	(6,246.89)	
540-00-35000	GAAP ADJUSTMENTS	(.23)	

REVENUE OVER EXPENDITUR 10,709.86

BALANCE - CURRENT DATE 10,709.86

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

STORM DRAIN FUND

TOTAL FUND EQUITY		477,138.62
TOTAL LIABILITIES AND EQUITY		

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

STORM DRAIN FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEARNED	PCNT
	<u>STORM DRAIN</u>					
540-77-40001	BEGINNING FUND BALANCE	.00	.00	335,335.00	335,335.00	.0
540-77-44100	CHARGES FOR SERVICES	17.71	17.71	50,000.00	49,982.29	.0
540-77-44520	UTILITY BILLINGS	58,409.35	527,031.30	702,000.00	174,968.70	75.1
540-77-44529	UTILITY BILLING WRITE-OFF	.00	(33.35)	.00	33.35	.0
540-77-46100	INTEREST INCOME	1,215.40	11,375.19	2,000.00	(9,375.19)	568.8
	TOTAL STORM DRAIN	59,642.46	538,390.85	1,089,335.00	550,944.15	49.4
	TOTAL FUND REVENUE	59,642.46	538,390.85	1,089,335.00	550,944.15	49.4

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

STORM DRAIN FUND

	PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
<u>STORM DRAIN</u>					
540-77-51100 SALARIES & WAGES	22,379.02	208,997.69	284,000.00	75,002.31	73.6
540-77-52100 EMPLOYEE BENEFITS	14,135.18	131,922.87	203,000.00	71,077.13	65.0
540-77-52300 WORKERS COMPENSATION PREMIU	.00	617.06	.00	(617.06)	.0
540-77-61110 REPAIRS & MAINTENANCE -INFRAST	.00	14,825.84	45,500.00	30,674.16	32.6
540-77-61120 REPAIRS&MAINTENANCE-BLDGS	292.33	467.04	3,000.00	2,532.96	15.6
540-77-61150 REPAIRS&MAINTENANCE-EQUIP	15,809.43	22,469.42	28,100.00	5,630.58	80.0
540-77-61160 REPAIRS&MAINTENANCE-VEHICLES	250.33	1,333.13	3,000.00	1,666.87	44.4
540-77-61200 RENT & LEASE PAYMENTS	404.41	1,885.85	2,000.00	114.15	94.3
540-77-61510 UTILITIES - ELECTRIC	295.89	2,314.38	3,400.00	1,085.62	68.1
540-77-61520 UTILITIES - GARBAGE	88.54	1,504.05	6,600.00	5,095.95	22.8
540-77-61530 UTILITIES - GAS	2.86	20.74	100.00	79.26	20.7
540-77-61540 UTILITIES - TELEPHONE/FAX	404.95	3,508.63	6,400.00	2,891.37	54.8
540-77-61810 INSURANCE - PROPERTY	.00	2,814.33	1,300.00	(1,514.33)	216.5
540-77-61820 INSURANCE-GENERAL LIABILITY	.00	6,195.03	8,500.00	2,304.97	72.9
540-77-61830 INSURANCE - AUTO	.00	2,523.54	1,100.00	(1,423.54)	229.4
540-77-62110 POSTAGE	113.11	1,670.90	6,000.00	4,329.10	27.9
540-77-62120 GENERAL OFFICE SUPPLIES	59.61	830.28	1,800.00	969.72	46.1
540-77-62201 GENERAL OPERATING SUPPLIES	92.75	440.13	1,000.00	559.87	44.0
540-77-62221 FUEL	185.44	1,840.78	3,500.00	1,659.22	52.6
540-77-62222 UNIFORMS	73.99	1,604.62	2,200.00	595.38	72.9
540-77-62261 CHEMICALS	.00	148.00	2,000.00	1,852.00	7.4
540-77-62291 OTHER OPERATING SUPPLIES	83.17	273.96	1,000.00	726.04	27.4
540-77-63100 CONTRACT & PROFESSIONAL SERVI	.00	.00	15,000.00	15,000.00	.0
540-77-63110 LEGAL	.00	53.00	2,000.00	1,947.00	2.7
540-77-63130 ACCOUNTING	.00	4,000.00	4,000.00	.00	100.0
540-77-63140 ENGINEERING	852.49	2,989.65	110,000.00	107,010.35	2.7
540-77-63150 LAB ANALYSIS	.00	.00	1,250.00	1,250.00	.0
540-77-63190 OTHER CONTRACT & PROFESSIONAL	263.90	3,479.30	7,000.00	3,520.70	49.7
540-77-63210 LICENSES & PERMITS	91.00	149.00	500.00	351.00	29.8
540-77-63220 DUES, MEMBERSHIPS & SUBSCRIPTI	3,474.60	12,332.19	20,155.00	7,822.81	61.2
540-77-63240 BANK FEES	809.52	7,778.95	8,000.00	221.05	97.2
540-77-64000 TRAVEL & TRAINING	115.00	1,798.46	4,700.00	2,901.54	38.3
540-77-85100 TRANSFER OUT	4,088.65	36,892.17	49,200.00	12,307.83	75.0
540-77-85215 TRANSFER OUT	.00	50,000.00	50,000.00	.00	100.0
540-77-87220 CAPITAL ASSET REPLACEMENT RESE	.00	.00	49,000.00	49,000.00	.0
540-77-88000 CONTINGENCY	.00	.00	155,030.00	155,030.00	.0
TOTAL STORM DRAIN	64,366.17	527,680.99	1,089,335.00	561,654.01	48.4
TOTAL FUND EXPENDITURES	64,366.17	527,680.99	1,089,335.00	561,654.01	48.4
NET REVENUE OVER EXPENDITURES	(4,723.71)	10,709.86	.00	(10,709.86)	.0

