



Urban Renewal Agency

Adopted Budget

Fiscal Year 2018-2019

Annual Budget for the La Pine Urban Renewal Agency (URA)

Fiscal Year

July 1, 2018 - June 30, 2019



Budget Committee

Urban Renewal Agency Board

Connie Briese, URA Board Chair

Ann Gawith, URA Board Vice-Chair

Stu Martinez, URA Board Member

Craig Heaton, URA Board Member

Vicki Russell, URA Board Member

Dan Varcoe, URA Board Member

Andrea Hine, URA Board Member

City Staff

Cory Misy – Executive Director, Budget Officer, City Manager

Melissa Bethel – City Community Development Director

Jake Obrist – City Public Works Manager

Jeremy Green – City Attorney

Erik Huffman – City Engineer

Brenda Bartlett – City Financial Consultant

Ashley Williams – City Accounting Clerk

Holly Smith – City Administrative Assistant

John Bales – City Utility Worker I

Reed Campbell – City Utility Worker I

City of La Pine Urban Renewal Agency – FY 2018-19 Budget

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Chair Connie Briese • Vice-Chair Ann Gawith
Stu Martinez • Craig Heaton • Dan Varcoe
Vicki Russell • Andrea Hine

Urban Renewal Agency

16345 Sixth Street — PO Box 2460
La Pine, Oregon 97739
TEL (541) 536-1432 — FAX (541) 536-1462
www.lapineoregon.gov/urbanrenewal

La Pine Urban Renewal Agency Budget Message for Fiscal Year 2018-19

May 1, 2018

Members of the La Pine Urban Renewal Agency Budget Committee

As the acting Executive Director and Budget Officer for the La Pine Urban Renewal Agency (URA) it is my pleasure to present the proposed Fiscal Year (FY) 2018-19 budget for consideration by the URA Budget Committee. The budget is submitted as required under Chapter 294 of the Oregon Revised Statutes (ORS).

The URA was formed by the La Pine City Council on June 16, 2014 via the adoption of Ordinance 2014-06. Up to this point, the URA has only spent funds on an annual audit and supporting the Sustainable City Year Program (SCYP) in La Pine during FY 2017-18, while most of the funds have been set aside allowing the beginning fund balance to grow and rollover. Correspondingly, the annual tax revenue has increased over the years, and the URA for FY 2018-19 is anticipated (conservatively) to have \$184,585 in total resources.

With an increase in development within the City of La Pine, and specifically the Urban Renewal District, the URA can expect to see continued—perhaps rapid—revenue increases through property taxes. This is due to new development and increases in assessed property values, not new taxes. The actual amount of property taxes received year-to-date this fiscal year have exceeded the budgeted \$45,000 by over \$15,000. Staff will continue to budget tax revenues each year as accurately (but conservatively) as possible; ultimately, the resources on hand are what is expendable to the URA Board via the budget process.

Staff has confidently budgeted \$80,000 in revenues for FY 2018-19 combined with a beginning fund balance of \$104,585; this proposed FY 2018-19 budget is balanced with \$184,585 in total resources and \$184,585 in total fund requirements. The resources in this proposed budget are allocated as approximately 30% for the storefront assistance program (\$50,000), 30% for minor capital enhancements (\$50,000), 20% reserved for future capital (\$37,000), 10% in fund contingency (\$20,000), and the remaining 10% spread across operating expenses. Any budgeted expenditures that are not spent will rollover to the following budget year. We are at the point to proactively and strategically build up the Reserve for Future Expenditures line item.

On the URA website, as well as at La Pine City Hall, the URA Plan and Report are available for public review. Furthermore, the reports produced through SCYP are available in those locations as well. During FY 2018-19, the URA Board anticipates building upon that foundation and recommendations to better outline and articulate priorities through a goal setting and strategic planning process. It will be important for the URA to balance expenditures of funds on current projects, while saving for the future. The potential for debt service—and the associated steps and requirements—should be explored during FY 2018-19 in order for planning and budgeting for larger, longer-term projects to take shape in their early stages.

Storefront Improvement Program

In the URA Report (Page 14) and Plan (Page 9) there is specific reference to “work with business owners to improve the overall appearance of the exteriors of their properties.” Specifically, this will be accomplished through a storefront improvement program; the URA worked with students through SCYP to develop short-term best practices and recommendations with an eye towards this program. They provided tangible next steps to help guide the creation and implementation of a storefront program during FY 2018-19. Staff intends to build upon their work—and timing of the City TGM Code Assistance project looking to establish architectural design standards by Fall 2018—to have a pilot program to roll out over the Winter 2019.

Key Program Considerations:

- Proactive vs. Reactive
- Overall Program Funding
- Loan/Grant Amount & Owner Contribution
- Business Criteria & Eligibility



Above and Below: “City of La Pine: Urban Renewal” by Liam Jacobs, Alex Edmonds, Ari Shapiro, Stephen Paul, Amy Marks, Drew Kriens, Rene Bodart, Nick Miller, Skylar Yang, and Pruthvi Nannapaneni.

Minor Enhancement Capital Projects

In the URA Report (Page 13) and Plan (Page 8) there is outline for a wide variety of public improvements under the heading of “District Identity/Transportation Improvements.” These include: sidewalk improvements, signage, streetscape, bicycle paths, gathering spaces, and parking. It will be critical for the URA to leverage dollars in conjunction with City projects, as well as looking at other public partners and private projects. Through SCYP, there were several recommendations in regards to prioritizing types of projects, especially given the limited resources in the URA budget at this point. Staff will work closely with the URA Board to identify opportunities and strategize how to maximize these funds.

