



TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943

AGENDA

REGULAR MEETING OF THE JEROME TOWN COUNCIL

JEROME CIVIC CENTER - 600 CLARK STREET - COUNCIL CHAMBERS

TUESDAY, NOVEMBER 10, 2020, AT 7:00 P.M.

**DUE TO PUBLIC HEALTH CONCERNS, IN-PERSON ATTENDANCE AT PUBLIC MEETINGS
HAS BEEN SUSPENDED UNTIL FURTHER NOTICE.**

**Notice is hereby given pursuant to A.R.S. 38-431.02 that members of the Town Council
may attend this meeting electronically.**

PUBLIC PARTICIPATION IN THE MEETING

Members of the public are welcome to participate in the meeting via the following options:

1. Zoom Conference
 - a. Computer: <https://us02web.zoom.us/j/9286347943>
 - b. Telephone: 1-669-900-6833 Meeting ID: 9286347943
2. Submitting questions and comments:
 - a. If attending by Zoom video conference, click the chat button at the bottom of the screen, or raise your hand.
 - b. Email c.gallagher@jerome.az.gov (Please submit comments at least one hour prior to the meeting.)

NOTE: FOR THOSE WITHOUT HOME INTERNET: A drive-up internet hotspot is now available in the parking lot in front of the Jerome Public Library. Bring your device and access the internet while sitting in your car. The network is **Sparklight Yavapai Free WIFI** and no password is required.

ITEM #1:	CALL TO ORDER/ROLL CALL Mayor/Chairperson to call meeting to order. Town Clerk to call and record the roll.	
ITEM #2:	REORGANIZATION (Council members have been sworn in prior to this meeting by Town Magistrate Joan Dwyer.)	
	ITEM #2A: SELECTION OF MAYOR AND VICE MAYOR Council may select their Mayor and Vice Mayor by nomination and vote.	Discussion/Possible Action
	ITEM #2B: REMARKS BY MAYOR, VICE MAYOR AND COUNCILMEMBERS	
	ITEM #2C: RESOLUTION NO. 607, DESIGNATING SIGNATORIES FOR TOWN BANK ACCOUNTS Council may approve Resolution No. 607, designating signatories for the Town's bank accounts with National Bank of Arizona and OneAZ Credit Union.	Sponsored by Mayor Alex Barber Discussion; Possible Action
ITEM #3:	FINANCIAL REPORTS Financial reports for October 2020	Discussion/Possible Action
ITEM #4:	STAFF AND COUNCIL REPORTS Written staff reports by the Town Manager/Clerk, Deputy Town Clerk, Utilities Clerk, Accounting Clerk, Public Works Department, Building Inspector, Library, Municipal Court, Police Chief, and Fire Chief, and verbal reports from Council members.	Discussion/Possible Action
ITEM #5:	ZONING ADMINISTRATOR'S PLANNING AND ZONING AND DESIGN REVIEW REPORT AND MINUTES Minutes are provided for the information of Council and do not require action.	Discussion/Possible Direction
ITEM #6:	APPROVAL OF MINUTES October 8 special meeting open session; October 8 special meeting closed session; October 13 regular meeting	Discussion/Possible Action
ITEM #7:	PETITIONS FROM THE PUBLIC Pursuant to A.R.S. § 38-431.01(H), public comment is permitted on matters not listed on the agenda, but the subject matter must be within the jurisdiction of the Council. All comments are subject to reasonable time, place and manner restrictions. All petitioners must fill out a request form with their name and subject matter. When recognized by the chair, please step to the podium, state your name and please observe the three (3) minute time limit. No petitioners will be recognized without a request. The Council's response to public comments is limited to asking staff to review a matter commented upon, asking that a matter be put on a future agenda, or responding to criticism.	Discussion/Possible Direction

ITEM #8:	PRESENTATIONS	
	ITEM #8A: COCODONA 250 RACE Steve Aderholt will address Council to provide information about the planned "Cocodona 250" running event that will pass through Jerome in May 2021.	Sponsored by Mayor Alex Barber Discussion; Possible Direction
ITEM #9:	ORDINANCES AND RELATED RESOLUTIONS	
	ITEM #9A: FIRST READING - ORDINANCE NO. 463, AN ORDINANCE OF THE TOWN OF JEROME, ARIZONA, RELATING TO THE TRANSACTION PRIVILEGE TAX; ADOPTING "THE 2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME BY REFERENCE; ESTABLISHING EFFECTIVE DATES; PROVIDING FOR SEVERABILITY AND PROVIDING PENALTIES FOR VIOLATIONS. Council may conduct the first reading of Ordinance No. 463, adopting 2012-2014 amendments to the Model City Tax Code as previously approved by the Municipal Tax Code Commission.	Sponsored by Mayor Alex Barber Discussion; Possible Action
	ITEM #9B: RESOLUTION NO. 608, A RESOLUTION OF THE TOWN COUNCIL OF THE TOWN OF JEROME, ARIZONA, DECLARING AS A PUBLIC RECORD THAT CERTAIN DOCUMENT FILED WITH THE TOWN CLERK AND ENTITLED "THE 2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME" Council may approve Resolution No. 607, declaring as a public record the document entitled "The 2012-2014 Amendments to the Tax Code of the Town of Jerome."	Sponsored by Mayor Alex Barber Discussion; Possible Action
	ITEM #9C: FIRST READING - ORDINANCE NO. 464, AMENDING THE JEROME TOWN CODE TO PROHIBIT RETAIL MARIJUANA ESTABLISHMENTS Council may conduct the first reading of Ordinance No. 465, amending the Town Code to prohibit retail marijuana establishments. A portion of this discussion may be conducted with the Town Attorney in executive session, pursuant to A.R.S. § 38-431.03 (A)(3) and (A)(4).	Sponsored by Mayor Alex Barber Discussion; Possible Action
ITEM #10:	UNFINISHED BUSINESS	
	ITEM #10A: BLANKET EXTENSION OF PERMITS Council will consider an additional extension of previously approved building and zoning permits. Previously, a blanket extension had been granted for six months, expiring on November 12.	Sponsored by Mayor Alex Barber Discussion; Possible Action
	ITEM #10B: DISCUSSION: DRAFT ORDINANCE TO AMEND THE JEROME TOWN CODE REGARDING THE KEEPING OF BEES WITHIN TOWN LIMITS Council will review a first draft of an ordinance amending the Town Code regarding the keeping of bees in Jerome and may direct staff in this regard.	Sponsored by Mayor Alex Barber Discussion; Possible Direction
	ITEM #10C: COVID-19 Council will again discuss plans and timeline for reopening Town Hall, resuming the weekend shuttle service, and conducting in-person public meetings.	Sponsored by Mayor Alex Barber Discussion; Possible Action
ITEM #11:	NEW BUSINESS	
	ITEM #11A: PARKING PERMIT REQUIREMENTS Council will review requirements for obtaining parking permits and may provide direction to staff regarding what qualifies as an off-street parking space.	Sponsored by Mayor Alex Barber Discussion; Possible Direction
	ITEM #11B: DISTRICT SIGNS Council will discuss current district signage and may determine if changes are needed to the process, appearance and/or locations.	Sponsored by Mayor Alex Barber Discussion; Possible Direction
	ITEM #11C: GHOST PEPPER LEASE Council will consider a request by Bill Sotiros of the Ghost Pepper Company to transfer his lease of space at 500 Main Street to a potential new owner of the business.	Sponsored by Mayor Alex Barber Discussion; Possible Action
	ITEM #11D: APPOINTMENT TO PLANNING & ZONING COMMISSION Council may make an appointment to fill a vacancy on the Planning and Zoning Commission for the remainder of the unexpired term ending February 28, 2023. As of the agenda preparation date (11/3/20) two applications had been received, from Mike Parry and Mike Harvey.	Sponsored by Councilmember Jack Dillenberg Discussion; Possible Action
	ITEM #11E: APPOINTMENT TO PSPRS BOARD Council may approve the appointment of the Mayor, or the Mayor's designee, as Chair of the PSPRS Board, as per statute.	Sponsored by Mayor Alex Barber Discussion; Possible Action
ITEM #12:	TO AND FROM THE COUNCIL Council may direct staff regarding items to be placed on a future agenda.	Discussion; Possible Direction
ITEM #13:	ADJOURNMENT	

The Town Council may recess the public meeting and convene in Executive Session for the purpose of discussion or consultation for legal advice with the Town Attorney, who may participate telephonically, regarding any item listed on this agenda pursuant to A.R.S. § 38-431.03 (A)(3). The Chair reserves the right, with the consent of Council, to take items on the agenda out of order.

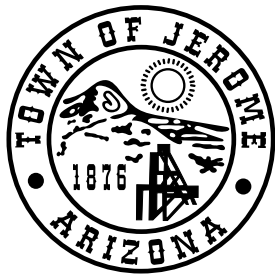
CERTIFICATION OF POSTING OF NOTICE

The undersigned hereby certifies that this notice and agenda was posted at the following locations on or before 7 p.m. on October 7, 2020 in accordance with the statement filed by the Jerome Town Council with the Jerome Town Clerk: (1) 970 Gulch Road, side of Gulch Fire Station, exterior posting case; (2) 600 Clark Street, Jerome Town Hall, exterior posting case; (3) 120 Main Street, Jerome Post office, interior posting case.

Rosa Cays, Deputy Town Clerk

The following items will be provided separately as soon as they are available, as an addendum to the meeting packet:

- October 13, 2020 draft minutes
- Police Staff Report
- Draft ordinance regarding the keeping of bees



TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 www.jerome.az.gov

RESOLUTION NO. 607

A RESOLUTION OF THE TOWN COUNCIL OF THE TOWN OF JEROME, ARIZONA, AUTHORIZING SIGNATORIES ON TOWN BANKING ACCOUNTS

WHEREAS, the Town of Jerome holds bank accounts with the National Bank of Arizona and OneAZ Credit Union, including regular checking, savings and payroll accounts; and

WHEREAS, it is necessary to update the authorized signatories on said accounts;

NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF JEROME, ARIZONA, that the following individuals are hereby authorized as signatories on all bank accounts held by the Town of Jerome with the National Bank of Arizona and the Arizona State Credit Union:

- 1.
- 2.
3. Candace B. Gallagher
4. Rosa Cays

BE IT FURTHER RESOLVED that a certified copy of this Resolution be provided to the National Bank of Arizona and OneAZ Credit Union.

APPROVED:

Mayor

ATTEST:

APPROVED AS TO FORM:

Candace Gallagher, Town Manager/Clerk

William J. Sims, Town Attorney

Town of Jerome
Budget to Actual Summary
20-Oct

Fund	Department	Current Period			YTD		
		Revenue	Budget	Variance	Revenue	Budget	Variance
	10 GF Revenue	\$ 153,795.99	\$ 168,372.60	\$ (14,576.61)	\$ 645,388.09	\$ 551,841.20	\$ 93,546.89
	Total	\$ 153,795.99	\$ 168,372.60	\$ (14,576.61)	\$ 645,388.09	\$ 551,841.20	\$ 93,546.89
		Expense	Budget	Variance	Expense	Budget	Variance
	11 Admin	\$ 39,022.00	\$ 43,928.34	\$ 4,906.34	\$ 153,422.44	\$ 167,051.53	\$ 13,629.09
	12 Court	\$ 6,656.72	\$ 7,109.56	\$ 452.84	\$ 27,612.90	\$ 29,534.52	\$ 1,921.62
	13 Police	\$ 37,768.86	\$ 46,910.57	\$ 9,141.71	\$ 162,508.98	\$ 185,434.08	\$ 22,925.10
	14 Fire	\$ 43,917.55	\$ 40,599.92	\$ (3,317.63)	\$ 145,592.44	\$ 166,641.04	\$ 21,048.60
	15 Library	\$ 6,602.64	\$ 7,864.35	\$ 1,261.71	\$ 25,319.94	\$ 32,219.96	\$ 6,900.02
	16 P&Z	\$ 9,141.66	\$ 8,873.63	\$ (268.03)	\$ 33,264.95	\$ 35,253.21	\$ 1,988.26
	17 Parks	\$ 988.14	\$ 1,569.10	\$ 580.96	\$ 3,844.32	\$ 6,001.20	\$ 2,156.88
	18 Properties	\$ 9,407.54	\$ 16,905.99	\$ 7,498.45	\$ 48,196.34	\$ 72,461.65	\$ 24,265.31
	Total	\$ 153,505.11	\$ 173,761.46	\$ 20,256.35	\$ 599,762.31	\$ 694,597.19	\$ 94,834.88
General	Net Income (Loss)	\$ 290.88	\$ (5,388.86)	\$ 5,679.74	\$ 45,625.78	\$ (142,755.99)	\$ 188,381.77
		Revenue	Budget	Variance	Revenue	Budget	Variance
	50 Water	\$ 16,541.11	\$ 17,345.83	\$ (804.72)	\$ 70,955.17	\$ 74,383.42	\$ (3,428.25)
	51 Sewer	\$ 16,604.01	\$ 17,541.66	\$ (937.65)	\$ 71,871.02	\$ 75,666.72	\$ (3,795.70)
	52 Trash	\$ 14,272.12	\$ 15,748.33	\$ (1,476.21)	\$ 57,070.65	\$ 63,013.36	\$ (5,942.71)
	Total	\$ 47,417.24	\$ 50,635.82	\$ (3,218.58)	\$ 199,896.84	\$ 213,063.50	\$ (13,166.66)
		Expense	Budget	Variance	Expense	Budget	Variance
	50 Water	\$ 14,431.08	\$ 25,413.93	\$ 10,982.85	\$ 57,055.62	\$ 90,712.31	\$ 33,656.69
	51 Sewer	\$ 15,844.33	\$ 22,216.43	\$ 6,372.10	\$ 53,086.66	\$ 82,792.31	\$ 29,705.65
	52 Trash	\$ 13,411.56	\$ 20,244.04	\$ 6,832.48	\$ 53,283.17	\$ 71,381.43	\$ 18,098.26
	Total	\$ 43,686.97	\$ 67,874.40	\$ 24,187.43	\$ 163,425.45	\$ 244,886.05	\$ 81,460.60
Utilities	Net Income (Loss)	\$ 3,730.27	\$ (17,238.58)	\$ 20,968.85	\$ 36,471.39	\$ (31,822.55)	\$ 68,293.94
		Revenue	Budget	Variance	Revenue	Budget	Variance
	30 HURF	\$ 3,695.86	\$ 3,443.66	\$ 252.20	\$ 14,367.57	\$ 13,774.72	\$ 592.85
		Expense	Budget	Variance	Expense	Budget	Variance
		\$ 6,438.85	\$ 14,234.86	\$ 7,796.01	\$ 29,466.53	\$ 49,257.62	\$ 19,791.09
Road	Net Income (Loss)	\$ (2,742.99)	\$ (10,791.20)	\$ 8,048.21	\$ (15,098.96)	\$ (35,482.90)	\$ 20,383.94
		Revenue	Budget	Variance	Revenue	Budget	Variance
	35 Parking	\$ 23,499.60	\$ 10,000.00	\$ 13,499.60	\$ 69,236.25	\$ 40,000.00	\$ 29,236.25
		Expense	Budget	Variance	Expense	Budget	Variance
		\$ 9,151.46	\$ 9,358.64	\$ 207.18	\$ 36,832.49	\$ 37,020.88	\$ 188.39
Parking	Net Income (Loss)	\$ 14,348.14	\$ 641.36	\$ 13,706.78	\$ 32,403.76	\$ 2,979.12	\$ 29,424.64
	Total Revenue	\$ 228,408.69			\$ 928,888.75		
	Less Total Expense	\$ 212,782.39			\$ 829,486.78		
	Net Income (Loss)	\$ 15,626.30			\$ 99,401.97		

11/3/20
9:16:30 AM

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (1) General
Department: (10) Revenues & General Fund

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
Revenues								
Property Taxes	\$912.80	\$1,000.00	\$(87.20)	(8.7)%	\$5,813.74	\$5,750.00	\$63.74	1.1%
City Sales Taxes	55,704.29	76,500.00	(20,795.71)	(27.2)	287,945.14	257,100.00	30,845.14	12.0
State Sales Taxes	4,845.79	3,437.16	1,408.63	41.0	17,311.04	13,748.72	3,562.32	25.9
Urban Revenue Share	17,864.25	17,864.25	0.00	0.0	71,457.00	71,457.00	0.00	0.0
Vehicle License Tax	3,334.82	2,830.91	503.91	17.8	13,662.94	11,323.72	2,339.22	20.7
Fines and Forfeitures	4,050.23	5,000.00	(949.77)	(19.0)	24,958.83	20,000.00	4,958.83	24.8
Court Security Fund Revenue	675.00	1,000.00	(325.00)	(32.5)	3,390.00	4,000.00	(610.00)	(15.3)
Building Permits	162.25	416.66	(254.41)	(61.1)	2,408.96	1,666.72	742.24	44.5
Planning & Zoning Fees	200.00	250.00	(50.00)	(20.0)	1,150.00	1,000.00	150.00	15.0
Business Licenses	420.00	500.00	(80.00)	(16.0)	1,080.00	2,000.00	(920.00)	(46.0)
Fire Dept Services Rev	0.00	833.33	(833.33)	(100.0)	1,208.00	3,333.36	(2,125.36)	(63.8)
Franchise Fees	3,977.77	4,250.00	(272.23)	(6.4)	7,054.40	8,500.00	(1,445.60)	(17.0)
Police Officer Safety Equip Rev	135.79	166.66	(30.87)	(18.5)	749.87	666.72	83.15	12.5
Police Services	1,950.00	1,666.66	283.34	17.0	8,722.30	6,666.72	2,055.58	30.8
Rents	6,603.51	6,543.50	60.01	0.9	26,334.04	26,174.00	160.04	0.6
Utility Reimbursements	226.89	416.66	(189.77)	(45.5)	891.95	1,666.72	(774.77)	(46.5)
Wildland Fire Fees	8,771.00	4,166.66	4,604.34	110.5	41,454.00	16,666.72	24,787.28	148.7
Wildlands Wage Reimbursement	29,882.22	24,750.00	5,132.22	20.7	68,597.44	33,000.00	35,597.44	107.9
Firewise Wage Reimbursement	0.00	2,083.33	(2,083.33)	(100.0)	2,233.04	8,333.36	(6,100.32)	(73.2)
Library Contributions	205.00	125.00	80.00	64.0	605.00	500.00	105.00	21.0
Interest	114.47	150.00	(35.53)	(23.7)	445.58	600.00	(154.42)	(25.7)
Sale of Assets	0.00	750.00	(750.00)	(100.0)	3,650.00	3,000.00	650.00	21.7
Miscellaneous Revenues	504.72	416.66	88.06	21.1	1,244.06	1,666.72	(422.66)	(25.4)
Administrative Charges	13,255.19	13,255.16	0.03	0.0	53,020.76	53,020.72	0.04	0.0
Net Revenues	\$153,795.99	\$168,372.60	\$(14,576.61)	(8.7)%	\$645,388.09	\$551,841.20	\$93,546.89	17.0 %
Net Income (Loss)	\$153,795.99	\$168,372.60	\$(14,576.61)	(8.7)%	\$645,388.09	\$551,841.20	\$93,546.89	17.0%

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (1) General
Department: (11) Administration

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Program Expenses</u>								
Advertising, Printing, & Publishing	\$0.00	\$375.00	\$375.00	100.0%	\$1,001.44	\$1,500.00	\$498.56	33.2%
Contract Services	710.41	1,283.33	572.92	44.6	1,989.96	5,133.36	3,143.40	61.2
Training & Education	836.91	208.33	(628.58)	(301.7)	1,529.91	833.36	(696.55)	(83.6)
Dues, Subs & Memberships	130.72	236.36	105.64	44.7	4,480.72	4,709.12	228.40	4.9
TPT Collection Fee Exp	0.00	0.00	0.00	0.0	1,171.59	1,196.00	24.41	2.0
Election expenses	0.00	445.45	445.45	100.0	1,812.37	2,436.40	624.03	25.6
Insurance	1,816.00	7,690.00	5,874.00	76.4	2,229.20	8,000.00	5,770.80	72.1
Insurance Deductible Exp	1,000.00	0.00	(1,000.00)	0.0	1,000.00	0.00	(1,000.00)	0.0
COVID Expenses	4,978.21	0.00	(4,978.21)	0.0	9,654.78	0.00	(9,654.78)	0.0
Legal Exp - Gen Gov	838.50	1,000.00	161.50	16.2	3,042.00	4,000.00	958.00	24.0
Miscellaneous	142.75	499.75	357.00	71.4	225.73	1,999.00	1,773.27	88.7
Bank Fees - Gen Admin	129.02	141.66	12.64	8.9	562.50	566.72	4.22	0.7
Bank Fees / Merch Svcs	456.84	566.66	109.82	19.4	2,852.35	2,266.72	(585.63)	(25.8)
Office Supplies	335.23	500.00	164.77	33.0	1,210.92	2,000.00	789.08	39.5
Copier & Equip Lease Expense	604.58	625.00	20.42	3.3	2,109.48	2,500.00	390.52	15.6
Software Support Exp - GG	2,616.16	733.33	(1,882.83)	(256.8)	3,560.80	2,933.36	(627.44)	(21.4)
Computer Hardware & Service	394.95	833.33	438.38	52.6	1,958.37	3,333.36	1,374.99	41.2
Operating Supplies - Gen Gov	323.17	83.33	(239.84)	(287.8)	408.42	333.36	(75.06)	(22.5)
Postage	277.05	416.66	139.61	33.5	1,019.92	1,666.72	646.80	38.8
Rep and Maint - Vehicles	0.00	41.66	41.66	100.0	0.00	166.72	166.72	100.0
Shuttle Expenses	0.00	136.36	136.36	100.0	0.00	409.12	409.12	100.0
Small Tools and Equipment	527.16	62.50	(464.66)	(743.5)	527.16	250.00	(277.16)	(110.9)
Telephone	224.70	291.66	66.96	23.0	820.56	1,166.72	346.16	29.7
Travel	172.50	250.00	77.50	31.0	172.50	1,000.00	827.50	82.8
Tourism 1% Bed Tax	0.00	0.00	0.00	0.0	10,000.00	10,000.00	0.00	0.0
Community Health	0.00	41.66	41.66	100.0	0.00	166.72	166.72	100.0
Preservation of Historic Buildings	0.00	833.33	833.33	100.0	0.00	3,333.36	3,333.36	100.0
Total Program Expenses	\$16,514.86	\$17,295.36	\$780.50	4.5 %	\$53,340.68	\$61,900.12	\$8,559.44	13.8 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$15,987.29	\$19,115.33	\$3,128.04	16.4%	\$72,233.58	\$76,461.36	\$4,227.78	5.5%
Longevity Bonus	318.00	318.00	0.00	0.0	799.00	954.00	155.00	16.2
Payment in Lieu of Medical Benefits	489.46	530.25	40.79	7.7	2,202.57	2,121.00	(81.57)	(3.8)
FICA Match	1,249.65	1,511.58	261.93	17.3	5,597.34	6,046.36	449.02	7.4
Retirement Match	1,225.30	1,398.66	173.36	12.4	5,547.51	5,594.72	47.21	0.8
Health/Life Insurance	2,979.42	3,360.00	380.58	11.3	13,407.39	13,440.00	32.61	0.2

11/2/20
3:33:35 PM

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (1) General
Department: (11) Administration

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
Workers Compensation	256.00	354.25	98.25	27.7	256.00	354.25	98.25	27.7
Unemployment Insurance	2.02	44.91	42.89	95.5	38.37	179.72	141.35	78.7
Total General & Administrative Expenses	\$22,507.14	\$26,632.98	\$4,125.84	15.5 %	\$100,081.76	\$105,151.41	\$5,069.65	4.8 %
Total Expenses	\$39,022.00	\$43,928.34	\$4,906.34	11.2%	\$153,422.44	\$167,051.53	\$13,629.09	8.2%
Net Income (Loss)	\$(39,022.00)	\$(43,928.34)	\$4,906.34	11.2%	\$(153,422.44)	\$(167,051.53)	\$13,629.09	8.2%

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (1) General
Department: (12) Court

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Program Expenses</u>								
Court Security Fund Expenses	\$228.79	\$25.00	\$(203.79)	(815.2)%	\$228.79	\$100.00	\$(128.79)	(128.8)%
Contract Services	49.70	583.33	533.63	91.5	49.70	2,333.36	2,283.66	97.9
Training & Education	0.00	43.75	43.75	100.0	0.00	175.00	175.00	100.0
Dues and Subscriptions	0.00	23.91	23.91	100.0	0.00	95.72	95.72	100.0
Miscellaneous	0.00	25.00	25.00	100.0	15.00	100.00	85.00	85.0
Office Supplies	0.00	16.66	16.66	100.0	0.00	66.72	66.72	100.0
Copier & Equip Lease Exp	0.00	0.00	0.00	0.0	1,153.14	1,125.00	(28.14)	(2.5)
Telephone	74.12	75.00	0.88	1.2	287.31	300.00	12.69	4.2
Travel	0.00	100.00	100.00	100.0	0.00	400.00	400.00	100.0
Total Program Expenses	\$352.61	\$892.65	\$540.04	60.5 %	\$1,733.94	\$4,695.80	\$2,961.86	63.1 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$5,593.41	\$5,509.00	\$(84.41)	(1.5)%	\$22,943.72	\$22,036.00	\$(907.72)	(4.1)%
Longevity Bonus	25.00	25.00	0.00	0.0	263.00	263.00	0.00	0.0
FICA and Medicare	429.80	424.66	(5.14)	(1.2)	1,775.29	1,698.72	(76.57)	(4.5)
Retirement	176.00	192.25	16.25	8.5	811.04	769.00	(42.04)	(5.5)
Worker's Compensation	68.00	64.00	(4.00)	(6.3)	68.00	64.00	(4.00)	(6.3)
Unemployment	11.90	2.00	(9.90)	(495.0)	17.91	8.00	(9.91)	(123.9)
Total General & Administrative Expenses	\$6,304.11	\$6,216.91	\$(87.20)	(1.4)%	\$25,878.96	\$24,838.72	\$(1,040.24)	(4.2)%
Total Expenses	\$6,656.72	\$7,109.56	\$452.84	6.4%	\$27,612.90	\$29,534.52	\$1,921.62	6.5%
Net Income (Loss)	\$(6,656.72)	\$(7,109.56)	\$452.84	6.4%	(\$27,612.90)	\$(29,534.52)	\$1,921.62	6.5%

11/2/20
3:56:57 PM

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (1) General
Department: (13) Police

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Program Expenses</u>								
Contract Services	\$0.00	\$0.00	\$0.00	0.0%	\$200.00	\$0.00	\$(200.00)	0.0%
Training & Education	0.00	83.33	83.33	100.0	0.00	333.36	333.36	100.0
Dues and Subscriptions	0.00	100.00	100.00	100.0	0.00	400.00	400.00	100.0
Fuel	667.33	625.00	(42.33)	(6.8)	1,813.08	2,500.00	686.92	27.5
Prosecutor Exp	1,826.00	2,000.00	174.00	8.7	5,346.00	8,000.00	2,654.00	33.2
Miscellaneous	0.00	50.00	50.00	100.0	0.00	200.00	200.00	100.0
Software Service & Support	510.34	366.66	(143.68)	(39.2)	2,240.33	2,566.72	326.39	12.7
Computer Hardware & Service	0.00	208.33	208.33	100.0	0.00	833.36	833.36	100.0
Operating Supplies - Police	89.38	208.33	118.95	57.1	196.32	833.36	637.04	76.4
Postage	0.00	16.66	16.66	100.0	31.05	66.72	35.67	53.5
Rep and Maint - Vehicles	1,735.82	468.96	(1,266.86)	(270.1)	4,351.45	3,748.96	(602.49)	(16.1)
Rep and Maint - Equipment	0.00	125.00	125.00	100.0	293.94	500.00	206.06	41.2
Police Officer Safety Equip Exp	0.00	166.66	166.66	100.0	0.00	666.72	666.72	100.0
Small Tools and Equipment	0.00	583.33	583.33	100.0	504.29	2,333.36	1,829.07	78.4
Telephone	296.89	333.33	36.44	10.9	1,175.46	1,333.36	157.90	11.8
Uniforms	70.54	125.00	54.46	43.6	115.99	500.00	384.01	76.8
Vehicles, Cap Outlay, Police	0.00	0.00	0.00	0.0	10,710.86	10,750.00	39.14	0.4
Total Program Expenses	\$5,196.30	\$5,460.59	\$264.29	4.8 %	\$26,978.77	\$35,565.92	\$8,587.15	24.1 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$19,651.15	\$25,265.91	\$5,614.76	22.2%	\$93,350.90	\$101,063.72	\$7,712.82	7.6%
Longevity Bonus	0.00	0.00	0.00	0.0	841.00	841.00	0.00	0.0
FICA and Medicare	1,427.27	1,942.58	515.31	26.5	6,759.75	7,770.36	1,010.61	13.0
Retirement	2,272.60	2,899.08	626.48	21.6	10,667.94	11,596.36	928.42	8.0
Health Insurance	4,231.60	5,679.50	1,447.90	25.5	19,042.20	22,718.00	3,675.80	16.2
Worker's Compensation	5,612.00	5,591.00	(21.00)	(0.4)	5,612.00	5,591.00	(21.00)	(0.4)
Unemployment	8.57	71.91	63.34	88.1	100.62	287.72	187.10	65.0
Payroll Adjustment-Police	(630.63)	0.00	630.63	0.0	(844.20)	0.00	844.20	0.0
Total General & Administrative Expenses	\$32,572.56	\$41,449.98	\$8,877.42	21.4 %	\$135,530.21	\$149,868.16	\$14,337.95	9.6 %
Total Expenses	\$37,768.86	\$46,910.57	\$9,141.71	19.5%	\$162,508.98	\$185,434.08	\$22,925.10	12.4%
Net Income (Loss)	\$(37,768.86)	\$(46,910.57)	\$9,141.71	19.5%	\$(162,508.98)	\$(185,434.08)	\$22,925.10	12.4%

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (1) General
Department: (14) Fire

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Program Expenses</u>								
Contract Services	\$0.00	\$41.66	\$41.66	100.0%	\$0.00	\$166.72	\$166.72	100.0%
Training & Education	2,440.00	1,000.00	(1,440.00)	(144.0)	2,992.51	2,500.00	(492.51)	(19.7)
Dispatch Fees	533.67	537.50	3.83	0.7	2,134.68	2,150.00	15.32	0.7
Dues and Subscriptions	0.00	125.00	125.00	100.0	105.00	500.00	395.00	79.0
Fuel	279.15	416.66	137.51	33.0	1,062.19	1,666.72	604.53	36.3
Legal Exp - Fire	0.00	41.66	41.66	100.0	0.00	166.72	166.72	100.0
Medical Expenses	0.00	83.33	83.33	100.0	0.00	333.36	333.36	100.0
Medical Supplies Exp	935.48	950.00	14.52	1.5	1,673.03	1,700.00	26.97	1.6
Miscellaneous	70.05	125.00	54.95	44.0	88.66	500.00	411.34	82.3
Software Service & Support	75.00	75.00	0.00	0.0	300.00	300.00	0.00	0.0
Operating Supplies - Fire Dept	1,457.00	1,125.00	(332.00)	(29.5)	1,566.95	1,500.00	(66.95)	(4.5)
Rep and Maint - Vehicles	350.50	842.43	491.93	58.4	8,608.81	9,260.56	651.75	7.0
Rep and Maint - Equipment	1,028.13	416.66	(611.47)	(146.8)	1,028.13	1,666.72	638.59	38.3
Small Tools and Equipment	1,528.13	333.33	(1,194.80)	(358.4)	4,073.42	3,833.36	(240.06)	(6.3)
Telephone	233.41	333.33	99.92	30.0	865.45	1,333.36	467.91	35.1
Training Center Assessment	0.00	0.00	0.00	0.0	2,692.00	2,700.00	8.00	0.3
Total Program Expenses	\$8,930.52	\$6,446.56	\$(2,483.96)	(38.5)%	\$27,190.83	\$30,277.52	\$3,086.69	10.2 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$7,789.56	\$11,100.75	\$3,311.19	29.8%	\$32,559.19	\$44,403.00	\$11,843.81	26.7%
Wildland Personnel	20,521.51	9,209.05	(11,312.46)	(122.8)	48,964.37	38,000.00	(10,964.37)	(28.9)
Volunteer-Employee Per Call Personnel	2,045.25	1,583.33	(461.92)	(29.2)	4,846.00	6,333.36	1,487.36	23.5
Firewise Personnel	0.00	2,750.00	2,750.00	100.0	3,097.50	11,000.00	7,902.50	71.8
Longevity Bonus	0.00	180.00	180.00	100.0	0.00	180.00	180.00	100.0
FICA and Medicare	(807.61)	1,245.55	2,053.16	164.8	3,498.00	5,527.60	2,029.60	36.7
Retirement	553.48	819.41	265.93	32.5	14,413.82	15,277.72	863.90	5.7
Health Insurance	1,687.72	2,705.00	1,017.28	37.6	7,594.74	10,820.00	3,225.26	29.8
Worker's Compensation	3,102.00	4,498.00	1,396.00	31.0	3,102.00	4,498.00	1,396.00	31.0
Unemployment	95.12	62.27	(32.85)	(52.8)	325.99	323.84	(2.15)	(0.7)
Total General & Administrative Expenses	\$34,987.03	\$34,153.36	\$(833.67)	(2.4)%	\$118,401.61	\$136,363.52	\$17,961.91	13.2 %
Total Expenses	\$43,917.55	\$40,599.92	\$(3,317.63)	(8.2)%	\$145,592.44	\$166,641.04	\$21,048.60	12.6%
Net Income (Loss)	\$(43,917.55)	\$(40,599.92)	\$(3,317.63)	(8.2)%	\$(145,592.44)	\$(166,641.04)	\$21,048.60	12.6%

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (1) General
Department: (15) Library

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Program Expenses</u>								
Contract Services	\$0.00	\$104.16	\$104.16	100.0%	\$0.00	\$416.72	\$416.72	100.0%
Miscellaneous	0.00	0.00	0.00	0.0	174.52	187.51	12.99	6.9
Office Supplies	0.00	20.83	20.83	100.0	0.00	83.36	83.36	100.0
Operating Supplies - Library	0.00	250.00	250.00	100.0	129.80	1,000.00	870.20	87.0
Print and Non-Print Materials	548.43	324.16	(224.27)	(69.2)	548.43	1,296.72	748.29	57.7
Rep and Maint - Equipment	0.00	8.33	8.33	100.0	0.00	33.36	33.36	100.0
Small Tools and Equipment	0.00	0.00	0.00	0.0	537.10	625.00	87.90	14.1
Telephone	84.24	75.00	(9.24)	(12.3)	319.79	300.00	(19.79)	(6.6)
E-Rate Exp	40.07	66.75	26.68	40.0	360.28	266.00	(94.28)	(35.4)
Total Program Expenses	\$672.74	\$849.23	\$176.49	20.8 %	\$2,069.92	\$4,208.67	\$2,138.75	50.8 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$4,435.04	\$5,329.25	\$894.21	16.8%	\$16,958.40	\$21,317.00	\$4,358.60	20.4%
Longevity Bonus	0.00	0.00	0.00	0.0	25.00	210.00	185.00	88.1
FICA and Medicare	332.59	412.16	79.57	19.3	1,269.20	1,648.72	379.52	23.0
Retirement	267.40	289.66	22.26	7.7	1,201.80	1,158.72	(43.08)	(3.7)
Health Insurance	824.94	888.00	63.06	7.1	3,712.23	3,552.00	(160.23)	(4.5)
Worker's Compensation	53.00	67.25	14.25	21.2	53.00	67.25	14.25	21.2
Unemployment	16.93	28.80	11.87	41.2	30.39	57.60	27.21	47.2
Total General & Administrative Expenses	\$5,929.90	\$7,015.12	\$1,085.22	15.5 %	\$23,250.02	\$28,011.29	\$4,761.27	17.0 %
Total Expenses	\$6,602.64	\$7,864.35	\$1,261.71	16.0%	\$25,319.94	\$32,219.96	\$6,900.02	21.4%
Net Income (Loss)	\$(6,602.64)	\$(7,864.35)	\$1,261.71	16.0%	(\$25,319.94)	\$(32,219.96)	\$6,900.02	21.4%

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (1) General
Department: (16) P & Z

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Program Expenses</u>								
Advertising, Printing, & Publishing	\$0.00	\$41.66	\$41.66	100.0%	\$0.00	\$166.72	\$166.72	100.0%
Conventions and Seminars	0.00	41.66	41.66	100.0	0.00	166.72	166.72	100.0
Training & Education	0.00	83.33	83.33	100.0	0.00	333.36	333.36	100.0
Legal Exp - P&Z	2,944.50	1,250.00	(1,694.50)	(135.6)	5,791.50	5,000.00	(791.50)	(15.8)
Map Upgrades and Materials	0.00	83.33	83.33	100.0	0.00	333.36	333.36	100.0
Miscellaneous	0.00	25.00	25.00	100.0	0.00	100.00	100.00	100.0
Software Maintenance & Support	0.00	58.33	58.33	100.0	0.00	233.36	233.36	100.0
Operating Supplies - P&Z	0.00	25.00	25.00	100.0	0.00	100.00	100.00	100.0
Small Tools and Equipment	0.00	25.00	25.00	100.0	0.00	100.00	100.00	100.0
Telephone	64.76	50.00	(14.76)	(29.5)	197.25	200.00	2.75	1.4
Travel	0.00	41.66	41.66	100.0	0.00	166.72	166.72	100.0
Total Program Expenses	\$3,009.26	\$1,724.97	\$(1,284.29)	(74.5)%	\$5,988.75	\$6,900.24	\$911.49	13.2 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$4,737.23	\$5,586.00	\$848.77	15.2%	\$21,210.67	\$22,344.00	\$1,133.33	5.1%
Longevity Bonus	0.00	0.00	0.00	0.0	218.00	218.00	0.00	0.0
Health Benefit Stipend	517.38	560.50	43.12	7.7	2,328.21	2,242.00	(86.21)	(3.8)
FICA and Medicare	401.99	472.33	70.34	14.9	1,817.41	1,889.36	71.95	3.8
Retirement	331.36	362.33	30.97	8.5	1,508.58	1,449.36	(59.22)	(4.1)
Health Insurance	5.22	0.00	(5.22)	0.0	23.49	0.00	(23.49)	0.0
Worker's Compensation	130.00	153.25	23.25	15.2	130.00	153.25	23.25	15.2
Unemployment	9.22	14.25	5.03	35.3	39.84	57.00	17.16	30.1
Total General & Administrative Expenses	\$6,132.40	\$7,148.66	\$1,016.26	14.2 %	\$27,276.20	\$28,352.97	\$1,076.77	3.8 %
Total Expenses	\$9,141.66	\$8,873.63	\$(268.03)	(3.0)%	\$33,264.95	\$35,253.21	\$1,988.26	5.6%
Net Income (Loss)	\$(9,141.66)	\$(8,873.63)	\$(268.03)	(3.0)%	(\$33,264.95)	\$(35,253.21)	\$1,988.26	5.6%

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (1) General
Department: (17) Parks