CITY OF INDEPENDENCE
BALANCE SHEET
MARCH 31, 2026

STORM DRAIN SDC FUND

<u>ASSETS</u>			
545-00-10101	CASH BY FUND	329,543.28	
545-00-12120	ACCOUNTS RECEIVABLE	177.50	
545-00-12510	LOAN RECEIVABLE	26,774.33	
	TOTAL ASSETS		356,495.11
<u>LIABILITIES AND EQUITY</u>			
<u>LIABILITIES</u>			
545-00-21110	ACCOUNTS PAYABLE	29,852.75	
545-00-25300	DEFERRED/UNEARNED REVENUE	26,774.00	
	TOTAL LIABILITIES		56,626.75
<u>FUND EQUITY</u>			
545-00-31300	UNRESTRICTED NET POSITION	414,424.63	
545-00-35000	GAAP ADJUSTMENTS	.33	
	REVENUE OVER EXPENDITURE	(114,556.60)	
	BALANCE - CURRENT DATE	(114,556.60)	
	TOTAL FUND EQUITY		299,868.36
	TOTAL LIABILITIES AND EQUITY		356,495.11

CITY OF INDEPENDENCE
REVENUES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

STORM DRAIN SDC FUND

		<u>PERIOD ACTUAL</u>	<u>YTD ACTUAL</u>	<u>BUDGET</u>	<u>UNEARNED</u>	<u>PCNT</u>
	<u>STORM DRAIN</u>					
545-77-40001	BEGINNING FUND BALANCE	.00	.00	297,512.00	297,512.00	.0
545-77-44611	SDC IMPROVEMENT	.00	.00	74,000.00	74,000.00	.0
545-77-46100	INTEREST INCOME	1,257.29	12,054.77	10,000.00	(2,054.77)	120.6
545-77-48130	INTERFUND LOAN REPAYMENT - PRI	.00	4,626.00	4,842.00	216.00	95.5
545-77-48230	INTERFUND LOAN REPAYMENT - INT	.00	216.00	.00	(216.00)	.0
	<u>TOTAL STORM DRAIN</u>	<u>1,257.29</u>	<u>16,896.77</u>	<u>386,354.00</u>	<u>369,457.23</u>	<u>4.4</u>
	 <u>TOTAL FUND REVENUE</u>	 <u>1,257.29</u>	 <u>16,896.77</u>	 <u>386,354.00</u>	 <u>369,457.23</u>	 <u>4.4</u>

CITY OF INDEPENDENCE
EXPENDITURES WITH COMPARISON TO BUDGET
FOR THE 9 MONTHS ENDING MARCH 31, 2026

STORM DRAIN SDC FUND

		PERIOD ACTUAL	YTD ACTUAL	BUDGET	UNEXPENDED	PCNT
	<u>STORM DRAIN</u>					
545-77-63140	ENGINEERING	.00	.00	225,000.00	225,000.00	.0
545-77-63190	OTHER CONTRACT & PROFESSIONAL	29,852.75	131,453.37	.00	(131,453.37)	.0
545-77-88000	CONTINGENCY	.00	.00	161,354.00	161,354.00	.0
	TOTAL STORM DRAIN	29,852.75	131,453.37	386,354.00	254,900.63	34.0
	TOTAL FUND EXPENDITURES	29,852.75	131,453.37	386,354.00	254,900.63	34.0
	NET REVENUE OVER EXPENDITURES	(28,595.46)	(114,556.60)	.00	114,556.60	.0

Agenda Item 7.5

Q3 Board, Commission, Committee Appointments
(West)



CITY OF INDEPENDENCE MEMORANDUM

TO: Mayor and City Council
FROM: City Manager Kenna West
MEETING DATE: July 14, 2026
SUBJECT: 2026 Quarter 3 Board/Committee/Commission
Appointment

☐ Information Only

☒ Action Requested

Statement of Issue:

Appointment of members to City of Independence Boards, Committees, and Commissions.

Background:

Pursuant to Section 20 of the Independence Charter, the Mayor is authorized to make appointments to City committees and all appointments shall be approved by vote of the Council.

In collaboration with Mayor Schwarzler, staff developed an updated Committee Appointment Application and appointment process which was implemented in 2025. In accordance with that new process the 2026 third-quarter appointments are now due.

Discussion

In response to the Council's goal of enhancing transparency and clarity in filling vacancies, the Committee Appointment Application and application process were updated to:

- Align Council Vacancy and Committee Appointment applications for ease of use by community members.
- Provide more detailed information for Council review.
- Ensure a consistent and efficient process for filling vacancies.

Based on that new process, applications have been accepted and collected for all open positions and redacted copies are attached to this staff report. Below is a summary of the openings, members requesting reappointment, and new applications for each board/committee/commission with openings.

Independence Public Library Board

The Independence Public Library Board has two open positions as follows:

- Position #1 – Term Expiration June 30, 2030
- Position #6 – Term Expiration June 30, 2030

There are three applicants for the open positions:

Nathan Christensen is currently serving in Position #6 and is applying for reappointment

Lorraine Sorensen is a new applicant

Loretta Pecchioni is a new applicant

Ad Hoc Community Services and Park Sustainability Committee

On November 25, 2025, the City Council adopted Resolution No. 25-1642 establishing the Ad Hoc Community Services and Parks Sustainability Committee. The Committee was created to review, evaluate, and recommend sustainability strategies for Community Services and Parks and, if necessary, assist with implementation. Its scope includes consideration of potential revenue strategies, alternative operational models, and other approaches to support the long-term sustainability of Community Services and Parks.