Recommendations:

- Phase I Public Safety: Sidewalks, Street Lighting, Crosswalks, Parking, Bicycle Racks
- Phase II Beautification: Trees, Flowers & Plants, Street Benches, Canopies & Gazebos, Trash & Recycling Cans, Dog Stations



Other Fund Changes

Given that the URA projects slated for FY 2018-19 (and beyond) will require additional staff time to administer, monitor, and review, this budget includes a Transfer Out to the City's General Fund to help support personnel services. This will be an item the URA Board – in consultation with staff – should monitor closely in the coming years to find the right balance. For this year, the intent is mostly to establish the precedent and keep the need at the forefront of consideration with future budgets.

This budget includes \$13,500 in Contracted Services available for additional consulting needs or the ability to support planning projects—either directly through the URA or in partnership with other public organizations. Some of these funds, and/or the Capital Outlay funds, may be allocated towards supporting specific elements of the Transit/City Center property development. That project is anticipated to have Phase I under construction in Summer 2019 with continued investment in Summer 2020.

Conclusion

This proposed budget represents a significant step in the role of the URA. We should all be excited for FY 2018-19 to be a year of action. Staff in close consultation with the URA Board will need to be cognizant of the time and energy necessary to bring the items budgeted for this upcoming year to fruition. It will be crucial for realistic timelines to be established and check points along the way to be monitored. As we have already started, it will be important to meet on a more regular basis (monthly) and maintain communication both between staff and the URA Board, while proactively engaging and including the public.

Thank you for your public service, dedication of time, and sincere contribution to making the La Pine Urban Renewal Agency a force for good and a critical component of shaping the future our community.

Respectfully submitted,



Cory Misley

La Pine Urban Renewal Executive Director and Budget Officer

The Budget Process

THE BUDGET PROCESS

The budget process is governed by the Urban Renewal Plan, Urban Renewal Bylaws, and State of Oregon Budget Laws. The initial tasks such as filling vacancies on the budget committee and setting the date for the first budget committee meeting begins early in the calendar year. The majority of the budget creation process takes place from February through June of each year.

The Executive Director and other staff work together to allocate spending parameters and estimate revenue from January through April to help develop a proposed budget. The Proposed Budget is then submitted to the Budget Committee which consists of the Urban Renewal Agency and, if available, an equal number of citizen members.

Notice of the Budget Committee public hearings, which are held in May, are published in the Wisebuys and the BendBulletin newspapers preceding the meeting as well as on the City's website. At the budget committee meeting, the Budget Officer presents the budget and budget message. The budget message explains the proposed budget and any significant changes in the Agency's financial position. The public is given a chance to comment or give testimony at this meeting. For more information about public involvement, see "Citizen Involvement Opportunities" section below.

When the Budget Committee is satisfied with the budget, including any changes, additions to or deletions from the proposed budget, it approves the budget for submission to the Urban Renewal Agency for adoption.

After the Budget Committee approves the proposed budget, the Budget Officer publishes a financial summary and notice of budget hearing in the local newspaper. The hearing is held during a regular Urban Renewal Agency meeting in June. The purpose of the public hearing is to receive budget related testimony from citizens and provide an opportunity for citizens to discuss the approved budget prior to adoption.

The Board has the authority to make some changes to the approved budget. The changes can be initiated by receiving new information and/or consideration of the public testimony. The changes allowed include adjusting resources, reducing or eliminating expenditures and/or increasing expenditures on a limited basis. Increases of expenditures of the amounts approved by the budget committee are limited to not exceed more than \$5,000 or 10 percent—whichever is greater. Expenditure increases above those limits require a republishing of the budget and an additional hearing. The Urban Renewal Agency then votes on a resolution, which formally adopts the budget and makes appropriations not later than June 30.

After the budget document is finalized, it is submitted to the County Clerk, distributed to all members of the budget committee, the Board and City staff. The document is posted on the City's website www.lapineoregon.gov and hard copies are placed throughout City Hall.



SCYP Bicycle Transportation Class—April 2018

Citizen Involvement Opportunities

All meetings of the Budget Committee and the Urban Renewal Agency are open to the public. Citizens are encouraged to provide comment during any of these meetings during the Public Comment period of the agenda. Citizens may also testify before the Urban Renewal Agency during the public hearing on the approved budget for adoption. The proposed budget document will be available for public review at City Hall and on the City’s website for a reasonable amount of time prior to the first budget committee meeting.

Copies of the entire document, or portions thereof, may be requested through the normal process of requesting public records.

Public Comment or testimony may be provided by:

1. Submitting a written statement by mail, e-mail or at a meeting or public hearing; or
2. Speaking to the Committee at their meetings during the public comment opportunities.

Changes after Adoption

Once the governing body has enacted the resolutions to adopt the budget, expenditures may not be made for any purpose in an amount greater than the amount appropriated, excepted as allowed by Oregon Revised Statute (ORS) (mainly 294.338, 463, 471, 473, and 478). Most changes require formal action in the form of a resolution or a supplemental budget. In some instances, a public hearing is required. The ORS sections mentioned above provide direction on which formal action is needed depending on the specific situation giving rise to the needed budget change; however, generally speaking, a supplemental budget is needed to create a new appropriation or a new fund transfer where a category of expense does not already exist in the adopted budget. Most other situations can be handled by resolution.

See Budget Calendar on the next page.