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Program Expenses</u>								
Fuel	\$4.22	\$4.16	\$(0.06)	(1.4)%	\$13.99	\$16.72	\$2.73	16.3%
Legal Exp - Parks	0.00	41.66	41.66	100.0	0.00	166.72	166.72	100.0
Miscellaneous	0.00	20.83	20.83	100.0	3.44	83.36	79.92	95.9
Software Service & Support	12.50	16.66	4.16	25.0	50.00	66.72	16.72	25.1
Operating Supplies - Parks	60.09	16.66	(43.43)	(260.7)	176.50	66.72	(109.78)	(164.5)
R&M Building - Parks	0.00	8.33	8.33	100.0	0.00	33.36	33.36	100.0
Rep and Maint - Vehicles	10.24	208.33	198.09	95.1	127.68	833.36	705.68	84.7
Rep and Maint - Infrastructure	0.00	125.00	125.00	100.0	0.00	500.00	500.00	100.0
Small Tools and Equipment	0.00	25.00	25.00	100.0	0.00	100.00	100.00	100.0
Uniform Exp Parks	72.03	25.00	(47.03)	(188.1)	115.16	100.00	(15.16)	(15.2)
Utilities	178.70	233.33	54.63	23.4	721.48	933.36	211.88	22.7
Lease Payments	0.00	21.66	21.66	100.0	65.04	86.72	21.68	25.0
Total Program Expenses	\$337.78	\$746.62	\$408.84	54.8 %	\$1,273.29	\$2,987.04	\$1,713.75	57.4 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$415.80	\$507.41	\$91.61	18.1%	\$1,786.83	\$2,029.72	\$242.89	12.0%
FICA and Medicare	30.69	38.83	8.14	21.0	131.64	155.36	23.72	15.3
Retirement	28.17	40.08	11.91	29.7	129.78	160.36	30.58	19.1
Health Insurance	98.72	143.00	44.28	31.0	444.24	572.00	127.76	22.3
Worker's Compensation	76.00	92.00	16.00	17.4	76.00	92.00	16.00	17.4
Unemployment	0.98	1.16	0.18	15.5	2.54	4.72	2.18	46.2
Total General & Administrative Expenses	\$650.36	\$822.48	\$172.12	20.9 %	\$2,571.03	\$3,014.16	\$443.13	14.7 %
Total Expenses	\$988.14	\$1,569.10	\$580.96	37.0%	\$3,844.32	\$6,001.20	\$2,156.88	35.9%
Net Income (Loss)	\$(988.14)	\$(1,569.10)	\$580.96	37.0%	\$(3,844.32)	\$(6,001.20)	\$2,156.88	35.9%

11/2/20
4:17:46 PM

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (1) General
Department: (18) Property

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Program Expenses</u>								
Contract Services	\$1,107.77	\$344.70	\$(763.07)	(221.4)%	\$5,825.54	\$5,742.47	\$(83.07)	(1.4)%
Engineering Fees	0.00	416.66	416.66	100.0	0.00	1,666.72	1,666.72	100.0
Fuel	8.44	8.33	(0.11)	(1.3)	97.14	33.36	(63.78)	(191.2)
Legal Exp - Properties	0.00	41.66	41.66	100.0	0.00	166.72	166.72	100.0
Miscellaneous	0.00	125.00	125.00	100.0	52.55	500.00	447.45	89.5
Software Service & Support	12.50	16.66	4.16	25.0	50.00	66.72	16.72	25.1
Operating Supplies - Properties	13.17	100.00	86.83	86.8	129.59	400.00	270.41	67.6
R&M Building - Properties	1,304.16	3,151.51	1,847.35	58.6	11,847.40	14,787.92	2,940.52	19.9
Rep and Maint - Vehicles	10.24	208.33	198.09	95.1	311.48	833.36	521.88	62.6
Rep and Maint - Equipment	0.00	0.00	0.00	0.0	124.50	0.00	(124.50)	0.0
Rep and Maint - Infrastructure	0.00	3,500.00	3,500.00	100.0	789.87	14,000.00	13,210.13	94.4
Small Tools and Equipment	0.00	20.83	20.83	100.0	0.00	83.36	83.36	100.0
Uniform Exp Properties	72.03	25.00	(47.03)	(188.1)	115.16	100.00	(15.16)	(15.2)
Utilities	2,894.59	3,833.33	938.74	24.5	12,909.93	15,333.36	2,423.43	15.8
Lease Payments	0.00	21.66	21.66	100.0	65.04	86.72	21.68	25.0
Total Program Expenses	\$5,422.90	\$11,813.67	\$6,390.77	54.1 %	\$32,318.20	\$53,800.71	\$21,482.51	39.9 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$2,574.77	\$3,142.00	\$567.23	18.1%	\$11,064.69	\$12,568.00	\$1,503.31	12.0%
FICA and Medicare	190.03	240.33	50.30	20.9	815.17	961.36	146.19	15.2
Retirement	174.46	248.00	73.54	29.7	803.76	992.00	188.24	19.0
Health Insurance	611.28	885.33	274.05	31.0	2,750.76	3,541.36	790.60	22.3
Worker's Compensation	428.00	569.50	141.50	24.8	428.00	569.50	141.50	24.8
Unemployment	6.10	7.16	1.06	14.8	15.76	28.72	12.96	45.1
Total General & Administrative Expenses	\$3,984.64	\$5,092.32	\$1,107.68	21.8 %	\$15,878.14	\$18,660.94	\$2,782.80	14.9 %
Total Expenses	\$9,407.54	\$16,905.99	\$7,498.45	44.4%	\$48,196.34	\$72,461.65	\$24,265.31	33.5%
Net Income (Loss)	\$(9,407.54)	\$(16,905.99)	\$7,498.45	44.4%	\$(48,196.34)	\$(72,461.65)	\$24,265.31	33.5%

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (3) Road
Department: (30) HURF

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Revenues</u>								
HURF Revenue	\$3,646.33	\$3,360.33	\$286.00	8.5%	\$14,173.77	\$13,441.36	\$732.41	5.4%
Interest and Investment Earnings	49.53	83.33	(33.80)	(40.6)	193.80	333.36	(139.56)	(41.9)
Net Revenues	\$3,695.86	\$3,443.66	\$252.20	7.3 %	\$14,367.57	\$13,774.72	\$592.85	4.3 %
<u>Program Expenses</u>								
Engineering Fees	\$0.00	\$416.66	\$416.66	100.0%	\$2,991.25	\$1,666.72	\$(1,324.53)	(79.5)%
Equipment Rentals - HURF	0.00	125.00	125.00	100.0	0.00	500.00	500.00	100.0
Fuel	4.22	8.33	4.11	49.3	14.00	33.36	19.36	58.0
Insurance	0.00	2,000.00	2,000.00	100.0	0.00	2,000.00	2,000.00	100.0
Miscellaneous	0.00	46.33	46.33	100.0	3.44	185.36	181.92	98.1
Software Service & Support	12.50	15.00	2.50	16.7	50.00	60.00	10.00	16.7
Operating Supplies - HURF	0.00	58.33	58.33	100.0	108.47	233.36	124.89	53.5
Public Restroom Supplies	0.00	183.33	183.33	100.0	0.00	733.36	733.36	100.0
R&M Building - HURF	0.00	416.66	416.66	100.0	0.00	1,666.72	1,666.72	100.0
Rep and Maint - Vehicles	10.24	166.25	156.01	93.8	48.09	670.00	621.91	92.8
Rep and Maint - Equipment	0.00	16.66	16.66	100.0	0.00	66.72	66.72	100.0
Rep and Maint - Infrastructure	0.00	2,812.50	2,812.50	100.0	52.42	11,250.00	11,197.58	99.5
Small Tools and Equipment	0.00	41.66	41.66	100.0	0.00	166.72	166.72	100.0
Street Lights	940.70	1,083.33	142.63	13.2	3,762.80	4,333.36	570.56	13.2
Street Supplies	153.68	500.00	346.32	69.3	642.27	2,000.00	1,357.73	67.9
Uniform Exp - HURF	72.03	25.00	(47.03)	(188.1)	115.16	100.00	(15.16)	(15.2)
Administrative Charge	881.78	881.75	(0.03)	0.0	3,527.12	3,527.00	(0.12)	0.0
Lease Payments	0.00	25.00	25.00	100.0	65.07	100.00	34.93	34.9
Total Program Expenses	\$2,075.15	\$8,821.79	\$6,746.64	76.5 %	\$11,380.09	\$29,292.68	\$17,912.59	61.2 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$3,046.82	\$3,676.91	\$630.09	17.1%	\$13,721.56	\$14,707.72	\$986.16	6.7%
FICA and Medicare	227.49	281.25	53.76	19.1	1,024.47	1,125.00	100.53	8.9
Retirement	140.87	200.25	59.38	29.7	649.00	801.00	152.00	19.0
Health Insurance	493.58	679.25	185.67	27.3	2,221.11	2,717.00	495.89	18.3
Worker's Compensation	450.00	562.50	112.50	20.0	450.00	562.50	112.50	20.0
Unemployment	4.94	12.91	7.97	61.7	20.30	51.72	31.42	60.8
Total General & Administrative Expenses	\$4,363.70	\$5,413.07	\$1,049.37	19.4 %	\$18,086.44	\$19,964.94	\$1,878.50	9.4 %
Total Expenses	\$6,438.85	\$14,234.86	\$7,796.01	54.8%	\$29,466.53	\$49,257.62	\$19,791.09	40.2%
Net Income (Loss)	\$(2,742.99)	\$(10,791.20)	\$8,048.21	74.6%	\$(15,098.96)	\$(35,482.90)	\$20,383.94	57.4%

11/3/20
9:17:38 AM

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (3) Road
Department: (30) HURF

Current Period				Year To Date			
Actual	Budget	Variance	%	Actual	Budget	Variance	%

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (3) Road
Department: (35) Parking

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Revenues</u>								
Parking Kiosk Revenue	\$23,499.60	\$10,000.00	\$13,499.60	135.0%	\$69,236.25	\$40,000.00	\$29,236.25	73.1%
Net Revenues	\$23,499.60	\$10,000.00	\$13,499.60	135.0 %	\$69,236.25	\$40,000.00	\$29,236.25	73.1 %
<u>Program Expenses</u>								
Miscellaneous	\$0.00	\$64.58	\$64.58	100.0%	\$57.00	\$258.36	\$201.36	77.9%
Credit Card Processing Fees	2,640.38	2,250.00	(390.38)	(17.4)	9,566.39	9,000.00	(566.39)	(6.3)
Software Service and Support	35.70	400.00	364.30	91.1	1,239.68	1,600.00	360.32	22.5
Operating Supplies	0.00	333.33	333.33	100.0	0.00	1,333.36	1,333.36	100.0
Telephone	120.32	125.00	4.68	3.7	360.96	500.00	139.04	27.8
Transfers Out	5,000.00	5,000.00	0.00	0.0	20,000.00	20,000.00	0.00	0.0
Total Program Expenses	\$7,796.40	\$8,172.91	\$376.51	4.6 %	\$31,224.03	\$32,691.72	\$1,467.69	4.5 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$1,097.28	\$966.66	\$(130.62)	(13.5)%	\$5,023.44	\$3,866.72	\$(1,156.72)	(29.9)%
Longevity Bonus	50.00	50.00	0.00	0.0	50.00	50.00	0.00	0.0
FICA and Medicare	87.78	73.91	(13.87)	(18.8)	388.15	295.72	(92.43)	(31.3)
Worker's Compensation	120.00	88.00	(32.00)	(36.4)	120.00	88.00	(32.00)	(36.4)
Unemployment	0.00	7.16	7.16	100.0	26.87	28.72	1.85	6.4
Total General & Administrative Expenses	\$1,355.06	\$1,185.73	\$(169.33)	(14.3)%	\$5,608.46	\$4,329.16	\$(1,279.30)	(29.6)%
Total Expenses	\$9,151.46	\$9,358.64	\$207.18	2.2%	\$36,832.49	\$37,020.88	\$188.39	0.5%
Net Income (Loss)	\$14,348.14	\$641.36	\$13,706.78	2137.1%	\$32,403.76	\$2,979.12	\$29,424.64	987.7%

11/2/20
4:20:24 PM

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (2) Utilities
Department: (50) Water

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Revenues</u>								
Connection Fees	\$0.00	\$0.00	\$0.00	0.0%	\$5,000.00	\$5,000.00	\$0.00	0.0%
Water Usage Fees	13,981.11	14,166.66	(185.55)	(1.3)	55,935.17	56,666.72	(731.55)	(1.3)
Miscellaneous	60.00	679.17	(619.17)	(91.2)	20.00	2,716.70	(2,696.70)	(99.3)
Transfers In	2,500.00	2,500.00	0.00	0.0	10,000.00	10,000.00	0.00	0.0
Net Revenues	\$16,541.11	\$17,345.83	\$(804.72)	(4.6)%	\$70,955.17	\$74,383.42	\$(3,428.25)	(4.6)%
<u>Program Expenses</u>								
Contract Services	\$900.00	\$900.00	\$0.00	0.0%	\$2,700.00	\$3,600.00	\$900.00	25.0%
Training & Education	0.00	33.33	33.33	100.0	0.00	133.36	133.36	100.0
Permit Fee Exp - Water	0.00	150.00	150.00	100.0	250.00	600.00	350.00	58.3
Engineering Fees	0.00	125.00	125.00	100.0	0.00	500.00	500.00	100.0
Fuel	62.07	166.66	104.59	62.8	308.64	666.72	358.08	53.7
Insurance	0.00	3,000.00	3,000.00	100.0	0.00	3,000.00	3,000.00	100.0
Legal Exp - Water	70.00	1,658.33	1,588.33	95.8	315.00	6,733.36	6,418.36	95.3
Miscellaneous	0.00	28.16	28.16	100.0	33.47	112.72	79.25	70.3
Software Support Exp - Water	12.50	233.33	220.83	94.6	50.00	933.36	883.36	94.6
Operating Supplies - Water	0.00	250.00	250.00	100.0	116.43	1,000.00	883.57	88.4
R&M Building - Water	0.00	41.66	41.66	100.0	0.00	166.72	166.72	100.0
Rep and Maint - Vehicles	10.24	208.33	198.09	95.1	207.29	833.36	626.07	75.1
Rep and Maint - Equipment	0.00	165.00	165.00	100.0	122.28	680.00	557.72	82.0
Rep and Maint - Infrastructure	1,842.08	4,583.33	2,741.25	59.8	7,313.34	18,333.36	11,020.02	60.1
Service Tests/System Testing	15.00	83.33	68.33	82.0	348.00	333.36	(14.64)	(4.4)
Small Tools and Equipment	0.00	125.00	125.00	100.0	32.94	500.00	467.06	93.4
DWR Fee Exp	0.00	0.00	0.00	0.0	0.00	900.00	900.00	100.0
Uniform Exp Water	72.03	25.00	(47.03)	(188.1)	115.16	100.00	(15.16)	(15.2)
Utilities Exp - Water	35.85	41.66	5.81	13.9	150.81	166.72	15.91	9.5
Administrative Charge	4,124.47	4,124.50	0.03	0.0	16,497.88	16,498.00	0.12	0.0
Lease Payments	0.00	75.91	75.91	100.0	227.64	303.72	76.08	25.0
Vehicle Purchase-Water	0.00	412.50	412.50	100.0	0.00	1,700.00	1,700.00	100.0
Total Program Expenses	\$7,144.24	\$16,431.03	\$9,286.79	56.5 %	\$28,788.88	\$57,794.76	\$29,005.88	50.2 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$4,541.82	\$5,542.41	\$1,000.59	18.1%	\$19,517.77	\$22,169.72	\$2,651.95	12.0%
FICA and Medicare	335.22	424.00	88.78	20.9	1,437.97	1,696.00	258.03	15.2
Retirement	307.73	437.41	129.68	29.6	1,417.84	1,749.72	331.88	19.0
Health Insurance	1,078.30	1,561.75	483.45	31.0	4,852.35	6,247.00	1,394.65	22.3

11/2/20
4:20:24 PM

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (2) Utilities
Department: (50) Water

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
Worker's Compensation	1,013.00	1,004.75	(8.25)	(0.8)	1,013.00	1,004.75	(8.25)	(0.8)
Unemployment	10.77	12.58	1.81	14.4	27.81	50.36	22.55	44.8
Total General & Administrative Expenses	\$7,286.84	\$8,982.90	\$1,696.06	18.9 %	\$28,266.74	\$32,917.55	\$4,650.81	14.1 %
Total Expenses	\$14,431.08	\$25,413.93	\$10,982.85	43.2%	\$57,055.62	\$90,712.31	\$33,656.69	37.1%
Net Income (Loss)	\$2,110.03	\$(8,068.10)	\$10,178.13	126.2%	\$13,899.55	\$(16,328.89)	\$30,228.44	185.1%

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (2) Utilities
Department: (51) Sewer

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Revenues</u>								
Connection Fees	\$0.00	\$0.00	\$0.00	0.0%	\$5,500.00	\$5,500.00	\$0.00	0.0%
Sewer Usage Fees	14,104.01	15,033.33	(929.32)	(6.2)	56,356.80	60,133.36	(3,776.56)	(6.3)
Interest and Investment Earnings	0.00	8.33	(8.33)	(100.0)	14.22	33.36	(19.14)	(57.4)
Transfers In	2,500.00	2,500.00	0.00	0.0	10,000.00	10,000.00	0.00	0.0
Net Revenues	\$16,604.01	\$17,541.66	\$(937.65)	(5.3)%	\$71,871.02	\$75,666.72	\$(3,795.70)	(5.0)%
<u>Program Expenses</u>								
Contract Services	\$3,200.00	\$3,200.00	\$0.00	0.0%	\$9,600.00	\$12,800.00	\$3,200.00	25.0%
Permit Fee Exp - Sewer	0.00	0.00	0.00	0.0	0.00	1,150.00	1,150.00	100.0
Engineering Fees	0.00	2,083.33	2,083.33	100.0	0.00	8,333.36	8,333.36	100.0
Fuel	64.14	183.33	119.19	65.0	265.03	733.36	468.33	63.9
Insurance	0.00	3,000.00	3,000.00	100.0	0.00	3,000.00	3,000.00	100.0
Legal Exp - Sewer	0.00	41.66	41.66	100.0	0.00	166.72	166.72	100.0
Miscellaneous	0.00	29.33	29.33	100.0	3.44	117.36	113.92	97.1
Software Support Exp - Sewer	12.50	233.33	220.83	94.6	50.00	933.36	883.36	94.6
Operating Supplies - Sewer	0.00	1,000.00	1,000.00	100.0	238.89	4,000.00	3,761.11	94.0
R&M Building - Sewer	0.00	41.66	41.66	100.0	0.00	166.72	166.72	100.0
Rep and Maint - Vehicles	10.24	165.83	155.59	93.8	127.69	673.36	545.67	81.0
Rep and Maint - Equipment	0.00	375.00	375.00	100.0	0.00	1,500.00	1,500.00	100.0
Rep and Maint - Infrastructure	48.31	1,250.00	1,201.69	96.1	301.51	5,000.00	4,698.49	94.0
Service Tests/System Testing	751.80	1,000.00	248.20	24.8	3,179.20	4,000.00	820.80	20.5
Small Tools and Equipment	3,505.94	250.00	(3,255.94)	(1302.4)	3,505.94	1,000.00	(2,505.94)	(250.6)
Uniform Exp Sewer	72.03	41.66	(30.37)	(72.9)	115.16	166.72	51.56	30.9
Utilities	138.86	250.00	111.14	44.5	605.94	1,000.00	394.06	39.4
Administrative Charge	4,124.47	4,124.50	0.03	0.0	16,497.88	16,498.00	0.12	0.0
Sewer Interest Expense	0.00	0.00	0.00	0.0	3,075.82	3,400.00	324.18	9.5
Lease Payments	0.00	75.91	75.91	100.0	227.64	303.72	76.08	25.0
Total Program Expenses	\$11,928.29	\$17,345.54	\$5,417.25	31.2 %	\$37,794.14	\$64,942.68	\$27,148.54	41.8 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$2,462.82	\$3,005.41	\$542.59	18.1%	\$10,583.58	\$12,021.72	\$1,438.14	12.0%
FICA and Medicare	181.77	229.91	48.14	20.9	779.76	919.72	139.96	15.2
Retirement	166.87	237.16	70.29	29.6	768.84	948.72	179.88	19.0
Health Insurance	584.72	846.83	262.11	31.0	2,631.24	3,387.36	756.12	22.3
Worker's Compensation	514.00	544.75	30.75	5.6	514.00	544.75	30.75	5.6
Unemployment	5.86	6.83	0.97	14.2	15.10	27.36	12.26	44.8

11/2/20
4:23:44 PM

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (2) Utilities
Department: (51) Sewer

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
Total General & Administrative Expenses	\$3,916.04	\$4,870.89	\$954.85	19.6 %	\$15,292.52	\$17,849.63	\$2,557.11	14.3 %
Total Expenses	\$15,844.33	\$22,216.43	\$6,372.10	28.7%	\$53,086.66	\$82,792.31	\$29,705.65	35.9%
Net Income (Loss)	\$759.68	\$(4,674.77)	\$5,434.45	116.3%	\$18,784.36	\$(7,125.59)	\$25,909.95	363.6%

11/2/20
4:25:20 PM

Town of Jerome
Income Statement
(Original Budget to Actual Comparison)
For the period of 10/1/2020 Through 10/31/2020

Fund: (2) Utilities
Department: (52) Sanitation

	Actual	Current Period Budget	Variance	%	Actual	Year To Date Budget	Variance	%
<u>Revenues</u>								
Sanitation Usage Fees	\$14,272.12	\$15,665.00	\$(1,392.88)	(8.9)%	\$56,902.65	\$62,680.00	\$(5,777.35)	(9.2)%
Miscellaneous	0.00	83.33	(83.33)	(100.0)	168.00	333.36	(165.36)	(49.6)
Net Revenues	\$14,272.12	\$15,748.33	\$(1,476.21)	(9.4)%	\$57,070.65	\$63,013.36	\$(5,942.71)	(9.4)%
<u>Program Expenses</u>								
Recycling Contract Exp	\$120.00	\$183.33	\$63.33	34.5%	\$360.00	\$733.36	\$373.36	50.9%
Training & Education	0.00	16.25	16.25	100.0	0.00	70.00	70.00	100.0
Equipment Rentals	0.00	54.16	54.16	100.0	0.00	216.72	216.72	100.0
Fuel	371.22	750.00	378.78	50.5	1,208.36	3,000.00	1,791.64	59.7
Insurance	0.00	4,000.00	4,000.00	100.0	0.00	4,000.00	4,000.00	100.0
Landfill Tipping Fees	1,826.00	2,041.66	215.66	10.6	4,688.00	8,166.72	3,478.72	42.6
Miscellaneous	0.00	16.58	16.58	100.0	3.45	66.36	62.91	94.8
Software Support Exp - Trash	12.50	108.33	95.83	88.5	50.00	433.36	383.36	88.5
Operating Supplies - Trash	0.00	16.66	16.66	100.0	116.47	66.72	(49.75)	(74.6)
Rep and Maint - Vehicles	34.01	833.33	799.32	95.9	293.60	3,333.36	3,039.76	91.2
Rep and Maint - Equipment	0.00	75.00	75.00	100.0	0.00	300.00	300.00	100.0
Small Tools and Equipment	0.00	250.00	250.00	100.0	0.00	1,000.00	1,000.00	100.0
Uniform Exp Trash	72.06	25.00	(47.06)	(188.2)	115.25	100.00	(15.25)	(15.3)
Administrative Charge	4,124.47	4,124.50	0.03	0.0	16,497.88	16,498.00	0.12	0.0
Transfers Out	0.00	0.00	0.00	0.0	5,000.00	5,000.00	0.00	0.0
Total Program Expenses	\$6,560.26	\$12,494.80	\$5,934.54	47.5 %	\$28,333.01	\$42,984.60	\$14,651.59	34.1 %
<u>General & Administrative Expenses</u>								
Salaries and Wages	\$3,918.12	\$4,781.33	\$863.21	18.1%	\$16,837.55	\$19,125.36	\$2,287.81	12.0%
FICA and Medicare	289.18	365.75	76.57	20.9	1,240.49	1,463.00	222.51	15.2
Retirement	265.48	377.33	111.85	29.6	1,223.12	1,509.36	286.24	19.0
Health Insurance	930.22	1,347.25	417.03	31.0	4,185.99	5,389.00	1,203.01	22.3
Worker's Compensation	1,439.00	866.75	(572.25)	(66.0)	1,439.00	866.75	(572.25)	(66.0)
Unemployment	9.30	10.83	1.53	14.1	24.01	43.36	19.35	44.6
Total General & Administrative Expenses	\$6,851.30	\$7,749.24	\$897.94	11.6 %	\$24,950.16	\$28,396.83	\$3,446.67	12.1 %
Total Expenses	\$13,411.56	\$20,244.04	\$6,832.48	33.8%	\$53,283.17	\$71,381.43	\$18,098.26	25.4%
Net Income (Loss)	\$860.56	\$(4,495.71)	\$5,356.27	119.1%	\$3,787.48	\$(8,368.07)	\$12,155.55	145.3%

11/2/20
2:40:49 PM

Town of Jerome
Balance Sheet
As of 10/31/2020
Fund: (1) General

Assets

Current Assets

LGIP	\$1,672.26	
Petty Cash - General Gov	275.00	
Auto Lieu Taxes	1,209.00	
City Sales Taxes	138,908.63	
Franchise Fees	3,596.84	
GF Accounts Receivable	1,838.19	
Property Taxes	11,657.97	
Rents	(254.05)	
State Sales Taxes	1,530.91	
Court - Checking & Bond Acct	105,036.50	
Court - JCEF Acct	12,790.38	
Court - FTG Acct	6,167.01	
Petty Cash - Fire Dept	150.00	
Petty Cash - Library	150.00	
NBA Checking	89,548.73	
OAZ Checking	256,005.00	
OAZ General Savings	395,708.69	
OAZ CTL Business Savings	5.00	
Total Current Assets		\$1,025,996.06

Other Assets

Due From Other Funds	\$1,900,041.13	
Total Other Assets		1,900,041.13

Total Assets

\$2,926,037.19

Liabilities and Net Assets

Current Liabilities

Accounts Payable	\$1,715.61	
Federal WH & FICA	2,796.37	
Arizona Withholding	(35.05)	
Unemployment Taxes	387.02	
AFLAC	(412.36)	
Health Insurance	2,580.22	
457G Retirement	66.53	
PSPRS	(56.83)	
Customer Deposits	6,760.72	
FD Per Call Payable	13,148.50	
Ganishments Payable	1,735.51	
Wages Payable	16,542.22	
Due To Other Funds	2,146,100.58	
Court Liabilities	10,835.64	
Suspense Account	(3,000.00)	
Total Current Liabilities		\$2,199,164.68
Total Liabilities		\$2,199,164.68

Net Assets

Unrestricted Funds	736,120.91	
Current Year Net Assets	(9,248.40)	
Total Net Assets		726,872.51

11/2/20
2:40:49 PM

Town of Jerome
Balance Sheet
As of 10/31/2020
Fund: (1) General

Total Liabilities and Net Assets

\$2,926,037.19

11/2/20
3:03:21 PM

Town of Jerome
Balance Sheet
As of 10/31/2020
Fund: (2) Utilities

Assets

Current Assets

Allowance for Doubtful Accts	\$(15,000.00)	
Utilities A/R	67,037.19	
Bond Account	15,473.58	
Replacement & Extension Acct	73,952.99	
Series 2001 Bond Reserve Acct	30,069.37	
Total Current Assets		\$171,533.13

Property, Plant & Equipment

Buildings-Prop, Plant, Equip	\$2,166,541.66	
Operating Equipment-Prop, Plant, Equip	189,011.29	
Buildings-Acc Depreciation	(1,477,164.98)	
Operating Equipment-Acc Depreciation	(153,793.20)	
Infrastructure	1,399,746.06	
Total Property, Plant & Equipment		2,124,340.83

Other Assets

Due From Other Funds	\$978,927.03	
Total Other Assets		978,927.03

Total Assets

\$3,274,800.99

Liabilities and Net Assets

Current Liabilities

Accounts Payable	\$112.22	
Sales Tax Payable	762.81	
Customer Deposits	23,570.96	
Compensated Absences	2,328.22	
Bonds Payable	148,445.73	
Other Liabilities	6,909.25	
Due To Other Funds	823,810.21	
Accrued Payroll	2,361.76	
Accrued Interest Payable	3,340.02	
Total Current Liabilities		\$1,011,641.18
Total Liabilities		\$1,011,641.18

Net Assets

Unrestricted Fund Balance	771,622.00	
Unrestricted Fund Balance	(153,829.30)	
Unrestricted Fund Balance	1,544,283.00	
Current Year Net Assets	101,084.11	
Total Net Assets		2,263,159.81
Total Liabilities and Net Assets		\$3,274,800.99

11/2/20
3:05:11 PM

Town of Jerome
Balance Sheet
As of 10/31/2020

Fund: (3) Road
Department: (30) HURF

Assets

Current Assets

HURF Accounts Receivable	\$3,625.78	
OAZ HURF Savings	391,507.37	
Total Current Assets		\$395,133.15

Other Assets

Due From Other Funds	\$298,688.66	
Total Other Assets		298,688.66

Total Assets

\$693,821.81

Liabilities and Net Assets

Current Liabilities

Accounts Payable	\$37.44	
Due To Other Funds	521,756.45	
Accrued Payroll	755.11	
Total Current Liabilities		\$522,549.00

Total Liabilities

\$522,549.00

Net Assets

Current Year Net Assets	\$171,272.81	
Total Net Assets		171,272.81
Total Liabilities and Net Assets		\$693,821.81

11/2/20
3:06:10 PM

Town of Jerome
Balance Sheet
As of 10/31/2020

Fund: (3) Road
Department: (35) Parking

Assets

Other Assets

Due From	\$69,292.25	
Total Other Assets		\$69,292.25
Total Assets		\$69,292.25

Liabilities and Net Assets

Current Liabilities

Due To	\$36,888.49	
Total Current Liabilities		\$36,888.49
Total Liabilities		\$36,888.49

Net Assets

Current Year Net Assets	\$32,403.76	
Total Net Assets		32,403.76
Total Liabilities and Net Assets		\$69,292.25

11/2/20
3:07:06 PM

Town of Jerome
Balance Sheet
As of 10/31/2020

Fund: (4) Firefighters Pension & Relief

Assets

Current Assets

Investments - Pension & Relief	\$142,578.23	
Total Current Assets		\$142,578.23

Other Assets

Due From Other Funds	\$55,402.82	
Total Other Assets		55,402.82

Total Assets		\$197,981.05
---------------------	--	---------------------

Liabilities and Net Assets

Current Liabilities

Due To Other Funds	\$43,372.12	
Total Current Liabilities		\$43,372.12

Total Liabilities		\$43,372.12
--------------------------	--	--------------------

Net Assets

Unrestricted Fund Balance	152,044.83	
Current Year Net Assets	2,564.10	

Total Net Assets		154,608.93
-------------------------	--	-------------------

Total Liabilities and Net Assets		\$197,981.05
---	--	---------------------

11/2/20
3:07:59 PM

Town of Jerome

Balance Sheet

As of 10/31/2020

Fund: (5) Operating Grants

Assets

Current Assets

Opr Grants Receivable	\$124,908.75	
Inventory	13,193.06	
Total Current Assets		\$138,101.81

Other Assets

Due From Other Funds	\$346,443.98	
Total Other Assets		346,443.98

Total Assets

\$484,545.79

Liabilities and Net Assets

Current Liabilities

Due To Other Funds	\$268,534.96	
Deferred Revenue - Opr Grants	56,436.41	
Accounts Payable - Opr Grants	(12,062.51)	
Total Current Liabilities		\$312,908.86

Total Liabilities

\$312,908.86

Net Assets

Unrestricted Fund Balance	11,433.46	
Current Year Net Assets	160,203.47	

Total Net Assets

171,636.93

Total Liabilities and Net Assets

\$484,545.79

11/2/20
3:08:35 PM

Town of Jerome
Balance Sheet
As of 10/31/2020

Fund: (6) Capital Grants

Assets

Other Assets

Due From Other Funds	\$328,869.56	
Total Other Assets		\$328,869.56
Total Assets		\$328,869.56

Liabilities and Net Assets

Current Liabilities

Deferred Revenue - Cap Grants	\$42,267.65	
Due To Other Funds	244,116.67	
Total Current Liabilities		\$286,384.32
Total Liabilities		\$286,384.32

Net Assets

Restricted Fund Balance	\$109,433.10	
Unrestricted Fund Balance	(117,281.30)	
Current Year Net Assets	50,333.44	
Total Net Assets		42,485.24
Total Liabilities and Net Assets		\$328,869.56

11/2/20
3:09:11 PM

Town of Jerome

Balance Sheet

As of 10/31/2020

Fund: (7) GF Contingencies

Assets

Other Assets

Due From Other Funds	\$89,351.93	
Total Other Assets		\$89,351.93
Total Assets		\$89,351.93

Liabilities and Net Assets

Current Liabilities

Due To Other Funds	\$14,562.32	
Total Current Liabilities		\$14,562.32
Total Liabilities		\$14,562.32

Net Assets

Unrestricted Fund Balance	\$120,310.72	
Current Year Net Assets	(45,521.11)	
Total Net Assets		74,789.61
Total Liabilities and Net Assets		\$89,351.93

11/2/20
3:09:54 PM

Town of Jerome
Balance Sheet
As of 10/31/2020

Fund: (9) Capital

Assets

Current Assets

OAZ Capital Improvements	\$50,702.10	
Total Current Assets		\$50,702.10

Other Assets

Due From Other Funds	\$32,124.44	
Total Other Assets		32,124.44

Total Assets		\$82,826.54
---------------------	--	--------------------

Net Assets

Unrestricted Fund Balance	\$67,643.86	
Current Year Net Assets	15,182.68	
Total Net Assets		82,826.54

Total Liabilities and Net Assets		\$82,826.54
---	--	--------------------

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
Description			Account								
VENDOR: 1002 - XEROX FINANCIAL SERVICES											\$0.00
101320MA6	10/12/20	10/12/20	11/11/20								
020-0098114-001, Inv 2290790 Lease			1.11.6191 - Copier & Equip Lease Expense		\$321.03	\$0.00	\$321.03	10/13/20	11358	ASCUCK	\$0.00
INVOICE 101320MA6 TOTALS:					\$321.03	\$0.00	\$321.03				\$0.00
XEROX FINANCIAL SERVICES TOTALS:					\$321.03	\$0.00	\$321.03				\$0.00
VENDOR: 1019 - ARROWHEAD GARAGE DOORS											\$0.00
10720MA1	10/07/20	10/07/20	11/06/20								
Inv LB-3034 Door Maintenance			1.18.6215 - R&M Building - Properties		\$145.00	\$0.00	\$145.00	10/07/20	11328	ASCUCK	\$0.00
INVOICE 10720MA1 TOTALS:					\$145.00	\$0.00	\$145.00				\$0.00
ARROWHEAD GARAGE DOORS TOTALS:					\$145.00	\$0.00	\$145.00				\$0.00
VENDOR: 1028 - YAVAPAI CO. EDUCATION TECH											\$0.00
10720MA20	10/07/20	10/07/20	11/06/20								
Inv 20-627 Internet Access GG			1.11.6192 - Software Support Exp - GG		\$120.00	\$0.00	\$120.00	10/07/20	11329	ASCUCK	\$0.00
Inv 20-627 Internet Access Parks			1.17.6192 - Software Service & Support		\$12.50	\$0.00	\$12.50	10/07/20	11329	ASCUCK	\$0.00
Inv 20-627 Internet Access Prop			1.18.6192 - Software Service & Support		\$12.50	\$0.00	\$12.50	10/07/20	11329	ASCUCK	\$0.00
Inv 20-627 Internet Access Water			2.50.6192 - Software Support Exp - Water		\$12.50	\$0.00	\$12.50	10/07/20	11329	ASCUCK	\$0.00
Inv 20-627 Internet Access Sewer			2.51.6192 - Software Support Exp - Sewer		\$12.50	\$0.00	\$12.50	10/07/20	11329	ASCUCK	\$0.00
Inv 20-627 Internet Access Trash			2.52.6192 - Software Support Exp - Trash		\$12.50	\$0.00	\$12.50	10/07/20	11329	ASCUCK	\$0.00
Inv 20-627 Internet Access HURF			3.30.6192 - Software Service & Support		\$12.50	\$0.00	\$12.50	10/07/20	11329	ASCUCK	\$0.00
Inv 20-627 Internet Access FD			1.14.6192 - Software Service & Support		\$75.00	\$0.00	\$75.00	10/07/20	11329	ASCUCK	\$0.00
Inv 20-627 Internet Access PD			1.13.6192 - Software Service & Support		\$150.00	\$0.00	\$150.00	10/07/20	11329	ASCUCK	\$0.00
INVOICE 10720MA20 TOTALS:					\$420.00	\$0.00	\$420.00				\$0.00
10720MA21	10/07/20	10/07/20	11/06/20								
Inv 20-609 E-Rate LB			1.15.6266 - E-Rate Exp		\$40.07	\$0.00	\$40.07	10/07/20	11329	ASCUCK	\$0.00
INVOICE 10720MA21 TOTALS:					\$40.07	\$0.00	\$40.07				\$0.00
YAVAPAI CO. EDUCATION TECH TOTALS:					\$460.07	\$0.00	\$460.07				\$0.00
VENDOR: 1032 - JANICE PONTIOUS											\$0.00
10720MA26	10/07/20	10/07/20	11/06/20								
Reimbursement For Cleaning /Paper S			1.13.6195 - Operating Supplies - Police		\$89.38	\$0.00	\$89.38	10/07/20	11330	ASCUCK	\$0.00
INVOICE 10720MA26 TOTALS:					\$89.38	\$0.00	\$89.38				\$0.00
JANICE PONTIOUS TOTALS:					\$89.38	\$0.00	\$89.38				\$0.00
VENDOR: 1033 - BROWN & BROWN LAW OFFICES											\$0.00
101320MA11	10/12/20	10/12/20	11/11/20								
Inv JEROME-2746 Legal, Water			2.50.6170 - Legal Exp - Water		\$70.00	\$0.00	\$70.00	10/13/20	11359	ASCUCK	\$0.00
INVOICE 101320MA11 TOTALS:					\$70.00	\$0.00	\$70.00				\$0.00