Resolution No. 25-1642 authorizes the Committee to serve for an initial term of 12 months, with the option for the City Council to extend its work for an additional six months if necessary. One of the appointed members has resigned following a move outside the Independence city limits, creating a vacancy on the Committee. Appointment of a replacement member is necessary to restore the Committee to its full complement of members.

Pursuant to the City Charter and Independence Municipal Code, the Mayor is authorized to appoint members to boards and committees, subject to approval by the City Council. Mayor Schwarzler will present her recommendation to fill the vacancy.

Attachment: Redacted Independence Public Library Board Applications

Prepared by Kenna West, JD, City Manager



CITY OF INDEPENDENCE COMMITTEE APPOINTMENT APPLICATION

The City of Independence solicits applications from individuals who have an interest in public service for appointment to periodic vacancies in City Boards, Commissions and Committees. If you have such an interest, please provide the following information:

NAME: Nathan Christensen DATE: 5/26/26
ADDRESS: [REDACTED]
PHONE / EMAIL ADDRESS: [REDACTED]

I am interested in appointment to (feel free to indicate interest in more than one):

- | | |
|---|---|
| ☐ Budget Committee | ☐ Historic Preservation Commission * |
| ☐ Independence Days Commission | ☒ Library Board |
| ☐ Museum Advisory Board | ☐ Parks & Recreation Board |
| ☐ Planning Commission * | ☐ Traffic Safety Commission |
| ☐ Other: (please specify)
_____ | |

Please complete the questionnaire attached with this document and return this application, the completed questionnaire and a resume or CV to the Office of the City Recorder, Independence City Hall, 555 S. Main Street, PO Box 7, Independence, OR 97351.

[REDACTED]
Applicant Signature

Volunteer service on commissions, committees and boards does require effort and time from members. Your interest and participation can help your community and is greatly appreciated. Appointments made to boards, commissions and committees are made by the Mayor, with the confirmation of the City Council.

***Attendance at city-funded training is required for appointees to the Planning Commission and Historic Preservation Commission.**

Please answer the following questions, attaching additional sheets as needed may be necessary.

1. Experience serving on an elected board:

I have already served one full term on the Budget Committee and the Library Advisory Board. I was also recently appointed to the Ad Hoc Community Services and Parks Sustainability Committee. I am also a current member of the MINET Budget Committee.

2. Experience volunteering with the City of Independence:

I have volunteered my time as a member of various committees, boards, and societies over the last seven years. While serving as the Museum Society President I also volunteered my time in fund-raising activities for the museum. I've also volunteered as support staff during various events over the years including Hops and Heritage and The Wall That Heals.

3. Describe your community involvement experience:

I am passionately involved in local government plans, policies, and actions. Our family has lived in Independence for more than 11 years now and we've always lived within walking distance of downtown. We attend local community events, support local downtown businesses, and take a close and active role in local governance and volunteer efforts.

4. Describe your vision for the future of Independence:

My vision for Independence aligns with its own Vision 2040 Plan published in March 2020. I am specifically invested in supporting the values of a Small-Town Feel, Quality of Life, Supporting Downtown and Public Facilities, and Fiscal Responsibility. I love living in Independence and I will work and sacrifice to make it as wonderful for my children as it has been for me.

5. If applying for the Budget Committee, please describe your experience with budgeting and public finance:

N/A

6. Describe the time commitment you are able to make to your chosen Committee/Commission/Board:

I am able to attend all planned Library Advisory Board meetings scheduled for 5pm on the fourth Monday of every month.

7. Your reason(s) for applying for the Committee/Commission/Board:

I want to serve my local community by leveraging my experience in professional government service. I want my city to succeed and thrive and I am willing to devote my time and talents in order to achieve that goal.

Objective Serve my local community by leveraging my experience in professional government service.

Summary I am a conscientious and intelligent military leader, program manager, and technical expert. I have a proven success record in analyzing struggling systems and implementing long-term solutions to improve real-world performance and increase policy compliance. I am a confident communicator with strong analytical skills. I care deeply about reality-based values and guide my day-to-day actions with the goal of improving the lives of people and positively transforming the systems in which they work and live. I distill the most important concepts from complicated issues and convey them clearly to partners, subordinates, and superiors.

Skills	Program Management	Professional	Personal
	Plan and direct state program	SECRET security clearance	Value-based ethics
	Set strategic goals and plans	Team leadership	Independent leadership
	Write military regulations	Expert MS Office skills	Impartial judgement
	Regulatory compliance	Course of action development	Strategic thinking
	Manage employee performance	Budget management	Composed under pressure
	Write and publish official reports	Hire staff	Conflict resolution
	Technical communication	Lead high-level briefings	Complex problem solving

Career **SAFETY AND OCCUPATIONAL HEALTH MANAGER (GS-0018-12) Aug 2016 – Present**
Oregon Army National Guard (ORARNG), Joint Force Headquarters (40 hours / week)

- Plan, organize, and direct actions of Safety and Occupational Health Program. Serve as principal advisor and technical expert on all Army SOH matters in ORARNG.
- Ensure all legal and Army regulatory requirements are accurately interpreted and met.
- Planned, wrote, and published multiple state level program regulations and policies.
- Select and recommend candidates for employment vacancies.
- Manage a geographically remote and functionally unique team of Safety, Occupational Health, and Industrial Hygiene specialists.
- Recipient of ESGR Patriotic Employer Award.
- Integrate and collaborate with diverse lateral staff sections including Medical Command, Training Command, and Installations Management.
- Developed, implemented, and monitored a new state-wide mishap tracking system; collected and analyzed detailed data on over 700 safety incidents over almost 10 years of detailed tracking.
- Analyzed mishap data and published multi-year trend analysis reports for general officers and senior leaders.
- Implemented and monitored new Range Safety Inspection Program for ORARNG training sites.
- Increased ORARNG compliance score from 16% to 96% on NGB-level state safety program survey over 6 years.
- Managed annual budget of more than \$175,000 for state-wide SOH program requirements.
- Monitor and ensure compliance with Army Safety Training program among ORARNG units and subordinate safety officers.
- Assisted and guided commanders and safety officers during mishap investigations.
- Developed and taught safety training at ORARNG Commander and First Sergeant Pre-Command Course.