City Staff hanging Holiday Lights on 1st Street Streetscape Improvements –November 2017



Urban Renewal District Budget Calendar Fiscal Year 2018-2019

Urban Renewal Agency Appoints Budget Officer	April 3, 2018 3:00 pm
City Council Appoints the Budget Committee	April 11, 2018 6:00 pm
Publish 1 st Notice of Budget Committee Meeting And Public Hearing for Comments from Public (WiseBuys/Bend Bulletin)	by April 17, 2018
Publish 2 nd Notice of Budget Committee Meeting And Public Hearing for Use of State Revenue Sharing (Website Only)	by April 24, 2018
Budget Message and Budget Committee Meeting	May 1, 2018 3:00 pm
Publish Notice of Budget Hearing (WiseBuys/Bend Bulletin)	by May 15, 2018
Public Hearing and adoption of budget	June 5, 2018 3:00 pm
Budget Officer:	Cory Misley, Executive Director
Finance Staff:	Brenda Bartlett, Ashley Williams, Holly Smith
Budget Committee:	Connie Briese, Craig Heaton, Stu Martinez, Ann Gawith, Dan Varcoe, Vicki Russell, and Andrea Hine

*****All dates and times are subject to change***

Budget Detail Sheet

**LA PINE URBAN RENEWAL AGENCY
BUDGET WORKSHEET
FY 2018-19**

GENERAL FUND									
		FY 2015-16	FY 2016-17	FY 2017-18			FY 2018-19		
		ACTUALS	ACTUALS	BUDGET	YTD March	Projection	PROPOSED	APPROVED	ADOPTED
80-301-100	BEGINNING FUND BALANCE	-	22,764	51,115	52,585	52,585	104,585	104,585	104,585
80-310-110	PROPERTY TAXES	22,764	35,405	45,000	60,838	65,000	80,000	80,000	80,000
80-480-100	TRANSFER IN - GENERAL FUND	-							
TOTAL FUND RESOURCES		22,764	58,169	96,115	113,423	117,585	184,585	184,585	184,585
MATERIALS & SERVICES									
80-520-2050	ACCOUNTING / AUDIT	-	5,584	5,500	3,390	5,000	5,000	5,000	5,000
80-520-2080	ADVERTISING EXPENSE				468	1,000	-	-	
80-520-2250	CONTRACTED SERVICES			15,000	650	6,500	13,500	13,500	18,500
80-520-2520	IT - SOFTWARE AND SUPPORT						-	-	
80-520-2600	LEGAL FEES						2,000	2,000	2,000
80-520-2750	OFFICE SUPPLIES						-	-	
80-520-2880	STOREFRONT IMPROVEMENT PROGRAM						50,000	50,000	50,000
80-520-2990	MISCELLANEOUS EXPENSE	-		5,000	38	500	2,085	2,085	2,085
TOTAL MATERIALS & SERVICES		-	5,584	25,500	4,546	13,000	72,585	72,585	77,585
CAPTIAL OUTLAY									
TBD	ENHANCEMENT PROJECTS						50,000	50,000	50,000
TOTAL CAPITAL OUTLAY		-	-	-	-	-	50,000	50,000	50,000
INTERFUND TRANSFERS - OUT									
TBD	TRANSFERS OUT - GENERAL FUND						5,000	5,000	-
TOTAL INTERFUND TRANSFERS - OUT		-	-	-	-	-	5,000	5,000	-
CONTINGENCY									
80-910-1000	CONTINGENCY			10,000		-	20,000	20,000	20,000
TOTAL CONTINGENCY		-	-	10,000	-	-	20,000	20,000	20,000
RESERVE FOR FUTURE EXPENDITURES									
TBD	RESERVE - FUTURE CAPITAL						37,000	37,000	37,000
TOTAL RESERVE FOR FUTURE EXPEND.		-	-	-	-	-	37,000	37,000	37,000
UNAPPR. ENDING FUND BALANCE									
80-990-1000	UNAPPR. ENDING FUND BALANCE			60,615					
TOTAL UNAPPR. ENDING FUND BALANCE		-	-	60,615	-	-	-	-	-
TOTAL FUND REQUIREMENTS		-	5,584	96,115	4,546	13,000	184,585	184,585	184,585
NET RESOURCES OVER REQUIREMENTS		22,764	52,585	-	108,877	104,585	-	-	-

Supporting Documents

Affidavit of Publication

STATE OF OREGON, COUNTY OF DESCHUTES

I, **Shawn Antoni**, a citizen of the United States and a resident of the county aforesaid; I am over the age of eighteen years, and not party to or interested in the above-entitled matter. I am the principal clerk of the printer of

The Bulletin

1777 SW Chandler Ave, Bend OR 97702

a daily newspaper of general circulation, published in the aforesaid county and state as defined by ORS 193.010 and ORS 193.020, that

Acct Name: CITY OF LAPINE

Case:

Legal Description: LEGAL NOTICE, NOTICE OF BUDGET , COMMITTEE , MEETINGS AND , PUBLIC HEARING, , 2018-2019 Budget for , the La Pine Urban , Renewal District ,

A public meeting of...

a printed copy of which is hereto affixed was published in each regular and entire issue of the said newspaper and not in any supplement thereof on the following dates, to wit:

4/13/18

Page C6

I certify (or declare) under penalty of perjury that the foregoing is true and correct.

Dated at Bend, Oregon, this 13 day of April, 2018.

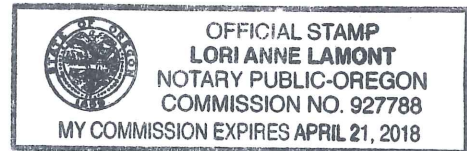
Shawn Antoni
Signature

AdName: **20941155A**

State of Oregon, County of Deschutes

Subscribed and Sworn to before me this 13 day of Apr, 2018 by Shawn Antoni

[Signature]
Notary Public for Oregon



No. _____
In the _____ Court of the
STATE OF OREGON
for the
COUNTY OF DESCHUTES

AFFIDAVIT OF PUBLICATION
Filed _____
By _____
From the Office of _____
Attorney for _____



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ceding information that
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the court or the
Co-Personal Repre-
sentatives, or the At-
torney for the Co-Personal
Representatives.
Dated and first pub-
lished on April 13,
2018. Co-Personal
Representatives: Da-
kota Clair, PO Box
358, Independence,
California 93526;
Thomas Clair, PO Box
8003, Salem, Oregon
97303. Attorney for
the Co-Personal
Representatives:
David E. Petersen,
Merrill O'Sullivan,
LLP, 805 SW Indus-
trial Way, Suite 5,
Bend, Oregon 97702.
Office: (541)
389-1770, Facsimile:
(541) 389-1777,
Email: redside@mer-
rill-osullivan.com.