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
Description		Account									
BROWN & BROWN LAW OFFICES TOTALS:					\$70.00	\$0.00	\$70.00				\$0.00
VENDOR: 1054 - PARKEON											\$0.00
102120MA16	10/21/20	10/21/20	11/20/20								
31335, Inv IV119036 Flowbird Fee		3.35.6192 - Software Service and Support			\$35.70	\$0.00	\$35.70	10/21/20	11373	ASCUCK	\$0.00
INVOICE 102120MA16 TOTALS:					\$35.70	\$0.00	\$35.70				\$0.00
PARKEON TOTALS:					\$35.70	\$0.00	\$35.70				\$0.00
VENDOR: 1060 - JOHN KNIGHT											\$0.00
102920MA20	10/29/20	10/29/20	11/28/20								
Community Garden Supplies		6.70.6185 - Misc Exp - Cap Grants			\$800.56	\$0.00	\$800.56	10/29/20	11406	ASCUCK	\$0.00
INVOICE 102920MA20 TOTALS:					\$800.56	\$0.00	\$800.56				\$0.00
JOHN KNIGHT TOTALS:					\$800.56	\$0.00	\$800.56				\$0.00
VENDOR: 1078 - D&B ELITE CARPENTRY, LLC											\$0.00
102920MA10	10/28/20	10/28/20	11/27/20								
Install of Windows Hotel Jerome		6.70.6215 - R&M Building Exp - Cap Grants			\$18,200.00	\$0.00	\$18,200.00	10/29/20	11392	ASCUCK	\$0.00
INVOICE 102920MA10 TOTALS:					\$18,200.00	\$0.00	\$18,200.00				\$0.00
D&B ELITE CARPENTRY, LLC TOTALS:					\$18,200.00	\$0.00	\$18,200.00				\$0.00
VENDOR: 1079 - O'REILLY AUTOMOTIVE, INC.											\$0.00
10720MA28	10/07/20	10/07/20	11/06/20								
Inv 2848366 Flasher, Glass Cleaner		2.52.6220 - Rep and Maint - Vehicles			\$18.25	\$0.00	\$18.25	10/07/20	11331	ASCUCK	\$0.00
INVOICE 10720MA28 TOTALS:					\$18.25	\$0.00	\$18.25				\$0.00
O'REILLY AUTOMOTIVE, INC. TOTALS:					\$18.25	\$0.00	\$18.25				\$0.00
VENDOR: 1080 - NICE JONS, INC.											\$0.00
101320MA8	10/12/20	10/12/20	11/11/20								
Inv 33909 Toilets/Wash Stations COV		1.11.6160 - COVID Expenses			\$1,443.20	\$0.00	\$1,443.20	10/13/20	11360	ASCUCK	\$0.00
INVOICE 101320MA8 TOTALS:					\$1,443.20	\$0.00	\$1,443.20				\$0.00
102120MA19	10/21/20	10/21/20	11/20/20								
Inv 33542 Toilets/ Washing Stations		1.11.6160 - COVID Expenses			\$959.20	\$0.00	\$959.20	10/21/20	11374	ASCUCK	\$0.00
INVOICE 102120MA19 TOTALS:					\$959.20	\$0.00	\$959.20				\$0.00
NICE JONS, INC. TOTALS:					\$2,402.40	\$0.00	\$2,402.40				\$0.00
VENDOR: 1081 - KATHERINE SEALEY											\$0.00
102920MA5	10/28/20	10/28/20	11/27/20								
Pay for Encinos Fire		1.14.5002 - Wildland Personnel			\$2,291.52	\$0.00	\$2,291.52	10/29/20	11393	ASCUCK	\$0.00
Pay for Horse Fire		1.14.5002 - Wildland Personnel			\$1,677.72	\$0.00	\$1,677.72	10/29/20	11393	ASCUCK	\$0.00

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
Description		Account									
INVOICE 102920MA5 TOTALS:					\$3,969.24	\$0.00	\$3,969.24				\$0.00
KATHERINE SEALEY TOTALS:					\$3,969.24	\$0.00	\$3,969.24				\$0.00
VENDOR: 109 - AFLAC											\$0.00
102120MA5	10/21/20	10/21/20	10/21/20								
Acct # DN513, Inv. 803326 Oct 2020		1.10.2405 - AFLAC			\$215.28	\$0.00	\$215.28	10/21/20	11375	ASCUCK	\$0.00
INVOICE 102120MA5 TOTALS:					\$215.28	\$0.00	\$215.28				\$0.00
AFLAC TOTALS:					\$215.28	\$0.00	\$215.28				\$0.00
VENDOR: 113 - ALL-MED EQUIPMENT & SERVICES											\$0.00
10720MA29	10/07/20	10/07/20	10/07/20								
Monthly Tank Rental Balance		1.14.6181 - Medical Supplies Exp			\$31.20	\$0.00	\$31.20	10/07/20	11332	ASCUCK	\$0.00
INVOICE 10720MA29 TOTALS:					\$31.20	\$0.00	\$31.20				\$0.00
ALL-MED EQUIPMENT & SERVICES TOTALS:					\$31.20	\$0.00	\$31.20				\$0.00
VENDOR: 119 - APS											\$0.00
10720MA24	10/07/20	10/07/20	10/22/20								
9438060 Hull St Roof		1.18.6285 - Utilities			\$15.21	\$0.00	\$15.21	10/07/20	11333	ASCUCK	\$0.00
INVOICE 10720MA24 TOTALS:					\$15.21	\$0.00	\$15.21				\$0.00
102920MA13	10/28/20	10/28/20	11/12/20								
1490440 Street Lights		3.30.6255 - Street Lights			\$940.70	\$0.00	\$940.70	10/29/20	11394	ASCUCK	\$0.00
2383901 Upper Park		1.17.6285 - Utilities			\$37.08	\$0.00	\$37.08	10/29/20	11394	ASCUCK	\$0.00
3216010 Hotel Jerome		1.18.6285 - Utilities			\$41.51	\$0.00	\$41.51	10/29/20	11394	ASCUCK	\$0.00
7575770 Civic Center		1.18.6285 - Utilities			\$1,048.91	\$0.00	\$1,048.91	10/29/20	11394	ASCUCK	\$0.00
2353720 FD Gulch		1.18.6285 - Utilities			\$40.00	\$0.00	\$40.00	10/29/20	11394	ASCUCK	\$0.00
8061950 Sunshine Hill Water Tank		2.50.6285 - Utilities Exp - Water			\$35.85	\$0.00	\$35.85	10/29/20	11394	ASCUCK	\$0.00
8468241 Middle Park		1.17.6285 - Utilities			\$39.04	\$0.00	\$39.04	10/29/20	11394	ASCUCK	\$0.00
6506951 Police Station		1.18.6285 - Utilities			\$169.55	\$0.00	\$169.55	10/29/20	11394	ASCUCK	\$0.00
0024240 Lower Park		1.17.6285 - Utilities			\$45.58	\$0.00	\$45.58	10/29/20	11394	ASCUCK	\$0.00
5613490 Upper Park 2		1.17.6285 - Utilities			\$57.00	\$0.00	\$57.00	10/29/20	11394	ASCUCK	\$0.00
4246290 WWTP		2.51.6285 - Utilities			\$138.86	\$0.00	\$138.86	10/29/20	11394	ASCUCK	\$0.00
6109570 Perkinsville Rd		1.18.6285 - Utilities			\$116.09	\$0.00	\$116.09	10/29/20	11394	ASCUCK	\$0.00
0421621 Fire Station		1.18.6285 - Utilities			\$338.16	\$0.00	\$338.16	10/29/20	11394	ASCUCK	\$0.00
2839800 Ghost Pepper		1.18.6285 - Utilities			\$81.01	\$0.00	\$81.01	10/29/20	11394	ASCUCK	\$0.00
1976520 Co-Op		1.18.6285 - Utilities			\$117.81	\$0.00	\$117.81	10/29/20	11394	ASCUCK	\$0.00
INVOICE 102920MA13 TOTALS:					\$3,247.15	\$0.00	\$3,247.15				\$0.00
APS TOTALS:					\$3,262.36	\$0.00	\$3,262.36				\$0.00
VENDOR: 122 - AT&T											\$0.00
102120MA15	10/21/20	10/21/20	11/20/20								
287251435682x10152020 PD		1.13.6265 - Telephone			\$45.47	\$0.00	\$45.47	10/21/20	11376	ASCUCK	\$0.00

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date							
Description		Account		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
INVOICE 102120MA15 TOTALS:				\$45.47	\$0.00	\$45.47				\$0.00
AT&T TOTALS:				\$45.47	\$0.00	\$45.47				\$0.00
VENDOR: 135 - AMRRP - WC										\$0.00
10720MA14	10/07/20	10/07/20	10/07/20							
Policy 2000214 July-Sept WC GG		1.11.5013 - Workers Compensation		\$256.00	\$0.00	\$256.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC CT		1.12.5013 - Worker's Compensation		\$68.00	\$0.00	\$68.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC PD		1.13.5013 - Worker's Compensation		\$5,612.00	\$0.00	\$5,612.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC FD		1.14.5013 - Worker's Compensation		\$3,102.00	\$0.00	\$3,102.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC LB		1.15.5013 - Worker's Compensation		\$53.00	\$0.00	\$53.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC PZ		1.16.5013 - Worker's Compensation		\$130.00	\$0.00	\$130.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC Parks		1.17.5013 - Worker's Compensation		\$76.00	\$0.00	\$76.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC Prop		1.18.5013 - Worker's Compensation		\$428.00	\$0.00	\$428.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC Water		2.50.5013 - Worker's Compensation		\$1,013.00	\$0.00	\$1,013.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC Sewer		2.51.5013 - Worker's Compensation		\$514.00	\$0.00	\$514.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC Trash		2.52.5013 - Worker's Compensation		\$1,439.00	\$0.00	\$1,439.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC HURF		3.30.5013 - Worker's Compensation		\$450.00	\$0.00	\$450.00	10/07/20	11334	ASCUCK	\$0.00
Policy 2000214 July-Sept WC Parking		3.35.5013 - Worker's Compensation		\$120.00	\$0.00	\$120.00	10/07/20	11334	ASCUCK	\$0.00
INVOICE 10720MA14 TOTALS:				\$13,261.00	\$0.00	\$13,261.00				\$0.00
AMRRP - WC TOTALS:				\$13,261.00	\$0.00	\$13,261.00				\$0.00
VENDOR: 151 - BEDROCK LANDSCAPE MATERIALS										\$0.00
102120MA12	10/21/20	10/21/20	11/20/20							
Inv 139286 Planters Mix Community G		6.70.6185 - Misc Exp - Cap Grants		\$233.98	\$0.00	\$233.98	10/21/20	11377	ASCUCK	\$0.00
INVOICE 102120MA12 TOTALS:				\$233.98	\$0.00	\$233.98				\$0.00
BEDROCK LANDSCAPE MATERIALS TOTALS:				\$233.98	\$0.00	\$233.98				\$0.00
VENDOR: 157 - BOUND TREE MEDICAL, LLC										\$0.00
101320MA1	10/12/20	10/12/20	11/11/20							
103795, Inv 83786160 Thermometers		1.14.6181 - Medical Supplies Exp		\$254.85	\$0.00	\$254.85	10/13/20	11361	ASCUCK	\$0.00
INVOICE 101320MA1 TOTALS:				\$254.85	\$0.00	\$254.85				\$0.00
BOUND TREE MEDICAL, LLC TOTALS:				\$254.85	\$0.00	\$254.85				\$0.00
VENDOR: 164 - ARIZONA SUPERIOR COURT										\$0.00
10720MA32	10/07/20	10/07/20	10/07/20							
Inv 1 2021 J July-Sept Pro Tem		1.12.6110 - Contract Services		\$49.70	\$0.00	\$49.70	10/07/20	11335	ASCUCK	\$0.00
INVOICE 10720MA32 TOTALS:				\$49.70	\$0.00	\$49.70				\$0.00
ARIZONA SUPERIOR COURT TOTALS:				\$49.70	\$0.00	\$49.70				\$0.00
VENDOR: 167 - OFFICE DEPOT										\$0.00

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date							
Description		Account		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
10720MA30	10/07/20	10/07/20	12/06/20							
63266436, Inv127164720001 Postal Sc		1.11.6190 - Office Supplies		\$28.23	\$0.00	\$28.23	10/07/20	11336	ASCUCK	\$0.00
63266436, Inv127175890001 Coffee		1.11.6190 - Office Supplies		\$11.83	\$0.00	\$11.83	10/07/20	11336	ASCUCK	\$0.00
INVOICE 10720MA30 TOTALS:				\$40.06	\$0.00	\$40.06				\$0.00
102920MA4	10/28/20	10/28/20	12/27/20							
63266436, Inv 131568149001 Supplies		1.11.6190 - Office Supplies		\$22.02	\$0.00	\$22.02	10/29/20	11395	ASCUCK	\$0.00
63266436, Inv 131069866001 PD Suppl		1.11.6190 - Office Supplies		\$72.39	\$0.00	\$72.39	10/29/20	11395	ASCUCK	\$0.00
63266436, Inv 131070876001 PD Suppl		1.11.6190 - Office Supplies		\$41.46	\$0.00	\$41.46	10/29/20	11395	ASCUCK	\$0.00
INVOICE 102920MA4 TOTALS:				\$135.87	\$0.00	\$135.87				\$0.00
OFFICE DEPOT TOTALS:				\$175.93	\$0.00	\$175.93				\$0.00
VENDOR: 168 - CENTURY LINK										\$0.00
101320MA3	10/12/20	10/12/20	10/27/20							
Acct 88707005 Inv 150790614 Long Di		1.11.6265 - Telephone		\$5.42	\$0.00	\$5.42	10/13/20	11362	ASCUCK	\$0.00
INVOICE 101320MA3 TOTALS:				\$5.42	\$0.00	\$5.42				\$0.00
102920MA12	10/28/20	10/28/20	11/12/20							
928 634 2245 PD		1.13.6265 - Telephone		\$36.00	\$0.00	\$36.00	10/29/20	11396	ASCUCK	\$0.00
928 634 7943 GG		1.11.6265 - Telephone		\$170.11	\$0.00	\$170.11	10/29/20	11396	ASCUCK	\$0.00
928 634 8992 PD		1.13.6265 - Telephone		\$173.52	\$0.00	\$173.52	10/29/20	11396	ASCUCK	\$0.00
928 639 0574 LB		1.15.6265 - Telephone		\$84.24	\$0.00	\$84.24	10/29/20	11396	ASCUCK	\$0.00
928 649 2776 PD		1.13.6265 - Telephone		\$41.90	\$0.00	\$41.90	10/29/20	11396	ASCUCK	\$0.00
928 649 3034 FD		1.14.6265 - Telephone		\$130.28	\$0.00	\$130.28	10/29/20	11396	ASCUCK	\$0.00
928 649 3250 CT		1.12.6265 - Telephone		\$74.12	\$0.00	\$74.12	10/29/20	11396	ASCUCK	\$0.00
INVOICE 102920MA12 TOTALS:				\$710.17	\$0.00	\$710.17				\$0.00
CENTURY LINK TOTALS:				\$715.59	\$0.00	\$715.59				\$0.00
VENDOR: 170 - THYSSENKRUPP ELEVATOR CORP										\$0.00
10720MA25	10/07/20	10/07/20	10/07/20							
51348, Inv 3005505430 Qrt Billing		1.18.6110 - Contract Services		\$1,057.77	\$0.00	\$1,057.77	10/07/20	11337	ASCUCK	\$0.00
INVOICE 10720MA25 TOTALS:				\$1,057.77	\$0.00	\$1,057.77				\$0.00
THYSSENKRUPP ELEVATOR CORP TOTALS:				\$1,057.77	\$0.00	\$1,057.77				\$0.00
VENDOR: 203 - SMART DOCUMENT SOLUTIONS										\$0.00
102120MA3	10/21/20	10/21/20	10/21/20							
C10253, CT1221-01, Inv 14328 Copier		1.11.6191 - Copier & Equip Lease Expense		\$283.55	\$0.00	\$283.55	10/21/20	11378	ASCUCK	\$0.00
INVOICE 102120MA3 TOTALS:				\$283.55	\$0.00	\$283.55				\$0.00
SMART DOCUMENT SOLUTIONS TOTALS:				\$283.55	\$0.00	\$283.55				\$0.00
VENDOR: 204 - SEDONA RECYCLES, INC										\$0.00
10720MA17	10/07/20	10/07/20	10/07/20							

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date							
Description		Account		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
Recycling Services, Inv JEROME 1020		2.52.6111 - Recycling Contract Exp		\$120.00	\$0.00	\$120.00	10/07/20	11338	ASCUCK	\$0.00
INVOICE 10720MA17 TOTALS:				\$120.00	\$0.00	\$120.00				\$0.00
SEDONA RECYCLES, INC TOTALS:				\$120.00	\$0.00	\$120.00				\$0.00
VENDOR: 218 - VERIZON WIRELESS										\$0.00
10720MA18	10/07/20	10/07/20	11/01/20							
928 451 2174 Kiosk Line		3.35.6265 - Telephone		\$30.08	\$0.00	\$30.08	10/07/20	11340	ASCUCK	\$0.00
928 451 2402 Kiosk Line		3.35.6265 - Telephone		\$30.08	\$0.00	\$30.08	10/07/20	11340	ASCUCK	\$0.00
928 451 2436 Kiosk Line		3.35.6265 - Telephone		\$30.08	\$0.00	\$30.08	10/07/20	11340	ASCUCK	\$0.00
928 821 0736 Kiosk Line		3.35.6265 - Telephone		\$30.08	\$0.00	\$30.08	10/07/20	11340	ASCUCK	\$0.00
INVOICE 10720MA18 TOTALS:				\$120.32	\$0.00	\$120.32				\$0.00
10720MA19	10/07/20	10/07/20	11/01/20							
928 300 5987 Barry		1.16.6265 - Telephone		\$48.66	\$0.00	\$48.66	10/07/20	11339	ASCUCK	\$0.00
928 300 8701 Rusty		1.14.6265 - Telephone		\$60.51	\$0.00	\$60.51	10/07/20	11339	ASCUCK	\$0.00
928 821 0133 Shuttle		1.11.6265 - Telephone		\$33.07	\$0.00	\$33.07	10/07/20	11339	ASCUCK	\$0.00
928 963 4958 Rusty		1.14.6265 - Telephone		\$10.42	\$0.00	\$10.42	10/07/20	11339	ASCUCK	\$0.00
Access Charge GG		1.11.6265 - Telephone		\$16.10	\$0.00	\$16.10	10/07/20	11339	ASCUCK	\$0.00
Access Charge FD		1.14.6265 - Telephone		\$32.20	\$0.00	\$32.20	10/07/20	11339	ASCUCK	\$0.00
Access Charge PZ		1.16.6265 - Telephone		\$16.10	\$0.00	\$16.10	10/07/20	11339	ASCUCK	\$0.00
INVOICE 10720MA19 TOTALS:				\$217.06	\$0.00	\$217.06				\$0.00
VERIZON WIRELESS TOTALS:				\$337.38	\$0.00	\$337.38				\$0.00
VENDOR: 224 - LEGEND										\$0.00
10720MA7	10/07/20	10/07/20	11/06/20							
Acct 00-0001475, Inv. 2014903		2.51.6240 - Service Tests/System Testing		\$75.00	\$0.00	\$75.00	10/07/20	11341	ASCUCK	\$0.00
INVOICE 10720MA7 TOTALS:				\$75.00	\$0.00	\$75.00				\$0.00
102120MA9	10/21/20	10/21/20	11/20/20							
Acct 00-0001475, Inv. 2015455		2.51.6240 - Service Tests/System Testing		\$24.00	\$0.00	\$24.00	10/21/20	11379	ASCUCK	\$0.00
INVOICE 102120MA9 TOTALS:				\$24.00	\$0.00	\$24.00				\$0.00
102920MA1	10/28/20	10/28/20	11/27/20							
Acct 00-0001475, Inv. 2015926, Wate		2.50.6240 - Service Tests/System Testing		\$15.00	\$0.00	\$15.00	10/29/20	11397	ASCUCK	\$0.00
Acct 00-0001475, Inv. 2015926, Sewe		2.51.6240 - Service Tests/System Testing		\$527.40	\$0.00	\$527.40	10/29/20	11397	ASCUCK	\$0.00
INVOICE 102920MA1 TOTALS:				\$542.40	\$0.00	\$542.40				\$0.00
102920MA21	10/29/20	10/29/20	11/28/20							
Acct 00-0001475, Inv. 2016066		2.51.6240 - Service Tests/System Testing		\$125.40	\$0.00	\$125.40	10/29/20	11407	ASCUCK	\$0.00
INVOICE 102920MA21 TOTALS:				\$125.40	\$0.00	\$125.40				\$0.00
LEGEND TOTALS:				\$766.80	\$0.00	\$766.80				\$0.00
VENDOR: 237 - UNISOURCE ENERGY SERVICES										\$0.00
102120MA6	10/21/20	10/21/20	11/10/20							

*V - Denotes Voided Check Entries

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date							
Description		Account		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
435334 Town Yard		1.18.6285 - Utilities		\$21.35	\$0.00	\$21.35	10/21/20	11380	ASCUCK	\$0.00
055982 Fire Department		1.18.6285 - Utilities		\$26.62	\$0.00	\$26.62	10/21/20	11380	ASCUCK	\$0.00
235334 Co-Op		1.18.6285 - Utilities		\$21.78	\$0.00	\$21.78	10/21/20	11380	ASCUCK	\$0.00
750593 Civic Center		1.18.6285 - Utilities		\$27.91	\$0.00	\$27.91	10/21/20	11380	ASCUCK	\$0.00
693726 Police Station		1.18.6285 - Utilities		\$21.78	\$0.00	\$21.78	10/21/20	11380	ASCUCK	\$0.00
INVOICE 102120MA6 TOTALS:				<u>\$119.44</u>	<u>\$0.00</u>	<u>\$119.44</u>				<u>\$0.00</u>
UNISOURCE ENERGY SERVICES TOTALS:				<u>\$119.44</u>	<u>\$0.00</u>	<u>\$119.44</u>				<u>\$0.00</u>
VENDOR: 238 - VERDE VALLEY HARDWARE										\$0.00
10720MA5	10/07/20	10/07/20	10/22/20							
2860 Inv 22270 Bushings		2.50.6230 - Rep and Maint - Infrastructure		\$36.28	\$0.00	\$36.28	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 22315 Tape, Oil, Paint & B		1.18.6215 - R&M Building - Properties		\$96.61	\$0.00	\$96.61	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 22429 Paint, Fastners		2.50.6230 - Rep and Maint - Infrastructure		\$16.86	\$0.00	\$16.86	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 22441 Oxygen Tank, Acetylene		2.50.6230 - Rep and Maint - Infrastructure		\$50.84	\$0.00	\$50.84	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 22536 Blacktop Repair Bags		3.30.6260 - Street Supplies		\$153.68	\$0.00	\$153.68	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 22700 Hex Bushing		2.52.6220 - Rep and Maint - Vehicles		\$5.48	\$0.00	\$5.48	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 22754 Faucet		5.40.6185 - Misc Exp - Opr Grants		\$14.27	\$0.00	\$14.27	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 22797 Misc Wiring Supplies		1.14.6250 - Small Tools and Equipment		\$113.94	\$0.00	\$113.94	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 22816 Flex Coupler		2.51.6230 - Rep and Maint - Infrastructure		\$48.31	\$0.00	\$48.31	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 23009 Gas Spout, Cleaner		1.14.6250 - Small Tools and Equipment		\$77.67	\$0.00	\$77.67	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 23011 Faucet, Elbow, Galv		5.40.6185 - Misc Exp - Opr Grants		\$188.72	\$0.00	\$188.72	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 23054 Spur Gear		1.14.6250 - Small Tools and Equipment		\$50.31	\$0.00	\$50.31	10/07/20	11342	ASCUCK	\$0.00
2860 Inv 23308 Graffiti Remover		1.18.6195 - Operating Supplies - Properties		\$13.17	\$0.00	\$13.17	10/07/20	11342	ASCUCK	\$0.00
INVOICE 10720MA5 TOTALS:				<u>\$866.14</u>	<u>\$0.00</u>	<u>\$866.14</u>				<u>\$0.00</u>
VERDE VALLEY HARDWARE TOTALS:				<u>\$866.14</u>	<u>\$0.00</u>	<u>\$866.14</u>				<u>\$0.00</u>
VENDOR: 249 - POSTMASTER										\$0.00
102920MA2	10/28/20	10/28/20	10/28/20							
Postage For Nov/Dec Newsletter		1.11.6200 - Postage		\$57.05	\$0.00	\$57.05	10/29/20	11398	ASCUCK	\$0.00
INVOICE 102920MA2 TOTALS:				<u>\$57.05</u>	<u>\$0.00</u>	<u>\$57.05</u>				<u>\$0.00</u>
POSTMASTER TOTALS:				<u>\$57.05</u>	<u>\$0.00</u>	<u>\$57.05</u>				<u>\$0.00</u>
VENDOR: 252 - NAPA AUTO PARTS										\$0.00
10720MA2	10/07/20	10/07/20	10/27/20							
31380, Inv 235939, 234523 Parks		1.17.6220 - Rep and Maint - Vehicles		\$10.24	\$0.00	\$10.24	10/07/20	11343	ASCUCK	\$0.00
31380, Inv 235939, 234523 Prop		1.18.6220 - Rep and Maint - Vehicles		\$10.24	\$0.00	\$10.24	10/07/20	11343	ASCUCK	\$0.00
31380, Inv 235939, 234523 Water		2.50.6220 - Rep and Maint - Vehicles		\$10.24	\$0.00	\$10.24	10/07/20	11343	ASCUCK	\$0.00
31380, Inv 235939, 234523 Sewer		2.51.6220 - Rep and Maint - Vehicles		\$10.24	\$0.00	\$10.24	10/07/20	11343	ASCUCK	\$0.00
31380, Inv 235939, 234523 Trash		2.52.6220 - Rep and Maint - Vehicles		\$10.28	\$0.00	\$10.28	10/07/20	11343	ASCUCK	\$0.00
31380, Inv 235939, 234523 HURF		3.30.6220 - Rep and Maint - Vehicles		\$10.24	\$0.00	\$10.24	10/07/20	11343	ASCUCK	\$0.00
31380, Inv 235487 Battery		1.14.6220 - Rep and Maint - Vehicles		\$153.78	\$0.00	\$153.78	10/07/20	11343	ASCUCK	\$0.00
INVOICE 10720MA2 TOTALS:				<u>\$215.26</u>	<u>\$0.00</u>	<u>\$215.26</u>				<u>\$0.00</u>

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
Description		Account									
NAPA AUTO PARTS TOTALS:					\$215.26	\$0.00	\$215.26				\$0.00
VENDOR: 255 - CITY OF COTTONWOOD											\$0.00
101320MA2	10/12/20	10/12/20	10/12/20								
Inv 3954 Dispatch Fees FD		1.14.6120 - Dispatch Fees			\$533.67	\$0.00	\$533.67	10/13/20	11363	ASCUCK	\$0.00
INVOICE 101320MA2 TOTALS:					\$533.67	\$0.00	\$533.67				\$0.00
CITY OF COTTONWOOD TOTALS:					\$533.67	\$0.00	\$533.67				\$0.00
VENDOR: 265 - CONTRACT WASTEWATER OPERATIONS											\$0.00
10720MA16	10/07/20	10/07/20	11/01/20								
Inv 1014727 Spring Maintenance Sept		2.50.6110 - Contract Services			\$900.00	\$0.00	\$900.00	10/07/20	11344	ASCUCK	\$0.00
Inv 1014727 WWTP Maintenance Sept.		2.51.6110 - Contract Services			\$3,200.00	\$0.00	\$3,200.00	10/07/20	11344	ASCUCK	\$0.00
Inv 1014727 Fabrication and Install		2.50.6230 - Rep and Maint - Infrastructure			\$1,700.00	\$0.00	\$1,700.00	10/07/20	11344	ASCUCK	\$0.00
INVOICE 10720MA16 TOTALS:					\$5,800.00	\$0.00	\$5,800.00				\$0.00
CONTRACT WASTEWATER OPERATIONS TOTALS:					\$5,800.00	\$0.00	\$5,800.00				\$0.00
VENDOR: 300 - REESE'S TIRE & AUTOTIRE PROS											\$0.00
10720MA27	10/07/20	10/07/20	11/06/20								
Inv 61629 Tires Mount & Balance Uni		1.13.6220 - Rep and Maint - Vehicles			\$42.00	\$0.00	\$42.00	10/07/20	11345	ASCUCK	\$0.00
Inv 61629 Tires & Kit Unit 27		1.13.6220 - Rep and Maint - Vehicles			\$566.62	\$0.00	\$566.62	10/07/20	11345	ASCUCK	\$0.00
INVOICE 10720MA27 TOTALS:					\$608.62	\$0.00	\$608.62				\$0.00
REESE'S TIRE & AUTOTIRE PROS TOTALS:					\$608.62	\$0.00	\$608.62				\$0.00
VENDOR: 339 - CRAIG STEARMAN											\$0.00
101320MA7	10/12/20	10/12/20	10/12/20								
JFD Pension Cashout		4.60.6235 - Retirement Exp FD P&R			\$4,765.09	\$0.00	\$4,765.09	10/13/20	11364	ASCUCK	\$0.00
INVOICE 101320MA7 TOTALS:					\$4,765.09	\$0.00	\$4,765.09				\$0.00
CRAIG STEARMAN TOTALS:					\$4,765.09	\$0.00	\$4,765.09				\$0.00
VENDOR: 370 - LN CURTIS & SONS											\$0.00
102120MA10	10/21/20	10/21/20	11/20/20								
C34064, Inv410160 Wildland Tools		7.25.6276 - Wildlands Exp - Contingency			\$218.47	\$0.00	\$218.47	10/21/20	11381	ASCUCK	\$0.00
INVOICE 102120MA10 TOTALS:					\$218.47	\$0.00	\$218.47				\$0.00
LN CURTIS & SONS TOTALS:					\$218.47	\$0.00	\$218.47				\$0.00
VENDOR: 381 - EXTRICATION CONCEPTS, LLC											\$0.00
101320MA15	10/13/20	10/13/20	11/12/20								
Inv ECI-3358 Holmarto Maintenance I		1.14.6225 - Rep and Maint - Equipment			\$795.00	\$0.00	\$795.00	10/13/20	11365	ASCUCK	\$0.00
Inv ECI-3358 Holmarto Maintenance p		1.14.6225 - Rep and Maint - Equipment			\$233.13	\$0.00	\$233.13	10/13/20	11365	ASCUCK	\$0.00
INVOICE 101320MA15 TOTALS:					\$1,028.13	\$0.00	\$1,028.13				\$0.00

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date							
Description		Account		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
EXTRICATION CONCEPTS, LLC TOTALS:				\$1,028.13	\$0.00	\$1,028.13				\$0.00
VENDOR: 384 - USA BLUE BOOK										\$0.00
102120MA17	10/21/20	10/21/20	11/20/20							
959133 Inv 310951 Y Connector Cable			2.51.6250 - Small Tools and Equipment	\$108.75	\$0.00	\$108.75	10/21/20	11382	ASCUCK	\$0.00
959133 Inv 311211 PM Portable Sampl			2.51.6250 - Small Tools and Equipment	\$3,397.19	\$0.00	\$3,397.19	10/21/20	11382	ASCUCK	\$0.00
INVOICE 102120MA17 TOTALS:				\$3,505.94	\$0.00	\$3,505.94				\$0.00
USA BLUE BOOK TOTALS:				\$3,505.94	\$0.00	\$3,505.94				\$0.00
VENDOR: 399 - YAVAPAI COLLEGE										\$0.00
10720MA8	10/07/20	10/07/20	11/06/20							
Inv S0051266 EMT Hembrough			1.14.6116 - Training & Education	\$1,220.00	\$0.00	\$1,220.00	10/07/20	11346	ASCUCK	\$0.00
Inv S0051266 EMT Rothwell			1.14.6116 - Training & Education	\$1,220.00	\$0.00	\$1,220.00	10/07/20	11346	ASCUCK	\$0.00
INVOICE 10720MA8 TOTALS:				\$2,440.00	\$0.00	\$2,440.00				\$0.00
YAVAPAI COLLEGE TOTALS:				\$2,440.00	\$0.00	\$2,440.00				\$0.00
VENDOR: 412 - JOHN MCDONALD										\$0.00
101320MA4	10/12/20	10/12/20	10/12/20							
Reimbursement For Supplies			1.11.6195 - Operating Supplies - Gen Gov	\$323.17	\$0.00	\$323.17	10/13/20	11366	ASCUCK	\$0.00
Reimbursement For Supplies			1.18.6215 - R&M Building - Properties	\$107.98	\$0.00	\$107.98	10/13/20	11366	ASCUCK	\$0.00
INVOICE 101320MA4 TOTALS:				\$431.15	\$0.00	\$431.15				\$0.00
JOHN MCDONALD TOTALS:				\$431.15	\$0.00	\$431.15				\$0.00
VENDOR: 450 - #1 FOOD STORE										\$0.00
101320MA5	10/12/20	10/12/20	10/12/20							
Fuel, FD			1.14.6145 - Fuel	\$279.15	\$0.00	\$279.15	10/13/20	11367	ASCUCK	\$0.00
INVOICE 101320MA5 TOTALS:				\$279.15	\$0.00	\$279.15				\$0.00
#1 FOOD STORE TOTALS:				\$279.15	\$0.00	\$279.15				\$0.00
VENDOR: 502 - DANA KEPNER CO										\$0.00
101320MA9	10/12/20	10/12/20	11/11/20							
5124, Inv 9022200 Galv Nipples			2.50.6230 - Rep and Maint - Infrastructure	\$38.10	\$0.00	\$38.10	10/13/20	11368	ASCUCK	\$0.00
INVOICE 101320MA9 TOTALS:				\$38.10	\$0.00	\$38.10				\$0.00
DANA KEPNER CO TOTALS:				\$38.10	\$0.00	\$38.10				\$0.00
VENDOR: 548 - NILES RADIO COMMUNICATION										\$0.00
101320MA13	10/13/20	10/13/20	11/12/20							
Inv 145761 Kenwood 6W Portable labo			5.40.6237 - Police Dept Exp - Opr Grants	\$85.00	\$0.00	\$85.00	10/13/20	11369	ASCUCK	\$0.00
Inv 145761 Kenwood 6W Portable part			5.40.6237 - Police Dept Exp - Opr Grants	\$4,811.82	\$0.00	\$4,811.82	10/13/20	11369	ASCUCK	\$0.00

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
Description		Account									
INVOICE 101320MA13 TOTALS:					\$4,896.82	\$0.00	\$4,896.82				\$0.00
NILES RADIO COMMUNICATION TOTALS:					\$4,896.82	\$0.00	\$4,896.82				\$0.00
VENDOR: 577 - JEROME MUNICIPAL COURT											\$0.00
10720MA31	10/07/20	10/07/20	11/06/20								
FY20 Fare Money		1.10.4500 - Miscellaneous Revenues			\$69.34	\$0.00	\$69.34	10/07/20	11347	ASCUCK	\$0.00
INVOICE 10720MA31 TOTALS:					\$69.34	\$0.00	\$69.34				\$0.00
JEROME MUNICIPAL COURT TOTALS:					\$69.34	\$0.00	\$69.34				\$0.00
VENDOR: 625 - YAVAPAI COUNTY EMERGENCY MGMT.											\$0.00
102120MA18	10/21/20	10/21/20	11/20/20								
Inv 92120-7 Emergency Operations Mg		1.11.6110 - Contract Services			\$191.00	\$0.00	\$191.00	10/21/20	11383	ASCUCK	\$0.00
INVOICE 102120MA18 TOTALS:					\$191.00	\$0.00	\$191.00				\$0.00
YAVAPAI COUNTY EMERGENCY MGMT. TOTALS:					\$191.00	\$0.00	\$191.00				\$0.00
VENDOR: 663 - TOWN OF JEROME											\$0.00
10720MA12	10/07/20	10/07/20	10/07/20								
Monthly P&I Sewer Bond Transfer		1.10.2999 - Suspense Account			\$1,450.00	\$0.00	\$1,450.00	10/07/20	11349	ASCUCK	\$0.00
INVOICE 10720MA12 TOTALS:					\$1,450.00	\$0.00	\$1,450.00				\$0.00
10720MA13	10/07/20	10/07/20	10/07/20								
Monthly R&E Sewer Bond Transfer		1.10.2999 - Suspense Account			\$455.00	\$0.00	\$455.00	10/07/20	11348	ASCUCK	\$0.00
INVOICE 10720MA13 TOTALS:					\$455.00	\$0.00	\$455.00				\$0.00
102920MA7	10/28/20	10/28/20	10/28/20								
Monthly P&I Sewer Bond Transfer		1.10.2999 - Suspense Account			\$1,450.00	\$0.00	\$1,450.00	10/29/20	11400	ASCUCK	\$0.00
INVOICE 102920MA7 TOTALS:					\$1,450.00	\$0.00	\$1,450.00				\$0.00
102920MA8	10/28/20	10/28/20	10/28/20								
Monthly R&E Sewer Bond Transfer		1.10.2999 - Suspense Account			\$455.00	\$0.00	\$455.00	10/29/20	11399	ASCUCK	\$0.00
INVOICE 102920MA8 TOTALS:					\$455.00	\$0.00	\$455.00				\$0.00
TOWN OF JEROME TOTALS:					\$3,810.00	\$0.00	\$3,810.00				\$0.00
VENDOR: 704 - MINGUS ELECTRIC											\$0.00
102120MA11	10/21/20	10/21/20	11/20/20								
Inv 1220 Fix Lights at Town Hall La		1.18.6215 - R&M Building - Properties			\$637.50	\$0.00	\$637.50	10/21/20	11384	ASCUCK	\$0.00
Inv 1220 Fix Lights at Town Hall Pa		1.18.6215 - R&M Building - Properties			\$100.71	\$0.00	\$100.71	10/21/20	11384	ASCUCK	\$0.00
INVOICE 102120MA11 TOTALS:					\$738.21	\$0.00	\$738.21				\$0.00
MINGUS ELECTRIC TOTALS:					\$738.21	\$0.00	\$738.21				\$0.00
VENDOR: 716 - AHS RESCUE											\$0.00

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
Description		Account									
102920MA3	10/28/20	10/28/20	11/27/20								
Inv 21263 Mesh Replacement, Prusiks		1.14.6250 - Small Tools and Equipment			\$314.56	\$0.00	\$314.56	10/29/20	11401	ASCUCK	\$0.00
INVOICE 102920MA3 TOTALS:					\$314.56	\$0.00	\$314.56				\$0.00
AHS RESCUE TOTALS:					\$314.56	\$0.00	\$314.56				\$0.00
VENDOR: 725 - DIESEL DIRECT WEST											\$0.00
10720MA4	10/07/20	10/07/20	10/22/20								
18583, Inv 83753729, 83754639 Water		2.50.6145 - Fuel			\$20.12	\$0.00	\$20.12	10/07/20	11350	ASCUCK	\$0.00
18583, Inv 83753729, 83754639 Sewer		2.51.6145 - Fuel			\$20.12	\$0.00	\$20.12	10/07/20	11350	ASCUCK	\$0.00
18583, Inv 83753729, 83754639 Trash		2.52.6145 - Fuel			\$161.04	\$0.00	\$161.04	10/07/20	11350	ASCUCK	\$0.00
INVOICE 10720MA4 TOTALS:					\$201.28	\$0.00	\$201.28				\$0.00
102120MA1	10/21/20	10/21/20	11/05/20								
18583, Inv 837763350 Fuel, Water		2.50.6145 - Fuel			\$11.41	\$0.00	\$11.41	10/21/20	11385	ASCUCK	\$0.00
18583, Inv 837763350 Fuel, Sewer		2.51.6145 - Fuel			\$11.41	\$0.00	\$11.41	10/21/20	11385	ASCUCK	\$0.00
18583, Inv 837763350 Fuel, Trash		2.52.6145 - Fuel			\$91.35	\$0.00	\$91.35	10/21/20	11385	ASCUCK	\$0.00
INVOICE 102120MA1 TOTALS:					\$114.17	\$0.00	\$114.17				\$0.00
DIESEL DIRECT WEST TOTALS:					\$315.45	\$0.00	\$315.45				\$0.00
VENDOR: 735 - FOUR-D LLC											\$0.00
10720MA10	10/07/20	10/07/20	11/06/20								
Inv 772 IT Work Completed Aug & Sep		1.11.6193 - Computer Hardware & Service			\$394.95	\$0.00	\$394.95	10/07/20	11351	ASCUCK	\$0.00
INVOICE 10720MA10 TOTALS:					\$394.95	\$0.00	\$394.95				\$0.00
10720MA9	10/07/20	10/07/20	11/06/20								
Inv 773 IT Consulting Services Sept		1.11.6193 - Computer Hardware & Service			\$7,950.00	\$0.00	\$7,950.00	10/07/20	11351	ASCUCK	\$0.00
INVOICE 10720MA9 TOTALS:					\$7,950.00	\$0.00	\$7,950.00				\$0.00
FOUR-D LLC TOTALS:					\$8,344.95	\$0.00	\$8,344.95				\$0.00
VENDOR: 747 - TOWN OF JEROME PR											\$0.00
10720MA11	10/07/20	10/07/20	10/07/20								
Monthly Payroll Transfer		1.10.2999 - Suspense Account			\$90,000.00	\$0.00	\$90,000.00	10/07/20	11352	ASCUCK	\$0.00
INVOICE 10720MA11 TOTALS:					\$90,000.00	\$0.00	\$90,000.00				\$0.00
102920MA9	10/28/20	10/28/20	10/28/20								
Monthly Payroll Transfer		1.10.2999 - Suspense Account			\$90,000.00	\$0.00	\$90,000.00	10/29/20	11402	ASCUCK	\$0.00
INVOICE 102920MA9 TOTALS:					\$90,000.00	\$0.00	\$90,000.00				\$0.00
TOWN OF JEROME PR TOTALS:					\$180,000.00	\$0.00	\$180,000.00				\$0.00
VENDOR: 748 - SIMS MACKIN, LTD											\$0.00
101320MA10	10/12/20	10/12/20	11/11/20								
Legal Services Sept 2020, GG		1.11.6170 - Legal Exp - Gen Gov			\$838.50	\$0.00	\$838.50	10/13/20	11370	ASCUCK	\$0.00