NATHAN R. CHRISTENSEN

COMPANY COMMANDER **February 2026 - Present**

ORARNG, 1186 Military Police Company **(Monthly weekend & 2 weeks / year)**

- Command Oregon's only Military Police Company of more than 100 Soldiers.
- Specifically selected by senior ORARNG leadership to prepare guard unit for active duty mobilization in support of the US southwest border mission from 2026-2027.

SUPERVISOR **2015 - 2016**

ATI Cast Products, Albany Operations **(40 hours / week)**

- Supervised 30+ employees in a demanding aerospace titanium part manufacturing facility.
- Developed a more efficient and accurate system for tracking and reporting workplace safety observations.
- Selected and recommended candidates for employment, promotion, and reassignment.
- Implemented several key environmental and system improvements over 12 months.
- Heard, mediated, and resolved multiple employee complaints, conflicts, and legal grievances.
- Supported hazard-free and safe workplace environment by analyzing and mitigating harmful workplace behaviors.

COMPANY COMMANDER (Captain) **2013 - 2017**

ORARNG, 821 HHD & 1186 Military Police Company **(Monthly weekend & 2 weeks / year)**

- Commanded units of up to 50 Soldiers to accomplish a variety of military projects and missions.
- Trained and certified in multiple Army leadership courses and training programs.
- Successfully executed crew-served and vehicle-based weapons ranges with zero injuries.
- Supervised the transfer of \$3 million worth of military equipment and vehicles from Milton-Freewater Oregon to Umatilla Oregon with zero losses and zero injuries.
- Identified and mediated solutions to multiple workplace grievances and personnel conflicts.
- Receive and implement orders and policies from higher command levels and recommend policy changes.

COMMUNICATIONS DIRECTOR (GS-9) **2013 - 2014**

ORARNG, Beyond the Yellow Ribbon Program **(40 hours / week)**

- Member of senior program staff responsible for contributing to department decisions and policies.
- Planned and executed a communications project to consolidate organizational outreach programs.
- Selected as project officer for the Northwest Military Employer Summit. Successfully contributed to execution of the most successful NMES event to that date.

FORCE PROTECTION OFFICER (First Lieutenant) **2011 - 2012**

ORARNG, 1186 Military Police Company **(24 hours / day)**

- Conducted Military Police and security operations in a combat zone (Kabul, Afghanistan).
- Lead 80 US Soldiers and 140 private security contractors in providing security for large military compound.
- Supervised the implementation of more than \$2 million in safety and security infrastructure upgrades.

Education	Oregon State University	2003 – 2009	Ft. Leonard Wood, Missouri	2019
	Liberal Studies, BS		Army Captains Career Course	
	Ft. Rucker, Alabama	2016	Ft. Rucker, Alabama	2016
	Ground Safety Officer Course		Accident Investigation Course	
	Ft. Leonard Wood, Missouri	2010		
	Military Police Basic Officer Leadership			



CITY OF INDEPENDENCE COMMITTEE APPOINTMENT APPLICATION

The City of Independence solicits applications from individuals who have an interest in public service for appointment to periodic vacancies in City Boards, Commissions and Committees. If you have such an interest, please provide the following information:

NAME: LORRAINE Sorensen DATE: 10-29-26

ADDRESS: [REDACTED]

PHONE / EMAIL ADDRESS: [REDACTED] m

I am interested in appointment to (feel free to indicate interest in more than one):

- | | |
|---|---|
| ☐ Budget Committee | ☐ Historic Preservation Commission * |
| ☐ Independence Days Commission | ☒ Library Board |
| ☐ Museum Advisory Board | ☐ Parks & Recreation Board |
| ☐ Planning Commission * | ☐ Traffic Safety Commission |
| ☐ Other: (please specify) | |

Please complete the questionnaire attached with this document and return this application, the completed questionnaire and a resume or CV to the Office of the City Recorder, Independence City Hall, 555 S. Main Street, PO Box 7, Independence, OR 97351.

[REDACTED]
Applicant Signature

Volunteer service on commissions, committees and boards does require effort and time from members. Your interest and participation can help your community and is greatly appreciated. Appointments made to boards, commissions and committees are made by the Mayor, with the confirmation of the City Council.

*Attendance at city-funded training is required for
appointees to the Planning Commission and
Historic Preservation Commission.

1. Experience serving on an elected board.

None.

2. Experience volunteering with the City of Independence.

None. I moved to Independence in March, 2026.

3. Describe your community involvement experience.

I have experience serving the Corvallis community as Membership Director of the Corvallis Chamber of Commerce for three years in the early 2000's. During that time and for a few years thereafter, I also served on the board of Zonta. I have also been a member of Altrusa and Soroptimist. When my employment shifted to Samaritan Health Services approximately 16 years ago, I no longer had the workday flexibility to participate in such organizations.

I was also actively involved in community theater in Albany and Corvallis for over 20 years, primarily with Albany Civic Theater, as an actor, designer and director.