LEGAL NOTICE
Estate of Luetta
Voight. NOTICE TO
INTERESTED PER-
SONS. Case Number:
18-PB-02522. In the
Circuit Court of the
State of Oregon, for
the County of Des-
chutes, in the matter
of the Estate of Luetta
Voight, deceased.
Notice is hereby given
that Joshua Harris
has been appointed
as personal repre-
sentative of the above
estate. All persons
having claims against
that estate are re-
quired to present
them to the personal
representative in care
of the undersigned
attorney, at: 158 NE
Greenwood Avenue,
Bend, Oregon 97701,
within four months
from the date of first
publication of this
notice, as stated below,
or they may be
barred. All persons
whose rights may be
affected by this pro-
ceeding may obtain
additional information
from the records of
the Court, the per-
sonal representative,
or the attorney for the
personal representa-
tive. Date of First
Publication April 13,
2018. **PERSONAL
REPRESENTATIVE:**
Joshua Harris. **AT-
TORNEY FOR PER-
SONAL REPRESENTATIVE:**
Frederick N.
Schroeder, OSB#
075341, Stahancyk,
Kent & Hook P.C.,
158 NE Greenwood
Avenue, Bend, OR
97701, 541-318-9115.

Oregon 97760 or they
may be barred. Addi-
tional information may
be obtained from the
court records, the
personal representa-
tive or the lawyers for
the personal repre-
sentative.
Date first published:
MARCH 30, 2018
Personal Representa-
tive:
Beverly Joan McKenzie
6437 SW Badger Road
Crooked River Ranch,
Oregon 97760
(541) 548-7109

LEGAL NOTICE
IN THE CIRCUIT
COURT OF THE
STATE OF OREGON
FOR THE COUNTY
OF DESCHUTES
PROBATE DEPART-
MENT. In the Matter
of the Estate of Peggy
Jean Bowsby, De-
ceased. Case No:
18PB02266. NOTICE
TO INTERESTED
PERSONS. Loretta
Tolle has been ap-
pointed personal rep-
resentative of the Es-
tate of Peggy Jean
Bowsby, Deceased,
by the Deschutes
County Circuit Court
of the State of Or-
egon, probate num-
ber 18PB02266. All
persons having claims
against the estate are
required to present
the same with proper
vouchers within four
(4) months after the
date of first publica-
tion to the under-
signed personal rep-
resentative at 2200
NE Hwy 20 #20,
Bend, Oregon 97701
or they may be
barred. Additional
information may be
obtained from the
court records, the
personal representa-
tive or the lawyers for
the personal repre-
sentative. Date first
published: April 6,
2018. Personal Rep-
resentative: Loretta
Tolle, 2200 NE Hwy
20 #20, Bend, Or-
egon 97701, (541)
382-7552. Attorney for
Personal Representa-
tive: Tony De Ali-
cante, De Alicante
Law Group, 19570
Amber Meadow Drive,
Suite 140, Bend, Or-
egon 97702, (541)
390-8961.

LEGAL NOTICE NOTICE OF BUDGET COMMITTEE MEETINGS AND PUBLIC HEARING

**2018-2019 Budget for
the La Pine Urban
Renewal District**
A public meeting of
the Budget Commit-
tee of the La Pine Ur-
ban Renewal District,
Deschutes County,
State of Oregon to
discuss the budget for
fiscal year July 1,
2018 to June 30,
2019, will be held at
La Pine City Hall,
16345 Sixth Street, La
Pine, Oregon. The
meeting will take
place on May 1st at
3:00 pm.

the bidder may agree
to remove at a fixed
rate. The Forest Ser-
vice reserves the right
to reject any and all
bids. Interested par-
ties may obtain a pro-
spectus from the of-
fice listed below. A
prospectus, bid form,
and complete infor-
mation concerning the
timber, the conditions
of sale, and submis-
sion of bids is avail-
able to the public from
the Deschutes Na-
tional Forest
Supervisor's Office,
63095 Deschutes
Market Road, Bend,
OR, 97701; Phone
541-383-4780; or on-
line
[http://www.fs.usda.gov/
v/goto/centraloregon/ti
mbersales](http://www.fs.usda.gov/goto/centraloregon/timbersales). The USDA
is an equal opportu-
nity provider and em-
ployer.

LEGAL NOTICE
NOTICE IS HEREBY
GIVEN that the un-
dersigned intends to
sell personal property
from unit(s) listed be-
low to enforce a lien
imposed on said
property under the
Oregon Self Storage
Facilities Act (ORS
87.685). The under-
signed will sell at pub-
lic sale by competi-
tive bidding on the
**28th day of April,
2018**, at 11:00 a.m.,
on the premises
where said property
has been stored and
which are located at
Bend Sentry Storage,
1291 SE Wilson,
Bend, State of Or-
egon, the following:
Unit #111 Ryan
Carter; Unit #142
Michelle Day; Unit
#172 Lance Orton.

LEGAL NOTICE NOTICE OF BUDGET COMMITTEE MEETINGS AND PUBLIC HEARING

**2018-2019 Budget for
the La Pine Urban
Renewal District**
A public meeting of
the Budget Commit-
tee of the La Pine Ur-
ban Renewal District,
Deschutes County,
State of Oregon to
discuss the budget for
fiscal year July 1,
2018 to June 30,
2019, will be held at
La Pine City Hall,
16345 Sixth Street, La
Pine, Oregon. The
meeting will take
place on May 1st at
3:00 pm.

fast results! It's the easiest
way in the world to sell.