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
Description		Account									
Legal Services Sept 2020, PZ		1.16.6170 - Legal Exp - P&Z			\$2,944.50	\$0.00	\$2,944.50	10/13/20	11370	ASCUCK	\$0.00
		INVOICE 101320MA10 TOTALS:			\$3,783.00	\$0.00	\$3,783.00				\$0.00
		SIMS MACKIN, LTD TOTALS:			\$3,783.00	\$0.00	\$3,783.00				\$0.00
VENDOR: 754 - ARIZONA BUG COMPANY											\$0.00
102120MA2	10/21/20	10/21/20	11/20/20								
Inv 164666 Pest Control, 10101 Prop		1.18.6110 - Contract Services			\$50.00	\$0.00	\$50.00	10/21/20	11386	ASCUCK	\$0.00
		INVOICE 102120MA2 TOTALS:			\$50.00	\$0.00	\$50.00				\$0.00
		ARIZONA BUG COMPANY TOTALS:			\$50.00	\$0.00	\$50.00				\$0.00
VENDOR: 773 - AZ MUNICIPAL RISK RET POOL P&C											\$0.00
10720MA6	10/07/20	10/07/20	10/07/20								
Claim #BCLM GL 000000106630 Inv 109		1.11.6156 - Insurance Deductible Exp			\$1,000.00	\$0.00	\$1,000.00	10/07/20	11353	ASCUCK	\$0.00
		INVOICE 10720MA6 TOTALS:			\$1,000.00	\$0.00	\$1,000.00				\$0.00
101320MA12	10/12/20	10/12/20	10/12/20								
40001406, Inv 10052020 Renewal		1.11.6155 - Insurance			\$1,816.00	\$0.00	\$1,816.00	10/13/20	11371	ASCUCK	\$0.00
		INVOICE 101320MA12 TOTALS:			\$1,816.00	\$0.00	\$1,816.00				\$0.00
		AZ MUNICIPAL RISK RET POOL P&C TOTALS:			\$2,816.00	\$0.00	\$2,816.00				\$0.00
VENDOR: 793 - TOWN OF JEROME - UTILITIES											\$0.00
10720MA15	10/07/20	10/07/20	11/06/20								
7002-01 Town Hall		1.18.6285 - Utilities			\$216.90	\$0.00	\$216.90	10/07/20	11354	ASCUCK	\$0.00
7015-01 Fire Station		1.18.6285 - Utilities			\$137.56	\$0.00	\$137.56	10/07/20	11354	ASCUCK	\$0.00
7031-01 Library		1.18.6285 - Utilities			\$137.56	\$0.00	\$137.56	10/07/20	11354	ASCUCK	\$0.00
7054-01 Police Station		1.18.6285 - Utilities			\$177.32	\$0.00	\$177.32	10/07/20	11354	ASCUCK	\$0.00
7060-01 Town Yard		1.18.6285 - Utilities			\$137.56	\$0.00	\$137.56	10/07/20	11354	ASCUCK	\$0.00
		INVOICE 10720MA15 TOTALS:			\$806.90	\$0.00	\$806.90				\$0.00
		TOWN OF JEROME - UTILITIES TOTALS:			\$806.90	\$0.00	\$806.90				\$0.00
VENDOR: 806 - PRESCOTT LAW GROUP, PLC											\$0.00
101320MA14	10/13/20	10/13/20	11/12/20								
2011-00019 Inv 3579 Legal, PD		1.13.6172 - Prosecutor Exp			\$1,826.00	\$0.00	\$1,826.00	10/13/20	11372	ASCUCK	\$0.00
		INVOICE 101320MA14 TOTALS:			\$1,826.00	\$0.00	\$1,826.00				\$0.00
		PRESCOTT LAW GROUP, PLC TOTALS:			\$1,826.00	\$0.00	\$1,826.00				\$0.00
VENDOR: 854 - ROKZOO SCREEN PRINTERS											\$0.00
102120MA14	10/21/20	10/21/20	11/20/20								
Inv 5063 Town Crew Uniforms PWALL P		1.17.6280 - Uniform Exp Parks			\$72.03	\$0.00	\$72.03	10/21/20	11387	ASCUCK	\$0.00
Inv 5063 Town Crew Uniforms PWALL P		1.18.6280 - Uniform Exp Properties			\$72.03	\$0.00	\$72.03	10/21/20	11387	ASCUCK	\$0.00
Inv 5063 Town Crew Uniforms PWALL W		2.50.6280 - Uniform Exp Water			\$72.03	\$0.00	\$72.03	10/21/20	11387	ASCUCK	\$0.00

*V - Denotes Voided Check Entries

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date							
Description		Account		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
Inv 5063 Town Crew Uniforms PWALL S		2.51.6280 - Uniform Exp Sewer		\$72.03	\$0.00	\$72.03	10/21/20	11387	ASCUCK	\$0.00
Inv 5063 Town Crew Uniforms PWALL T		2.52.6280 - Uniform Exp Trash		\$72.06	\$0.00	\$72.06	10/21/20	11387	ASCUCK	\$0.00
Inv 5063 Town Crew Uniforms PWALL H		3.30.6280 - Uniform Exp - HURF		\$72.03	\$0.00	\$72.03	10/21/20	11387	ASCUCK	\$0.00
INVOICE 102120MA14 TOTALS:				\$432.21	\$0.00	\$432.21				\$0.00
ROKZOO SCREEN PRINTERS TOTALS:				\$432.21	\$0.00	\$432.21				\$0.00
VENDOR: 910 - WOLFE COMMUNICATIONS										\$0.00
10720MA22	10/07/20	10/07/20	10/07/20							
Inv 10555 Pager Batteries		1.14.6185 - Miscellaneous		\$70.05	\$0.00	\$70.05	10/07/20	11355	ASCUCK	\$0.00
INVOICE 10720MA22 TOTALS:				\$70.05	\$0.00	\$70.05				\$0.00
WOLFE COMMUNICATIONS TOTALS:				\$70.05	\$0.00	\$70.05				\$0.00
VENDOR: 912 - TRAFFICADE WORKZONE SHORING										\$0.00
10720MA23	10/07/20	10/07/20	11/06/20							
Inv 01508640 Message Board COVID		1.11.6160 - COVID Expenses		\$1,137.67	\$0.00	\$1,137.67	10/07/20	11356	ASCUCK	\$0.00
INVOICE 10720MA23 TOTALS:				\$1,137.67	\$0.00	\$1,137.67				\$0.00
102120MA8	10/21/20	10/21/20	11/20/20							
Inv 01510476 Message Board COVID		1.11.6160 - COVID Expenses		\$1,137.67	\$0.00	\$1,137.67	10/21/20	11388	ASCUCK	\$0.00
INVOICE 102120MA8 TOTALS:				\$1,137.67	\$0.00	\$1,137.67				\$0.00
TRAFFICADE WORKZONE SHORING TOTALS:				\$2,275.34	\$0.00	\$2,275.34				\$0.00
VENDOR: 952 - KAIROS HEALTH ARIZONA, INC.										\$0.00
102120MA4	10/21/20	10/21/20	11/20/20							
Health Insurance - Inv 1020-52 Oct		1.10.2406 - Health Insurance		\$13,518.91	\$0.00	\$13,518.91	10/21/20	11389	ASCUCK	\$0.00
INVOICE 102120MA4 TOTALS:				\$13,518.91	\$0.00	\$13,518.91				\$0.00
KAIROS HEALTH ARIZONA, INC. TOTALS:				\$13,518.91	\$0.00	\$13,518.91				\$0.00
VENDOR: 968 - PATRIOT DISPOSAL, INC.										\$0.00
10720MA3	10/07/20	10/07/20	11/06/20							
0040, Inv 2867 Ticket #226164		2.52.6165 - Landfill Tipping Fees		\$389.20	\$0.00	\$389.20	10/07/20	11357	ASCUCK	\$0.00
0040, Inv 2867 Ticket #226574		2.52.6165 - Landfill Tipping Fees		\$396.00	\$0.00	\$396.00	10/07/20	11357	ASCUCK	\$0.00
0040, Inv 2867 Ticket #227000		2.52.6165 - Landfill Tipping Fees		\$355.20	\$0.00	\$355.20	10/07/20	11357	ASCUCK	\$0.00
0040, Inv 2867 Ticket #227426		2.52.6165 - Landfill Tipping Fees		\$342.00	\$0.00	\$342.00	10/07/20	11357	ASCUCK	\$0.00
0040, Inv 2867 Ticket #227841		2.52.6165 - Landfill Tipping Fees		\$343.60	\$0.00	\$343.60	10/07/20	11357	ASCUCK	\$0.00
INVOICE 10720MA3 TOTALS:				\$1,826.00	\$0.00	\$1,826.00				\$0.00
PATRIOT DISPOSAL, INC. TOTALS:				\$1,826.00	\$0.00	\$1,826.00				\$0.00
VENDOR: 999 - ROSA CAYS										\$0.00
102120MA13	10/21/20	10/21/20	11/20/20							
Reimbursement for Sanitizing Wipes		1.11.6160 - COVID Expenses		\$52.79	\$0.00	\$52.79	10/21/20	11390	ASCUCK	\$0.00

*V - Denotes Voided Check Entries

Town of Jerome

AP Vendor Detail Ledger (Range of Posting Dates with Payment Detail)

Ledger as of : 10/1/2020 to 10/31/2020

Invoice Number	Inv.Date	Post.Date	Due.Date		Amount	Discount	Amount Paid	Check Date	Check No.	Bank	Balance
Description		Account									
INVOICE 102120MA13 TOTALS:					\$52.79	\$0.00	\$52.79				\$0.00
ROSA CAYS TOTALS:					\$52.79	\$0.00	\$52.79				\$0.00
VENDOR: ONETIM - ALEXANDRA VOELKER											\$0.00
102920MA14	10/28/20	10/28/20	11/27/20								
Refund of LMP		2.00.2600 - Customer Deposits			\$77.74	\$0.00	\$77.74	10/29/20	11404	ASCUCK	\$0.00
INVOICE 102920MA14 TOTALS:					\$77.74	\$0.00	\$77.74				\$0.00
ALEXANDRA VOELKER TOTALS:					\$77.74	\$0.00	\$77.74				\$0.00
VENDOR: ONETIM - JON MARTINEZ											\$0.00
102120MA7	10/21/20	10/21/20	11/20/20								
Mileage Reimbursement Court Securit		1.12.6037 - Court Security Fund Expenses			\$174.23	\$0.00	\$174.23	10/21/20	11391	ASCUCK	\$0.00
Reimbursement For Meals		1.12.6037 - Court Security Fund Expenses			\$54.56	\$0.00	\$54.56	10/21/20	11391	ASCUCK	\$0.00
INVOICE 102120MA7 TOTALS:					\$228.79	\$0.00	\$228.79				\$0.00
JON MARTINEZ TOTALS:					\$228.79	\$0.00	\$228.79				\$0.00
VENDOR: ONETIM - KYLE KELT											\$0.00
102920MA6	10/28/20	10/28/20	11/27/20								
Reimbursement of P&Z Fees		1.10.4041 - Planning & Zoning Fees			\$100.00	\$0.00	\$100.00	10/29/20	11405	ASCUCK	\$0.00
INVOICE 102920MA6 TOTALS:					\$100.00	\$0.00	\$100.00				\$0.00
KYLE KELT TOTALS:					\$100.00	\$0.00	\$100.00				\$0.00
VENDOR: ONETIM - MANDY WORTH											\$0.00
102920MA11	10/28/20	10/28/20	11/27/20								
Mileage Reimbursement NACOG		1.11.6275 - Travel			\$172.50	\$0.00	\$172.50	10/29/20	11403	ASCUCK	\$0.00
Lodging Reimbursement NACOG		1.11.6116 - Training & Education			\$161.91	\$0.00	\$161.91	10/29/20	11403	ASCUCK	\$0.00
Meal Reimbursement NACOG		1.11.6116 - Training & Education			\$20.00	\$0.00	\$20.00	10/29/20	11403	ASCUCK	\$0.00
INVOICE 102920MA11 TOTALS:					\$354.41	\$0.00	\$354.41				\$0.00
MANDY WORTH TOTALS:					\$354.41	\$0.00	\$354.41				\$0.00
LEDGER TOTALS:					\$295,127.17	\$0.00	\$295,127.17				\$0.00

For the meeting of November 10, 2020

MONTHLY STAFF REPORT TO THE MAYOR AND COUNCIL

Candace B. Gallagher, Town Manager/Clerk

My activities over the past month included:

- Continuation of COVID-19 activities, including conference calls twice a week with local, County, State and Federal officials.
- Completed final close out documents and reimbursement request for USDA Rural Development grant for the windows at the Hotel Jerome.
- Submitted initial documents for new CDBG grant for Dundee/Deception/Holly waterline improvements.
- Submitted preliminary information to DEMA regarding COVID expenses to date.
- Submitted report to prosecutor regarding illegal use of Town logo.
- Drafted two versions of ordinance regarding recreational marijuana (one permitting retail and one prohibiting retail).
- Continued maintenance of Town of Jerome website and Facebook page.
- Continued to meet and/or speak individually with residents, businesspeople, contracted professionals, members of the governing body, and staff regarding various issues.
- Continued to field and respond to day-to-day issues requiring my attention, including public records requests, Planning and Zoning issues, personnel matters and more.

Following are a water flows report and an accounting of sales tax revenues through September. As always, please feel free to contact me with any questions or concerns.

Candace

WATER FLOWS REPORT

Some fluctuations due to turnout or turn-in of springs as needed.

Reading Date		WALNUT GPM	VERDE GPM
2019	7-Oct	40	212
	14-Oct	43.5	212
	21-Oct	47.6	216
	31-Oct	39.5	232
	5-Nov	39.5	232
	14-Nov	39.5	192
	25-Nov	36	199
	2-Dec	39.5	172
	9-Dec	47.6	301
	11-Dec	39.5	70
	16-Dec	39.5	44
	17-Dec	39.5	76
	23-Dec	39.5	80
	30-Dec	47.6	220
2020	3-Jan	47.6	190
	6-Jan	43.5	178
	10-Jan	43.5	170
	13-Jan	43.5	158
	17-Jan	43.5	146
	22-Jan	47.5	144
	3-Feb	52	136
	10-Feb	56.5	125
	18-Feb	55.6	118
	24-Feb	56.5	120
	2-Mar	61	138
	9-Mar	61	135
	16-Mar	414	330
	17-Mar	277	Turned out
	23-Mar	211	↓
	27-Mar	265	↓
	30-Mar	328	↓
	3-Apr	476	↓
	6-Apr	181	↓
	10-Apr	163	↓
	13-Apr	154	↓
	17-Apr	211	↓
	20-Apr	211	↓
	24-Apr	200	↓
	27-Apr	191	↓
	1-May	191	↓
	4-May	181	↓
	8-May	172	↓
	11-May	181	↓
	14-May	163	↓
	18-May	154	↓
	22-May	No reading	219
	26-May	146	190
	29-May	138	190
	4-Jun	130	170
	10-Jun	123	154
	18-Jun	108	145
	22-Jun	108	150
	25-Jun	108	150
	29-Jun	108	140
	6-Jul	89	220
	16-Jul	83	212
	20-Jul	83	214
	24-Jul	89	220
	27-Jul	89	210
	3-Aug	83	208
	10-Aug	77	200
	17-Aug	71	204
	21-Aug	71	199
	25-Aug	83	215
	3-Sept	66	201
	9-Sept	77	200
	15-Sept	77	200
	21-Sept	71	205
	28-Sept	66	197
	5-Oct	71	190
	12-Oct	67	190
	19-Oct	66	190
	26-Oct	77	182

TOWN OF JEROME, AZ
CITY SALES TAXES PER ADOR ONLINE REPORTS
SALES TAX REVENUES

	FY2021 BUDGET	FY2021 actual	Budget +/-	FY2020 actual	Compared to prior year +/-
July	60,300	84,065	23,765	88,280	(4,215)
August	63,200	81,343	18,143	94,652	(13,309)
September	57,100	77,127	20,027	77,333	(206)
October	76,500			94,743	
November	86,300			106,938	
December	65,500			103,563	
January	69,200			82,098	
February	50,800			72,541	
March	60,000			84,006	
April	94,700			61,358	
May	96,400			17,842	
June	70,000			56,019	
Total YTD	850,000	242,535	61,935	939,373	(17,730)

TOWN OF JEROME, AZ

Comparison of Restaurant/Bar, Accomodation and Retail Sales Tax Revenues
FY2020 vs FY2019

	RESTAURANTS/BARS (Bus Class 11)			ACCOMMODATION (Bus Class 44/144/325/344)			RETAIL (Bus Class 17)		
	FY2021 actual	FY2020 actual	+/-	FY2021 actual	FY2020 actual	+/-	FY2021 actual	FY2020 actual	+/-
July	30,997	39,559	(8,562)	12,545	11,815	730	31,882	29,123	2,759
August	27,677	33,614	(5,937)	12,215	12,450	(235)	26,169	32,101	(5,932)
September	28,733	29,346	(613)	12,548	11,761	787	27,630	28,177	(547)
October		32,816			12,094			37,691	
November		34,381			17,329			45,646	
December		39,638			13,276			43,142	
January		26,239			9,493			34,031	
February		27,273			9,242			26,862	
March		26,192			12,659			31,545	
April		21,873			7,097			23,466	
May		2,029			986			8,853	
June									
Total YTD		312,960	(15,112)		118,202	1,282		340,637	(3,720)

Added 1% Bed Tax

		<u>TOTAL TO DATE</u>
July	1,930	1,930
August	1,879	3,809
September	1,930	5,739
October		
November		
December		
January		
February		
March		
April		
May		
June		

**JEROME MUNICIPAL COURT
CASH REPORT
MONTH OF OCTOBER 2020**

TOWN REVENUE

TRAFFIC & CRIMINAL FINES	\$	3,606.75
DEFENS DRIVING DIVERSION FEE	\$	-
ATTORNEY FEES REIMBURSEMENT	\$	181.16
DEFAULT FEE	\$	210.00
OFFICER SAFETY EQUIPMENT - PD	\$	109.19
DEFERRED PROSECUTION FEE	\$	-
LICENSE PLATE VIOLATION	\$	43.10
WARRANT FEE&OVERPAYMENT FORFEIT		
COURT SECURITY FEE	\$	480.00
TOTAL TOWN REVENUE	\$	4,630.20

COURT REVENUE			YTD
COURT ENHANCEMENT FEE	\$	20.00	\$ 44,674.68

REMITTED DIRECT	CLEAN ELECTION FUND (16-949D;16-954C)	\$	340.72
	CRIMINAL JUSTICE ENHANCE FUND	\$	1,464.53
	DNA STATE 3%	\$	26.88
	FARE DELINQUENCY FEE	\$	35.00
	FARE SPECIAL COLLECTION	\$	82.08
	FARE ENHANCED SPEC COLLECT FEE	\$	49.00
	FARE ENHANCED DELINQUENCY FEE	\$	609.53
	FILL THE GAP 7%	\$	238.44
	DUI ABATEMENT FUND	\$	250.00
	JUDICIAL COLLECTION ENHANCE FUND	\$	58.50
	EXTRA DUI ASSESSMENT	\$	1,000.00
	PEACE OFFICER TRAINING EQUIP FUND	\$	97.53
	MED SERV ENHANCE 11% (36-2219.01;23-116.0)	\$	442.88
	2011 ADDTNL ASSMT-STATE TRSR	\$	218.39
	PRISON CONSTRUCTION	\$	1,934.00
	PROBATION SURCHARGE	\$	561.17
	ADPS FORENSIC FUND	\$	177.89
	PUBLIC SAFETY EQUIPMENT FUND	\$	1,041.00
	VICTIM COMPENSATION/ASSIST FUND	\$	85.80
	VICTIMS RIGHTS ENFOR ASSMT FUND	\$	54.58
	VICTIM'S RIGHT FUND	\$	142.63
	TOTAL STATE REVENUE	\$	8,910.55

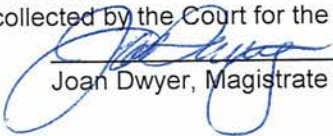
REMITTED DIRECT	JAIL (INCARCERATION FEES)	\$	18.84
	2011 ADDTNL ASSMT - CNTY TRSR	\$	27.29
	TOTAL COUNTY REVENUE	\$	46.13

LOCAL JCEF/ TIME PAYMENT ALLOCATION RECEIVED			YTD
TITLE 22 Fees	\$	31.50	\$ 13,618.73
TOTAL JCEF FEES	\$	31.50	

UNAPPLIED PAYMENTS	\$	-
OVERPAYMENT REFUNDS		
TOTAL RECEIPTED FOR MONTH	\$	13,638.38

BONDS	Received During the Month	\$	-
	Bonds Forfeited to Pay Fines	\$	-
	Open Bonds	\$	500.00

I, Joan Dwyer, Magistrate for the Town of Jerome, do hereby certify that the foregoing is a true & accurate account of the funds collected by the Court for the month of October 2020


Joan Dwyer, Magistrate

COURT REVENUE

2020-2021 TOWN REVENUE

June - May

SECURITY

	Gross	PD Equip Fund	FEE	NET to Town
June	\$ 9,121.19	\$ 241.29	\$ 1,160.00	\$ 8,879.90
July	\$ 7,501.14	\$ 176.32	\$ 915.00	\$ 6,409.82
August	\$ 6,387.90	\$ 129.02	\$ 640.00	\$ 5,618.88
Sept	\$ 4,860.39	\$ 135.16	\$ 675.00	\$ 4,050.23
October	\$ 4,630.20	\$ 109.19	\$ 480.00	\$ 4,041.01
November				
December				
2020				
January				
February				
March				
April				
May				

TOTAL \$ 32,500.82 \$ 790.98 \$ 3,870.00 \$ 28,999.84

NOTE:

Month noted in column reflects prior month revenue
i.e., June column is money received in May

Other Court Monies (as of 10-31--2020)

JCEF	\$ 13,618.73
Fill the Gap	\$ 7,545.64
Court Enhancement Funds 2	\$ 44,674.68
Court Enhancement Funds 1	\$ 31,392.97
2008-2011	\$ 1,200.69
Fare Money	

funds transferred to Court on 10-19-2017

TOTAL

\$ 98,432.71

CHARGES

Civil Traffic Criminal Criminal Traffic DUI

*CEF

\$ 47.00	67	6	2	0
\$ 139.24	23	2	2	0
\$ 43.70	42	5	5	2
\$ -	32	7	0	7
\$ 20.00	37	1	2	0

\$ 249.94 201 21 11 9

*Court Enhancement Fund



Jerome Volunteer Fire Department

P.O. Box 1025 Jerome, AZ 86331 Tel. (928) 649-3034 Fax (928) 649-3039

E-mail: blair@jeromefire.us

Fire Chief's Report Month: October Year: 2020

Calls by Type	Number	Resident	Non-Resident
EMS Calls	13	4	9
Residential Fire	0	0	0
Commercial Fire	1	1	0
Wildland	1	0	1
Still Assignment	5	3	2
Special Duty	21	9	12
Snake Removal	0	0	0
Tech Rescue / rope	1	0	1
MVA/Rescue	4	0	4
HazMat	0	0	0
Dispatch Error	0	0	0
Totals:	46	17	29
Total Calls Chief on Scene	38		
Total JFD Meetings Chief Attended	6		

Department Meetings and Drills	Number
Officer's Meeting	0
Work Session	1
Rope Drill	1
Drills	4

JVFD Hours Worked (No Salaried Hours Included in these totals)	Total Hours:
--	--------------

Fire Chief Meetings	Date
Fire Chief's Meeting	10-7-20
UNS Gas Training	10-8-20
Pipe Line Safety	10-13-20
Council meeting	10-13-20
Yavapai County Chiefs meeting	10-29-20

Education, Yavapai College Spring Semester

- The fall semester for the college has just finished up. Currently we have 1 new recruit who has finished the EMT basic course: Chad Hembrough.
- Keith Lazaro finished his EMT basic course at the end of December, and Sean Bauer at the end of May last year. They still need to test with the national registry to become EMTs.

Additional Training:

- On October 1 from 5PM to 7PM we conducted our business meeting and monthly truck checks.
- On October 8 from 5PM to 7PM we performed hose testing with Blair.

- On October 10 Saturday from 9AM to 11PM we had a Work Session with Blair.
- On October 16 from 5PM to 7PM we performed hose testing and EMS training with Blair.
- On October 22 from 5PM to 7PM we did hose testing and deployment training with Matt Poe.
- On October 24 from 9AM to 12PM we did rope training fundamentals with Kerry Lee.
- On October 29 from 5PM to 7PM we did Narcan and stop-the-bleed training with Muma.

Using social distancing practices, we have been conducting regular weekly training to ensure continuity within the Fire Department.

Coronavirus update

- In preparation for the coronavirus, the Fire Department has provided additional training and protocols for personnel to limit exposure at the station and out on calls. The meeting room, door handles, and vehicles have been wiped down daily. At this point we have boxes of gloves, N95 masks, eye protection, gowns, biohazard suits, and hand sanitizer in all the vehicles and around the station. Jerome is in a unique situation with a limited population, and with few tourists, it is easy for us to social distance during these times. I have ordered and received non-contact, infrared body thermometers. Right now we just have 6; I have issued 1 to Jerome PD, and Jerome Fire has 5 to monitor personnel and patients with the coronavirus. In addition, we've also received our ultraviolet lighting that we can use to sterilize entire rooms and vehicles. Masks are now required for all meetings.

Department Affairs and Ongoing Projects

- Due to the lack of moisture, the Jerome Fire Department and surrounding agencies will stay in Stage 1 fire restrictions until further notice.
- Our September call volume was up to 46 calls over last year's September calls of 43. Our year-to-date call volume is 342 compared with 539 calls YTD 2019. Our Fire Department personnel are performing their tasks in a professional manner with no injuries occurring.
- Jerome Fire Department was deployed for Brush 111 to the Ocotillo Fire on May 30 and made \$6762.00. It was also deployed to the Aquila Fire on June 23 and made \$3773.00. The truck was deployed to the Polles Fire near Payson on July 5 and made \$8,771.00. It was also deployed to the Pig Fire on August 1 and the truck made \$5,047. The truck was also deployed to the Goldfield Fire, making \$2,205. It was also deployed to the Constellation and the Bozarth Fires making \$8,134 and \$4,851, respectively.
- On September 25th we were deployed to the Sears fire near Cave Creek fire, the crew was out for six days with Jerome Fire Department invoicing \$15,427.98. The truck made \$8,771.00
- We were deployed to the Encinos fire on the October 8. The crew was out for 9 days with a total invoice of \$23,911.44, with the truck making \$13,720. From there the crew was reassigned to the Horse fire and worked there from the 17th to the 22nd, with the invoice totaling \$16,277.37. The truck brought in \$8,820.
- We have an invoiced total of \$106,875.79, with the truck itself making \$70,855 in revenue. The rest went to wages, hotels, and food. Jerome Fire Department has utilized \$18,000 with the purchase of a new Polaris for the town crew and \$3,000 worth of materials bought under wildland contingency. The council approved \$20,000 for a new engine for car 112, station staffing for fire department companies, and additional equipment. This leaves approximately \$31,000 that has not been earmarked yet, left in wildland contingency.
- The brush truck will be out on more deployments at least into December as there is no moisture forecast soon. This year has been the driest, hottest, most active fire season in modern history. It is good there is no such thing as climate change.
- The town has currently been paid for all outstanding invoices for the fires except for the Encinos and Horse Fires.
- The Chamber of Commerce and Narcotics Anonymous meetings are still being held at Station 11.
- Our annual fire hydrant testing and hose testing is near completion

Prevention

- We have had a total of zero Firewise activities with zero loads to the burn pile. We have closed the brush pile until there is enough moisture for us to be able to safely burn.
- Keep in mind that Jerome Fire Department is the only nationally recognized Firewise community in the Verde Valley.
- Also, the Fire Department has brought its ISO rating down to a 4 from a 6, since I started as fire chief.
- We have been using grant monies from PAWIC in the amount of \$21,000 for fuel abatement work with a crew of two.
- Performed 6 fire inspections for business licenses.
- JFD responded to a grease fire at the Asylum restaurant. We had them shut down for a few hours as they properly cleaned, and I reinspected before they reopened.
- Had an adult probation crew of 6 out to pick up trash and do weed eating on 89A.

Other projects the chief has been involved with since 2008

- CDBG installation both water tanks on Sunshine Hill. The construction of a Road and reconstruction of the water tanks on Cleopatra Hill. Most recently assisting with the grant for the water lines on Dundee Ave and Deception Lane.
- Worked on grants from Freeport Mac Moran heading up projects for the horseshoe pit area chase way. The sidewalk from the fire station to the 300 level. The curb and gutter for the paid parking.
- Yavapai Apache nation grant for improvements to both upper and middle park.
- Submitted the idea for paid parking in 2008 and since then did 3 surveys to show feasibility of the project.
- Implemented a prevention program and adopted new fire codes.
- Assisted with FEMA grants receiving a new truck, extrication equipment, air packs, SCBA compressor, turnouts and hose.
- 100 club grants receiving new turnouts and a Thermo imager
- Firehouse Sub grant receiving turnouts.
- RFA grants receiving wildland gear.
- Oversaw the public works Department in between 4 public works directors and more.

Incident	Date	Time	Day	Select Type	Additional Info	#
119	10/1/20	9:32:00 AM	Thurs	EMS Non-Resident	Difficulty breathing	6
20-180	10/1/20	8:00:00 AM	Thurs	Special Duty Non-Resident	Assist adult probation with traffic control	1
20-181	10/2/20	9:30:00 AM	Fri	Special Duty Non-Resident	Assist PD with oversized	1
20-182	10/2/20	4:30:00 PM	Fri	Special Duty Non-Resident	Assist JPD with traffic stop	1
20-183	10/3/20	11:15:00 AM	Sat	Special Duty Non-Resident	Assist citizen with stuck vehicle	4
20-184	10/3/20	4:00:00 PM	Sat	EMS Non-Resident	Basic first aid 43 YOF	1
120	10/4/20	10:12:00 AM	Sun	MVA/Rescue Non-Resident	Motorcycle accident	7
20-185	10/4/20	10:30:00 AM	Sun	EMS Non-Resident	Basic first aid 65 YOF	3
121	10/4/20	4:32:00 PM	Sun	MVA/Rescue Non-Resident	Collision w/ ejection; 2 vehicles	9
20-186	10/4/20	5:20:00 PM	Sun	Special Duty Resident	Assist w/ disabled vehicle	3
20-187	10/4/20	5:30:00 PM	Sun	Special Duty Resident	Assist w/ traffic control	5
20-188	10/6/20	12:00:00 AM	Tue	Special Duty Resident	Removed road hazards - rock slide	2
20-189	10/6/20	12:30:00 PM	Tue	Special Duty Non-Resident	Assist JPD w/ vehicle escort	2
122	10/7/20	1:46:00 PM	Wed	Commercial Fire	Grease fire	12
20-190	10/8/20	11:45:00 AM	Thurs	Special Duty Non-Resident	Assist Wildland crew w/ deployment	6
123	10/8/20	12:20:00 PM	Thurs	Wildland	Encino Fire	3
124	10/9/20	1:08:00 AM	Fri	EMS Non-Resident	20 YOM seizure	3
125	10/9/20	11:04:00 AM	Fri	EMS Non-Resident	35 YOM Unknown medical problem	6

20-191	10/9/20	12:00:00 PM	Fri	Special Duty Resident	Checked on down line	1
126	10/10/20	12:55:00 AM	Sat	MVA/Rescue Non-Resident	Assist JPD w/ traffic	4
127	10/10/20	10:45:00 AM	Sat	Tech Rescue Non-Resident	21 YOF Back pain/ Stuck on trail	9
128	10/10/20	12:49:00 PM	Sat	Special Duty Non-Resident	Pedestrian in distress	2
20-192	10/10/20	1:50:00 PM	Sat	Special Duty Resident	Cleared overflowing dumpster	2
129	10/10/20	9:02:00 PM	Sat	EMS Non-Resident	Laceration to head M in 30s	6
130	10/11/20	6:28:00 PM	Sun	Still Assignment Non-Resident	Campfire 100 ft off roadway	7
20-193	10/11/20	11:00:00 AM	Sun	Special Duty Resident	Assist Public works with Garbage	2
20-194	10/12/20	1:00:00 PM	Mon	Special Duty Non-Resident	Assisted JPD with traffic control	1
131	10/12/20	2:44:00 PM	Mon	EMS Non-Resident	51 YOF slip and fall	7
20-195	10/13/20	8:00:00 AM	Tues	Special Duty Resident	Skunk removal	2
20-196	10/16/20	1:30:00 PM	Fri	Special Duty Non-Resident	Assist JPD w/ oversized	5
132	10/17/20	8:16:00 AM	Sat	EMS Resident	68 YOF fall	6
20-197	10/18/20	11:00:00 AM	Sun	MVA/Rescue Non-Resident	Assist JPD w/ disabled vehicle	1
133	10/19/20	10:27:00 AM	Mon	EMS Resident	68 YOF sick person	6
20-198	10/19/20	9:00:00 AM	Mon	Special Duty Resident	Skunk removal	1
20-199	10/21/20	1:30:00 PM	Wed	Special Duty Non-Resident	Assisted JPD with an oversized truck	1
20-200	10/24/20	10:15:00 AM	Sat	EMS Resident	Basic first aid 29 YOM	2
20-201	10/24/20	1:00:00 PM	Sat	EMS Non-Resident	Basic first aid 42 YOM	2
20-202	10/23/20	7:30:00 PM	Fri	Still Assignment Resident	Put out illegal fire on steps	1
20-203	10/24/20	8:00:00 PM	Sat	Still Assignment Resident	Put out illegal fire	1
20-204	10/25/20	3:00:00 PM	Sun	Special Duty Resident	Assist JPD w/ disabled vehicle	2
134	10/28/20	12:35:00 PM	Wed	EMS Non-Resident	47 YOF with injuries due to a fall	8
135	10/29/20	12:35:00 PM	Thurs	EMS Resident	80 YOF with Injuries due to a fall	2
20-205	10/29/20	2:15:00 PM	Thurs	Still Assignment Non-Resident	Checked on smoking truck brakes	3
20-206	10/29/20	2:45:00 PM	Thurs	Special Duty Non-Resident	Assisted JPD oversized escort	3
20-207	10/31/20	6:30:00 PM	Sat	Still Assignment Resident	Put out illegal fire	2
20-208	10/31/20	6:45:00 PM	Sat	Special Duty Non-Resident	Assisted JPD with an illegal parked vehicle	2

Incident	Date	Time	Day	Select Type	Additional Info	#
----------	------	------	-----	-------------	-----------------	---

October 2020 Burn Pile Log

Date	Address	Adult Prob.	Firewise	# Loads	# crew	# Hrs.	Total Hrs.
		0	0	0	0	0	0
	Jerome Citizen Hours- 0	Adult Prob.	Firewise	# Loads	# Crew	# Hrs.	Total # Hrs

Thank you to all Jerome residents and property owners who have helped in the creation of defensible space around their properties by removing dead and overgrown trees, brush, and grasses.

**Thank you for your continuing support,
Rusty Blair Chief JVFD**



Founded 1876
Incorporated 1899

TOWN OF JEROME, ARIZONA
POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943

November 2020 staff report for October activity submitted by Kristen Muenz

Utilities

Current debt (45 days past due):

Twenty-seven accounts were on the shut-off list at the beginning of October. No accounts were sent Yellow Tags and no shutoffs were completed per our pandemic relief. One of the accounts is on a monthly payment plan. Three accounts on the shut-off list are in “closed” status. Those three closed accounts were sent to collections and the accounts marked as “bad debt” in our billing system.

Balance owed on these accounts from September billing: \$12,454.45

Balance owed at end of October: \$9,318.22

A copy of the October AR Aging report is attached.

Business Licenses

Applications submitted: 9

Issued: 10

In process: 6

Renewal reminders went out to 9 businesses whose licenses expire at the end of October and we received additional applications for 3 new businesses.

Rentals

Two renters have not made a payment in October. The third renter that had fallen behind by one month was able to make 2 payments in October and is now current on payments. The renter behind the most has not paid rent since March, or 8 months of non-payment.