4. Describe your vision for the future of Independence.

I was drawn to Independence because of it's history and it's size. I grew up in the town of Echo, Oregon, with a population of 500 people. My great-aunt was the town historian. The Oregon Trail is very much part of the culture of the town even today. I would love to encourage Independence to highlight it's connection to the Oregon Trail and its namesake, Independence, Missouri. They anchor the eastern and western ends of the trail.

I am aware there are many cultural perspectives on the settlement and expansion of the west. I firmly believe it's possible to acknowledge harm while also taking pride in the accomplishments of every culture that has called this place home. This land has been and continues to be home to many remarkable cultures, and there is space for all our stories.

5. If applying for the Budget Committee, please describe your experience with budgeting and public finance.

n/a

6. Describe the time commitment you are able to make to your chosen Committee/Commission/Board.

It is my understanding that the Library Board meets once a month, on the 4th Monday of the month. I am available for those meetings. I am also willing to spend time reading, researching and learning about this town, this county, and regional library concerns.

7. Your reason(s) for applying for the Committee/Commission/Board.

In my tiny hometown of Echo, the library was my path to a broader world, to science fiction, to philosophy, to science, to so many possibilities. I spent many summer hours in the library and many more at home with the books from the library.

My college work-study my freshman year at Linfield was at the library.

A library is so much more than books. I noted at the Albany library recently that you can even check out gold-panning equipment. Fantastic idea!

I would love to learn more about the needs and interests of the Independence community and find innovative ways for the library to meet those needs. Be that books, computers, gold-panning or leading a Reader's Theater group.

I am not applying to the Library Board because I think I know what this town needs. I am applying because I am interested in learning more about this community and I am hopeful I might have something useful to offer.

PS. I do not have a current resume. I have been employed by Samaritan Health Services since January 2008, first in the business office and since 2012, as a software analyst for the Epic electronic health record. Prior to that I have done everything from wearing a hard hat and galoshes while unloading potato trucks in Boardman, to fast food, retail, legal secretary, helping at-risk youth find jobs at Community Services Consortium, and many years working in the temp industry, both as a temp and as the person in the office placing people in temp positions. I was the disaster recovery planner for Nypro in Corvallis, and as noted above, was the Membership Director for the Corvallis Chamber of Commerce and did a few years in B2B sales. I have a broad skillset and value flexible thinking.



CITY OF INDEPENDENCE
COMMITTEE APPOINTMENT APPLICATION

RECEIVED
JUN 10 2026
CITY OF
INDEPENDENCE

The City of Independence solicits applications from individuals who have an interest in public service for appointment to periodic vacancies in City Boards, Commissions and Committees. If you have such an interest, please provide the following information:

NAME: Loretta Pecchioni DATE: 6/6/26
ADDRESS: [REDACTED] Independence
PHONE / EMAIL ADDRESS: [REDACTED]

I am interested in appointment to (feel free to indicate interest in more than one):

- | | |
|---|---|
| ☐ Budget Committee | ☐ Historic Preservation Commission * |
| ☐ Independence Days Commission | ☒ Library Board |
| ☐ Museum Advisory Board | ☐ Parks & Recreation Board |
| ☐ Planning Commission * | ☐ Traffic Safety Commission |
| ☐ Other: (please specify) | |

Please complete the questionnaire attached with this document and return this application, the completed questionnaire and a resume or CV to the Office of the City Recorder, Independence City Hall, 555 S. Main Street, PO Box 7, Independence, OR 97351.

[REDACTED]
Applicant Signature

Volunteer service on commissions, committees and boards does require effort and time from members. Your interest and participation can help your community and is greatly appreciated. Appointments made to boards, commissions and committees are made by the Mayor, with the confirmation of the City Council.

*Attendance at city-funded training is required for
appointees to the Planning Commission and
Historic Preservation Commission

Please answer the following questions, attaching additional sheets as needed may be necessary.

1. Experience serving on an elected board:

Although not in elected positions, I am currently a member of the Advisory Board at the Monmouth Senior and Community Center (serving since 2021) and am the co-treasurer for the Ella Curran Community Food Bank (serving since 2023).

2. Experience volunteering with the City of Independence:

3. Describe your community involvement experience:

Besides the above service, I have volunteered with social justice, voter engagement, and political advocacy groups.

4. Describe your vision for the future of Independence:

Having moved here in 2021, I see that the City has budgeting challenges which impact all the services it is able to provide. While I find the overall quality of life here wonderful, I see that families with young children, in particular, experience challenges in finding healthy outlets for their learning and creativity.

5. If applying for the Budget Committee, please describe your experience with budgeting and public

finance: NA

6. Describe the time commitment you are able to make to your chosen Committee/Commission/Board:

I am retired, so I have a flexible schedule. My current time commitments would allow me to not only prepare for and attend Board meetings, but to provide as much as 4 or 5 hours per week to support the library.

7. Your reason(s) for applying for the Committee/Commission/Board:

As a life-long lover of books and a former educator, I appreciate the need for access to books and other materials that provide a wide-range of information for both children and adults. I also appreciate the cost of accessing the internet, so having that access for individuals (especially those who are unhoused) is essential.