The Bulletin Classified
541-385-5809

LEGAL NOTICE
Public Auction
Unit B-11 (5x10) Anne
Sorenson of Portland,
OR; Unit C-165
(10x20) Sarah Mc-
Cloud of Bend, OR.
Bend Self Stor, 63273
Nels Anderson Rd.,
Bend, OR 97701,
541-389-1664. April
28th, 9:00 a.m.

PUBLIC NOTICE
Bar Towing Inc.,
541-318-4280, 160
SE Logsdon St.,
Bend, OR 97702 will
hold a public auc-
tion - Pursuant to
ORS Chapter 87, on
4/14/18 at 10am, for
the following ve-
hicle:
1953 Ford Panel Van
will be sold for cash
plus auction fees to
the highest bidder.
impound fees at
auction of
\$5395 Email:
SEAN@BARTOW-
ING.COM

PUBLIC NOTICE NOTICE OF BUDGET COMMITTEE MEETING

A public meeting of
the Budget Commit-
tee of Four Rivers
Vector Control Dis-
trict, Deschutes
County, State of Or-
egon, to discuss the
budget for the fiscal
years July 1, 2018 to
June 30, 2020 will be
held at 56478 Solar
Drive, Bend, OR.

The meeting will take
place on the 9th day
of May, 2018 at 6:00
P.M.

The purpose is to re-
ceive the budget
message and to re-
ceive comment from
the public on the bud-
get. A copy of the
budget document may
be inspected or ob-
tained on or after April
23, 2018 at 56478
Solar Drive, Bend,
Oregon 97707.

This is a public meet-
ing where delibera-
tion of the Budget
Committee will take
place. Any person
may appear at the
meeting and discuss
the proposed pro-
grams with the Bud-
get Committee.

Affidavit of Publication

STATE OF OREGON, COUNTY OF DESCHUTES

I, **Shawn Antoni**, a citizen of the United States and a resident of the county aforesaid; I am over the age of eighteen years, and not party to or interested in the above-entitled matter. I am the principal clerk of the printer of

The Bulletin

1777 SW Chandler Ave, Bend OR 97702

a daily newspaper of general circulation, published in the aforesaid county and state as defined by ORS 193.010 and ORS 193.020, that

Acct Name: CITY OF LAPINE

Case:

Legal Description: Notice of Budget Hearing UR-1
Notice of Budget Hearing UR-1

a printed copy of which is hereto affixed was published in each regular and entire issue of the said newspaper and not in any supplement thereof on the following dates, to wit:

5/28/18

Page C2

I certify (or declare) under penalty of perjury that the foregoing is true and correct.

Dated at Bend, Oregon, this 29 day of May, 2018.

Shawn Antoni
Signature

AdName: 20953142D

State of Oregon, County of Deschutes

Subscribed and Sworn to before me this 29 day of May, 2018 by Shawn Antoni

K MacFarland
Notary Public for Oregon



No. _____

In the _____ Court of the

STATE OF OREGON
for the
COUNTY OF DESCHUTES

AFFIDAVIT OF PUBLICATION

Filed _____

By _____

From the Office of

Attorney for _____

Resolution of the City of La Pine Urban Renewal Agency 2018-01

A RESOLUTION ADOPTING THE FISCAL YEAR 2018-2019 BUDGET, MAKING APPROPRIATIONS, DECLARING THE TAX INCREMENT, AND COLLECTING THE MAXIMUM AMOUNT OF THE DIVISION OF TAX

ADOPTING THE BUDGET

BE IT RESOLVED that the City of La Pine Urban Renewal Agency Board hereby adopts the budget for fiscal year 2018-2019 in the total amount of \$184,585. The budget can be reviewed at La Pine City Hall, 16345 Sixth Street, La Pine, Oregon 97739.

MAKING APPROPRIATIONS

BE IT RESOLVED that the amounts shown below are hereby appropriated for the fiscal year beginning July 1, 2018, for the following purpose:

General Fund

Materials and Services	\$ 77,585
Capital Outlay	\$ 50,000
Contingency	\$ 20,000
Total	\$ 147,585

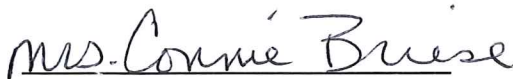
Total Appropriations, All Funds	\$ 37,000
Total Unappropriated Reserve Amounts, All Funds	\$ 184,585

TOTAL ADOPTED BUDGET **\$ 184,585**


DECLARING TAX INCREMENT

BE IT RESOLVED that the La Pine Urban Renewal Agency Board hereby elects to certify to the county assessor a request for the La Pine Urban Renewal Plan Area for the maximum amount of revenue that may be raised by dividing the taxes under Section 1e, Article IX of the Oregon Constitution and ORS Chapter 457.

The above resolution statements were approved and declared adopted on this 5th day of June, 2018.



Mrs. Connie Bruese
Chair



Cory Misley, Executive Director

• Submit two (2) copies to county assessor by July 15.

Check here if this is an amended form.

Notification

La Pine Urban Renewal Agency authorizes its 2018-19 ad valorem tax increment amounts
(Agency Name)

by plan area for the tax roll of Deschutes.
(County Name)

Cory Misley
(Contact Person)

541-536-1432
(Telephone Number)

7-6-2018
(Date Submitted)

PO Box 2460, La Pine, OR 97739
(Agency's Mailing Address)

cmisley@lapineoregon.gov
(Contact Person's E-mail Address)

Yes, the agency has filed an impairment certificate by May 1 with the assessor (ORS 457.445).