Charge Item Summary By User Type

ChargeItem	Future	Current	Age2	Age3	Age4	Age5	Balance
UserType: Commercial							
Credit	\$0.00	(\$382.96)	(\$137.56)	(\$137.56)	(\$137.56)	(\$1,044.80)	(\$1,840.44)
Water	\$0.00	\$4,127.70	\$545.83	\$121.33	\$82.34	\$712.22	\$5,589.42
Sewer	\$0.00	\$5,203.66	\$700.30	\$155.67	\$105.65	\$1,214.63	\$7,379.91
Trash	\$0.00	\$6,994.76	\$844.10	\$223.50	\$178.78	\$1,875.23	\$10,116.37
Tax	\$0.00	\$404.22	\$53.73	\$11.94	\$8.11	\$82.76	\$560.76
Misc	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Late Fee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,160.00	\$2,160.00
LMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
UserType: Commercial (8)-----							
Subtotal --->	\$0.00	\$16,347.38	\$2,006.40	\$374.88	\$237.32	\$5,000.04	\$23,966.02
UserType: Residential							
Credit	\$0.00	(\$206.12)	(\$300.98)	(\$245.70)	(\$1,096.18)	(\$2,072.47)	(\$3,921.45)
Water	\$0.00	\$8,358.80	\$2,081.99	\$889.51	\$469.88	\$2,576.31	\$14,376.49
Sewer	\$0.00	\$7,559.35	\$2,257.24	\$800.74	\$383.41	\$3,693.70	\$14,694.44
Trash	\$0.00	\$6,005.06	\$1,862.70	\$700.28	\$355.87	\$2,311.64	\$11,235.55
Tax	\$0.00	\$812.09	\$204.40	\$87.22	\$45.93	\$339.70	\$1,489.34
Misc	\$0.00	\$30.00	\$15.00	\$0.00	\$0.00	\$93.55	\$138.55
Late Fee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,809.45	\$5,809.45
LMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
UserType: Residential (8)-----							
Subtotal --->	\$0.00	\$22,559.18	\$6,120.35	\$2,232.05	\$158.91	\$12,751.88	\$43,822.37
UserType: Municipal							
Credit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Water	\$0.00	\$169.69	\$0.00	\$0.00	\$0.00	\$0.00	\$169.69
Sewer	\$0.00	\$217.70	\$0.00	\$0.00	\$0.00	\$0.00	\$217.70
Trash	\$0.00	\$185.92	\$0.00	\$0.00	\$0.00	\$0.00	\$185.92
Tax	\$0.00	\$16.69	\$0.00	\$0.00	\$0.00	\$0.00	\$16.69
Misc	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Late Fee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
LMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
UserType: Municipal (8)-----							
Subtotal --->	\$0.00	\$590.00	\$0.00	\$0.00	\$0.00	\$0.00	\$590.00

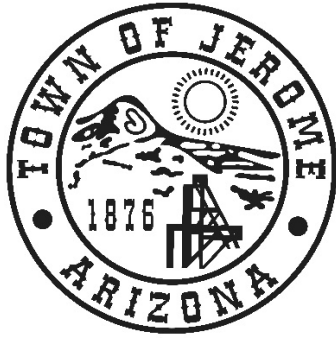
Charge Item Summary By User Type

ChargeItem	Future	Current	Age2	Age3	Age4	Age5	Balance
=====							
UserType: Commercial							
Credit	\$0.00	(\$116.95)	(\$60.00)	(\$60.00)	(\$10.00)	\$0.00	(\$246.95)
Misc	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Late Fee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Rent	\$0.00	\$4,738.16	\$296.17	\$296.02	\$243.20	\$1,320.16	\$6,893.71
Gas	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Electric	\$0.00	\$81.01	\$0.00	\$0.00	\$0.00	\$0.00	\$81.01
Utilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
LMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
UserType: Commercial (8)-----							
Subtotal --->	\$0.00	\$4,702.22	\$236.17	\$236.02	\$233.20	\$1,320.16	\$6,727.77
UserType: Default							
Credit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Misc	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
LMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
UserType: Default (3)-----							
Subtotal --->	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Total (35)=====							
=====>	\$0.00	\$44,198.78	\$8,362.92	\$2,842.95	\$629.43	\$19,072.08	\$75,106.16

Charge Item Summary

ChargeItem	Future	Current	Age2	Age3	Age4	Age5	Balance
Credit	\$0.00	(\$706.03)	(\$498.54)	(\$443.26)	(\$1,243.74)	(\$3,117.27)	(\$6,008.84)
Water	\$0.00	\$12,656.19	\$2,627.82	\$1,010.84	\$552.22	\$3,288.53	\$20,135.60
Sewer	\$0.00	\$12,980.71	\$2,957.54	\$956.41	\$489.06	\$4,908.33	\$22,292.05
Trash	\$0.00	\$13,185.74	\$2,706.80	\$923.78	\$534.65	\$4,186.87	\$21,537.84
Tax	\$0.00	\$1,233.00	\$258.13	\$99.16	\$54.04	\$422.46	\$2,066.79
Misc	\$0.00	\$30.00	\$15.00	\$0.00	\$0.00	\$93.55	\$138.55
Late Fee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,969.45	\$7,969.45
Rent	\$0.00	\$4,738.16	\$296.17	\$296.02	\$243.20	\$1,320.16	\$6,893.71
Gas	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Electric	\$0.00	\$81.01	\$0.00	\$0.00	\$0.00	\$0.00	\$81.01
Utilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
LMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Total (12)	=====	=====	=====	=====	=====	=====	=====
=====>	\$0.00	\$44,198.78	\$8,362.92	\$2,842.95	\$629.43	\$19,072.08	\$75,106.16

Customer Count = 380



TOWN OF JEROME, ARIZONA
POST OFFICE BOX 335, JEROME,
ARIZONA 86331

(928) 634-7943 FAX (928) 634-0715

OCTOBER 2020 STAFF REPORT

From: Melanie Atkin, Accounting Clerk

To: The Mayor and Council

Accounting Duties:

- ❖ Processed the weekly imports, which accounts for A/R transactions made with checks, credit cards, and cash.
- ❖ Made the weekly bank deposits.
- ❖ Processed two payrolls through ADP, ran payroll reports, completed various ledgers with the report's information, and posted payroll into the general ledger.
- ❖ Made necessary monthly transfers for Admin Charges and Water/Sewer transfers from the Parking Fund.
- ❖ Ran monthly fund, departmental, and vendor reports.
- ❖ Created a September summary budget to actual report for General, Utility, Road, and Parking funds.
- ❖ Attended a four-day governmental accounting webinar with GFOA (Government Finance Officers Association).
- ❖ Beginning the process of preparing for the audit. Created spreadsheets and ran reports to send to our CPA. The audit is set for December 15th – 17th.

HR Duties:

- ❖ Helped some employees with general health insurance questions.
- ❖ Finalized two recent full-time hire's health benefits enrollments.



Founded 1876
Incorporated 1899

TOWN OF JEROME, ARIZONA

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 FAX (928) 634-0715 m.boland@jerome.az.gov

Celebrating Our 120th Anniversary
1899 - 2020

OCTOBER 2020 PUBLIC WORKS MONTHLY REPORT

NORMAL WEEKLY DUTIES

- TRASH: Monday, Wednesday, and Friday.
- PARKS: Clean parks, weed whip, and mow.
- RECYCLE: Pickup cardboard and glass Tuesdays and Thursdays and go to recycle on Thursdays.
- WATER: Read water meters on Thursdays.
- HURF: Clean curb and gutters, weed whip.
- SEWER: Repair lines.

OTHER PROJECTS

- Pick up, haul, process (add water to), and take dirt to the garden.
- Repair rock wall on County and UVX Rds.
- Clean gutter on Clark St.
- Water line repair at 700 Hull and at Spook Hall.
- Snake sewer on Fourth St. and Center Ave., Diaz, and repair break below Hampshire.
- Fix the noisy lid on Clark St. above Town Hall.
- Fix some old power equipment and get others ready to sell.
- Repair insulation on pipes at the tanks on Sunshine Hill.
- Install 5 MPH signs on Allen Springs Rd.
- Picked up chlorine and hauled it to the sewer plant and Walnut springs.
- Worked on the blue Polaris and the Gator; Polaris is waiting on a new starter.
- Installed a vent pipe on the bathroom at the Town yard, only took 8 yrs. In fairness, no one knew the original builders did not put one in. Anyways, no more smell
- Filled potholes on Verde St.
- Pulled and replaced tires on the woodchipper and "radar" trailer.
- After having others "organize" our shop to no avail, I am trying to reorganize it to fit our needs ... again, so we had some time to go through our inventory, order parts we need to have in stock. I was able to work with Tracy from Dana Kepner to find pieces to parts that had been "robbed" from for different jobs over time, instead of buying all new and scraping together what we do have. We will slowly replace what we are missing.

REGULATORS

Lyle and I met with Michael Urwin about valve inserts above the School St. and Clark St regulators. We are waiting for a quote back from him on those and a timeline that might work best for installing these. I know this has been a long venture on doing something about these valves, but we are really trying to come up with the best route with minimal impact on the town as far as water being off. In talking with Michael, these valves seem to be the best way to go, and as soon as I have a price for the two, we will do what we can to get them installed. Thank you for the patience.



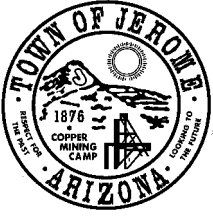
Founded 1876
Incorporated 1899

TOWN OF JEROME, ARIZONA
POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 FAX (928) 634-0715

Deputy Clerk November 2020 Staff Report (October activity)

Respectfully submitted by Rosa Cays

- ⚙ Assisted in preparing packets for Council, Design Review, and P&Z meetings; took minutes for the videoconferenced meetings and transcribed the minutes, including for special meetings.
- ⚙ Archived signed resolutions, ordinances, and meeting minutes (and agenda packets) for the town's records for Council, Design Review, and P&Z.
- ⚙ Collected, edited, and published content for the November–December *Point of View* newsletter, with contributions from staff, town council, and members of the community.
- ⚙ Arranged for Councilmember Mandy Worth's stay in Grand Canyon Village for the NACOG meeting in late October.
- ⚙ Posted various town notices at the three locations in town (Gulch Road, post office, town hall) throughout the month.
- ⚙ Continue to review and edit documents associated with P&Z and DRB for John Knight, zoning administrator, including staff reports, resolutions, notices of decision, agendas, and other documents.
- ⚙ Processed the daily bank reconciliation reports as well as the end-of-month reconciliations for September.
- ⚙ Continue to assist staff members, department heads, board members, and residents with a range of inquiries or tasks and help answer the phone when needed.



TOWN OF JEROME, ARIZONA

POST OFFICE BOX 335, JEROME, ARIZONA 86331

Barry Wolstencroft , Building Official

Office: (928) 634-7943 Fax: (928) 634-0715 b.wolstencroft@jerome.az.gov

Founded 1876

Incorporated 1899

OCTOBER 2020

1. Frame combo at 11 Rich Street.
2. Followed up on concerns at 221 Dundee Avenue.
3. Extended building permit for project at 446 Clark Street
4. Business license inspections.
5. Re-inspection for occupancy at 309 Main Street.

Barry Wolstencroft, Building inspector

Library Staff Report, October 2020

- Began FY 19/20 Public Library Survey. Most libraries in Yavapai County closed for a portion of this fiscal year so survey numbers are expected to be significantly down from previous years.
- Participated in Kids Voting Arizona, a voter education program with a mock presidential election and online games.
- Completed survey for Digital Media 'The Power of Literature' Survey conducted by the YLN Video Lab.
- Conducted staff trainings on printing from the Chromebook.
- Downloaded Summer Reading Manual for 2021.
- Created signage for the public concerning library use during partial closure.

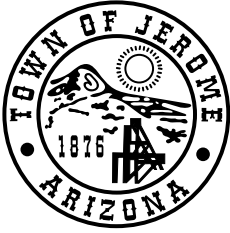
The Chromebook Checkout program is going smoothly; we have had a regular stream of users.

Library staff are settling back into the everyday business of book ordering, cataloging, and processing.

The Old Book Room and Community Art Room will remain closed until further notice.

Respectfully,

Librarian Kathleen Jarvis



Town of Jerome – Zoning Administrator's Report

Council Meeting Date: Tuesday, November 10, 2020

Prepared by: John Knight, Zoning Administrator

- P&Z – Oct. 21st: Study sessions/discussions on code amendments for mixed use, yard requirements, setbacks, and appeals to Council
- DRB - Nov. 2nd: Metal cornice for 136 Main (Nellie Bly building), two-rail pipe fence for 200 Hill Street (Grand Hotel), sign for 420 Hull Avenue (Mimi - formerly Lola), paint for 123 Beale Street (Gallagher residence), discussion about minor modifications to projects that occur in the field
- Joint P&Z/Council Meeting – Dec. 1st at 6:00 pm: Joint meeting to discuss upcoming code amendments and planning related issues
- Miscellaneous
 - Working on various code amendments
 - Residential parking permits
 - Deck expansion on Juarez
 - Easement from Verde Ex. for waterline on Rich Street
 - Code Enforcement
 - Meeting about rehabilitation of Mohawk Gas Station
 - Met with current owner and new buyer of Jerome Clubhouse
 - Need to set a meeting date with Council to discuss code enforcement process and penalties for violations
- Design Guidelines Grant: working on an RFP (or RFQ)
- Community Garden Update
 - Raised beds constructed and filled
 - Many of the beds are planted
 - Unclaimed beds have a cover crop
 - Obtaining bids for fencing
 - Mimi Romberger working on a garden sign
 - Working with Kristen Muenz on a notification/bulletin board
 - Considering doing a workshop on composting and/or vermiculture
 - Beds are still available!



TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA (928) 634-7943

REGULAR MEETING OF THE DESIGN REVIEW BOARD

Monday, October 5, 2020, 6:00 pm

ACTION MINUTES

Item 1: Call to order

All board members present except Danny Smith.

Item 2: Petitions from the public

Item 3: Approval of Minutes: Minutes of the regular meeting of August 31, 2020
Discussion/Possible Action

APPROVED

Item 4: Presentations: Official welcome of new board member Carol Wittner

Continued Items/Old Business: None

New Business:

Item 5: Design Review for garage remodel

Applicants: Don and Kathi Feher

Address: 11 Rich Street

Zone: C-1

Owner of record: Donald J. and Mary K. Feher

APN: 401-06-085

Applicants are seeking preliminary and final design review approval to add a window and new garage doors.

Discussion/Possible Action – DRB Reso. 2020-26

APPROVED

Item 6: Design Review for stair replacement

Applicant: Kyle W. Kelt

Address: 665 Main Street

Zone: R1-5

Owners of record: Kyle and Erica Kelt

APN: 401-07-064

Applicant is seeking preliminary and final design review to replace existing exterior wood stairs.

Discussion/Possible Action – DRB Reso. 2020-27

APPROVED

Informational Items (Current Event Summaries):

Item 7: Updates of Recent and Upcoming Meetings: John Knight, Zoning Administrator

- a) **P&Z – September 16, 2020:** Study session on code amendments for residential lodging, temporary signs, and mixed use
- b) **Council – September 21, 2020 (special meeting):** Discussion and direction on setbacks, yards, and the appeals process, and P&Z's role when reviewing site plans

Item 8: Future DRB Agenda Items for November 2, 2020: 123 Beale Street fence

Item 9: Miscellaneous: SHPO awarded Jerome a Certified Local Government (CLG) grant to prepare design guidelines

Item 10: Adjourn **6:32 p.m.**



TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA (928) 634-7943

Regular Meeting of the **Planning and Zoning Commission**

Wednesday, October 21, 2020, 6:00 pm

ACTION MINUTES

Item 1: Call to order 6:02

Item 2: Petitions from the public — Pursuant to A.R.S. § 38-431.01(H), public comment is permitted on matters not listed on the agenda, but the subject matter must be within the jurisdiction of the commission. All comments are subject to reasonable time, place, and manner restrictions. All petitioners must fill out a request form with their name and subject matter. When recognized by the chair, please state your name and please observe the three (3)-minute time limit. No petitioners will be recognized without a request. The commission's response to public comments is limited to asking staff to review a matter commented upon, asking that a matter be put on a future agenda, or responding to criticism.

Possible Direction to Staff

Item 3: Approval of Minutes – Minutes of the meeting of September 16, 2020

APPROVED

Item 4: Election of Vice Chair – Elect new Vice Chair to complete term of former Vice Chair Joe Testone

Discussion/Possible Action

Commissioner Chuck Romberger elected vice chair

Old (continued) Business:

Item 5: Initiate code amendments to allow mixed use in C-1 and possibly the Industrial Zone

Applicant: Town of Jerome

Initiate updates to the Jerome Zoning Ordinance related to mixed use in the C-1 Zone and possibly the Industrial Zone. This could include but is not limited to horizontal and vertical mixed use and live-work units.

Discussion/Possible Action – P&Z Reso. 2020-16

APPROVED

New Business:

Item 6: Study Session on possible ordinance amendments including, but not limited to, amendments regarding setbacks, yard requirements, and appeals to Council

Applicant: Town of Jerome

Discussion/Direction to staff

Informational Items (Current Event Summaries):

Item 7: Updates of recent and upcoming meetings – John Knight, Zoning Administrator

- a. **September 21, 2020 Council Meeting** – Amendments to the ordinance regarding stair setbacks, yard requirements and appeals process.
- b. **October 5, 2020 DRB Meeting** – Design Review for Kelt stairs (665 Main Street) and Feher garage (11 Rich Street)
- c. **October 8, 2020 Council Meeting** – Zoning Administrator work priorities (recreational marijuana ordinance, code amendments/code enforcement, telecom ordinance, design guidelines, and small projects)
- d. **October 13, 2020 Council Meeting** – beekeeping ordinance, COVID-19 reopening, and recreational marijuana ordinance
- e. **October 14, 2020 Council Meeting** – Recreational marijuana ordinance

Item 8: Potential items for Wednesday, November 18, 2020: Various code amendments

Discussion/Possible Direction to Staff

Item 9: Adjourn 7:26



TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 www.jerome.az.gov

MINUTES SPECIAL MEETING OF THE JEROME TOWN COUNCIL COUNCIL CHAMBERS, JEROME TOWN HALL THURSDAY, OCTOBER 8, 2020 AT 1:00 PM

<div>ITEM #1:</div> <div>1:05 (0:19)</div>	<div>CALL TO ORDER/ROLL CALL</div> <div>Mayor/Chairperson to call meeting to order.</div> <div>Mayor Alex Barber called the meeting to order at 1:05 pm.</div> <div>Town Clerk to call and record the roll.</div> <div>Town Manager/Clerk Candace Gallagher called the roll. Present were Mayor Barber, Vice Mayor Sage Harvey, and Councilmembers Jane Moore, Dr. Jack Dillenberg, and Mandy Worth. Zoning Administrator John Knight and Deputy Clerk Rosa Cays were also present.</div>																																										
<div>ITEM #2:</div> <div>1:05 (0:40)</div>	<div>EXECUTIVE SESSION: PERFORMANCE REVIEW</div> <div>Council will conduct a one-year performance review of the Zoning Administrator in executive session, pursuant to A.R.S. § 38-431.03 (A)(1).</div> <div>NOTE: Public attendees will be placed in or remain in the Zoom "waiting room" during this executive session and will be admitted immediately upon reconvening into open session.</div> <div>Motion to Enter into Executive Session</div> <table><tr><th>COUNCILMEMBER</th><th>MOVED</th><th>SECONDED</th><th>AYE</th><th>NAY</th><th>ABSENT</th><th>ABSTAIN</th></tr><tr><td>BARBER</td><td>X</td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>DILLENBERG</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>HARVEY</td><td></td><td>X</td><td>X</td><td></td><td></td><td></td></tr><tr><td>MOORE</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>WORTH</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr></table>	COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN	BARBER	X		X				DILLENBERG			X				HARVEY		X	X				MOORE			X				WORTH			X			
COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN																																					
BARBER	X		X																																								
DILLENBERG			X																																								
HARVEY		X	X																																								
MOORE			X																																								
WORTH			X																																								
<div>ITEM #3:</div> <div>3:09 (1:06)</div>	<div>ZONING ADMINISTRATOR WORK PRIORITIES</div> <div>Council will discuss with the Zoning Administrator projects that he is currently working on and may establish priorities and add or remove projects from that list.</div> <div>Mayor Barber reviewed the priorities that were established in 2019: 1) Affordable housing; 2) telecommunications ordinance; 3) wayfinding signage; and 4) the old Jerome cemetery site in Clarkdale.</div> <div>Mr. Knight then read from his staff report. He said some of the established priorities had been worked on, others set aside. He agreed that affordable housing—housing in general—is important and work on the Hotel Jerome should continue and perhaps be revisited at a future meeting. Mr. Knight brought up C-1 parking, which has been an ongoing challenge, and the possibility of a lease agreement linking private parking with kiosk parking. He also touched on the telecommunications ordinance and suggested this could probably wait until the ongoing class-action lawsuit is further along. Mayor Barber mentioned that the League of Cities and Towns was involved with the lawsuit. Mr. Knight said the wayfinding signage, mostly for parking, is basically done. As for the Jerome cemetery site in Clarkdale, he said more work is needed.</div> <div>Vice Mayor Harvey suggested making zoning ordinance amendments the priority. She said not having them in place causes problems for the zoning administrator, the town boards, and Council.</div> <div>Mr. Knight then referred the councilmembers to the second page of his staff report and a list of additional items that also need to be prioritized: the CLG design guidelines, the community garden, zoning/code enforcement, and several zoning ordinance amendments. Mr. Knight suggested a separate open meeting be held to discuss zoning/code enforcement and wondered how the town could get in front of it to keep people from doing things without permission, i.e., fines, punishments, or penalties. Mr. Knight then went through the list of code amendments and where they each were in the process and mentioned Prop 207 (marijuana regulation). He then suggested listing things in order of priority.</div> <div>Ms. Gallagher said Prop 207 about recreational marijuana IS the priority since it will be on the ballot in November.</div> <div>Councilmember Worth said the telecommunications ordinance was also very important and that Council needs to be proactive and get something in place, regardless of the outcome of the lawsuit. She said affordable housing, though the work on the Hotel Jerome is ongoing, could probably wait and be addressed after the state and League of Cities/Towns works things out at their level. She didn't feel the cemetery site was a priority for at least the next three to six months. Ms. Worth continued down the list. She felt that mixed use should be discussed separately for the C-1 and industrial zones and not lumped together in the zoning ordinance.</div> <div>Vice Mayor Harvey said parking in the C-1 zone can wait until spring. Ms. Harvey feels the code amendments are the priority after prop 207.</div>																																										

	<p>Mayor Barber confirmed with Ms. Gallagher that town attorney Bill Sims had advised that Council wait until after the lawsuit to address the telecom ordinance. She said she and Mr. Knight had attended a League of Cities seminar where the speaker repeatedly stated that "whatever is better for them and worse for you is what the new law will be." Ms. Barber shared other concerns about the new telecom technology including the use of energy, cell sites dotting the landscape, and the health effects. She wants to confer with Mr. Sims to get advice on how to go forward.</p> <p>Ms. Gallagher said that the danger in doing nothing, if the town has no regulations in place, is that the telecom companies can come in and essentially do whatever they want.</p> <p>Ms. Worth suggested adding a more general ordinance that would cover all utilities. Discussion continued.</p> <p>Vice Mayor Harvey said the three main issues to prioritize are Prop 207, the ordinance amendments, and a telecom ordinance.</p> <p>Regarding cellular towers, Councilmember Moore said the "stealth ordinance" in Sedona is not acceptable—just hiding the cell sites is not sufficient; and to write an ordinance to "cover everything" would be impossible, noting that 40 years ago, no one would have thought vacation rentals would become an issue. As for mixed use, Ms. Moore reminded everyone that this will involve parking in the C-1 zone.</p> <p>Vice Mayor Harvey asked if, when amending the ordinance, something can be written that basically states that just because it's not in the ordinance doesn't mean it's permitted. Discussion ensued.</p> <p>Ms. Moore and Mr. Knight both said the ordinance does make a similar statement. Ms. Moore referred to the pages in the ordinance. Mr. Knight noted that the statement in the code applies to <u>use</u> and that he had a discussion with Mr. Sims regarding this.</p> <p>Mayor Barber brought the conversation back to the priorities:</p> <p>1 – Prop 207 code amendment for recreational marijuana</p> <p>2 – Code amendments, including zoning code enforcement</p> <p>3 – Telecom ordinance (Ms. Gallagher will discuss this with Mr. Sims)</p> <p>4 – Design guidelines</p> <p>5 – Various small projects</p>																																										
ITEM #4:	<p>ADJOURNMENT</p> <p><u>Motion to Adjourn at 3:38 p.m.</u></p> <table><tr><th>COUNCILMEMBER</th><th>MOVED</th><th>SECONDED</th><th>AYE</th><th>NAY</th><th>ABSENT</th><th>ABSTAIN</th></tr><tr><td>BARBER</td><td></td><td>X</td><td>X</td><td></td><td></td><td></td></tr><tr><td>DILLENBERG</td><td>X</td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>HARVEY</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>MOORE</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>WORTH</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr></table>	COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN	BARBER		X	X				DILLENBERG	X		X				HARVEY			X				MOORE			X				WORTH			X			
COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN																																					
BARBER		X	X																																								
DILLENBERG	X		X																																								
HARVEY			X																																								
MOORE			X																																								
WORTH			X																																								

APPROVE:

ATTEST:

 Mayor

 Candace B. Gallagher, CMC, Town Manager/Clerk

Date: _____

COCODONA 250





COCODONA 250 - Who is Aravaipa?

Aravaipa – AIR-UH-VIE-PAH

Aravaipa is a local family owned event company based in Phoenix. We have been producing events since 2008 and have a worldwide reputation for quality races. Our goal is to organize events that are loved by our runners and also the communities we pass through. We are committed to minimizing the event impact on Jerome and ensuring the safety of the residents. References from other communities we have worked with over the years can be provided if desired.

All of the many permitting agencies (Forest Service, BLM, cities, private land owners, etc.) along the 254-mile course have given a thumbs up for the event, Jerome is the final connection. No pressure 😊

Bottomline, we will work tirelessly to ensure Jerome and its residents are happy with this event.

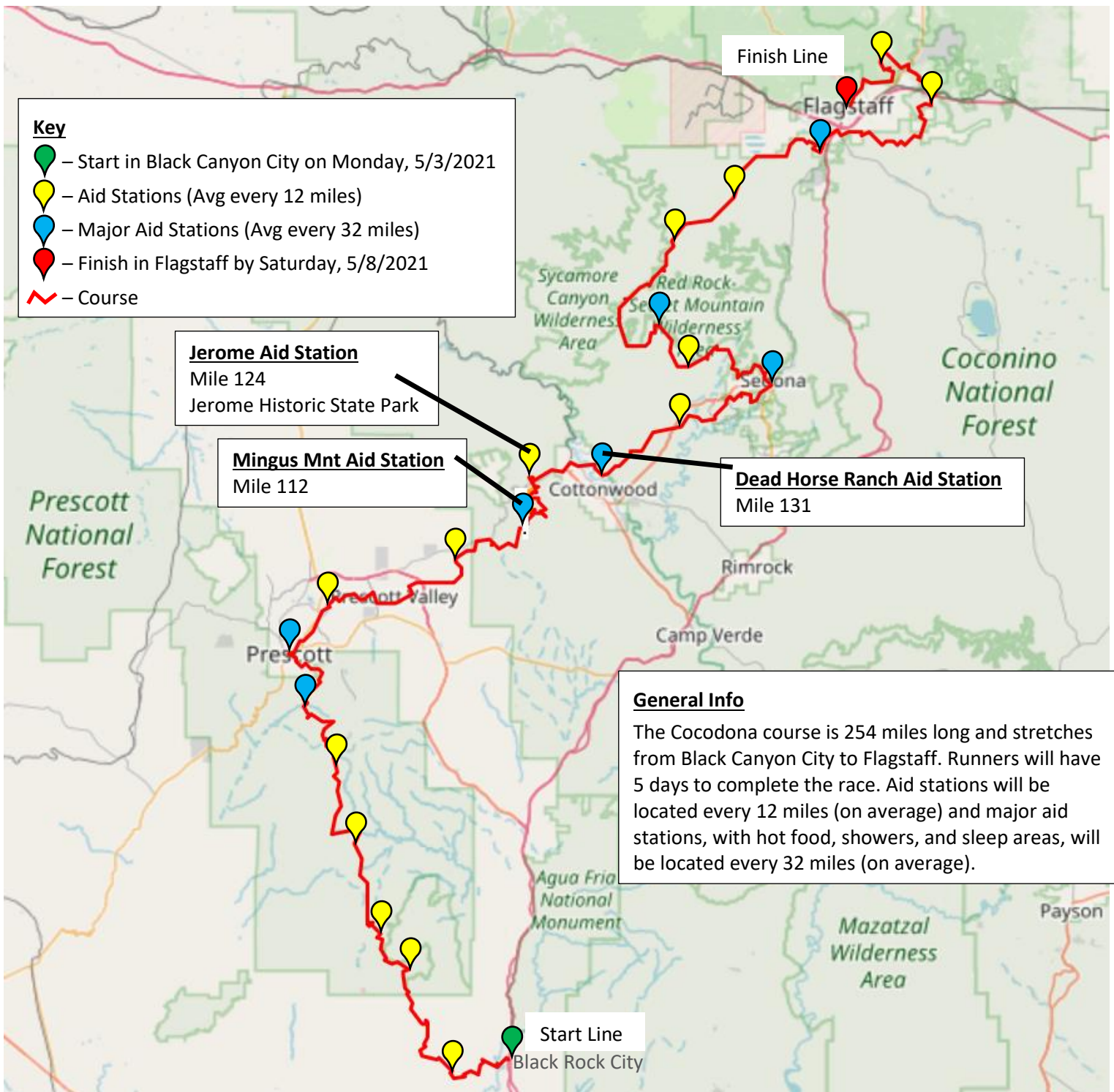
COCODONA 250 - What is the Cocodona250?

Believe it or not, 200+ mile running races are starting to become common across the US and world. Crazy, huh?!?

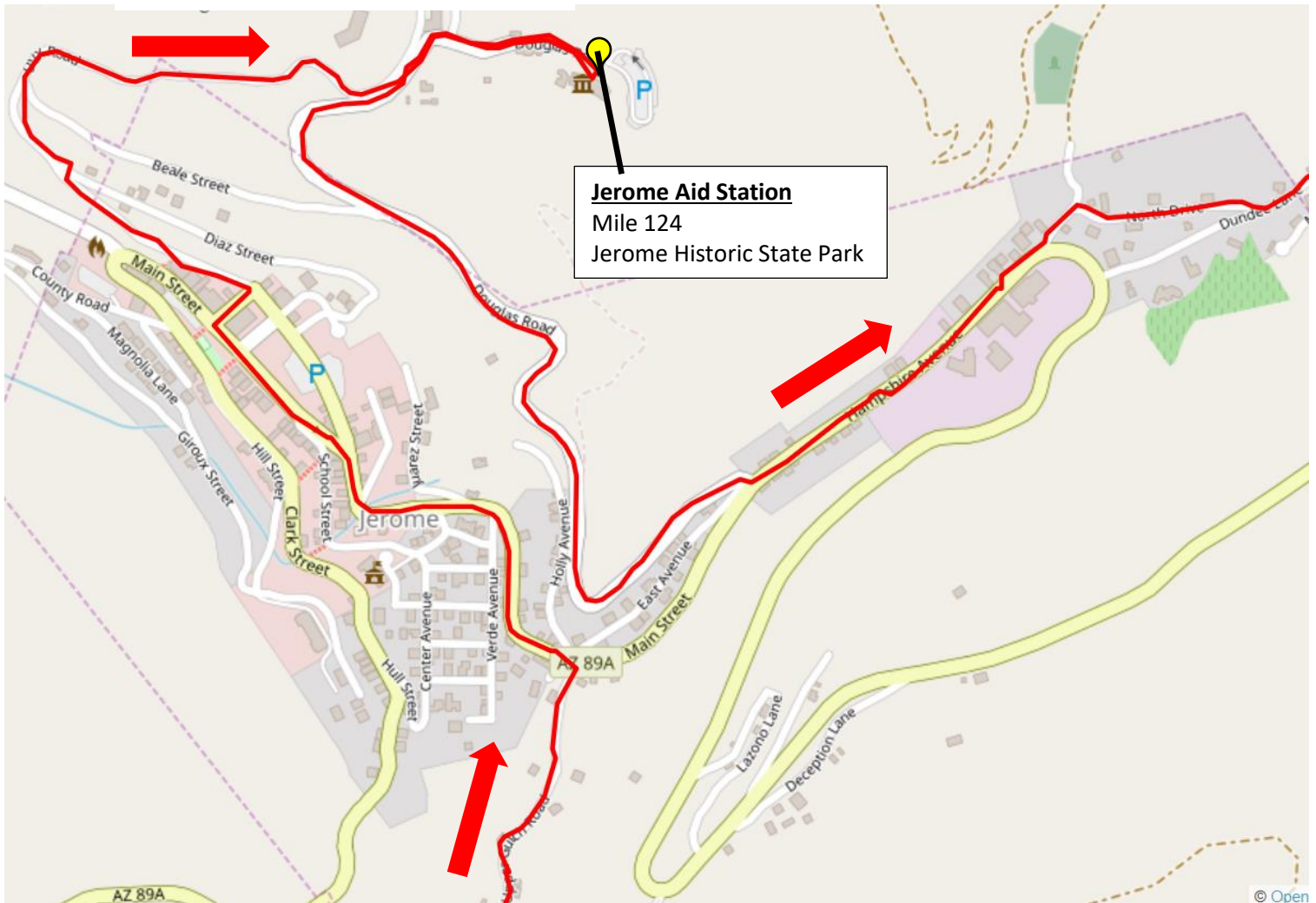
The Cocodona250 is a 254-mile running race from Black Canyon City to Flagstaff. Much of the course is on trails but there are sections of dirt roads and even some on pavement. Runners have 120 hours (Mon morning thru Sat morning) to complete the course. Most will take around 100 hours and sleep for a couple of hours each night. Our participants are extremely experienced, well-seasoned runners who can safely handle the rigors of the event.

Most runners will have a support “crew” that will drive a car and help their runner complete the journey. These vehicles will not drive along the course slowly, but will rather meet runners at aid stations. Each runner will wear a GPS tracking device and we will have a full event staff and medical team that ensure the event runs smoothly and the runners are kept safe.

COCODONA 250 - Course Overview



COCODONA 250 - Course through Jerome

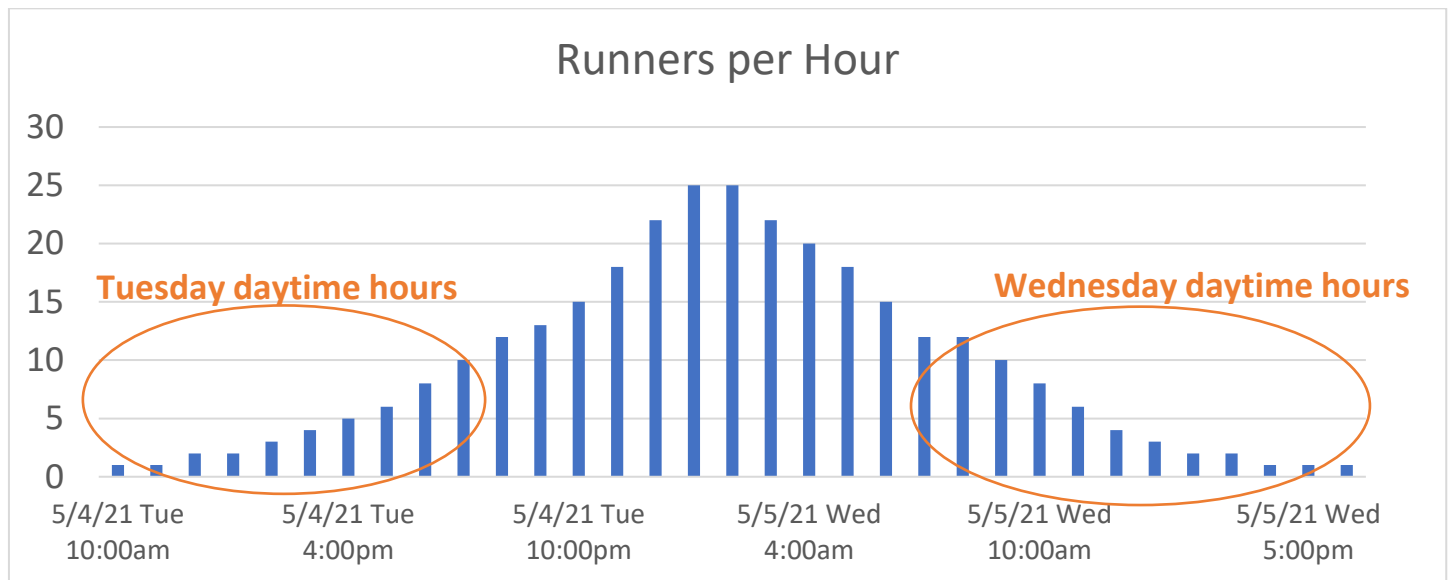


COCODONA 250 General Information

- **Race Dates** – Monday, May 3rd thru Saturday, May 8th, 2021
- **Anticipated Number of Runners** – 350 runners
- **Estimated First Runner to enter Jerome** – 10:00am Tuesday, May 4th
- **Estimated Last Runner to leave Jerome** – 6:00pm Wednesday, May 5th

COCODONA 250 Runner spacing in Jerome

200+ mile races are not like the average running race you might envision. By the time runners reach Jerome (mile 124), most will be walking and they will be **VERY** spread out. Below is an estimated flow of runners by hour through Jerome.



COCODONA 250 Runners to respect locals

We understand that Jerome sees lots of traffic and is a high tourist destination. We also understand that the residents of Jerome want to minimize the impact of so much traffic through their community. The Cocodona event, although large in difficulty, will produce an extremely low impact on the residents of Jerome. These are some of the rules we will enforce to ensure this minimized impact.

- Runners passing through Jerome will obey all traffic / pedestrian laws.
- Traffic will not be stopped or slowed by runners. Runners will stay on sidewalks and shoulders and wait until it is safe to cross streets.
- Runners and crews will be quiet when passing through Jerome.
- Runner crew vehicles will proceed directly to Jerome State Historic Park. Crew vehicles will not be allowed along the course to cheer or provide aid to runners under any circumstance.
- Strict quiet hours will be observed at the Jerome Historic State Park Aid Station.

COCODONA 250 COVID Precautions

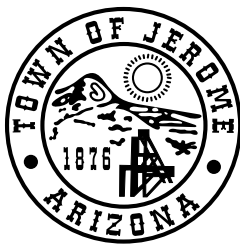
Trail running races are still happening in Arizona and across the US during Covid. This is in part to the dispersed nature of runners during trail running and also the efforts of running event companies like Aravaipa. Here are some of the policies we have enacted to keep our runners, crews, volunteers, and staff safe, as well as the communities we run through.

- **Temperature Checks** – For all runners at the start line.
- **Wave Starts** – Small groups starting in spaced out waves. Six-foot separation in starting corral. Faster runner's waves first.
- **Social Distancing** – All congregation points (start line, aid stations, finish line) redesigned to ensure social distancing.
- **Masks** – Runners, crews, and volunteers must wear masks at the start, at all aid stations, and the finish.
- **Hygiene** – Masks, gloves, and frequent sanitizer use by volunteers at aid stations.
- **Touchless** – No touch water and food at aid stations.

Thank you!

We will bend over backwards to ensure you are happy with this event and welcome us back for many years to come.

Race Director – Steve Aderholt (801)746-9848 steve@aravaiparunning.com



TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 www.jerome.az.gov

ORDINANCE NO. 463

AN ORDINANCE OF THE TOWN OF JEROME, ARIZONA, RELATING TO THE TRANSACTION PRIVILEGE TAX; ADOPTING "THE 2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME" BY REFERENCE; ESTABLISHING EFFECTIVE DATES; PROVIDING FOR SEVERABILITY AND PROVIDING PENALTIES FOR VIOLATIONS.

BE IT ORDAINED BY THE MAYOR AND COUNCIL OF THE TOWN OF JEROME, ARIZONA:

Section 1: That certain document known as "The 2012-2014 Amendments to the Tax Code of the Town of Jerome", three copies of which are on file in the office of the Town Clerk of the Town of Jerome, Arizona, which document was made a public record by Resolution No. 608 of the Town of Jerome, Arizona, is hereby referred to, adopted and made a part hereof as if fully set out in this ordinance.