Loretta Lucia Pecchioni
(abbreviated CV*)

[REDACTED]
Independence, OR 97351
[REDACTED]

EDUCATION

Doctor of Philosophy May, 1998	University of Oklahoma – Norman, OK Communication Area of Focus: Interpersonal Communication Dissertation: <i>The Older Mother-Daughter Relationship: The Influence of Caregiving Beliefs on Communicative Behaviors Prior to Dependency</i> Major Professor: Jon F. Nussbaum
Masters of Science May, 1981	Kansas State University – Manhattan, KS Geology Thesis: <i>Depositional Environment of the Eskridge Shale (Lower Permian)</i>
Bachelors of Science January, 1978	Indiana University – Bloomington, IN Geology

ACADEMIC APPOINTMENTS

August, 1998 to May, 2020	<i>Louisiana State University</i> <i>Department of Communication Studies</i> Assistant Professor (8/98 to 8/03) Associate Professor (8/03 to 8/16) Professor (8/16 to 5/20) Basic Course Director (1/05 to 5/11) Director of Graduate Studies (8/12 to 8/14) Department Chair (8/16 to 8/19)
July, 1996 to May, 1998	<i>University of Oklahoma Health Sciences Center</i> <i>Oklahoma Center on Aging</i> Research Associate/Assistant II Program Manager & Research Analyst

August, 1995 to May, 1996 *University of Oklahoma*
Department of Communication
Graduate Teaching Assistant

August, 1978 to May, 1980 *Kansas State University*
Geology Department
Graduate Teaching Assistant

May, 1979 to August, 1979 *Amoco Production Co.*
Graduate Research Assistant

December, 1977 to August, 1978 *Indiana Geological Survey*
Research Assistant

ADDITIONAL WORK EXPERIENCE

August, 1992 to August, 1995 Oklahoma CASA Association, Inc.
Executive Director

October, 1987 to August, 1992 Oklahoma County Juvenile Bureau
Coordinator, Volunteer Services Unit

March, 1981 to February, 1987 Occidental Petroleum/Cities Service Oil & Gas
Corporation
Exploration Geologist

**details of publications, teaching experience and service activities available upon request*

Agenda Item 7.6

Executive Session, 3rd Floor Conference Room
Pursuant to ORS 192.660(2)(e) to conduct
deliberations with persons designated by the
governing body to negotiate real property
transactions.

Agenda Item 7.7

Potential Action from Executive Session: Real Estate Negotiation (West)

Agenda Item 9.1

Management Team notes 06/24/2026

Management Team Notes
Wednesday, June 24, 2026

Present: Amanda Carey, Amy, Emmanuel, Fred, Gerald, Jason, Myra, Patrick, Shawn, Tino, Kenna

Pending agenda review.

Amy:

- This month has been focused on implementing our America250 grant, with staff purchasing supplies and materials for upcoming interpretive projects and community programming.
- We are also preparing for Independence Days, including construction and planning for the museum's "Celebrating 50 Years" parade float.
- Community volunteers have begun assembling the Community Quilt, and it has been exciting to see the hundreds of individual blocks come together into a true representation of our community.
- Next week, the museum will begin implementing the new admission fee for visitors who reside outside the City of Independence, while admission will remain free for Independence residents with a suggested donation.
- In addition to these projects, staff continue to manage daily museum operations, respond to historical research requests, support collections work, and develop future exhibits and interpretive programming. Our front desk is fully staffed by volunteers, and we've welcomed two new volunteers in the past week with background checks underway.

Emmanuel:

- Memorial plaque today
- shooting and editing historic home roadshow episodes
- working on fee communications
- New "We've Heard" series launched, first one went really well: 3.1k views, second one will come out this week
- Movie in the Park is cancelled
- Special Olympics torch run
- OEDA presentation went well

Fred:

- City Council - Preparing for a Public Hearing on the More Housing, Same (Great) Neighborhood project at the meeting of July 14.
- Planning Commission - Preparing for Planning Commission meeting on July 6th. The meeting will feature a walking tour of Edwards Addition in Monmouth. The Commission will have a public hearing about potential changes to requirements for parks and open space in new development at their meeting in August.
- Historic Homes Videos - Preparing for final Historic Home Roadshow video. The series is slated to end in June with the expiration of the Certified Local Government Grant.

- Tour - Preparing for final walking tour of the Historic District on June 24. The tour will focus on the growth of the community from 1940 to 1970 and include details about the architecture and history from the time.
- Reviewing various development applications. The plat for Southwest Crossing is close to being recorded.
- Out of the office June 29th to July 3rd.

Gerald:

Project Updates

- **2022-09 WWTP Upgrade:** Construction underway through 10/15/28.
- **2022-12 OR 51–5th St SRTS Crossing:** Design to begin in July.
- **2022-17 9th St PS Ph 2-3:** See WWTP Upgrade.
- **2023-04 Surface Water Treatment Plant:** Looking at options between collector well and intake.
- **2023-06 Stormwater Master Plan Update:** Planning Commission and City Council hearings to be determined.
- **2023-12 Chestnut St Bridge:** Waiting for IGA between ODOT, Marion County, and city.
- **2023-13 Corvallis Rd Waterline:** Construction underway through 07/31/26.
- **2024-01 ODOT ADA Upgrades:** ODOT construction to start late summer.
- **2024-04 Polk-Main Intersection Improvement:** ROW acquisition underway.
- **2025-04 Stormwater SDC and Rate Study** – Project to start in 2027.

Private Development Projects

The following is a status update on larger private development projects underway.

- 2021-02 SW Crossing: Construction underway.
- 2024-03 Ella Curran Food: Waiting for detention pond landscaping.
- 2024-06 601 Stryker Rd Industrial: Construction underway.

Jason:

- **Enterprise System Modernization (Google → Microsoft 365 Migration)**
 - Continued execution of migration project in coordination with Elevate Tech, including resolving authentication issues, OneDrive provisioning gaps, and licensing alignment.
 - Addressed data migration blockers (inactive accounts, licensing mismatches, storage provisioning) to maintain project momentum.
- **Microsoft 365 Licensing & OneDrive Enablement**
 - Oversaw user licensing decisions and OneDrive readiness to support cloud migration and long-term platform strategy.
 - Coordinated with vendor partners to finalize licensing configurations.
- **Regional IT Services Expansion (SEDCOR)**
 - Finalized IT services agreement with SEDCOR and initiated onboarding, including billing setup and service delivery.
- **Cybersecurity Readiness & Threat Mitigation**
 - Responded to reports of account compromise incidents affecting multiple law enforcement agencies across the state; due to strong cybersecurity practices and staff training, the City of Independence was not impacted.