Part 1: Option One Plans (Reduced Rate). For definition of Option One plans, see ORS 457.435(2)(a)

Plan Area Name	Increment Value to Use*	100% from Division of Tax*	Special Levy Amount**
	\$ Or	Yes ___	\$
	\$ Or	Yes ___	\$
	\$ Or	Yes ___	\$
	\$ Or	Yes ___	\$

Part 2: Option Three Plans (Standard Rate). For definition of Option Three plans, see ORS 457.435(2)(c)

Plan Area Name	Increment Value to Use***	100% from Division of Tax***	Special Levy Amount****
	\$ Or		
	\$ Or		
	\$ Or		

Part 3: Other Standard Rate Plans. For definition of standard rate plans, see ORS 457.445(2)

Plan Area Name	Increment Value to Use*	100% from Division of Tax*	
	\$ Or	Yes ___	
	\$ Or	Yes ___	
	\$ Or	Yes ___	
	\$ Or	Yes ___	
	\$ Or	Yes ___	

Part 4: Other Reduced Rate Plans. For definition of reduced rate plans, see ORS 457.445(1)

Plan Area Name	Increment Value to Use*	100% from Division of Tax*	
La Pine Urban Renewal Area	\$ Or	Yes <u>X</u>	
	\$ Or	Yes ___	
	\$ Or	Yes ___	
	\$ Or	Yes ___	
	\$ Or	Yes ___	

Notice to Assessor of Permanent Increase in Frozen Value. Effective 2017-2018, permanently increase frozen value to:

Plan Area Name	New frozen value \$
Plan Area Name	New frozen value \$

* **All Plans except Option Three:** Enter amount of Increment Value to Use that is less than 100% Or check "Yes" to receive 100% of division of tax. Do NOT enter an amount of Increment Value to Use AND check "Yes".

** If an **Option One plan** enters a Special Levy Amount, you MUST check "Yes" and NOT enter an amount of Increment to Use.

*** **Option Three plans** enter EITHER an amount of Increment Value to Use to raise less than the amount of division of tax stated in the 1998 ordinance under ORS 457.435(2)(c) OR the Amount from Division of Tax stated in the ordinance, NOT both.

**** If an **Option Three plan** requests both an amount of Increment Value to Use that will raise less than the amount of division of tax stated in the 1998 ordinance and a Special Levy Amount, the Special Levy Amount cannot exceed the amount available when the amount from division of tax stated in the ordinance is subtracted from the plan's Maximum Authority.

Glossary

Glossary of Municipal Finance Terms

Accrual basis. Method of accounting recognizing transactions when they occur without regard toward cash flow timing [ORS 294.311(1)].

Activity. That portion of the work of an organizational unit relating to a specific function or class of functions, a project or program, a subproject or subprogram, or any convenient division of these [ORS 294.311 (2)].

Adopted budget. Financial plan that is the basis for appropriations. Adopted by the governing body [ORS 294.456].

Ad valorem tax. A property tax computed as a percentage of the value of taxable property. See “Assessed Value.”

Appropriation. Authorization for spending a specific amount of money for a specific purpose during a fiscal year. It is based on the adopted budget, including supplemental budgets, if any. It is presented in a resolution or ordinance adopted by the governing body [ORS 294.311(3)].

Approved budget. The budget that has been approved by the budget committee. The data from the approved budget is published in the Financial Summary before the budget hearing [ORS 294.428].

Assessed value. The value set on real and personal property as a basis for imposing taxes. It is the lesser of the property’s maximum assessed value or real market value. The growth is limited to 3% unless an exception applies (e.g., new or enlarged structure).

Assessment date. The date on which the real market value of property is set—January 1. Audit. The annual review and appraisal of a municipal corporation’s accounts and fiscal affairs conducted by an accountant under contract or the Secretary of State [ORS 297.425].

Audit report. A report in a form prescribed by the Secretary of State made by an auditor expressing an opinion about the propriety of a local government’s financial statements, and compliance with requirements, orders and regulations.

Bequest. A gift by will of personal property; a legacy. Biennial budget. A budget for a 24-month period.

Billing rate. A district’s tax rate used to compute ad valorem taxes for each property. The billing rate is expressed in dollars per \$1,000 of assessed property value.

Budget. Written document showing the local government’s comprehensive financial plan for one fiscal year or biennium. It must include a balanced statement of actual revenues and expenditures during each of the last two years, and estimated revenues and expenditures for the current and upcoming year [ORS 294.311(5)].

Budget committee. Fiscal planning board of a local government, consisting of the governing body plus an equal number of registered voters appointed from the district [ORS 294.414]. Proposed Budget Fiscal **Budget message.** Written explanation of a local government’s budget and financial policies, including any changes from the prior fiscal year. It is prepared and presented under the direction of the executive officer or chairperson of the governing body [ORS 294.403].

Budget officer. Person appointed by the governing body to assemble budget material and information and to physically prepare the proposed budget [ORS 294.331].

Budget period. For local governments on a biennial budget, the 24-month period beginning July 1 and ending June 30 of the second following calendar year. See also “Fiscal year.”

Budget transfers. Amounts moved from one fund to finance activities in another fund. They are shown as expenditures in the originating fund and revenues in the receiving fund.

CDP: Community Development Project

Capital outlay. Items which generally have a useful life of one or more years, such as machinery, land, furniture, equipment, or buildings.

Capital projects fund. A fund used to account for resources, such as bond sale proceeds, and expenditures to be used for major capital item purchase or construction [OAR 150-294.352(1)].

Cash basis. System of accounting under which revenues are accounted for only when received in cash, and expenditures are accounted for only when paid [ORS 294.311(9)].

Category of limitation. The three categories of taxes on property for the purpose of the constitutional limits - education, general government, excluded from limitation [ORS 310.150].