Section 2: Any person found guilty of violating any provision of these amendments to the Tax Code shall be guilty of a class one misdemeanor. Each day that a violation continues shall be a separate offense punishable as herein above described.

Section 3: If any section, subsection, sentence, clause, phrase or portion of this ordinance or any part of these amendments to the Tax Code adopted herein by reference is for any reason held to be invalid or unconstitutional by the decision of any court of competent jurisdiction, such decision shall not affect the validity of the remaining portions thereof.

Section 4: The provisions of this ordinance conforms this local code to the Model City Tax Code, which is controlling. The provisions of each section are effective as stated in each section and are as provided by the Municipal Tax Code Commission upon approval of the stated change to the Model City Tax Code. Provisions subject to a retroactive effective date at the time of approval by the Municipal Tax Code Commission favor taxpayers by reducing an imposition of the tax or increasing an allowable deduction, exemption, or exclusion. Provisions that increase the imposition of the tax or decrease the application of a deduction, exemption, or exclusion had a prospective effective date at the time of approval by the Municipal Tax Code Commission. Provisions creating a new Option state the first effective date the new Option is available for selection. Provisions eliminating an existing Option state the last effective date of the eliminated Option.

PASSED AND ADOPTED by the Mayor and Council of the Town of Jerome, Arizona, this ____ day of _____, 2020.

Mayor

ATTEST:

APPROVED AS TO FORM:

Candace Gallagher, Town Manager/Clerk

William J. Sims, Esq.
Town Attorney

Date of first reading: _____

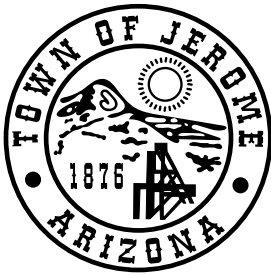
Dates of publication: _____

Date of adoption: _____

Date of posting: _____

Voting record at adoption:

	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN
BARBER						
DILLENBERG						
HARVEY						
MOORE						
WORTH						



TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 www.jerome.az.gov

RESOLUTION NO. 608

A RESOLUTION OF THE TOWN COUNCIL OF THE TOWN OF JEROME, ARIZONA, DECLARING AS A PUBLIC RECORD THAT CERTAIN DOCUMENT FILED WITH THE TOWN CLERK AND ENTITLED "THE 2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME"

BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF JEROME, ARIZONA:

THAT certain document entitled "THE 2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME", three copies of which are on file in the office of the Town Clerk, is hereby declared to be a public record, and said copies are ordered to remain on file with the Town Clerk.

PASSED AND ADOPTED BY THE Mayor and Council of the Town of Jerome, Arizona, this ____ day of _____, 2020.

APPROVED:

Mayor

ATTEST:

APPROVED AS TO FORM:

Candace Gallagher, Town Manager/Clerk

William J. Sims, Town Attorney

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

Section I. Model City Tax Code Section 8-2-100 is amended as follows, with an effective date of January 1, 2007 for the change to “Business”; October 1, 2007 for the change to “Prosthetic.”

Sec. 8-2-100. General definitions.

For the purposes of this Chapter, the following definitions apply:

"Assembler" means a person who unites or combines products, wares, or articles of manufacture so as to produce a change in form or substance of such items without changing or altering component parts.

"Broker" means any person engaged or continuing in business who acts for another for a consideration in the conduct of a business activity taxable under this Chapter, and who receives for his principal all or part of the gross income from the taxable activity.

"Business" ~~means~~ **INCLUDES** all activities or acts, personal or corporate, engaged in ~~and~~ **OR** caused to be engaged in with the object of gain, benefit, or advantage, either direct**LY** or indirect**LY**, but **DOES** not **INCLUDE EITHER:** casual activities or sales; **OR THE TRANSFER OF ELECTRICITY FROM A SOLAR PHOTOVOLTAIC GENERATION SYSTEM TO AN ELECTRIC UTILITY DISTRIBUTION SYSTEM.**

"Business Day" means any day of the week when the Tax Collector's office is open for the public to conduct the Tax Collector's business.

"Casual Activity or Sale" means a transaction of an isolated nature made by a person who neither represents himself to be nor is engaged in a business subject to a tax imposed by this Chapter. However, no sale, rental, license for use, or lease transaction concerning real property nor any activity entered into by a business taxable by this Chapter shall be treated, or be exempt, as casual. This definition shall include sales of used capital assets, provided that the volume and frequency of such sales do not indicate that the seller regularly engages in selling such property.

"Combined Taxes" means the sum of all applicable Arizona Transaction Privilege and Use Taxes; all applicable transportation taxes imposed upon gross income by this County as authorized by Article III, Chapter 6, Title 42, Arizona Revised Statutes; and all applicable taxes imposed by this Chapter.

"Commercial Property" is any real property, or portion of such property, used for any purpose other than lodging or lodging space, including structures built for lodging but used otherwise, such as model homes, apartments used as offices, etc.

"Communications Channel" means any line, wire, cable, microwave, radio signal, light beam, telephone, telegraph, or any other electromagnetic means of moving a message.

"Construction Contracting" refers to the activity of a construction contractor.

"Construction Contractor" means a person who undertakes to or offers to undertake to, or purports to have the capacity to undertake to, or submits a bid to, or does himself or by or through others, construct, alter, repair, add to, subtract from, improve, move, wreck, or demolish any building, highway, road, railroad, excavation, or other structure, project, development, or improvement to real property, or to do any part thereof.

"Construction contractor" includes subcontractors, specialty contractors, prime contractors, and any person receiving consideration for the general supervision and/or coordination of such a construction project except

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

for remediation contracting. This definition shall govern without regard to whether or not the construction contractor is acting in fulfillment of a contract.

"Delivery (of Notice) by the Tax Collector" means "receipt (of notice) by the taxpayer".

"Delivery, Installation, or Other Direct Customer Services" means services or labor, excluding repair labor, provided by a taxpayer to or for his customer at the time of transfer of tangible personal property; provided further that the charge for such labor or service is separately billed to the customer and maintained separately in the taxpayer's books and records.

"Engaging", when used with reference to engaging or continuing in business, includes the exercise of corporate or franchise powers.

"Equivalent Excise Tax" means either:

- (1) a Privilege or Use Tax levied by another Arizona municipality upon the transaction in question, and paid either to such Arizona municipality directly or to the vendor; or
- (2) an excise tax levied by a political subdivision of a state other than Arizona upon the transaction in question, and paid either to such jurisdiction directly or to the vendor; or
- (3) an excise tax levied by a Native American Government organized under the laws of the Federal Government upon the transaction in question and paid either to such jurisdiction directly or to the vendor.

"Federal Government" means the United States Government, its departments and agencies; but not including national banks or federally chartered or insured banks, savings and loan institutions, or credit unions.

"Food" means any items intended for human consumption as defined by rules and regulations adopted by the Department of Revenue, State of Arizona, pursuant to A.R.S. Section 42-5106. Under no circumstances shall "food" include alcoholic beverages or tobacco, or food items purchased for use in conversion to any form of alcohol by distillation, fermentation, brewing, or other process. Under no circumstances shall "food" include an edible product, beverage, or ingredient infused, mixed, or in any way combined with medical marijuana or an active ingredient of medical marijuana.

"Hotel" means any public or private hotel, inn, hostelry, tourist home, house, motel, rooming house, apartment house, trailer, or other lodging place within the Town offering lodging, wherein the owner thereof, for compensation, furnishes lodging to any transient, except foster homes, rest homes, sheltered care homes, nursing homes, or primary health care facilities.

"Jet Fuel" means jet fuel as defined in A.R.S. Section 42-5351.

"Job Printing" means the activity of copying or reproducing an article by any means, process, or method. "Job printing" includes engraving of printing plates, embossing, copying, micrographics, and photo reproduction.

"Lessee" includes the equivalent person in a rental or licensing agreement for all purposes of this Chapter.

"Lessor" includes the equivalent person in a rental or licensing agreement for all purposes of this Chapter.

"Licensing (for Use)" means any agreement between the user ("licensee") and the owner or the owner's agent ("licensor") for the use of the licensor's property whereby the licensor receives consideration, where such agreement does not qualify as a "sale" or "lease" or "rental" agreement.

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

"Lodging (Lodging Space)" means any room or apartment in a hotel or any other provider of rooms, trailer spaces, or other residential dwelling spaces; or the furnishings or services and accommodations accompanying the use and possession of said dwelling space, including storage or parking space for the property of said tenant.

"Manufactured Buildings" means a manufactured home, mobile home or factory-built building, as defined in A.R.S. Section 41-2142.

"Manufacturer" means a person engaged or continuing in the business of fabricating, producing, or manufacturing products, wares, or articles for use from other forms of tangible personal property, imparting to such new forms, qualities, properties, and combinations.

"Medical marijuana" means "marijuana" used for a "medical use" as those terms are defined in A.R.S. Section 36-2801.

"Mining and Metallurgical Supplies" means all tangible personal property acquired by persons engaged in activities defined in Section 8-2-432 for such use. This definition shall not include:

- (1) janitorial equipment and supplies.
- (2) office equipment, office furniture, and office supplies.
- (3) motor vehicles licensed for use upon the highways of the State.

"Modifier" means a person who reworks, changes, or adds to products, wares, or articles of manufacture.

"Nonprofit Entity" means any entity organized and operated exclusively for charitable purposes, or operated by the Federal Government, the State, or any political subdivision of the State.

"Occupancy (of Real Property)" means any occupancy or use, or any right to occupy or use, real property including any improvements, rights, or interests in such property.

"Out-of-Town Sale" means the sale of tangible personal property and job printing if all of the following occur:

- (1) transference of title and possession occur without the Town; and
- (2) the stock from which such personal property was taken was not within the corporate limits of the Town; and
- (3) the order is received at a permanent business location of the seller located outside the Town; which location is used for the substantial and regular conduct of such business sales activity. In no event shall the place of business of the buyer be determinative of the situs of the receipt of the order.

For the purpose of this definition, it does not matter that all other indicia of business occur within the Town, including, but not limited to, accounting, invoicing, payments, centralized purchasing, and supply to out-of-Town storehouses and out-of-Town retail branch outlets from a primary storehouse within the Town.

"Out-of-State Sale" means the sale of tangible personal property and job printing if all of the following occur:

- (1) the order is placed from without the State of Arizona; and

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

- (2) the property is delivered to the buyer at a location outside the State; and
- (3) the property is purchased for use outside the State.

"Owner-Builder" means an owner or lessor of real property who, by himself or by or through others, constructs or has constructed or reconstructs or has reconstructed any improvement to real property.

"Person" means an individual, firm, partnership, joint venture, association, corporation, estate, trust, receiver, syndicate, broker, the Federal Government, this State, or any political subdivision or agency of this State. For the purposes of this Chapter, a person shall be considered a distinct and separate person from any general or limited partnership or joint venture or other association with which such person is affiliated. A subsidiary corporation shall be considered a separate person from its parent corporation for purposes of taxation of transactions with its parent corporation.

"Prosthetic" means any of the following tangible personal property if such items are prescribed or recommended by a licensed podiatrist, chiropractor, dentist, physician or surgeon, naturopath, optometrist, osteopathic physician or surgeon, psychologist, hearing aid dispenser, physician assistant, nurse practitioner or veterinarian:

- (1) any man-made device for support or replacement of a part of the body, or to increase acuity of one of the senses. Such items include: prescription eyeglasses; contact lenses; hearing aids; artificial limbs or teeth; neck, back, arm, leg, or similar braces.
- (2) insulin, insulin syringes, and glucose test strips sold with or without a prescription.
- (3) hospital beds, crutches, wheelchairs, similar home health aids, or corrective shoes.
- (4) drugs or medicine, including oxygen.
- (5) equipment used to generate, monitor, or provide health support systems, such as respiratory equipment, oxygen concentrator, dialysis machine.
- (6) durable medical equipment which has a federal health care financing administration common procedure code, is designated reimbursable by Medicare, can withstand repeated use, is primarily and customarily used to serve a medical purpose, is generally not useful to a person in the absence of illness or injury and is appropriate for use in the home.
- (7) ORTHODONTIC DEVICES DISPENSED BY A DENTAL PROFESSIONAL WHO IS LICENSED UNDER TITLE 32, CHAPTER 11 TO A PATIENT AS PART OF THE PRACTICE OF DENTISTRY.
- ~~(7)~~(8) Under no circumstances shall "prosthetic" include medical marijuana regardless of whether it is sold or dispensed pursuant to a prescription, recommendation, or written certification by any authorized person.

"Qualifying Community Health Center"

- (1) means an entity that is recognized as nonprofit under 501(c)(3) of the United States Internal Revenue Code, that is a community-based, primary care clinic that has a community-based board of directors and that is either:
 - (a) the sole provider of primary care in the community.

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

(b) a nonhospital affiliated clinic that is located in a federally designated medically underserved area in this State.

(2) includes clinics that are being constructed as qualifying community health centers.

"Qualifying Health Care Organization" means an entity that is recognized as nonprofit under Section 501(c) of the United States Internal Revenue Code and that uses, saves or invests at least eighty percent (80%) of all monies that it receives from all sources each year only for health and medical related educational and charitable services, as documented by annual financial audits prepared by an independent certified public accountant, performed according to generally accepted accounting standards and filed annually with the Arizona Department of Revenue. Monies that are used, saved or invested to lease, purchase or construct a facility for health and medical related education and charitable services are included in the eighty percent (80%) requirement.

"Qualifying Hospital" means any of the following:

- (1) a licensed hospital which is organized and operated exclusively for charitable purposes, no part of the net earnings of which inures to the benefit of any private shareholder or individual.
- (2) a licensed nursing care institution or a licensed residential care institution or a residential care facility operated in conjunction with a licensed nursing care institution or a licensed kidney dialysis center, which provides medical services, nursing services or health related services and is not used or held for profit.
- (3) a hospital, nursing care institution or residential care institution which is operated by the Federal Government, this State or a political subdivision of this State.
- (4) a facility that is under construction and that on completion will be a facility under subdivision (1), (2) or (3) of this paragraph.

"Receipt (of Notice) by the Taxpayer" means the earlier of actual receipt or the first attempted delivery by certified United States mail to the taxpayer's address of record with the Tax Collector.

"Remediation" means those actions that are reasonable, necessary, cost-effective and technically feasible in the event of the release or threat of release of hazardous substances into the environment such that the waters of the State are or may be affected, such actions as may be necessary to monitor, assess and evaluate such release or threat of release, actions of remediation, removal or disposal of hazardous substances or taking such other actions as may be necessary to prevent, minimize or mitigate damage to the public health or welfare or to the waters of the State which may otherwise result from a release or threat of release of a hazardous substance that will or may affect the waters of the State. Remediation activities include the use of biostimulation with indigenous microbes and bioaugmentation using microbes that are nonpathogenic, nonopportunistic and that are naturally occurring. Remediation activities may include community information and participation costs and providing an alternative drinking water supply.

"Rental Equipment" means tangible personal property sold, rented, leased, or licensed to customers to the extent that the item is actually used by the customer for rental, lease, or license to others; provided that:

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

- (1) the vendee is regularly engaged in the business of renting, leasing, or licensing such property for a consideration; and
- (2) the item so claimed as "rental equipment" is not used by the person claiming the exemption for any purpose other than rental, lease, or license for compensation, to an extent greater than fifteen percent (15%) of its actual use.

"Rental Supply" means an expendable or nonexpendable repair or replacement part sold to become part of "rental equipment", provided that:

- (1) the documentation relating to each purchased item so claimed specifically itemizes to the vendor the actual item of "rental equipment" to which the purchased item is intended to be attached as a repair or replacement part; and
- (2) the vendee is regularly engaged in the business of renting, leasing, or licensing such property for a consideration; and
- (3) the item so claimed as "rental equipment" is not used by the person claiming the exemption for any purpose other than rental, lease, or license for compensation, to an extent greater than fifteen percent (15%) of its actual use.

"Repairer" means a person who restores or renews products, wares, or articles of manufacture.

"Resides within the Town" means in cases other than individuals, whose legal addresses are determinative of residence, the engaging, continuing, or conducting of regular business activity within the Town.

"Restaurant" means any business activity where articles of food, drink, or condiment are customarily prepared or served to patrons for consumption on or off the premises, also including bars, cocktail lounges, the dining rooms of hotels, and all caterers. For the purposes of this Chapter, a "fast food" business, which includes street vendors and mobile vendors selling in public areas or at entertainment or sports or similar events, who prepares or sells food or drink for consumption on or off the premises is considered a "restaurant", and not a "retailer".

"Retail Sale (Sale at Retail)" means the sale of tangible personal property, except the sale of tangible personal property to a person regularly engaged in the business of selling such property.

"Retailer" means any person engaged or continuing in the business of sales of tangible personal property at retail.

"Sale" means any transfer of title or possession, or both, exchange, barter, conditional or otherwise, in any manner or by any means whatsoever, including consignment transactions and auctions, of property for a consideration. "Sale" includes any transaction whereby the possession of such property is transferred but the seller retains the title as security for the payment of the price. "Sale" also includes the fabrication of tangible personal property for consumers who, in whole or in part, furnish either directly or indirectly the materials used in such fabrication work.

"Solar Daylighting" means a device that is specifically designed to capture and redirect the visible portion of the solar beam, while controlling the infrared portion, for use in illuminating interior building spaces in lieu of artificial lighting.

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

"Solar Energy Device" means a system or series of mechanisms designed primarily to provide heating, to provide cooling, to produce electrical power, to produce mechanical power, to provide solar daylighting or to provide any combination of the foregoing by means of collecting and transferring solar generated energy into such uses either by active or passive means, including wind generator systems that produce electricity. Solar energy systems may also have the capability of storing solar energy for future use. Passive systems shall clearly be designed as a solar energy device, such as a trombe wall, and not merely as a part of a normal structure, such as a window.

"Speculative Builder" means either:

- (1) an owner-builder who sells or contracts to sell, at any time, improved real property (as provided in Section 8-2-416) consisting of:
 - (A) custom, model, or inventory homes, regardless of the stage of completion of such homes; or
 - (B) improved residential or commercial lots without a structure; or
- (2) an owner-builder who sells or contracts to sell improved real property, other than improved real property specified in subsection (1) above:
 - (A) prior to completion; or
 - (B) before the expiration of twenty-four (24) months after the improvements of the real property sold are substantially complete.

"Substantially Complete" means the construction contracting or reconstruction contracting:

- (1) has passed final inspection or its equivalent; or
- (2) certificate of occupancy or its equivalent has been issued; or
- (3) is ready for immediate occupancy or use.

"Supplier" means any person who rents, leases, licenses, or makes sales of tangible personal property within the Town, either directly to the consumer or customer or to wholesalers, jobbers, fabricators, manufacturers, modifiers, assemblers, repairers, or those engaged in the business of providing services which involve the use, sale, rental, lease, or license of tangible personal property.

"Tax Collector" means the Town Council or their designee or agent for all purposes under this Chapter.

"Taxpayer" means any person liable for any tax under this Chapter.

"Taxpayer Problem Resolution Officer" means the individual designated by the Town to perform the duties identified in Sections 8-2-515 and 8-2-516. In municipalities with a population of fifty thousand (50,000) or more, the Taxpayer Problem Resolution Officer shall be an employee of the Town. In cities with a population of less than fifty thousand (50,000), the Taxpayer Problem Resolution Officer need not be an employee of the Town. Regardless of whether the Taxpayer Problem Resolution Officer is or is not an employee of the Town, the Taxpayer Problem Resolution Officer shall have substantive knowledge of taxation. The identity of, and telephone number for the Taxpayer Problem Resolution Officer can be obtained from the Tax Collector.

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

"Telecommunication Service" means any service or activity connected with the transmission or relay of sound, visual image, data, information, images, or material over a communications channel or any combination of communications channels.

"Transient" means any person who either at the person's own expense or at the expense of another obtains lodging space or the use of lodging space on a daily or weekly basis, or on any other basis for less than thirty (30) consecutive days.

"Utility Service" means the producing, providing, or furnishing of electricity, electric lights, current, power, gas (natural or artificial), or water to consumers or ratepayers.

Section II. Model City Tax Code Section 8-2-120 and Model Option #2 is repealed, with an effective date of July 1, 2013.

~~(Sec. 8-2-120.) (RESERVED)~~

Section III. Model City Tax Code Section 8-2-200 is amended as follows, with an effective date of July 1, 2013.

Sec. 8-2-200. Determination of gross income: in general.

- (a) Gross income includes:
 - (1) the value proceeding or accruing from the sale of property, the providing of service, or both.
 - (2) the total amount of the sale, lease, license for use, or rental price at the time of such sale, rental, lease, or license.
 - (3) all receipts, cash, credits, barter, exchange, reduction of or forgiveness of indebtedness, and property of every kind or nature derived from a sale, lease, license for use, rental, or other taxable activity.
 - (4) all other receipts whether payment is advanced prior to, contemporaneous with, or deferred in whole or in part subsequent to the activity or transaction.
- (b) Barter, exchange, trade-outs, or similar transactions are includable in gross income at the fair market value of the service rendered or property transferred, whichever is higher, as they represent consideration given for consideration received.

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (c) No deduction or exclusion is allowed from gross income on account of the cost of the property sold, the time value of money, expense of any kind or nature, losses, materials used, labor or service performed, interest paid, or credits granted.
- (D) FOR THE PURPOSES OF THIS CHAPTER THE TOTAL AMOUNT OF GROSS INCOME, GROSS RECEIPTS OR GROSS PROCEEDS OF SALES FOR NUCLEAR FUEL SHALL BE DEEMED TO BE THE VALUE OF THE PURCHASE PRICE OF URANIUM OXIDE USED IN PRODUCING THE FUEL. THE TAX IMPOSED BY THIS CHAPTER MAY BE IMPOSED ONLY ONCE FOR ANY ONE QUANTITY OR BATCH OF NUCLEAR FUEL REGARDLESS OF THE NUMBER OF TRANSACTIONS OR FINANCING ARRANGEMENTS WHICH MAY OCCUR WITH RESPECT TO THAT NUCLEAR FUEL.

Section IV. Model City Tax Code Article III is REPEALED AND REPLACED IN ITS ENTIRETY with the following Sections 8-2-300 through 8-2-380, effective January 1, 2015.

Article III - Licensing and Recordkeeping

Sec. 8-2-300. Licensing requirements.

- (a) The following persons shall make application to the Tax Collector for a Transaction Privilege and Use Tax License and no person shall engage or continue in business or engage in such activities until he shall have such a license:
- (1) Every person engaging or continuing in business activities within the Town upon which a Transaction Privilege Tax is imposed by this Chapter.
 - (2) (Reserved)
 - (3) (Reserved)
- (b) For the purpose of determining whether a Transaction Privilege and Use Tax License is required, a person shall be deemed to be "engaging or continuing in business" within the Town if:
- (1) engaging in any activity as a principal or broker, the gross receipts of which may be subject to Transaction Privilege Tax under Article IV of this Chapter, or
 - (2) maintaining within the Town directly, or if a corporation by a subsidiary, an office, distribution house, sales house, warehouse or other place of business; maintaining within the Town directly, or if a corporation by a subsidiary, any real or tangible personal property; or having any agent or other representative operating within the Town under the authority of such person, or if a corporation by a subsidiary, irrespective of whether such place of business, property, or agent or other representative is located here permanently or temporarily, or

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

- (3) soliciting sales, orders, contracts, leases, and other similar forms of business relationships, within the Town from customers, consumers, or users located within the Town, by means of salesmen, solicitors, agents, representatives, brokers, and other similar agents or by means of catalogs or other advertising, whether such orders are received or accepted within or without this Town.
- (4) (Reserved)
- (5) (Reserved)
- (c) A person engaging in more than one activity subject to Transaction Privilege Tax at any one business location is not required to obtain a separate license for each activity, provided that, at the time such person makes application for a license, he shall list on such application each category of activity in which he is engaged.
- (d) The licensee shall inform the Tax Collector of any changes in his business activities, location, or mailing address within thirty (30) days.
- (e) Limitation. The issuance of a Transaction Privilege and Use Tax License by the Tax Collector shall in no way be construed as permission to operate a business activity in violation of any other law or regulation to which such activity may be subject.
- (f) Casual activity. For the purposes of this Chapter, individuals engaging in a “casual activity or sale” are not subject to the license requirements imposed under this Article provided that they are only engaged in private sales activities, such as the sale of a personal automobile or garage sale, on no more than three separate occasions during any calendar year.

Sec. 8-2-310. Licensing: special requirements.

- (a) Partnerships. Application for a Transaction Privilege and Use Tax License for a partnership engaging or continuing in business shall provide, as a minimum, the names and addresses of all general partners. Licenses issued to persons engaging in business as partners, limited or general, shall be in the name of the partnership.
- (b) Limited Liability Companies. Application for a Transaction Privilege and Use Tax License for a Limited Liability Company (LLC) engaging or continuing in business shall provide, as a minimum, the names and addresses of all members and the manager. Licenses issued to persons engaging in business as Limited Liability Companies, shall be in the name of the LLC.
- (c) Corporations. Application for a Transaction Privilege and Use Tax License for a corporation engaging or continuing in business shall provide, as a minimum, the names and addresses of both the Chief Executive Officer and Chief Financial Officer of the corporation. Licenses issued to persons engaging in business as corporations shall be in the name of the corporation.
- (d) Multiple Locations or Multiple Business Names. A person engaging or continuing in one or more businesses at two (2) or more locations or under two (2) or more business names shall procure a

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

license for each such location or business name. A "location" is a place of a separate business establishment.

- (e) Real Property Rental, Leasing, and Licensing for Use. In all cases the Transaction Privilege and Use Tax License shall be issued only to the owner of the real property regardless of the owner engaging a property manager or other broker to oversee the owner's business activity including filing tax returns on behalf of the owner. Each rental property that can be independently sold or transferred is deemed to be a separate business establishment. Each platted parcel of real property subject to the tax imposed by this Chapter is deemed to be a separate business establishment and requires a separate license, regardless of the number of rental units located on that platted parcel. If one structure is located on multiple parcels in a manner such that ownership of an individual parcel cannot be sold or transferred without requiring alteration to divide the structure, one license shall be required for all affected parcels.

Sec. 8-2-320. License fees; annual renewal; renewal fees.

- (a) The Transaction Privilege and Use Tax License shall be valid upon receipt of a non-refundable license fee of two dollars (\$2.00), except for a license to engage in the business activity of residential or commercial real property rental, leasing, and licensing for use as separately identified in this Section. The Transaction Privilege and Use Tax License shall be valid only for the calendar year in which it is issued unless renewed each year by filing the appropriate application for license renewal and paying an annual license renewal fee of zero dollars (\$0.00) for each license, subject to the limitations in A.R.S. Section 42-5005. Such annual renewal fee shall be due and payable on January 1 of each year and shall be considered delinquent if not paid and received on or before the last business day of January.
- (b) The Transaction Privilege and Use Tax License to engage in the business activity of residential real property rental, leasing, and licensing for use shall be valid only upon receipt of a non-refundable license fee of two dollars (\$2.00). The Transaction Privilege and Use Tax License shall be valid only for the calendar year in which it is issued unless renewed each year by filing the appropriate application for license renewal and paying an annual license renewal fee of zero dollars (\$0.00) for each license, subject to the limitations in A.R.S. Section 42-5005. Such fee shall be due and payable on January 1 of each year and shall be considered delinquent if not paid and received on or before the last business day of January.
- (c) The Transaction Privilege and Use Tax License to engage in the business activity of commercial real property rental, leasing, and licensing for use shall be valid only upon receipt of a non-refundable license fee of two dollars (\$2.00). The Transaction Privilege and Use Tax License shall be valid only for the calendar year in which it is issued unless renewed each year by filing the appropriate application for license renewal and paying an annual license renewal fee of zero dollars (\$0.00) for each license, subject to the limitations in A.R.S. Section 42-5005. Such fee shall be due and payable on January 1 of each year and shall be considered delinquent if not paid and received on or before the last business day of January.

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

Sec. 8-2-330. Licensing; duration; transferability; display; penalties; penalty waiver; relicensing; fees collectible as if taxes.

- (a) The Transaction Privilege and Use Tax License shall be valid only for the calendar year in which it is issued unless renewed each year by filing the appropriate application for license renewal and paying the applicable license renewal fee for each license, subject to the limitations in A.R.S. Section 42-5005. Such fee shall be due and payable on January 1 of each year and shall be considered delinquent if not paid and received on or before the last business day of January. Application and payment of the annual fee must be received in the Tax Collector's office to be deemed paid and received.
- (b) The Transaction Privilege and Use Tax License shall be nontransferable between owners or locations and shall be on display to the public in the licensee's place of business.
- (c) Any person required to be licensed under this Chapter who fails to obtain a license on or before conducting any business activity requiring such license shall be subject to the license fees due for each year in business plus a penalty in the amount of fifty percent (50%) of the applicable fee for each period of time for which such fee would have been imposed, from and after the date on which such activity commenced until paid. This penalty shall be in addition to any other penalty imposed under this Chapter and must be paid prior to the issuance of any license. License fee penalties may be waived by the Tax Collector subject to the same terms as the waiver of tax penalties as provided for in Section 8-2-540.
- (d) Any licensee who fails to renew his license on or before the due date shall be deemed to be operating without a license following such due date, and shall be subject to all penalties imposed under this Chapter against persons required to be licensed and operating without a license. The non-licensed status may be removed by payment of the annual license fee for each year or portion of a year he operated without a license, plus a license fee penalty of fifty percent (50%) of the license fee due for each year. License fee penalties may be waived by the Tax Collector subject to the same terms as the waiver of tax penalties as provided for in Section 8-2-540.
- (e) Any licensee who permits his license to expire through cancellation as provided in Section 8-2-340, by his request for cancellation, by surrender of the license, or by the cessation of the business activity for which the license was issued, and who thereafter applies for a license, shall be granted a new license as a new applicant and shall pay the current license fee imposed under Section 8-2-320.
- (f) Any licensee who needs a copy of his Transaction Privilege and Use Tax License which is still in effect shall be charged the current license fee for each reissuance of a license.
- (g) Any person conducting a business activity subject to licensing without obtaining a Transaction Privilege and Use Tax License shall be liable to the Town for all applicable fees and penalties and shall be subject to the provisions of Sections 8-2-580 and 8-2-590, to the same extent as if such fees and penalties were taxes and penalties under such Sections.

Sec. 8-2-340. Licensing; cancellation; revocation.

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

- (a) Cancellation. The Tax Collector may cancel the Transaction Privilege and Use Tax License of any licensee as "inactive" if the taxpayer, required to report monthly, has neither filed any return nor remitted any taxes imposed by this Chapter for a period of six (6) consecutive months; or, if required to report quarterly, has neither filed any return nor remitted any taxes imposed by this Chapter for two (2) consecutive quarters; or, if required to report annually, has neither filed any return nor remitted any taxes imposed by this Chapter when such annual report and tax are due to be filed with and remitted to the Tax Collector.
- (b) Revocation. If any licensee fails to pay any tax, interest, penalty, fee, or sum required to be paid under this Chapter, or if such licensee fails to comply with any other provisions of this Chapter, the Tax Collector may revoke the Transaction Privilege and Use Tax License of said licensee.
- (c) Notice and Hearing. The Tax Collector shall deliver notice to such licensee of cancellation or revocation of the Transaction Privilege and Use Tax License. If the licensee requests a hearing within twenty (20) days of receipt of such notice, he shall be granted a hearing before the Tax Collector.
- (d) After cancellation or revocation of a taxpayer's license, the taxpayer shall not be issued a new license until all reports have been filed; all fees, taxes, interest, and penalties due have been paid; and he is in compliance with all provisions of this Chapter.

Sec. 8-2-350. Operating without a license.

It shall be unlawful for any person who is required by this Chapter to obtain a Transaction Privilege and Use Tax License to engage in or continue in business without a license. The Tax Collector shall assess any delinquencies in tax, interest, and penalties which may apply against such person upon any transactions subject to the taxes imposed by this Chapter.

Sec. 8-2-360. Recordkeeping requirements.

- (a) It shall be the duty of every person subject to the tax imposed by this Chapter to keep and preserve suitable records and such other books and accounts as may be necessary to determine the amount of tax for which he is liable under this Chapter. The books and records must contain, at a minimum, such detail and summary information as may be required by this Article; or when records are maintained within an electronic data processing (EDP) system, the requirements established by the Arizona Department of Revenue for Privilege Tax filings will be accepted. It shall be the duty of every person to keep and preserve such books and records for a period equal to the applicable limitation period for assessment of tax, and all such books and records shall be open for inspection by the Tax Collector during any business day.
- (b) The Tax Collector may direct, by letter, a specific taxpayer to keep specific other books, records, and documents. Such letter directive shall apply:
 - (1) only for future reporting periods, and

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (2) only by express determination of the Tax Collector that such specific recordkeeping is necessary due to the inability of the taxing jurisdiction to conduct an adequate examination of the past activities of the taxpayer, which inability resulted from inaccurate or inadequate books, records, or documentation maintained by the taxpayer.

Sec. 8-2-362. Recordkeeping: income.

The minimum records required for persons having gross income subject to, or exempt or excluded from tax by this Chapter must show:

- (a) The gross income of the taxpayer attributable to any activity occurring in whole or in part in the Town.
- (b) The gross income taxable under this Chapter, divided into categories as stated in the official Town tax return.
- (c) The gross income subject to Arizona Transaction Privilege Taxes, divided into categories as stated in the official State tax return.
- (d) The gross income claimed to be exempt, and with respect to each activity or transaction so claimed:
 - (1) If the transaction is claimed to be exempt as a sale for resale or as a sale, rental, lease, or license for use of rental equipment:
 - (A) The Town Privilege License number and State Transaction Privilege Tax License number of the customer (or the equivalent municipality, if applicable, and state tax numbers of the municipality and state where the customer resides), and
 - (B) The name, business address, and business activity of the customer, and
 - (C) Evidence sufficient to persuade a reasonably prudent businessman that the transaction is believed to be in good faith a purchase for resale, or a purchase, rental, lease, or license for use of rental equipment, by the vendee in the ordinary and regular course of his business activity, as provided by Regulation.
 - (2) If the transaction is claimed to be exempt for any other reason:
 - (A) The name, business address, and business activity of the customer, and
 - (B) Evidence which would establish the applicability of the exemption to a reasonably prudent businessman acting in good faith. Ordinary business documentation which would reasonably indicate the applicability of an exemption shall be sufficient to relieve the person on whom the tax would otherwise be imposed from liability therein, if he acts in good faith as provided by Regulation.
- (e) With respect to those allowed deductions or exclusions for tax collected or charges for delivery or other direct customer services, where applicable, evidence that the deductible income has been separately stated and shown on the records of the taxpayer and on invoices or receipts provided to the

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

customer. All other deductions, exemptions, and exclusions shall be separately shown and substantiated.

- (f) With respect to special classes and activities, such other books, records, and documentation as the Tax Collector, by Regulation, shall deem necessary for specific classes of taxpayer by reason of the specialized business activity of any such class.
- (g) In all cases, the books and records of the taxpayer shall indicate both individual transaction amounts and totals for each reporting period for each category of taxable, exempt, and excluded income defined by this Chapter.

Sec. 8-2-364. Recordkeeping: expenditures.

The minimum records required for persons having expenditures, costs, purchases and rental or lease or license expenses subject to, or exempt or excluded from, tax by this Chapter are:

- (a) The total price of all goods acquired for use or storage in the Town.
- (b) The date of acquisition and the name and business address of the seller or lessor of all goods acquired for use or storage in the Town.
- (c) Documentation of taxes, freight, and direct customer service labor separately charged and paid for each purchase, rental, lease, or license.
- (d) The gross price of each acquisition claimed as exempt from tax, and with respect to each transaction so claimed, sufficient evidence to satisfy the Tax Collector that the exemption claimed is applicable.
- (e) As applicable to each taxpayer, documentation sufficient to the Tax Collector, so that he may ascertain:
 - (1) All construction expenditures and all Privilege and Use Taxes claimed paid, relating to owner-builders and speculative builders.
 - (2) Disbursement of collected gratuities and related payroll information required of restaurants.
 - (3) Franchise and license fee payments and computations thereto which relate to:
 - (A) Utility service.
 - (B) (Reserved)
 - (4) The validity of any claims of proof of exemption.
 - (5) A claimed alternative prior value for reconstruction.
 - (6) (Reserved)
 - (7) (Reserved)
 - (8) Payments of tax to the Arizona Department of Transportation and computations therefore, when a motor-vehicle transporter claims such the exemption.

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

- (9) (Reserved)
- (f) Any additional documentation as the Tax Collector, by Regulation, shall deem necessary for any specific class of taxpayer by reason of the specialized business activity of specific exemptions afforded to that class of taxpayer.
- (g) In all cases, the books and records of the taxpayer shall indicate both individual transaction amounts and totals for each reporting period for each category of taxable, exempt, and excluded expenditures as defined by this Chapter.

Sec. 8-2-366. Recordkeeping: out-of-Town and out-of-State sales.

- (a) Out-of-Town Sales. Any person engaging or continuing in a business who claims out-of-Town sales shall maintain and keep accounting records or books indicating separately the gross income from the sales of tangible personal property from such out-of-Town branches or locations.
- (b) Out-of-State sales. Persons engaged in a business claiming out-of-State sales shall maintain accounting records or books indicating for each out-of-State sale the following documentation:
 - (1) documentation of location of the buyer at the time of order placement; and
 - (2) shipping, delivery, or freight documents showing where the buyer took delivery; and
 - (3) documentation of intended location of use or storage of the tangible personal property sold to such buyer.

Sec. 8-2-370. Recordkeeping: claim of exclusion, exemption, deduction, or credit; documentation; liability.

- (a) All deductions, exclusions, exemptions and credits provided in this Chapter are conditional upon adequate proof and documentation of such as may be required under A.R.S. Section 42-5022 or by this Chapter or Regulation.
- (b) Any person who claims and receives an exemption, deduction, exclusion, or credit to which he is not entitled under this Chapter, shall be subject to, liable for, and pay the tax on the transaction as if the vendor subject to the tax had passed the burden of the payment of the tax to the person wrongfully claiming the exemption. A person who wrongfully claimed such exemption shall be treated as if he is delinquent in the payment of the tax and shall be subject to interest and penalties upon such delinquency. However, if the tax is collected from the vendor on such transaction it shall not again be collected from the person claiming the exemption, or if collected from the person claiming the exemption it shall not also be collected from the vendor.

Sec. 8-2-372. Proof of exemption: sale for resale; sale, rental, lease, or license of rental equipment.

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

A claim of purchase for resale or of purchase, rental, lease, or license for rent, lease, or license is valid only if the evidence is sufficient to persuade a reasonably prudent businessman that the particular item is being acquired for resale or for rental, lease, or license in the ordinary course of business. The fact that the acquiring person possesses a Privilege License number and makes a verbal claim of "sale for resale or lease" or "lease for re-lease" does not meet this burden and is insufficient to justify an exemption. The "reasonable evidence" must be evidence which exists objectively, and not merely in the mind of the vendor, that the property being acquired is normally sold, rented, leased, or licensed by the acquiring person in the ordinary course of business. Failure to obtain such reasonable evidence at the time of the transaction will be a basis for disallowance of any claimed deduction on returns filed for such transactions.

Sec. 8-2-380. Inadequate or unsuitable records.