- Continued emphasis on security awareness and proactive defense to mitigate risk to City systems and public safety services.
- **Intergovernmental / Policy Engagement**
 - Participating in League of Oregon Cities Broadband, Telecommunications, AI & Cybersecurity Policy Committee to review emerging legislation and cybersecurity reporting requirements.
 - Preparing for upcoming policy discussions impacting municipal cybersecurity obligations.
- **Regional Governance (MINET)**
 - Attending MINET Board meeting and participating in adoption of the organization's approved budget, supporting regional telecommunications governance and financial oversight.
- **Core IT Infrastructure & Operations**
 - Completed infrastructure work including backup system rebuild and continued device lifecycle management (laptops and systems).
 - Managed account lifecycle and access control tasks to maintain system security.
- **City Staff Support & Public Safety Systems**
 - Supported onboarding of new staff and provided technical support to City departments.
 - Participated in coordination efforts related to public safety systems (e.g., library/911 integration review).
- **Financial & Administrative IT Management**
 - Managed IT billing, invoices, and financial tracking across departments and partner organizations.
- **Regional IT Collaboration (Independence / Monmouth)**
 - Continued shared IT services coordination through weekly collaboration with partner city staff.
- **Leadership & Executive Coordination**
 - Participated in management and department head meetings at Independence and Monmouth and provided regular reporting to City leadership.

Myra:

- Back from training and medical, trying to catch up.
- We have received 4 applications for council positions and 1 application for mayor so far. All are posted on the city's website. Candidate signature sheets are due mid-August.
- Currently at 41 records requests this year. Two are paused per the requestor, one is in process.

Patrick:

- Meeting with both CCRLS and the State Library to determine the ramifications/steps of closing the library.
- Low Voltage NW is scheduled to come to the library tomorrow to help diagnose the wiring issues first found by the CCRLS IT Team.
- Summer Reading has been really busy so far. 567 people signed up as of Tuesday evening (6/23). We had over 160 people at our first two programs.
 - Summer Reading Programs before the next Management Team Meeting:
 - Unit Souzou (Taiko Drumming) - 6/24 @ the library @ 3pm
 - Fun with Seeds - 6/25 @ Inspiration Garden @ 3pm
 - Music to Literacy Early Learning Storytime - 7/02 @ the library @ 11:30 am
 - Teen & Adult Sun Catchers - 7/07 @ the library @ 3 pm
 - Lego Mania: Build a City - 7/8 @ the library @ 3pm

- Kid's Build it with Home Depot - 7/9 @ the library @ 3pm
- Storytimes every Wednesday morning @ the library @ 10:30 am
- The library will be at the Central School District Summer School Meet and Greet 6/24
- The library/museum/parks joint Advocacy and Promotions subcommittees are scheduled to meet July 9.
- EveryLibrary, a national nonprofit, is leading a two-day training in October in Maupin. The library board has been made aware of this training, and Patrick is looking into the prospect of his attending.

Shawn:

- Sports park deal should be coming to a conclusion soon.
- Got an offer on the museum building, will be negotiating.
- Finalizing summer series - seasonal staffer on board, sponsor benefits, etc. Had to cancel Friday's movie due to rain.
- Company visit with Biz OR and Governor's office rep today.
- Moving forward with Local Wetland Inventory - funded by DLCD
- Working on property owner & BPA approval for N/S trail by the GATE
- Cyclocross looking to come back for a full weekend. Hope to make some tweaks to the course layout.

Tino:

- Tino will be out for a few days. Gilbert left in charge.
- ORPAT - Great effort by IPD officers.
- LETR (Law Enforcement Torch Run) next Thursday.
- Chiefs interviews today (great candidates)
- Indy Days prep different but ready

Agenda Item 9.2

Miscellaneous Correspondence-Scheck

Myra Russell

From: scheck2oregon@aol.com
Sent: Monday, July 13, 2026 10:29 AM
To: Myra Russell
Subject: Myra can you put this in the agenda packet?
Attachments: Indy 24-25 budget re levy-highlighted.pdf; Indy 25-26 budget consolidation-highlighted.pdf

July 13, 2026

Re: Information requested by Trammart News

Mayor & Councilors:

Thank you. Trammart News is trying to pin down the operational costs of the museum, library & parks, as the news outlet continues to cover a referendum movement to place the fee of nearly \$20 before voters -- a fee that was adopted by the Independence City Council to pay for these services.

The reason the information is important, in the view of TN, is that fee was approved in a year when staff positions are to be added, including a full-time attorney. Two former city managers presented evidence to Trammart News that: a) adding a full-time attorney is a relative rarity for a city with a population the size of Independence; b) the addition won't be prevent need for hiring outside attorneys, as is the current practice.

There is no wish by Trammart News to be seen as criticizing or supporting this move -- only to report on it, in light of financial scarcity. Tracking tax dollars is a free-press mission, in the view of this news agency.

I've included information from 2 previous budget years (attached), which announce community services (museum building) were to be closed due lack of money. One preceded the levy vote. The other followed it.

Additionally, I sent a portion of a then-unpublished article to the city in which I showed the questions about the referendum and answers -- but no corrections or clarifications were requested from the city recipients.