Compression. A reduction in taxes required by Measure 5 (1990) property tax limits. Compression is computed on a property-by-property basis, and is first applied towards local option tax levies, then permanent rate levies.

Consolidated billing tax rate. The consolidated billing tax rate is the combined total of the billing rates for all taxing districts in a limitation category in the code area but does not include the billing rate for any urban renewal special levies or non-ad valorem taxes, fees, or other charges.

Constitutional limits. The maximum amount of tax on property that can be collected from an individual property for education and for other government activities (Art. XI, sect. 11b, Or Const.).

Contingency. An amount appropriated in anticipation that some operating expenditures will become necessary which cannot be foreseen and planned in the budget. A general operating fund may contain one line for operating contingency [ORS 294.388].

Debt service fund. A fund established to account for payment of general long-term debt principal and interest [OAR 150-294.352(1)].

Devise. A gift by will of the donor of real property.

District. See "Local government." A local government entity that imposes property taxes (e.g. county, city, K-12 school district).

Division of tax. Division of tax refers to the process of, and revenue from, apportioning tax to urban renewal agencies based on the relationship of the excess to frozen value, a.k.a. tax increment revenue.

Double majority. A term that refers to an election where at least 50 percent of the registered voters eligible to vote in the election cast a ballot and more than 50 percent voting approve the question. (Any March or September Election)

Education category. The limitation category for taxes that will be used to support the public school system and that are not used to pay exempt bonded indebtedness [ORS 310.150(1)(b)]

Encumbrance. An obligation chargeable to an appropriation and for which part of the appropriation is reserved [ORS 294.311(13)].

Enterprise fund. A fund established to account for operations that are financed and operated in a manner similar to private business enterprises. They are usually self-supporting. Examples of enterprise funds are those for water, gas, and electric utilities, swimming pools, airports, parking garages, transit systems, and ports [OAR 150-294.352(1)].

Excluded from limitation category. The category for taxes used to pay principal and interest on exempt bonded indebtedness [ORS 310.150(1)(a)].

Exempt bonded indebtedness. 1) Bonded indebtedness authorized by a specific provision of the Oregon Constitution, or 2) bonded indebtedness issued as a general obligation on or before November 6, 1990, incurred for capital construction or capital improvements, or 3) bonded indebtedness issued as a general obligation after November 6, 1990, incurred for capital construction or capital improvements with the approval of the electors of the local government. Bonded indebtedness issued to refund or refinance any bonded indebtedness described above is also included [ORS 310.140(7)(b)].

Existing plan. An existing urban renewal plan is defined as a plan that existed in December 1996, and, 1) chose an option and, 2) established a maximum amount of indebtedness by July 1998 and has not been amended to increase the land area or maximum indebtedness [ORS 457.435(4)(a)].

Expenditures. Total amount incurred if accounts are kept on an accrual basis; total amount paid if accounts are kept on a cash basis. Does not include amounts budgeted for interfund transfers, contingency, reserved for future expenditure or unappropriated ending fund balance. [ORS 294.311(16)].

Fiscal year. A 12 month period to which the annual operating budget applies. The fiscal year is July 1 through June 30 for local governments [ORS 294.311(17)].

Fund. A fiscal and accounting entity with self-balancing accounts to record cash and other financial resources, related liabilities, balances and changes, all segregated for specific, regulated activities and objectives.

Fund balance. The excess of the assets of a fund over its liabilities and reserves. [ORS 294.311(18)]. Fund type. One of nine fund types: General, special revenue, debt service, capital projects, special assessment, enterprise, internal service, trust and agency, and reserve [OAR 150-294.352(1)].

General fund. A fund used to account for most fiscal activities except for those activities required to be accounted for in another fund [OAR 150-294.352(1)].

General government category. The limitation category for taxes used to support general government operations that are not for the purposes of paying exempt bonded indebtedness [ORS 310.150(1)(c)].

Governing body. County court or board of commissioners, city council, school board, board of trustees, board of directors, or other managing board of a local government unit [ORS 294.311(20)]

Grant. A donation or contribution in cash by one governmental unit to another unit which may be made to support a specified purpose or function, or general purpose [ORS 294.311(21)].

Interfund loan. Loan made from one fund to another and authorized by resolution or ordinance [ORS 294.468].

Interfund Transfer. Transfer from an existing appropriation category in one fund to another existing appropriation category in another fund. [ORS 294.463].

Intrafund Transfer. Transfer from one existing appropriation category to another within the same fund. [ORS 294.463].

Internal service fund. A fund used to account for fiscal activities when goods or services are provided by one organizational unit to another on a cost-reimbursement basis [ORS 294.311(23) and 294.343].

Levy. Amount of ad valorem tax certified by a local government for the support of governmental activities.

Liability. Debt or other legal obligation arising from transactions in the past which must be liquidated, renewed, or refunded at a future date; does not include encumbrances [ORS 294.311(24)].

Local government. Any city, county, port, school district, community college, public or quasi-public corporation (including a municipal utility or dock commission) operated by a separate board or commission; a municipal corporation or municipality [ORS 294.311(26)].

Local option tax. Taxing authority approved by voters that is in addition to the taxes generated by the permanent tax rate. Local option taxes can be for general operations, a specific purpose or capital projects. They are limited to five years unless they are for a capital project, then they are limited to the useful life of the project or 10 years, whichever is less.

Materials and Services. Expenses for operating costs and supplies and contracted services, such as utilities, rent, liability insurance, repair parts, fuel, accountant's fees, etc.

Maximum assessed value (MAV). The maximum taxable value limitation placed on real or personal property by the Article XI, section 11 of the Constitution. It can increase a maximum of 3 percent each year. The 3 percent limit may be exceeded if there are qualifying improvements made to the property, such as a major addition or new construction.