In the event the records provided by the taxpayer are considered by the Tax Collector to be inadequate or unsuitable to determine the amount of the tax for which such taxpayer is liable under the provisions of this Chapter, it is the responsibility of the taxpayer either:

- (a) to provide such other records required by this Chapter or Regulation; or
- (b) to correct or to reconstruct his records, to the satisfaction of the Tax Collector.

This change also ELIMINATES the following Regulations, effective January 1, 2015:

~~**Regulation 300.1. Who must apply for a license.**~~

~~**Regulation 300.2. (Reserved)**~~

~~**Regulation 310.1. (Reserved)**~~

~~**Regulation 310.2. (Reserved)**~~

~~**Regulation 310.3. (Reserved)**~~

~~**Regulation 350.1. Recordkeeping: income.**~~

~~**Regulation 350.2. Recordkeeping: expenditures.**~~

~~**Regulation 350.3. Recordkeeping: out-of-Town and out-of-State sales.**~~

~~**Regulation 360.1. Proof of exemption: sale for resale; sale, rental, lease or license of rental equipment.**~~

~~**Regulation 360.2. Proof of exemption: exemption certificate.**~~

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

Section V. Model City Tax Code Section 8-2-422, Local Option #LL is amended as follows to correct an obsolete reference, with an effective date of July 20, 2011.

Sec. 8-2-422. (Reserved)

Section VI. Model City Tax Code Section 8-2-425 is amended as follows to eliminate Local Option #MM, which will no longer be used by any city or town, effective July 1, 2012. New Subsection (7) is added with an effective date of September 21, 2006.

Sec. 8-2-425. Job printing.

- (a) The tax rate shall be at an amount equal to three and one-half percent (3.5%) of the gross income from the business activity upon every person engaging or continuing in the business of job printing, which includes engraving of printing plates, embossing, copying, micrographics, and photo reproduction.
- (b) The tax imposed by this Section shall not apply to:
 - (1) job printing purchased for the purpose of resale by the purchaser in the form supplied by the job printer.
 - (2) out-of-Town sales.
 - (3) out-of-State sales.
 - (4) (Reserved)
 - (5) sales of job printing to a qualifying hospital, qualifying community health center or a qualifying health care organization, except when the property sold is for use in activities resulting in gross income from unrelated business income as that term is defined in 26 U.S.C. Section 512.
 - (6) (Reserved)
 - (7) SALES OF POSTAGE AND FREIGHT EXCEPT THAT THE AMOUNT DEDUCTED SHALL NOT EXCEED THE ACTUAL POSTAGE AND FREIGHT EXPENSE THAT IS PAID TO THE UNITED STATES POSTAL SERVICE OR A COMMERCIAL DELIVERY SERVICE AND THAT IS SEPARATELY ITEMIZED BY THE TAXPAYER ON THE CUSTOMER'S INVOICE AND IN THE TAXPAYER'S RECORDS.**

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

Section VII. Model City Tax Code Section 8-2-445 is amended as follows, with an effective date of July 1, 2013.

Sec. 8-2-445. Rental, leasing, and licensing for use of real property.

- (a) The tax rate shall be at an amount equal to three and one-half percent (3.5%) of the gross income from the business activity upon every person engaging or continuing in the business of leasing or renting real property located within the Town for a consideration, to the tenant in actual possession, or the licensing for use of real property to the final licensee located within the Town for a consideration including any improvements, rights, or interest in such property; provided further that:
 - (1) Payments made by the lessee to, or on behalf of, the lessor for property taxes, repairs, or improvements are considered to be part of the taxable gross income.
 - (2) Charges for such items as telecommunications, utilities, pet fees, or maintenance are considered to be part of the taxable gross income.
 - (3) However, if the lessor engages in telecommunication activity, as evidenced by installing individual metering equipment and by billing each tenant based upon actual usage, such activity is taxable under Section 8-2-470.
- (b) If individual utility meters have been installed for each tenant and the lessor separately charges each single tenant for the exact billing from the utility company, such charges are exempt.
- (c) Charges by a qualifying hospital, qualifying community health center or a qualifying health care organization to patients of such facilities for use of rooms or other real property during the course of their treatment by such facilities are exempt.
- (d) Charges for joint pole usage by a person engaged in the business of providing or furnishing utility or telecommunication services to another person engaged in the business of providing or furnishing utility or telecommunication services are exempt from the tax imposed by this Section.
- (e) (Reserved)
- (f) (Reserved)
- (g) (Reserved)
- (h) (Reserved)
- (i) (Reserved)
- (j) Exempt from the tax imposed by this Section is gross income derived from the activities taxable under Section 8-2-444 of this Code.
- (k) (Reserved)
- (l) (Reserved)
- (m) (Reserved)

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

- (n) Notwithstanding the provisions of Section 8-2-200(b), the fair market value of one (1) apartment, in an apartment complex provided rent free to an employee of the apartment complex is not subject to the tax imposed by this Section. For an apartment complex with more than fifty (50) units, an additional apartment provided rent free to an employee for every additional fifty (50) units is not subject to the tax imposed by this Section.
- (o) Income derived from incarcerating or detaining prisoners who are under the jurisdiction of the United States, this State or any other state or a political subdivision of this State or of any other state in a privately operated prison, jail or detention facility is exempt from the tax imposed by this Section.
- (p) Charges by any hospital, any licensed nursing care institution, or any kidney dialysis facility to patients of such facilities for the use of rooms or other real property during the course of their treatment by such facilities are exempt.
- (q) Charges to patients receiving "personal care" or "directed care", by any licensed assisted living facility, licensed assisted living center or licensed assisted living home as defined and licensed pursuant to Chapter 4 Title 36 Arizona Revised Statutes and Title 9 of the Arizona Administrative Code are exempt.
- (r) Income received from the rental of any "low-income unit" as established under Section 42 of the Internal Revenue Code, including the low-income housing credit provided by IRC Section 42, to the extent that the collection of tax on rental income causes the "gross rent" defined by IRC Section 42 to exceed the income limitation for the low-income unit is exempt. This exemption also applies to income received from the rental of individual rental units subject to statutory or regulatory "low-income unit" rent restrictions similar to IRC Section 42 to the extent that the collection of tax from the tenant causes the rental receipts to exceed a rent restriction for the low-income unit. This subsection also applies to rent received by a person other than the owner or lessor of the low-income unit, including a broker. This subsection does not apply unless a taxpayer maintains the documentation to support the qualification of a unit as a low-income unit, the "gross rent" limitation for the unit and the rent received from that unit.
- ~~(s) The gross proceeds of sales or gross income derived from a commercial lease in which a reciprocal insurer or a corporation leases real property to an affiliated corporation is exempt. For the purposes of this paragraph:~~
 - ~~(1) "Affiliated corporation" means a corporation that meets one of the following conditions:~~
 - ~~(A) The corporation owns or controls at least eighty per cent of the lessor.~~
 - ~~(B) The corporation is at least eighty per cent owned or controlled by the lessor.~~
 - ~~(C) The corporation is at least eighty per cent owned or controlled by a corporation that also owns or controls at least eighty per cent of the lessor.~~
 - ~~(D) The corporation is at least eighty per cent owned or controlled by a corporation that is at least eighty per cent owned or controlled by a reciprocal insurer.~~
 - ~~(2) For the purposes of subsection (1), ownership and control are determined by reference to the voting shares of a corporation.~~

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

~~(3) —“Reciprocal insurer” has the same meaning as prescribed in A.R.S. Section 20-762.~~

(S) THE GROSS PROCEEDS OF A COMMERCIAL LEASE OF REAL PROPERTY BETWEEN AFFILIATED COMPANIES, BUSINESSES, PERSONS OR RECIPROCAL INSURERS ARE EXEMPT. FOR THE PURPOSES OF THIS PARAGRAPH:

(1) "AFFILIATED COMPANIES, BUSINESSES, PERSONS OR RECIPROCAL INSURERS" MEANS THE LESSOR HOLDS A CONTROLLING INTEREST IN THE LESSEE, THE LESSEE HOLDS A CONTROLLING INTEREST IN THE LESSOR, AN AFFILIATED ENTITY HOLDS A CONTROLLING INTEREST IN BOTH THE LESSOR AND THE LESSEE OR AN UNRELATED PERSON HOLDS A CONTROLLING INTEREST IN BOTH THE LESSOR AND LESSEE.

(2) "CONTROLLING INTEREST" MEANS DIRECT OR INDIRECT OWNERSHIP OF AT LEAST EIGHTY PERCENT (80%) OF THE VOTING SHARES OF A CORPORATION OR OF THE INTERESTS IN A COMPANY, BUSINESS OR PERSON OTHER THAN A CORPORATION.

(3) "RECIPROCAL INSURER" HAS THE SAME MEANING AS PRESCRIBED IN A.R.S. SECTION 20-762.

Section VIII. Model City Tax Code Section 8-2-450 is amended as follows, with an effective date of September 1, 2004.

Sec. 8-2-450. Rental, leasing, and licensing for use of tangible personal property.

- (a) The tax rate shall be at an amount equal to three and one-half percent (3.5%) of the gross income from the business activity upon every person engaging or continuing in the business of leasing, licensing for use, or renting tangible personal property for a consideration, including that which is semi-permanently or permanently installed within the Town as provided by Regulation.
- (b) Special provisions relating to long-term motor vehicle leases. A lease transaction involving a motor vehicle for a minimum period of twenty-four (24) months shall be considered to have occurred at the location of the motor vehicle dealership, rather than the location of the place of business of the lessor, even if the lessor's interest in the lease and its proceeds are sold, transferred, or otherwise assigned to a lease financing institution; provided further that the city or town where such motor vehicle dealership is located levies a Privilege Tax or an equivalent excise tax upon the transaction.
- (c) Gross income derived from the following transactions shall be exempt from Privilege Taxes imposed by this Section:

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (1) rental, leasing, or licensing for use of tangible personal property to persons engaged or continuing in the business of leasing, licensing for use, or rental of such property.
- (2) rental, leasing, or licensing for use of tangible personal property that is semi-permanently or permanently installed within another city or town that levies an equivalent excise tax on the transaction.
- (3) rental, leasing, or licensing for use of film, tape, or slides to a theater or other person taxed under Section 8-2-410, or to a radio station, television station, or subscription television system.
- (4) rental, leasing, or licensing for use of the following:
 - (A) prosthetics.
 - (B) income-producing capital equipment.
 - (C) mining and metallurgical supplies.

These exemptions include the rental, leasing, or licensing for use of tangible personal property which, if it had been purchased instead of leased, rented, or licensed by the lessee or licensee, would qualify as income-producing capital equipment or mining and metallurgical supplies.

- (5) rental, leasing, or licensing for use of tangible personal property to a qualifying hospital, qualifying community health center or a qualifying health care organization, except when the property so rented, leased, or licensed is for use in activities resulting in gross income from unrelated business income as that term is defined in 26 U.S.C. Section 512 or rental, leasing, or licensing for use of tangible personal property in this State by a nonprofit charitable organization that has qualified under Section 501(c)(3) of the United States Internal Revenue Code and that engages in and uses such property exclusively for training, job placement or rehabilitation programs or testing for mentally or physically handicapped persons.
- (6) separately billed charges for delivery, installation, repair, and/or maintenance as provided by Regulation.
- (7) charges for joint pole usage by a person engaged in the business of providing or furnishing utility or telecommunication services to another person engaged in the business of providing or furnishing utility or telecommunication services.
- (8) (Reserved)
- (9) rental, leasing, or licensing of aircraft that would qualify as aircraft acquired for use outside the State, as prescribed by Regulation, if such rental, leasing, or licensing had been a sale.
- (10) rental, leasing and licensing for use of an alternative fuel vehicle if such vehicle was manufactured as a diesel fuel vehicle and converted to operate on alternative fuel and equipment that is installed in a conventional diesel fuel motor vehicle to convert the vehicle to operate on an alternative fuel, as defined in A.R.S. Section 1-215.

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (11) rental, leasing, and licensing for use of solar energy devices, for taxable periods beginning from and after July 1, 2008. The lessor shall register with the Department of Revenue as a solar energy retailer. By registering, the lessor acknowledges that it will make its books and records relating to leases of solar energy devices available to the Department of Revenue and Town, as applicable, for examination.
- (12) LEASING OR RENTING CERTIFIED IGNITION INTERLOCK DEVICES INSTALLED PURSUANT TO THE REQUIREMENTS PRESCRIBED BY A.R.S. SECTION 21461. FOR THE PURPOSES OF THIS PARAGRAPH, "CERTIFIED IGNITION INTERLOCK DEVICE" HAS THE SAME MEANING PRESCRIBED IN A.R.S. SECTION 21301.

Section IX. Model City Tax Code Section 8-2-460 is amended as follows, with an effective date of October 1, 2007.

Sec. 8-2-460. Retail sales: measure of tax; burden of proof; exclusions.

- (a) The tax rate shall be at an amount equal to three and one-half percent (3.5%) of the gross income from the business activity upon every person engaging or continuing in the business of selling tangible personal property at retail.
- (b) The burden of proving that a sale of tangible personal property is not a taxable retail sale shall be upon the person who made the sale.
- (c) Exclusions. For the purposes of this Chapter, sales of tangible personal property shall not include:
- (1) sales of stocks, bonds, options, or other similar materials.
 - (2) sales of lottery tickets or shares pursuant to Article I, Chapter 5, Title 5, Arizona Revised Statutes.
 - (3) sales of platinum, bullion, or monetized bullion, except minted or manufactured coins transferred or acquired primarily for their numismatic value as prescribed by Regulation.
 - (4) gross income derived from the transfer of tangible personal property which is specifically included as the gross income of a business activity upon which another Section of this Article imposes a tax, shall be considered gross income of that business activity, and are not includable as gross income subject to the tax imposed by this Section.
 - (5) sales by professional or personal service occupations where such sales are inconsequential elements of the service provided.
 - (6) SALES OF CASH EQUIVALENTS. THE GROSS PROCEEDS OF SALES OR GROSS INCOME DERIVED FROM THE REDEMPTION OF ANY CASH EQUIVALENT BY THE HOLDER AS A MEANS OF PAYMENT FOR GOODS OR SERVICES THAT ARE TAXABLE UNDER THIS ARTICLE IS SUBJECT TO THE TAX. "CASH

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

EQUIVALENTS" MEANS ITEMS OR INTANGIBLES, WHETHER OR NOT NEGOTIABLE, THAT ARE SOLD TO ONE OR MORE PERSONS, THROUGH WHICH A VALUE DENOMINATED IN MONEY IS PURCHASED IN ADVANCE AND MAY BE REDEEMED IN FULL OR IN PART FOR TANGIBLE PERSONAL PROPERTY, INTANGIBLES OR SERVICES. CASH EQUIVALENTS INCLUDE GIFT CARDS, STORED VALUE CARDS, GIFT CERTIFICATES, VOUCHERS, TRAVELER'S CHECKS, MONEY ORDERS OR OTHER INSTRUMENTS, ORDERS OR ELECTRONIC MECHANISMS, SUCH AS AN ELECTRONIC CODE, PERSONAL IDENTIFICATION NUMBER OR DIGITAL PAYMENT MECHANISM, OR ANY OTHER PREPAID INTANGIBLE RIGHT TO ACQUIRE TANGIBLE PERSONAL PROPERTY, INTANGIBLES OR SERVICES IN THE FUTURE, WHETHER FROM THE SELLER OF THE CASH EQUIVALENT OR FROM ANOTHER PERSON. CASH EQUIVALENTS DO NOT INCLUDE EITHER OF THE FOLLOWING:

- (A) ITEMS OR INTANGIBLES THAT ARE SOLD TO ONE OR MORE PERSONS, THROUGH WHICH A VALUE IS NOT DENOMINATED IN MONEY.
- (B) PREPAID CALLING CARDS OR PREPAID AUTHORIZATION NUMBERS FOR TELECOMMUNICATIONS SERVICES MADE TAXABLE BY SUBSECTION (g) OF THIS SECTION.

- (d) (Reserved)
- (e) When this Town and another Arizona city or town with an equivalent excise tax could claim nexus for taxing a retail sale, the city or town where the permanent business location of the seller at which the order was received shall be deemed to have precedence, and for the purposes of this Chapter such city or town has sole and exclusive right to such tax.
- (f) The appropriate tax liability for any retail sale where the order is received at a permanent business location of the seller located in this Town or in an Arizona city or town that levies an equivalent excise tax shall be at the tax rate of the city or town of such seller's location.
- (g) Retail sales of prepaid calling cards or prepaid authorization numbers for telecommunications services, including sales of reauthorization of a prepaid card or authorization number, are subject to tax under this Section.

Section X. Model City Tax Code Section 8-2-462 is added as follows, with an effective date of July 1, 2013.

SEC. 8-2-462. RETAIL SALES: FOOD FOR HOME CONSUMPTION.

- (a) THE TAX RATE SHALL BE AT AN AMOUNT EQUAL TO ZERO PERCENT (0%) OF THE GROSS INCOME FROM THE BUSINESS ACTIVITY UPON EVERY PERSON ENGAGING OR

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

CONTINUING IN THE BUSINESS OF SELLING FOOD FOR HOME CONSUMPTION AT
RETAIL.

(b) FOR THE PURPOSES OF THIS SECTION ONLY, THE FOLLOWING DEFINITIONS SHALL
BE APPLICABLE:

(1) "ELIGIBLE GROCERY BUSINESS" MEANS AN ESTABLISHMENT WHOSE SALES
OF FOOD ARE SUCH THAT IT IS ELIGIBLE TO PARTICIPATE IN THE FOOD
STAMP PROGRAM ESTABLISHED BY THE FOOD STAMP ACT OF 1977 (P.L. 95-
113; 91 STAT. 958.7 U.S.C. SECTION 2011 ET SEQ.), ACCORDING TO
REGULATIONS IN EFFECT ON JANUARY 1, 1979. AN ESTABLISHMENT IS
DEEMED ELIGIBLE TO PARTICIPATE IN THE FOOD STAMP PROGRAM IF IT IS
AUTHORIZED TO PARTICIPATE IN THE PROGRAM BY THE UNITED STATES
DEPARTMENT OF AGRICULTURE FOOD AND NUTRITION SERVICE FIELD
OFFICE ON THE EFFECTIVE DATE OF THIS SECTION, OR IF, PRIOR TO A
REPORTING PERIOD FOR WHICH THE RETURN IS FILED, SUCH RETAILER
PROVES TO THE SATISFACTION OF THE TAX COLLECTOR THAT THE
ESTABLISHMENT, BASED ON THE NATURE OF THE RETAILER'S FOOD SALES,
COULD BE ELIGIBLE TO PARTICIPATE IN THE FOOD STAMP PROGRAM
ESTABLISHED BY THE FOOD STAMP ACT OF 1977 ACCORDING TO
REGULATIONS IN EFFECT ON JANUARY 1, 1979.

(2) "FACILITIES FOR THE CONSUMPTION OF FOOD" MEANS TABLES, CHAIRS,
BENCHES, BOOTHS, STOOLS, COUNTERS, AND SIMILAR CONVENIENCES,
TRAYS, GLASSES, DISHES, OR OTHER TABLEWARE AND PARKING AREAS FOR
THE CONVENIENCE OF IN-CAR CONSUMPTION OF FOOD IN OR ON THE
PREMISES ON WHICH THE RETAILER CONDUCTS BUSINESS.

(3) "FOOD FOR CONSUMPTION ON THE PREMISES" MEANS ANY OF THE
FOLLOWING:

(A) "HOT PREPARED FOOD" AS DEFINED BELOW.

(B) HOT OR COLD SANDWICHES.

(C) FOOD SERVED BY AN ATTENDANT TO BE EATEN AT TABLES, CHAIRS,
BENCHES, BOOTHS, STOOLS, COUNTERS, AND SIMILAR
CONVENIENCES AND WITHIN PARKING AREAS FOR THE CONVENIENCE
OF IN-CAR CONSUMPTION OF FOOD.

(D) FOOD SERVED WITH TRAYS, GLASSES, DISHES, OR OTHER
TABLEWARE.

(E) BEVERAGES SOLD IN CUPS, GLASSES, OR OPEN CONTAINERS.

(F) FOOD SOLD BY CATERERS.

(G) FOOD SOLD WITHIN THE PREMISES OF THEATRES, MOVIES, OPERAS,
SHOWS OF ANY TYPE OR NATURE, EXHIBITIONS, CONCERTS,

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

CARNIVALS, CIRCUSES, AMUSEMENT PARKS, FAIRS, RACES, CONTESTS, GAMES, ATHLETIC EVENTS, RODEOS, BILLIARD AND POOL PARLORS, BOWLING ALLEYS, PUBLIC DANCES, DANCE HALLS, BOXING, WRESTLING AND OTHER MATCHES, AND ANY BUSINESS WHICH CHARGES ADMISSION, ENTRANCE, OR COVER FEES FOR EXHIBITION, AMUSEMENT, ENTERTAINMENT, OR INSTRUCTION.

(H) ANY ITEMS CONTAINED IN SUBSECTIONS (B)(3)(A) THROUGH (G) ABOVE EVEN THOUGH THEY ARE SOLD ON A "TAKE-OUT" OR "TO GO" BASIS, AND WHETHER OR NOT THE ITEM IS PACKAGED, WRAPPED, OR IS ACTUALLY TAKEN FROM THE PREMISES.

(4) "HOT PREPARED FOOD" MEANS THOSE PRODUCTS, ITEMS, OR INGREDIENTS OF FOOD WHICH ARE PREPARED AND INTENDED FOR CONSUMPTION IN A HEATED CONDITION. "HOT PREPARED FOOD" INCLUDES A COMBINATION OF HOT AND COLD FOOD ITEMS OR INGREDIENTS IF A SINGLE PRICE HAS BEEN ESTABLISHED.

(5) "PREMISES" MEANS THE TOTAL SPACE AND FACILITIES IN OR ON WHICH A VENDOR CONDUCTS BUSINESS AND WHICH ARE OWNED OR CONTROLLED, IN WHOLE OR IN PART, BY A VENDOR OR WHICH ARE MADE AVAILABLE FOR THE USE OF CUSTOMERS OF THE VENDOR OR GROUP OF VENDORS, INCLUDING ANY BUILDING OR PART OF A BUILDING, PARKING LOT, OR GROUNDS.

(6) "FOOD FOR HOME CONSUMPTION" MEANS ALL FOOD, EXCEPT FOOD FOR CONSUMPTION ON THE PREMISES, IF SOLD BY ANY OF THE FOLLOWING:

(A) AN ELIGIBLE GROCERY BUSINESS.

(B) A PERSON WHO CONDUCTS A BUSINESS WHOSE PRIMARY BUSINESS IS NOT THE SALE OF FOOD BUT WHO SELLS FOOD WHICH IS DISPLAYED, PACKAGED, AND SOLD IN A SIMILAR MANNER AS AN ELIGIBLE GROCERY BUSINESS.

(C) A PERSON WHO SELLS FOOD AND DOES NOT PROVIDE OR MAKE AVAILABLE ANY FACILITIES FOR THE CONSUMPTION OF FOOD ON THE PREMISES.

(D) A PERSON WHO CONDUCTS A DELICATESSEN BUSINESS EITHER FROM A COUNTER WHICH IS SEPARATE FROM THE PLACE AND CASH REGISTER WHERE TAXABLE SALES ARE MADE OR FROM A COUNTER WHICH HAS TWO CASH REGISTERS AND WHICH ARE USED TO RECORD TAXABLE AND TAX EXEMPT SALES, OR A RETAILER WHO CONDUCTS A DELICATESSEN BUSINESS WHO USES A CASH REGISTER WHICH HAS AT LEAST TWO TAX COMPUTING KEYS WHICH ARE USED TO RECORD TAXABLE AND TAX EXEMPT SALES.

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (E) VENDING MACHINES AND OTHER TYPES OF AUTOMATIC RETAILERS.
 - (F) A PERSON'S SALES OF FOOD, DRINK AND CONDIMENT FOR CONSUMPTION WITHIN THE PREMISES OF ANY PRISON, JAIL OR OTHER INSTITUTION UNDER THE JURISDICTION OF THE STATE DEPARTMENT OF CORRECTIONS, THE DEPARTMENT OF PUBLIC SAFETY, THE DEPARTMENT OF JUVENILE CORRECTIONS OR A COUNTY SHERIFF.
- (c) INCOME DERIVED FROM THE FOLLOWING SOURCES IS EXEMPT FROM THE TAX IMPOSED BY THIS SECTION:
- (1) SALES OF FOOD FOR HOME CONSUMPTION TO A PERSON REGULARLY ENGAGED IN THE BUSINESS OF SELLING SUCH PROPERTY.
 - (2) OUT-OF-TOWN SALES OR OUT-OF-STATE SALES.
 - (3) CHARGES FOR DELIVERY OR OTHER "DIRECT CUSTOMER SERVICES" AS PRESCRIBED BY REGULATION.
 - (4) FOOD PURCHASED WITH FOOD STAMPS PROVIDED THROUGH THE FOOD STAMP PROGRAM ESTABLISHED BY THE FOOD STAMP ACT OF 1977 (P.L. 95-113; 91 STAT. 958.7 U.S.C. SECTION 2011 ET SEQ.) OR PURCHASED WITH FOOD INSTRUMENTS ISSUED UNDER SECTION 17 OF THE CHILD NUTRITION ACT (P.L. 95-627; 92 STAT. 3603; AND P.L. 99-669; SECTION 4302; 42 UNITED STATES CODE SECTION 1786) BUT ONLY TO THE EXTENT THAT FOOD STAMPS OR FOOD INSTRUMENTS WERE ACTUALLY USED TO PURCHASE SUCH FOOD.
 - (5) SALES OF FOOD PRODUCTS BY PRODUCERS AS PROVIDED FOR BY A.R.S. SECTIONS 3-561, 3-562 AND 3-563.
 - (6) SALES OF FOOD, BEVERAGES, CONDIMENTS AND ACCESSORIES TO A PUBLIC EDUCATIONAL ENTITY, PURSUANT TO ANY OF THE PROVISIONS OF TITLE 15, ARIZONA REVISED STATUTES, INCLUDING A REGULARLY ORGANIZED PRIVATE OR PAROCHIAL SCHOOL THAT OFFERS AN EDUCATIONAL PROGRAM FOR GRADE TWELVE OR UNDER WHICH MAY BE ATTENDED IN SUBSTITUTION FOR A PUBLIC SCHOOL PURSUANT TO A.R.S. SECTION 15-802 ; TO THE EXTENT SUCH ITEMS ARE TO BE PREPARED OR SERVED TO INDIVIDUALS FOR CONSUMPTION ON THE PREMISES OF A PUBLIC EDUCATIONAL ENTITY DURING SCHOOL HOURS. FOR THE PURPOSES OF THIS SUBSECTION, "ACCESSORIES" MEANS PAPER PLATES, PLASTIC EATING UTENSILS, NAPKINS, PAPER CUPS, DRINKING STRAWS, PAPER SACKS OR OTHER DISPOSABLE CONTAINERS, OR OTHER ITEMS WHICH FACILITATE THE CONSUMPTION OF THE FOOD.
 - (7) SALES OF FOOD, BEVERAGES, CONDIMENTS AND ACCESSORIES TO A NONPROFIT CHARITABLE ORGANIZATION THAT HAS QUALIFIED AS AN EXEMPT ORGANIZATION UNDER 26 U.S.C. SECTION 501(C)(3) AND REGULARLY SERVES MEALS TO THE NEEDY AND INDIGENT ON A CONTINUING BASIS AT

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

NO COST. FOR THE PURPOSES OF THIS SUBSECTION, "ACCESSORIES" MEANS PAPER PLATES, PLASTIC EATING UTENSILS, NAPKINS, PAPER CUPS, DRINKING STRAWS, PAPER SACKS OR OTHER DISPOSABLE CONTAINERS, OR OTHER ITEMS WHICH FACILITATE THE CONSUMPTION OF THE FOOD.

(d) REPORTING. SUCH PERSONS WHO SELL FOOD FOR HOME CONSUMPTION SHALL, IN CONJUNCTION WITH THE RETURN REQUIRED PURSUANT TO SECTION 8-2-520, REPORT TO THE TAX COLLECTOR IN A MANNER PRESCRIBED BY THE TAX COLLECTOR ALL SALES OF FOOD FOR HOME CONSUMPTION EXEMPTED FROM TAXES IMPOSED BY THIS CHAPTER.

(e) RECORDKEEPING.

(1) RETAILERS SHALL MAINTAIN ACCURATE, VERIFIABLE, AND COMPLETE RECORDS OF ALL PURCHASES AND SALES OF TANGIBLE PERSONAL PROPERTY IN ORDER TO VERIFY EXEMPTIONS FROM TAXES IMPOSED BY THIS CHAPTER. A RETAILER MAY USE ANY METHOD OF REPORTING THAT PROPERLY REFLECTS ALL PURCHASES AND SALES OF FOOD FOR HOME CONSUMPTION, AS WELL AS ALL PURCHASES AND SALES OF ITEMS SUBJECT TO TAXES IMPOSED BY THIS CHAPTER, PROVIDED THAT SUCH RECORDS ARE MAINTAINED IN ACCORDANCE WITH ARTICLE III, AND REGULATIONS OF THE TAX COLLECTOR.

(2) ANY PERSON WHO FAILS TO MAINTAIN RECORDS AS PROVIDED HEREIN SHALL BE DEEMED TO HAVE HAD NO SALES OF FOOD FOR HOME CONSUMPTION, AND IF UPON REQUEST BY THE TAX COLLECTOR, A PERSON CANNOT DEMONSTRATE TO THE TAX COLLECTOR THAT SUCH RECORDS AND REPORTS DO PROPERLY REFLECT ALL SALES OF FOOD FOR HOME CONSUMPTION, THE TAX COLLECTOR MAY RECOMPUTE THE AMOUNT OF TAX TO BE PAID AS PROVIDED IN SECTIONS 8-2-370 AND 8-2-545(B).

Section XI. Model City Tax Code Section 8-2-465 is amended as follows. All changes are effective July 1, 2013, except new subsection (mm), which is effective January 1, 2007.

Sec. 8-2-465. Retail sales: exemptions.

Income derived from the following sources is exempt from the tax imposed by Section 8-2-460:

- (a) sales of tangible personal property to a person regularly engaged in the business of selling such property.
- (b) out-of-Town sales or out-of-State sales.

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (c) charges for delivery, installation, or other direct customer services as prescribed by Regulation.
- (d) charges for repair services as prescribed by Regulation, when separately charged and separately maintained in the books and records of the taxpayer.
- (e) sales of warranty, maintenance, and service contracts, when separately charged and separately maintained in the books and records of the taxpayer.
- (f) sales of prosthetics.
- (g) sales of income-producing capital equipment.
- (h) sales of rental equipment and rental supplies.
- (i) sales of mining and metallurgical supplies.
- (j) sales of motor vehicle fuel and use fuel which are subject to a tax imposed under the provisions of Article I or II, Chapter 16, Title 28, Arizona Revised Statutes; or sales of use fuel to a holder of a valid single trip use fuel tax permit issued under A.R.S. Section 28-5739, or sales of natural gas or liquefied petroleum gas used to propel a motor vehicle.
- (k) sales of tangible personal property to a construction contractor who holds a valid Privilege Tax License for engaging or continuing in the business of construction contracting where the tangible personal property sold is incorporated into any structure or improvement to real property as part of construction contracting activity.
- (l) sales of motor vehicles to nonresidents of this State for use outside this State if the vendor ships or delivers the motor vehicle to a destination outside this State.
- (m) sales of tangible personal property which directly enters into and becomes an ingredient or component part of a product sold in the regular course of the business of job printing, manufacturing, or publication of newspapers, magazines, or other periodicals. Tangible personal property which is consumed or used up in a manufacturing, job printing, publishing, or production process is not an ingredient nor component part of a product.
- (n) sales made directly to the Federal Government to the extent of:
 - (1) one hundred percent (100%) of the gross income derived from retail sales made by a manufacturer, modifier, assembler, or repairer.
 - (2) fifty percent (50%) of the gross income derived from retail sales made by any other person.
- (o) sales to hotels, bars, restaurants, dining cars, lunchrooms, boarding houses, or similar establishments of articles consumed as food, drink, or condiment, whether simple, mixed, or compounded, where such articles are customarily prepared or served to patrons for consumption on or off the premises, where the purchaser is properly licensed and paying a tax under Section 455 or the equivalent excise tax upon such income.
- (p) sales of tangible personal property to a qualifying hospital, qualifying community health center or a qualifying health care organization, except when the property sold is for use in activities resulting in gross income from unrelated business income as that term is defined in 26 U.S.C. Section 512 or sales of tangible personal property purchased in this State by a nonprofit charitable organization that

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

has qualified under Section 501(c)(3) of the United States Internal Revenue Code and that engages in and uses such property exclusively for training, job placement or rehabilitation programs or testing for mentally or physically handicapped persons.

~~(q) food purchased with food stamps provided through the food stamp program established by the Food Stamp Act of 1977 (P.L. 95-113; 91 Stat. 958.7 U.S.C. Section 2011 et seq.) or purchased with food instruments issued under Section 17 of the Child Nutrition Act (P.L. 95-627; 92 Stat. 3603; and P.L. 99-669; Section 4302; 42 United States Code Section 1786) but only to the extent that food stamps or food instruments were actually used to purchase such food. (RESERVED)~~

(r) (Reserved)

(1) (Reserved)

(2) (Reserved)

(3) (Reserved)

(4) (Reserved)

(s) sales of groundwater measuring devices required by A.R.S. Section 45-604.

(t) (Reserved)

(u) sales of aircraft acquired for use outside the State, as prescribed by Regulation.

(v) sales of food products by producers as provided for by A.R.S. Sections 3-561, 3-562 and 3-563.

(w) (Reserved)

(x) SALES OF FOOD AND DRINK TO A PERSON WHO IS ENGAGED IN BUSINESS THAT IS CLASSIFIED UNDER THE RESTAURANT CLASSIFICATION AND THAT PROVIDES SUCH FOOD AND DRINK WITHOUT MONETARY CHARGE TO ITS EMPLOYEES FOR THEIR OWN CONSUMPTION ON THE PREMISES DURING SUCH EMPLOYEES' HOURS OF EMPLOYMENT.

(y) (Reserved)

(z) (Reserved)

(aa) the sale of tangible personal property used in remediation contracting as defined in Section 8-2-100 and Regulation 8-2-100.5.

(bb) sales of materials that are purchased by or for publicly funded libraries including school district libraries, charter school libraries, community college libraries, state university libraries or federal, state, county or municipal libraries for use by the public as follows:

(1) printed or photographic materials.

(2) electronic or digital media materials.

(cc) sales of food, beverages, condiments and accessories used for serving food and beverages to a commercial airline, as defined in A.R.S. Section 42-5061(A)(49), that serves the food and beverages to its passengers, without additional charge, for consumption in flight. For the purposes of this

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

subsection, "accessories" means paper plates, plastic eating utensils, napkins, paper cups, drinking straws, paper sacks or other disposable containers, or other items which facilitate the consumption of the food.

- (dd) in computing the tax base in the case of the sale or transfer of wireless telecommunication equipment as an inducement to a customer to enter into or continue a contract for telecommunication services that are taxable under Section 8-2-470, gross proceeds of sales or gross income does not include any sales commissions or other compensation received by the retailer as a result of the customer entering into or continuing a contract for the telecommunications services.
- (ee) for the purposes of this Section, a sale of wireless telecommunication equipment to a person who holds the equipment for sale or transfer to a customer as an inducement to enter into or continue a contract for telecommunication services that are taxable under Section 8-2-470 is considered to be a sale for resale in the regular course of business.
- (ff) sales of alternative fuel as defined in A.R.S. Section 1-215, to a used oil fuel burner who has received a Department of Environmental Quality permit to burn used oil or used oil fuel under A.R.S. Sections 49-426 or 49-480.
- (gg) sales of food, beverages, condiments and accessories to a public educational entity, pursuant to any of the provisions of Title 15, Arizona Revised Statutes, INCLUDING A REGULARLY ORGANIZED PRIVATE OR PAROCHIAL SCHOOL THAT OFFERS AN EDUCATIONAL PROGRAM FOR GRADE TWELVE (12) OR UNDER WHICH MAY BE ATTENDED IN SUBSTITUTION FOR A PUBLIC SCHOOL PURSUANT TO A.R.S. SECTION 15-802; to the extent such items are to be prepared or served to individuals for consumption on the premises of a public educational entity during school hours. For the purposes of this subsection, "accessories" means paper plates, plastic eating utensils, napkins, paper cups, drinking straws, paper sacks or other disposable containers, or other items which facilitate the consumption of the food.
- (hh) sales of personal hygiene items to a person engaged in the business of and subject to tax under Section 8-2-444 of this Code if the tangible personal property is furnished without additional charge to and intended to be consumed by the person during his occupancy.
- (ii) for the purposes of this Section, the diversion of gas from a pipeline by a person engaged in the business of operating a natural or artificial gas pipeline, for the sole purpose of fueling compressor equipment to pressurize the pipeline, is not a sale of the gas to the operator of the pipeline.
- (jj) sales of food, beverages, condiments and accessories to a nonprofit charitable organization that has qualified as an exempt organization under 26 U.S.C. Section 501(c)(3) and regularly serves meals to the needy and indigent on a continuing basis at no cost. For the purposes of this subsection, "accessories" means paper plates, plastic eating utensils, napkins, paper cups, drinking straws, paper sacks or other disposable containers, or other items which facilitate the consumption of the food.
- (kk) sales of motor vehicles that use alternative fuel if such vehicle was manufactured as a diesel fuel vehicle and converted to operate on alternative fuel and sales of equipment that is installed in a conventional diesel fuel motor vehicle to convert the vehicle to operate on an alternative fuel, as defined in A.R.S. Section 1-215.