My main question is a simple one: Why has the city announced these community services will be shut down, if funds are lacking, three years in a row? The continued support of them would suggest there is some sustainability. TN seeks only to determine how operational costs are divvied up, in a dollars-and-cents way.

The city rarely responds to Trammart News but I believe this issue merits a response.

The mayor claims that Trammart News is a disruptive force -- the mayor made such statements on the heels of a shoulder-grab by the city's communications director for TN asking a question of the former finance director. The mayor has been reminded

by TN that physically preventing Trammart News from asking questions is inappropriate and landed the city in...well, a bit of hot water, in the view of this journalist.

There is now a communications director on the staff with a complaint of harassment that's been upheld.

None of this questioning is ever done for any reason but this one: Answers are being sought for the public.

Questions from the press may not be welcome to the city -- and often aren't. That's very understandable.

But accountability & the watchdog role of journalism is constitutionally enshrined. So, a person named Anne Scheck sure *isn't very important at all*, but the role as a news provider and the press is considered essential.

Thank you,
Anne Scheck
Trammart News & Publishing

As indicated, here is the question from the previous article, which was submitted to the city.

4. How will the museum, parks and library function without it?

City sources indicate that there is money in the budget to continue these services – they have been functioning all year after the city manager declared the city "broke" in 2025. However, the budget approved by the city council seems to depend on this new revenue to meet its needs in 2026 - 2027 – including the addition of two staff positions.

(<https://www.ci.independence.or.us/wp-content/uploads/2026/04/BUDGET-2026-2027-AC-V2.pdf>)

Operational and Budget Challenges

Recommended Financial Stability Actions

While the influx of federal funds via the American Rescue Plan Act was welcome, these one-time funds created significant fluctuations that made it harder to see the base budget for FY 2023 and ensure that it was sustainable. As we advised in the FY2024 Budget Message the General Fund is not sustainable without an alternative revenue stream. This FY2025 balanced budget incorporates the following proposals:

- A one-time, reduction in General Fund contingency of \$400,000 relative to the FY2024 budget brings the City below the required contingency amount specified in policy, which will be replenished through a strategy involving additional revenue streams discussed below and eventually provide funds for reinvestment in services; and
- The implementation of a \$27 per month Public Safety Fee to be added to each utility bill beginning in January 2025. This will generate approximately \$510,000 during FY2025. The fee amount is proposed to be reduced for the 2025-26 fiscal year to \$10 per month, and then indexed each year in December based on inflation as calculated in CPU-West Region; and
- The City will place an Arts and Culture Operating Levy on the ballot(s) in 2024-25 to support the Independence Public Library, the Independence Heritage Museum, and City parks. This will generate \$1.065 million per year and translates to a rate of \$1.82/\$1,000 assessed value or about \$548 per year on

a home valued at \$300,000. If this levy fails, the City will begin to close those departments that would have been funded by the levy.

The implementation of the \$27 per month fee for utility customers provides a necessary infusion to the General Fund for public safety in the first year to establish a sustainable base. The lesser per month fee in subsequent years helps to protect that base against inflationary erosion of services and allow for reinvestment in public safety through measured increases in staffing in the Police Department. This strategy is projected to support the hiring of one additional police officer in the 2025-26 fiscal year, two additional police officers in the 2026-27 fiscal year, and one additional officer in each of the 2027-28 and 2028-29 fiscal years.

It should be noted that a failure to approve any one of the above proposals will result in the need to close non-essential departments (Library, Museum, Parks) and/or reduce staffing further in essential departments (Police Department). If implemented this strategy provides stability to the General Fund over the life of the levy. The fund balance would grow modestly each year and allow the City to rebuild a healthy fund balance and perhaps begin to reinvest in service levels in the later years. It should further be noted that to sustain this stability the operating levy would need to be renewed every five years.

Despite significant efforts to address funding gaps, the General Fund's ongoing deficit will require long-term solutions, including new revenue sources or additional cost reductions. Core services, including police, library, museum, and parks, remain at risk without sustainable funding mechanisms. Although the introduction of the public safety fee has helped stabilize funding for police services, the November 2024 levy to support the Library, Museum, and Parks did not pass. As a result, the City must move forward with difficult but necessary budgetary measures to reduce costs and preserve critical services. These measures include:

1. Consolidating the Museum and Library into a single "Community Services" department, housed in the current Library building to reduce facility and operational costs.
2. Selling the Museum building to generate one-time revenue and reduce debt payments and maintenance expenses.
3. Selling at least one park property from a designated list to provide additional one-time revenue.
4. Closing the Independence Civic Center on Fridays to save operational costs. Note: the Police Department would remain open.
5. Reducing public access to the Library by one additional day per week to decrease operational costs.

These measures are intended as temporary stopgaps to address immediate fiscal challenges. They are not long-term solutions, and without additional revenue or further reductions, the City will face further financial instability, leading to a forced reduction in core services.

As advised in the FY 2025 budget message, the Tourism and Events Fund is not sustainable in its current form. Indy Days wristband costs increased significantly, concert series entrance fees were introduced, and movie nights were discontinued as part of an effort to stabilize the Fund. Additionally, a one-time transfer from the General Fund supported the Downtown Manager position, which has historically been primarily responsible for organizing Indy Days. As the current Downtown Manager has tendered her resignation, the City has opted not to fill the position and will instead transition Indy Days out of the City's control. These changes are expected to provide greater stability to the Tourism and Events Fund moving forward.

Personnel and Staffing Challenges

City departments have been operating under significant staffing constraints for the last few years. The combination of reduced revenue and increased service demands has strained staff capacity, yet employees continue to rise to the challenge and deliver quality public services. Although we are fiscally constrained and unable to address the staffing challenges,

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