Maximum authority. The limitation on the amount of revenue that can be raised each year for an existing urban renewal plan area [ORS 457.435(3)(a)]. Plans that are not existing plans do not have a maximum authority amount. This amount is adjusted each year based on the growth of excess value in the plan area.

Maximum indebtedness. The amount of the principal of the indebtedness necessary to complete an urban renewal plan. This does not include indebtedness incurred to refund or refinance existing indebtedness [ORS 457.190(3)(a)]. It is specified in dollars and cents and based on good faith estimates of the scope and costs of the anticipated project or projects. All existing plans are required to have an ordinance which establishes a maximum indebtedness.

Measure 5. A constitutional tax rate limitation (Article XI, Section 11b) passed by the voters in 1990 which restricts the amount an individual property can be taxed. Measure 5 limits school taxes to \$5 per \$1,000 of 'real market value'. All other general government taxes are limited to \$10 per \$1,000 of 'real market value'.

Measure 50. Initially this measure was passed as Measure 47 in 1996 and was found to be unworkable, so was rewritten and submitted to the voters as Measure 50 in 1997 and passed. M50 reduced every property's 1995-96 assessed value by 10%, and also limited the amount of annual growth of the assessed value to 3%. M50 also established permanent rate limitations for each taxing district in the state based on the current year tax in 1997, and then reduced 13% for most districts. If a district did not have a tax levy in 1997 and had never levied a tax, they could later request a permanent rate limit by going to the voters through a ballot measure.

Municipal corporation. See "Local government."

Municipality. See "Local government."

Net working capital. The sum of the cash balance, accounts receivable expected to be realized during the ensuing year, inventories, supplies, prepaid expenses less current liabilities and, if encumbrance method of accounting is used, reserve for encumbrances [ORS 294.311(27)].

Object classification. A grouping of expenditures, such as personnel services, materials and services, capital outlay, debt services, and other types of requirements [ORS 294.311(29)].

Operating rate. The rate determined by dividing the local government's tax amount by the estimated assessed value in district. This rate is calculated by the assessor when a local government imposes its operating tax as an amount, rather than a tax rate.

Ordinance. A formal enactment by the governing board of a municipality.

Organizational unit. Any administrative subdivision of the local government, especially one charged with carrying on one or more specific functions such as a department, office or division. [ORS 294.311(31)].

Personnel Services. Expenses related to the compensation of salaried employees, such as health and accident insurance premiums, Social Security and retirement contributions, civil service assessments.

Permanent rate limit. The maximum rate of ad valorem property taxes that a local government can impose. Taxes generated from the permanent rate limit can be used for any purpose. No action of the local government or its voters can increase or decrease a permanent rate limit. A district can levy any rate or amount up to their permanent rate authority each year. Prior years' tax levies. Taxes levied for fiscal years preceding the current one.

Program. A group of related activities to accomplish a major service or function for which the local government is responsible [ORS 294.311(33)].

Property taxes. An ad valorem tax, another other "tax on property", or fees, charges and assessments that are specifically authorized by statute to be certified to the county assessor by a local government unit.

Proposed budget. Financial and operating plan prepared by the budget officer. It is submitted to the public and the budget committee for review.

Publication. Public notice given by publication in a newspaper of general circulation within the boundaries of the local government; mailing through the U.S. Postal Service by first class mail to each street address, PO Box and Rural Route within the boundaries of the local government; or hand delivery to each street address, PO Box and Rural Route address within the boundaries of the local government.

Real Market Value (RMV). The amount in cash which could reasonably be expected by an informed seller from an informed buyer in an arm's-length transaction as of the assessment date (Jan 1). [ORS 308.205].

Reserve for Future Expenditure. An amount budgeted, but not appropriated, that is not anticipated to be spent in the fiscal year, but rather carried forward into future fiscal years. The correct way to "save" money under Local Budget Law.

Reserve fund. Established to accumulate money from year to year for a specific purpose, such as purchase of new equipment [ORS 294.346; 280.050].

Resolution. A formal order of a governing body; lower legal status than an ordinance. Resource. Estimated beginning funds on hand plus anticipated receipts [ORS 294.361].

Special levy. A special levy is an ad valorem tax imposed for an existing urban renewal plan. It is not a result of a division of tax but rather imposed directly for the plan.

Special revenue fund. A fund used to account for the proceeds of specific revenue sources that are legally restricted to expenditure for specific purposes [OAR 150-294.352(1)].

Special payment. A budget expenditure category for distributions, pass-through payments, grants made to other organizations and other one-time or unusual expenditures where goods or services are not received in return, and that do not fall into the other categories of personal services, materials and services, capital outlay, etc.

Supplemental budget. A revised financial plan prepared to meet unexpected needs or to spend revenues not anticipated when the regular budget was adopted. It cannot be used to authorize additional taxes. [ORS 294.471].

Tax increment financing. A financial mechanism for urban renewal plans which captures the tax from the growth in property value within a designated geographical area. AKA urban renewal division of tax.

Tax on property. Any tax, fee, charge or assessment imposed by any government unit upon property or upon a property owner as a direct consequence of ownership of that property [ORS 310.140(18)].

Tax rate. The amount of tax stated in terms of a unit of tax for each \$1,000 of assessed value of taxable property.

Tax roll. The official list showing the amount of taxes imposed against each taxable property.

Tax year. The fiscal year from July 1 through June 30.

Trust fund. A fund used to account for fiscal activities of assets held in trust by a local government.

Unappropriated ending fund balance. Amount set aside in the budget to be used as a cash carryover to the next year's budget. It provides the local government with operating cash until tax money is received from the county treasurer in November. This amount cannot be transferred by resolution or used through a supplemental budget, unless necessitated by a qualifying emergency [ORS 294.398].