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (II) sales of solar energy devices, for taxable periods beginning from and after July 1, 2008. The retailer shall register with the Department of Revenue as a solar energy retailer. By registering, the retailer acknowledges that it will make its books and records relating to sales of solar energy devices available to the Department of Revenue and Town, as applicable, for examination.
- (MM) SALES OR OTHER TRANSFERS OF RENEWABLE ENERGY CREDITS OR ANY OTHER UNIT CREATED TO TRACK ENERGY DERIVED FROM RENEWABLE ENERGY RESOURCES. FOR THE PURPOSES OF THIS PARAGRAPH, "RENEWABLE ENERGY CREDIT" MEANS A UNIT CREATED ADMINISTRATIVELY BY THE CORPORATION COMMISSION OR GOVERNING BODY OF A PUBLIC POWER UTILITY TO TRACK KILOWATT HOURS OF ELECTRICITY DERIVED FROM A RENEWABLE ENERGY RESOURCE OR THE KILOWATT HOUR EQUIVALENT OF CONVENTIONAL ENERGY RESOURCES DISPLACED BY DISTRIBUTED RENEWABLE ENERGY RESOURCES.
- (NN) SALES OF MAGAZINES OR OTHER PERIODICALS OR OTHER PUBLICATIONS BY THIS STATE TO ENCOURAGE TOURIST TRAVEL.
- (OO) SALES OF PAPER MACHINE CLOTHING, SUCH AS FORMING FABRICS AND DRYER FELTS, SOLD TO A PAPER MANUFACTURER AND DIRECTLY USED OR CONSUMED IN PAPER MANUFACTURING.
- (PP) SALES OF OVERHEAD MATERIALS OR OTHER TANGIBLE PERSONAL PROPERTY THAT IS USED IN PERFORMING A CONTRACT BETWEEN THE UNITED STATES GOVERNMENT AND A MANUFACTURER, MODIFIER, ASSEMBLER OR REPAIRER, INCLUDING PROPERTY USED IN PERFORMING A SUBCONTRACT WITH A GOVERNMENT CONTRACTOR WHO IS A MANUFACTURER, MODIFIER, ASSEMBLER OR REPAIRER, TO WHICH TITLE PASSES TO THE GOVERNMENT UNDER THE TERMS OF THE CONTRACT OR SUBCONTRACT.
- (QQ) SALES OF COAL, PETROLEUM, COKE, NATURAL GAS, VIRGIN FUEL OIL AND ELECTRICITY SOLD TO A QUALIFIED ENVIRONMENTAL TECHNOLOGY MANUFACTURER, PRODUCER OR PROCESSOR AS DEFINED IN A.R.S. SECTION 41-1514.02 AND DIRECTLY USED OR CONSUMED IN THE GENERATION OR PROVISION OF ON-SITE POWER OR ENERGY SOLELY FOR ENVIRONMENTAL TECHNOLOGY MANUFACTURING, PRODUCING OR PROCESSING OR ENVIRONMENTAL PROTECTION. THIS PARAGRAPH SHALL APPLY FOR TWENTY FULL CONSECUTIVE CALENDAR OR FISCAL YEARS FROM THE DATE THE FIRST PAPER MANUFACTURING MACHINE IS PLACED IN SERVICE. IN THE CASE OF AN ENVIRONMENTAL TECHNOLOGY MANUFACTURER, PRODUCER OR PROCESSOR WHO DOES NOT MANUFACTURE PAPER, THE TIME PERIOD SHALL BEGIN WITH THE DATE THE FIRST MANUFACTURING, PROCESSING OR PRODUCTION EQUIPMENT IS PLACED IN SERVICE.
- (RR) SALES OR GROSS INCOME DERIVED FROM SALES OF MACHINERY, EQUIPMENT, MATERIALS AND OTHER TANGIBLE PERSONAL PROPERTY USED DIRECTLY AND PREDOMINANTLY TO CONSTRUCT A QUALIFIED ENVIRONMENTAL TECHNOLOGY

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

MANUFACTURING, PRODUCING OR PROCESSING FACILITY AS DESCRIBED IN A.R.S. SECTION 41-1514.02. THIS SUBSECTION APPLIES FOR TEN FULL CONSECUTIVE CALENDAR OR FISCAL YEARS AFTER THE START OF INITIAL CONSTRUCTION.

Section XII. Model City Tax Code Section 8-2-480 is amended as follows, with an effective date of January 1, 2007, except new Local Option #PP which is available to be selected effective August 1, 2014.

Sec. 8-2-480. Utility services.

- (a) The tax rate shall be at an amount equal to three and one-half percent (3.5%) of the gross income from the business activity upon every person engaging or continuing in the business of producing, providing, or furnishing utility services, including electricity, electric lights, current, power, gas (natural or artificial), or water to:
 - (1) consumers or ratepayers who reside within the Town.
 - (2) (Reserved)
- (b) Exclusion of certain sales of natural gas to a public utility. Notwithstanding the provisions of subsection (a) above, the gross income derived from the sale of natural gas to a public utility for the purpose of generation of power to be transferred by the utility to its ratepayers shall be considered a retail sale of tangible personal property subject to Sections 8-2-460 and 8-2-465, and not considered gross income taxable under this Section.
- (c) Resale utility services. Sales of utility services to another provider of the same utility services for the purpose of providing such utility services either to another properly licensed utility provider or directly to such purchaser's customers or ratepayers shall be exempt and deductible from the gross income subject to the tax imposed by this Section, provided that the purchaser is properly licensed by all applicable taxing jurisdictions to engage or continue in the business of providing utility services, and further provided that the seller maintains proper documentation, in a manner similar to that for sales for resale, of such transactions.
- (d) Tax credit offset for franchise fees. There shall be allowed as an offset any franchise fees paid to the Town pursuant to the terms of a franchise agreement. However, such offset shall not be allowed against taxes imposed by any other Section of this Chapter. Such offsets shall not be deemed in conflict with or violation of subsection 8-2-400(b).
- (e) The tax imposed by this Section shall not apply to sales of utility services to a qualifying hospital, qualifying community health center or a qualifying health care organization, except when sold for use in activities resulting in gross income from unrelated business income as that term is defined in 26 U.S.C. Section 512.

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (f) The tax imposed by this Section shall not apply to sales of natural gas or liquefied petroleum gas used to propel a motor vehicle.
- (g) The tax imposed by this Section shall not apply to:
 - (1) revenues received by a municipally owned utility in the form of fees charged to persons constructing residential, commercial or industrial developments or connecting residential, commercial or industrial developments to a municipal utility system or systems if the fees are segregated and used only for capital expansion, system enlargement or debt service of the utility system or systems.
 - (2) revenues received by any person or persons owning a utility system in the form of reimbursement or contribution compensation for property and equipment installed to provide utility access to, on or across the land of an actual utility consumer if the property and equipment become the property of the utility. This exclusion shall not exceed the value of such property and equipment.
- (h) The tax imposed by this Section shall not apply to sales of alternative fuel as defined in A.R.S. Section 1-215, to a used oil fuel burner who has received a Department of Environmental Quality permit to burn used oil or used oil fuel under A.R.S. Sections 49-426 or 49-480.
- (I) THE TAX IMPOSED BY THIS SECTION SHALL NOT APPLY TO SALES OR OTHER TRANSFERS OF RENEWABLE ENERGY CREDITS OR ANY OTHER UNIT CREATED TO TRACK ENERGY DERIVED FROM RENEWABLE ENERGY RESOURCES. FOR THE PURPOSES OF THIS PARAGRAPH, "RENEWABLE ENERGY CREDIT" MEANS A UNIT CREATED ADMINISTRATIVELY BY THE CORPORATION COMMISSION OR GOVERNING BODY OF A PUBLIC POWER UTILITY TO TRACK KILOWATT HOURS OF ELECTRICITY DERIVED FROM A RENEWABLE ENERGY RESOURCE OR THE KILOWATT HOUR EQUIVALENT OF CONVENTIONAL ENERGY RESOURCES DISPLACED BY DISTRIBUTED RENEWABLE ENERGY RESOURCES.
- (J) THE TAX IMPOSED BY THIS SECTION SHALL NOT APPLY TO THE PORTION OF GROSS PROCEEDS OF SALES OR GROSS INCOME ATTRIBUTABLE TO TRANSFERS OF ELECTRICITY BY ANY RETAIL ELECTRIC CUSTOMER OWNING A SOLAR PHOTOVOLTAIC ENERGY GENERATING SYSTEM TO AN ELECTRIC DISTRIBUTION SYSTEM, IF THE ELECTRICITY TRANSFERRED IS GENERATED BY THE CUSTOMER'S SYSTEM.
- (K) (RESERVED)

Section XIII. Model City Tax Code Section 8-2-485 is amended as follows, with an effective date of July 1, 2013.

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

Sec. 8-2-485. WASTEWATER REMOVAL SERVICES

- (A) THE TAX RATE SHALL BE AN AMOUNT EQUAL TO ZERO PERCENT (0%) OF THE GROSS INCOME FROM THE BUSINESS ACTIVITY UPON EVERY PERSON ENGAGING OR CONTINUING IN THE BUSINESS OF PROVIDING WASTEWATER REMOVAL SERVICES BY MEANS OF SEWER LINES OR SIMILAR PIPELINES TO:
- (1) CONSUMERS OR RATEPAYERS WHO RESIDE WITHIN THE TOWN.
 - (2) CONSUMERS OR RATEPAYERS OF THIS TOWN, WHETHER WITHIN THE TOWN OR WITHOUT, TO THE EXTENT THAT THIS TOWN PROVIDES SUCH PERSONS WASTEWATER REMOVAL SERVICES, EXCLUDING CONSUMERS OR RATEPAYERS WHO ARE RESIDENTS OF ANOTHER CITY OR TOWN WHICH LEVIES AN EQUIVALENT EXCISE TAX UPON THIS TOWN FOR PROVIDING SUCH WASTEWATER REMOVAL SERVICES TO SUCH PERSONS.
- (B) THE TAX IMPOSED BY THIS SECTION SHALL NOT APPLY TO GROSS INCOME RELATING TO THE PROVIDING OF WASTEWATER REMOVAL SERVICES FROM A QUALIFYING HOSPITAL, QUALIFYING COMMUNITY HEALTH CENTER OR A QUALIFYING HEALTH CARE ORGANIZATION.

Section XIV. Model City Tax Code, Appendix IV, Section 8-2-570 (Local Audits) is amended as follows to conform the Appendix language with prior changes made to Section 8-2-570 of the Model language, with an effective date of July 1, 2008.

**Sec. 8-2-570. Administrative review; petition for hearing or for redetermination; finality of order.
(State Administration and Audits)**

- (a) Closing agreements between the Tax Collector and a taxpayer have no force of law unless made in accordance with the provisions of A.R.S. Section 42-1113.
- (b) Administrative review.
- (1) Petitions of appeal shall be made to, and hearings shall be conducted by, the Arizona Department of Revenue, in accordance with the provisions of A.R.S. Section 42-1251, as modified by Section 8-2-571.
 - (2) (Reserved)
 - (3) (Reserved)
 - (4) (Reserved)

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (5) Hearings shall be held by the Arizona Department of Revenue in accordance with the provisions of A.R.S. Section 42-1251. The Department's decision may be appealed to the State Board of Tax Appeals, in accordance with the provisions of A.R.S. Section 42-1253.
- (6) (Reserved)
- (7) (Reserved)
- (8) (Reserved)
- (c) (Reserved)
- (d) (Reserved)
- (e) Taxpayers shall be subject to the State Taxpayer Bill of Rights (A.R.S. Section 42-2051 et. seq.).

**Sec. 8-2-570. Administrative review; petition for hearing or for redetermination; finality of order.
(Local Audits)**

For the purposes of this section, "Municipal Tax Hearing Office" means the administrative offices of the Municipal Tax Hearing Officer.

- (a) Informal Conference. A taxpayer shall have the right to discuss any proposed assessment with the auditor prior to the issuance of any assessment, but any such informal conference is not required for the taxpayer to file a petition for administrative review.
- (b) Administrative Review.
 - (1) Filing a Petition. Other than in the case of a jeopardy assessment, a taxpayer may contest the applicability or amount of tax, penalty, or interest imposed upon or paid by him pursuant to this Chapter by filing a petition for a hearing or for redetermination with the Tax Collector as set forth below:
 - (A) within forty-five (45) days of receipt by the taxpayer of notice of a determination by the Tax Collector that a tax, penalty, or interest amount is due, or that a request for refund or credit has been denied; or
 - (B) by voluntary payment of any contested amount when accompanied by a timely filed return and a petition requesting a refund of the protested portion of said payment; or
 - (C) by petition accompanying a timely filed return contesting an amount reported but not paid; or
 - (D) by petition requesting review of denial of waiver of penalty as provided in subsection 8-2-540(g).
 - (2) Extension to file a petition. In all cases, the taxpayer may request ~~only one (1) AN~~ extension from the Tax Collector. Such request must be in writing, state the reasons for the requested delay ~~and time of delay requested~~, and must be filed with the Tax Collector within the period allowed above for originally filing a petition. The Tax Collector shall allow ~~such~~ A FORTY-FIVE (45) DAY extension to file a petition, when such written request has been properly and

2012-2014 AMENDMENTS TO THE TAX CODE OF THE TOWN OF JEROME

timely made by the taxpayer, ~~but such extension shall not exceed forty-five (45) days beyond the time provided for originally filing a petition.~~ THE TAX COLLECTOR MAY GRANT AN ADDITIONAL EXTENSION AND MAY DETERMINE THE CORRESPONDING TIME OF ANY SUCH EXTENSION AT THEIR SOLE DISCRETION.

(3) Requirements for petition.

- (A) The petition shall be in writing and shall set forth the reasons why any correction, abatement, or refund should be granted, and the amount of reduction or refund requested. The petition may be amended at any time prior to the time the taxpayer rests his case at the hearing or such time as the Hearing Officer allows for submitting of amendments in cases of redeterminations without hearings. The Hearing Officer may require that amendments be in writing, and in that case, he shall provide a reasonable period of time to file the amendment. The Hearing Officer shall provide a reasonable period of time for the Tax Collector to review and respond to the petition and to any written amendments.
- (B) The taxpayer, as part of the petition, may request a hearing which shall be granted by the Hearing Officer. If no request for hearing is made the petition shall be considered to be submitted for decision by the Hearing Officer on the matters contained in the petition and in any reply made by the Tax Collector.
- (C) The provisions of this Section are exclusive, and no petition seeking any correction, abatement, or refund shall be considered unless the petition is timely and properly filed under the Section.

(4) Transmittal to Hearing Officer. The Town shall designate a Hearing Officer, who may be other than an employee of the Town). The Tax Collector, if designated to receive petitions, shall forward any petition to the Municipal Tax Hearing Officer within twenty (20) days after receipt, accompanied by documentation as to timeliness. In cases where the Hearing Officer determines that the petition is not timely or not in proper form, he shall notify both the taxpayer and the Tax Collector; and in cases of petitions not in proper form only, the Hearing Officer shall provide the taxpayer with an extension up to forty-five (45) days to correct the petition.

(5) Hearings shall be conducted by a Hearing Officer and shall be continuous until the Hearing Officer closes the record. The taxpayer may be heard in person or by his authorized representative at such hearing. Hearings shall be conducted informally as to the order of proceeding and presentation of evidence. The Hearing Officer shall admit evidence over hearsay objections where the offered evidence has substantial probative value and reliability. Further, copies of records and documents prepared in the ordinary course of business may be admitted, without objection as to foundation, but subject to argument as to weight, admissibility, and authenticity. Summary accounting records may be admitted subject to satisfactory proof of the reliability of the summaries. In all cases, the decision of the Hearing Officer shall be made solely upon substantial and reliable evidence. All expenses incurred in the hearing shall be paid by the party incurring the same.

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (6) Redeterminations upon a "petition for redetermination" shall follow the same conditions, except that no oral hearing shall be held.
- (7) Hearing Ruling. In either case, the Hearing Officer shall issue his ruling not later than forty-five (45) days after the close of the record by the Hearing Officer.
- (8) Notice of Refund or Adjusted Assessment. Within sixty (60) days of the issuance of the Hearing Officer's decision, the Tax Collector shall issue to the taxpayer either a notice of refund or an adjusted assessment recalculated to conform to the Hearing Officer's decision.
- (c) Stipulations that future tax is also protested. A taxpayer may enter into a stipulation with the Tax Collector that future taxes of similar nature are also at issue in any protest or appeal. However, unless such stipulation is made, it is presumed that the protest or appeal deals solely and exclusively with the tax specifically protested and no other. When a taxpayer enters into such a stipulation with the Tax Collector that future taxes of similar nature will be included in any redetermination, hearing, or court case, it is the burden of that taxpayer to identify, segregate, and keep record of such income or protested taxable amount in his books and records in the same manner as the taxpayer is required to segregate exempt income.
- (d) When an assessment is final.
 - (1) If a request for administrative review and petition for hearing or redetermination of an assessment made by the Tax Collector is not filed within the period required by subsection (b) above, such person shall be deemed to have waived and abandoned the right to question the amount determined to be due and any tax, interest, or penalty determined to be due shall be final as provided in subsections 8-2-545(a) and 8-2-555(f).
 - (2) The decision made by the Hearing Officer upon administrative review by hearing or redetermination shall become final thirty (30) days after the taxpayer receives the notice of refund or adjusted assessment required by subsection (b)(8) above, unless the taxpayer appeals the order or decision in the manner provided in Section 8-2-575.
- (e) The provisions of the State Taxpayer Bill of Rights (A.R.S. Section 42-2051 et. seq.) shall not apply.

Section XV. Model City Tax Code Section 8-2-660 is amended as follows. All changes are effective July 1, 2013, except new subsection (mm), which is effective January 1, 2007, and new Local Option #PP which is available to be selected effective August 1, 2014.

Sec. 8-2-660. (Reserved)

Section XVI. Model City Tax Code Regulation 8-2-120.1 is repealed, with an effective date of July 1, 2013.

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

~~Regulation 8-2-120.1 (Reserved)~~

Section XVII. Model City Tax Code Regulation 8-2-270.1 is amended as follows, with an effective date of July 1, 2013.

Reg. 8-2-270.1. Proprietary activities of municipalities are not considered activities of a governmental entity.

The following activities, when performed by a municipality, are considered to be activities of a person engaged in business for the purposes of this Chapter, and not excludable by reason of Section 8-2-270:

- (a) rental, leasing, or licensing for use of real property to other than another department or agency of the municipality.
- (b) producing, providing, or furnishing electricity, electric lights, current, power, gas (natural or artificial), or water to consumers or ratepayers.
- (c) sale of tangible personal property to the public, when similar tangible personal property is available for sale by other persons, as, for example, at police or surplus auctions.

(D) PROVIDING WASTEWATER REMOVAL SERVICES TO CONSUMERS OR RATEPAYERS BY MEANS OF SEWER LINES OR SIMILAR PIPELINES.

Section XVIII. Model City Tax Code Regulation 8-2-460.1 is amended as follows, with an effective date of July 1, 2013.

Reg. 8-2-460.1. Distinction between retail sales and certain other transfers of tangible personal property.

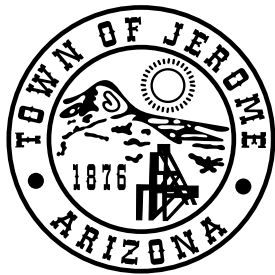
- (a) Charges for transfer of tangible personal property included in the gross income of the business activity of persons engaged in the following business activities shall be deemed only as gross income from such business activity and not sales at retail taxed by Section 8-2-460:
 - (1) tangible personal property incorporated into real property as part of reconstruction or construction contracting, per Sections 8-2-415 through 8-2-418.
 - (2) (Reserved)
 - (3) job printing, per Section 8-2-425.

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (4) mining, timbering, and other extraction, but not sales of sand, gravel, or rock extracted from the ground, per Section 8-2-430.
- (5) publication of newspapers, magazines, and other periodicals, per Section 8-2-435.
- (6) rental, leasing, and licensing of real or tangible personal property, per Sections 8-2-445 or 8-2-450.
- (7) restaurants and bars, per Section 8-2-455.
- ~~(8)~~ (8) FOOD FOR HOME CONSUMPTION, PER SECTION 8-2-462.
- ~~(8)(9)~~ telecommunications services, per Section 8-2-470.
- ~~(9)(10)~~ utility services, per Section 8-2-480.
- (11) WASTEWATER REMOVAL SERVICES, PER SECTION 8-2-485.
- (b) Distinction between construction contracting, retail, and certain direct customer service activities.
 - (1) When an item is attached or installed on real property, it is a construction contracting activity and any subsequent repair, removal, or replacement of that item is construction contracting.
 - (2) Items attached or installed on tangible personal property are retail sales.
 - (3) Transactions where no tangible personal property is attached or installed are considered direct customer service activities (for example: carpet cleaning, lawn mowing, and landscape maintenance).
 - (4) Demolition, earth moving, and wrecking activities are considered construction contracting.
- (c) The sale of sand, rock, and gravel extracted from the ground shall be deemed a sale of tangible personal property and not mining or metallurgical activity.
- (d) Sale of consumable goods incorporated into or applied to real property is considered a retail sale and not construction contracting. Examples of consumable goods are lubricants, faucet washers, and air conditioning coolant, but not paint.
- (e) Installation or removal of tangible personal property which has independent functional utility is considered a retail activity.
 - (1) "Tangible personal property which has independent functional utility" must be able to substantially perform its function(s) without attachment to real property. "Attachment to real property" must include more than connection to water, power, gas, communication, or other service.
 - (2) Examples of tangible personal property which has independent functional utility include artwork, furnishings, "plug-in" kitchen equipment, or similar items installed by bolts or similar fastenings.
 - (3) Examples of tangible personal property which does not have independent functional utility include wall-to-wall carpeting, flooring, wallpaper, kitchen cabinets, or "built-in" dishwashers or ranges.

**2012-2014 AMENDMENTS TO THE
TAX CODE OF THE TOWN OF JEROME**

- (4) The installation of window coverings (drapes, mini-blinds, etc.) is always a retail activity.



TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 www.jerome.az.gov

ORDINANCE NO. 464

AN ORDINANCE OF THE TOWN COUNCIL OF THE TOWN OF JEROME, YAVAPAI COUNTY, ARIZONA, AMENDING THE JEROME TOWN CODE BY ADOPTING A NEW CHAPTER 19, "RECREATIONAL MARIJUANA," ESTABLISHING A PURPOSE; SETTING FORTH DEFINITIONS; PROHIBITING MARIJUANA ON PUBLIC PROPERTY; PROHIBITING MARIJUANA TESTING FACILITIES; PROHIBITING MARIJUANA ESTABLISHMENTS; SETTING FORTH VIOLATIONS; PROVIDING FOR PENALTIES; AND DECLARING AN EMERGENCY.

WHEREAS, marijuana contains tetrahydrocannabinol ("THC"), which remains on Schedule I of the Controlled Substances Act pursuant to 21 U.S.C. § 811 et al. and any possession and use is a violation of federal law pursuant to 21 U.S.C. § 841 et. al.; and

WHEREAS, the Arizona Medical Marijuana Act, Arizona Revised Statutes Sections § 36-2801 et al., and Title 9, Chapter 17 of the Arizona Administrative Code allow the establishment and operation of nonprofit medical marijuana dispensaries in Jerome according to a prescribed statutory and regulatory process; and

WHEREAS, the statewide ballot measure I-23-2020 ("Proposition 207"), known as "Smart and Safe Arizona Act" was approved by the voters at the November 3, 2020 general election ballot and contains provisions authorizing the possession, consumption, purchase, processing, manufacturing or transporting of marijuana by an individual who is at least twenty-one (21) years of age; authorizing possession, transport, cultivation or processing of marijuana plants in a primary residence by adults over 21 years of older; allowing a nonprofit medical marijuana dispensary or other non-dispensary applicant to apply to the Department of Health Services to become a licensed marijuana establishment authorized to engage in the retail sale, cultivation and manufacturing of marijuana; and allowing the Department, or another entity designated by the Department, to become a marijuana testing facility to test the potency of marijuana and detect any harmful contaminants;

WHEREAS, the Town of Jerome finds that Proposition 207 authorizes marijuana establishments to use chemical extraction or chemical synthesis, including butane and other flammable gases, to extract marijuana concentrate, which poses a threat to the health, safety and security of the community and increases the responsibilities of law enforcement and other Town departments to respond to violations of state and local laws, including building, electrical and fire codes; and

Date of first reading: _____

Dates of publication: _____

Date of adoption: _____

Date of posting: _____

Voting record at adoption:

	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN
BARBER						
DILLENBERG						
HARVEY						
MOORE						
WORTH						

WHEREAS, the Town finds that marijuana establishments and marijuana testing facilities constitute a nuisance to public health, safety and welfare, and seeks to enact regulations to prohibit marijuana establishments and marijuana testing facilities in Jerome;

NOW THEREFORE, BE IT ORDAINED by the Common Council of the Town of Jerome, Arizona, as follows:

Section I. In General.

The Code of Jerome, Arizona, is hereby amended by adding a new Chapter 19, "Recreational Marijuana," to read as follows:

CHAPTER 19 RECREATIONAL MARIJUANA

ARTICLE	19-1	Purpose
	19-2	Definitions
	19-3	Marijuana Prohibited on Public Property
	19-4	Marijuana Establishments Prohibited
	19-5	Marijuana Testing Facilities Prohibited
	19-6	Marijuana Delivery Prohibited
	19-7	Violations; Penalties

Article 19-1 Purpose.

This Chapter is adopted to protect the health, safety, and welfare of the community.

Article 19-2 Definitions.

The below words and phrases, wherever used in this Chapter, shall be construed as defined in this section. Words used in the present tense include the future tense, words in the plural number include the singular number, and words in the singular number include the plural number.

- A. *"Chemical Extraction"* means the process of removing a particular component of a mixture from others present, including removing resinous tetrahydrocannabinol from marijuana.
- B. *"Chemical Synthesis"* means production of a new particular molecule by adding to, subtracting from, or changing the structure of a precursor molecule.
- C. *"Consume," "Consuming,"* and *"Consumption"* mean the act of ingesting, inhaling or otherwise introducing marijuana into the human body.
- D. *"Consumer"* means an individual who is at least twenty-one years of age and who purchases marijuana or marijuana products.

- E. *“Cultivate”* and *“Cultivation”* mean to propagate, breed, grow, prepare and package marijuana.
- F. *“Department”* means the State of Arizona Department of Health Services or its successor agency.
- G. *“Dual Licensee”* means an entity that holds both a nonprofit medical marijuana dispensary registration and a marijuana establishment license.
- H. *“Enclosed Area”* means a building, greenhouse, or other structure that has:
1. A complete roof enclosure supported by connecting walls that are constructed of solid material extending from the ground to the roof;
 2. Is secure against unauthorized entry;
 3. Has a foundation, slab or equivalent base to which the floor is securely attached; and
 4. Meets performance standards ensuring that cultivation and processing activities cannot be and are not perceptible from the structure in terms of not being visible from public view without using binoculars, aircraft or other optical aids and is equipped with a lock or other security device that prevents access by minors.
 5. Meets all applicable Fire Code, Building Code and Zoning Ordinance requirements.
- I. *“Extraction”* means the process of extracting or separating resin from marijuana to produce or process any form of marijuana concentrates using water, lipids, gases, solvents, or other chemicals or chemical processes.
- J. *“Manufacture”* and *“Manufacturing”* mean to compound, blend, extract, infuse or otherwise make or prepare a marijuana product.
- K. *“Marijuana”*
1. Means all parts of the plant of the genus cannabis, whether growing or not, as well as the seeds from the plant, the resin extracted from any part of the plant, and every compound, manufacture, salt, derivative, mixture or preparation of the plant or its seeds or resin.
 2. Includes cannabis as defined in A.R.S. § 13-3401.
 3. Does not include industrial hemp, the fiber produced from the stalks of the plant of the genus cannabis, oil or cake made from the seeds of the plant, sterilized seeds of the plant that are incapable of germination, or the weight of any other ingredient combined with marijuana to prepare topical or oral administrations, food, drink or other products.
- L. *“Marijuana Concentrate”*
1. Means resin extracted from any part of a plant of the genus cannabis and every compound, manufacture, salt, derivative, mixture or preparation of that resin or tetrahydrocannabinol.

2. Does not include industrial hemp or the weight of any other ingredient combined with cannabis to prepare topical or oral administrations, food, drink or other products.
- M. *"Marijuana Establishment"* means an entity licensed by the Department to operate any of the following:
1. A single retail location at which the licensee may sell marijuana and marijuana products to consumers, cultivate marijuana and manufacture marijuana products.
 2. A single off-site cultivation location at which the licensee may cultivate marijuana, process marijuana and manufacture marijuana products, but from which marijuana and marijuana products may not be transferred or sold to consumers.
 3. A single off-site location at which the licensee may manufacture marijuana products and package and store marijuana and marijuana products, but from which marijuana and marijuana products may not be transferred or sold to consumers.
- N. *"Marijuana Products"* means marijuana concentrate and products that are composed of marijuana and other ingredients and that are intended for use or consumption, including edible products, ointments, and tinctures.
- O. *"Marijuana Testing Facility"* means the Department or another entity that is licensed by the Department to analyze the potency of marijuana and test marijuana for harmful contaminants.
- P. *"Nonprofit Medical Marijuana Dispensary"* means a nonprofit entity as defined in A.R.S. § 36-2801(12).
- Q. *"Open Space"* means a public park, public sidewalk, public walkway or public pedestrian thoroughfare.
- R. *"Person"* means an individual, partnership, corporation, association, or any other entity of whatever kind or nature.
- S. *"Process" and "Processing"* means to harvest, dry, cure, trim or separate parts of the marijuana plant.
- T. *"Public Place"* has the same meaning prescribed in the Smoke-Free-Arizona Act, A.R.S. § 36-601.01.
- U. *"Smoke"* means to inhale, exhale, burn, carry or possess any lighted marijuana or lighted marijuana products, whether natural or synthetic.

Article 19-3 Marijuana Prohibited on Public Property.

- A. The use, sale, cultivation, manufacture, production or distribution of marijuana or marijuana products is prohibited on property that is occupied, owned, controlled or operated by the Town of Jerome.

- B. It is unlawful for an individual to smoke marijuana in a public place or open space in Jerome.

Article 19-4 Marijuana Establishments Prohibited.

- A. To the fullest extent allowable by law, the operation of a marijuana establishment is not permitted in Jerome.
- B. To the fullest extent allowable by law, the operation of a marijuana establishment by a dual licensee is not permitted in Jerome.

Article 19-5 Marijuana Testing Facility Prohibited.

- A. To the fullest extent allowable by law, the operation of a marijuana testing facility is prohibited in Jerome.

NOTE: Article 19-6 is OPTIONAL; Town Attorney will review this provision with Council.

Article 19-6 Marijuana Delivery Prohibited.

- A. It is unlawful to deliver marijuana in the Town of Jerome to a person who is not a medical marijuana cardholder as defined in the Arizona Medical Marijuana Act, chapter 28.1 of Title 36, Arizona Revised Statutes.

Article 19-7 Violations; Penalties.

- A. Each day of any violation of any provision of this chapter shall continue shall constitute a separate offense.
- B. Civil Penalty: Except as otherwise provided herein, violations of any provision of this chapter shall be civil code offenses which may be adjudicated and enforced by the Town of Jerome civil hearing process set forth in Article 18-3 of the Jerome Town Code.

Section II. Providing for Repeal of Conflicting Ordinances.

All ordinances and parts of ordinances in conflict with the provisions of this Ordinance or any part of the Code adopted herein by reference, are hereby repealed.

Section III. Emergency.

Because of the urgent need for the implementation of the Town's regulations concerning recreational marijuana, the immediate operation of this Ordinance is necessary for the preservation of the health, safety, and general welfare. An emergency is hereby declared to exist and this Ordinance shall be in full force and effect from and after its passage and approval by the Mayor and Council as required by law.

Section IV. Providing for Severability.

If any section, subsection, sentence, clause, phrase or portion of this Ordinance or any part of the Code adopted herein by reference, is for any reason held to be invalid or unconstitutional by the decision of any court of competent jurisdiction, such decision shall not affect the validity of the remaining portions thereof.

_____ PASSED AND ADOPTED by the Common Council of the Town of Jerome, Arizona, this
_____ day of _____, 2020.

Mayor

ATTEST:

APPROVED AS TO FORM:

Candace Gallagher, Town Manager/Clerk

William J. Sims, Esq.
Town Attorney



TOWN OF JEROME
POST OFFICE BOX 335, JEROME, ARIZONA 86331
OFFICE (928) 634-7943 FAX (928) 634-0715

**ZONING ADMINISTRATOR ANALYSIS
COUNCIL STAFF REPORT
November 10, 2020**

ITEM 10A: **Blanket Extension of Building and Zoning Permits**
Recommendation: Discussion/Possible Action
Prepared by: John Knight, Zoning Administrator

Background and Summary: Due to COVID-19, many construction projects have been postponed and applicants are reluctant to move during these uncertain times. At the Council meeting on May 12, 2020, the Council agreed to extend all active building and zoning permits by six months. This extension expires November 12, 2020. Some projects have been able to proceed. However, several of the projects that were extended have still not been able to move forward due financing or other concerns. As a result, there have been additional requests for extensions for both building permits and zoning permits (such as Design Review and Site Plan Review approvals). Under the current emergency order, the council can provide authority to the mayor to extend both building permits and zoning permits by another six months.

Building Permits: Once issued, building permits are valid for six months. Owners and contractors are currently keeping their permits active by doing minor work, calling for inspections for small items (like an inspection to replace an electrical outlet), or been forced to apply for individual extensions. This takes up unnecessary staff time that could potentially be avoided if all active building permits were extended for a period of six months.

Zoning Permits: There are several projects that have received Site Plan and Design Review approvals that are still not able to move forward. Some applicants are unable or unwilling to obtain financing until the economy improves. As a result, their permits will expire unless they request an extension. These extensions would go before the Planning and Zoning Commission, Design Review Board, and (in some cases) the Council. Rather than processing these extensions individually, the Council may want to consider an additional blanket extension that would give applicants an additional six months. This would save staff time and time for the boards.

Action: Direct the Mayor to provide a blanket extension to May 12, 2020 for the following types of active permits:

- Building Permits
- Site Plan Review
- Design Review
- Conditional Use Permits
- Demolition Permits

**INFORMATION REGARDING BEES
PROVIDED BY
VICE MAYOR SAGE HARVEY**

Bees Threatening Bees | Earth Wise

October 16, 2020 By EarthWise [Leave a Comment](#)



0:00 / 2:00

Millions of bee colonies are trucked across the country every year to pollinate cranberries, melons, broccoli, blueberries, and cherries, and also to produce honey.

After the growing seasons, honeybees are trucked to various locations to rest and rebuild their population and to replenish bees lost to disease and pesticides. Some of these locations are in national forests. Thousands of hives belonging to 112 apiaries are currently permitted in national forests by the Department of Agriculture. This presents a problem because these hives are being permitted on public lands with virtually no environmental review and with little consideration of the impact these colonies can have on local wild bee populations.

The 4,000 wild bee species in the U.S. consume up to 95% of local available pollen. Nearly 40 federally listed threatened or endangered species of bees, butterflies, and flower flies depend on national forest land for their survival. And now the pollinators in these places, which were once refuges for these species and others, increasingly face competition from millions of domesticated honeybees.

Honeybees are super-foraging machines and are literally taking the pollen out of the mouths of other bees and pollinators. Honeybees themselves have been facing numerous problems from habitat loss, pesticides, and other stress factors. So, what is happening is essentially a pollinator habitat crunch that carries long-term implications for the U.S. food supply. We need to find some answers and the sooner the better.

Web Links

[Will Putting Honey Bees on Public Lands Threaten Native Bees?](#)

EARTH WISE is a production of WVAWC NORTHWEST PUBLIC RADIO.

📌 Tagged With: agriculture, bees, colonies, competition, crops, department of agriculture, disease, domesticated, endangered, environmental review, food, food supply, foraging, fruits, habitat loss, honey, honeybees, implications, land, long term, national forests, native bees, permitted, pesticides, pollen, pollination, pollinators, population, public lands, refuges, stress factors, survival, system, threatened, United States, vegetables, wild bees, wild populations

Leave a Reply

Your email address will not be published. Required fields are marked *

Comment

Name *

Do managed bees have negative effects on wild bees?: A systematic review of the literature

Rachel E. Mallinger, Hannah R. Gaines-Day, Claudio Gratton

Published: December 8, 2017 • <https://doi.org/10.1371/journal.pone.0189268>

Abstract

Managed bees are critical for crop pollination worldwide. As the demand for pollinator-dependent crops increases, so does the use of managed bees. Concern has arisen that managed bees may have unintended negative impacts on native wild bees, which are important pollinators in both agricultural and natural ecosystems. The goal of this study was to synthesize the literature documenting the effects of managed honey bees and bumble bees on wild bees in three areas: (1) competition for floral and nesting resources, (2) indirect effects via changes in plant communities, including the spread of exotic plants and decline of native plants, and (3) transmission of pathogens. The majority of reviewed studies reported negative effects of managed bees, but trends differed across topical areas. Of studies examining competition, results were highly variable with 53% reporting negative effects on wild bees, while 28% reported no effects and 19% reported mixed effects (varying with the bee species or variables examined). Equal numbers of studies examining plant communities reported positive (36%) and negative (36%) effects, with the remainder reporting no or mixed effects. Finally, the majority of studies on pathogen transmission (70%) reported potential negative effects of managed bees on wild bees. However, most studies across all topical areas documented the potential for impact (e.g. reporting the occurrence of competition or pathogens), but did not measure direct effects on wild bee fitness, abundance, or diversity. Furthermore, we found that results varied depending on whether managed bees were in their native or non-native range; managed bees within their native range had lesser competitive effects, but potentially greater effects on wild bees via pathogen transmission. We conclude that while this field has expanded considerably in recent decades, additional research measuring direct, long-term, and population-level effects of managed bees is needed to understand their potential impact on wild bees.

Citation: Mallinger RE, Gaines-Day HR, Gratton C (2017) Do managed bees have negative effects on wild bees?: A systematic review of the literature. PLoS ONE 12(12): e0189268. <https://doi.org/10.1371/journal.pone.0189268>

Editor: Nigel E. Raine, University of Guelph, CANADA

Received: October 12, 2016; **Accepted:** November 23, 2017; **Published:** December 8, 2017

Copyright: © 2017 Mallinger et al. This is an open access article distributed under the terms of the [Creative Commons Attribution License](#), which permits unrestricted use, distribution, and reproduction in any medium, provided the original author and source are credited.

Data Availability: All relevant data are within the paper and its Supporting Information files.

Funding: The University of Wisconsin Vilas Associates Award and University of Wisconsin Hatch Funds (WIS201516) awarded to Claudio Gratton, and the United States Department of Agriculture Specialty Crop Block Grant (SCBG 15-02) awarded to Claudio Gratton and Hannah Gaines, provided funds to cover publication costs. These funders had no role in study design, data collection and analysis, decision to publish, or preparation of the manuscript.

Competing interests: The authors have declared that no competing interests exist.

Introduction

The status of bees worldwide is currently a topic of research and conservation concern [1–5]. There are approximately 20,000 species of bees worldwide, and these insects are arguably the most important pollinators for both crop and wild plants [6–8]. Numerous factors may be threatening bees including habitat loss and fragmentation, pesticides, and disease [3, 9–10]. In addition, the increasingly widespread use of managed bees may have negative effects on wild bee populations (reviewed by [11, 12]). Managed bees, including honey bees, bumble bees, and some solitary bees, have become an integral component of agriculture due to a rising demand for pollinator-dependent crops (e.g., almonds, tree fruits, berries), and without which many farms would likely experience pollination deficits [13–14]. However, the use of managed bees may negatively affect wild bee abundance or diversity, which could in turn impact food production since a diverse wild bee community has been found to increase pollination rates and subsequent crop yields even when managed bees are present [15–19]. Furthermore, in natural habitats, a diverse wild bee community is integral for maintaining plant diversity and ecosystem function [20–21]. Thus, identifying and quantifying the factors that affect wild bees is essential for bee conservation and to ensure pollination services within both managed and natural habitats.

There are several ways in which managed bees could affect wild bees including through competition over finite resources such as nectar, pollen, or nesting habitat (Fig 1). Competition with managed bees for pollen and nectar may induce changes in wild bee floral use and niche breadth, with potential consequences for bee fitness. While the majority of wild bees are polylectic and

potentially able to modify foraging behaviors in the presence of honey bees, competition could still have negative effects if wild bees are forced to forage on less nutritious plants, spend more time searching for flowers that are unoccupied or whose resources have not yet been depleted, or forage further from their nests [22–26]. Additionally, in regions where managed bees escape and establish in the wild, they could compete with wild bees for nesting sites such as tree or ground cavities [27]. The extent of competitive effects, however, could depend on many factors including overall resource availability, the degree of niche overlap between managed and wild bee species, and densities of both managed and wild bees.

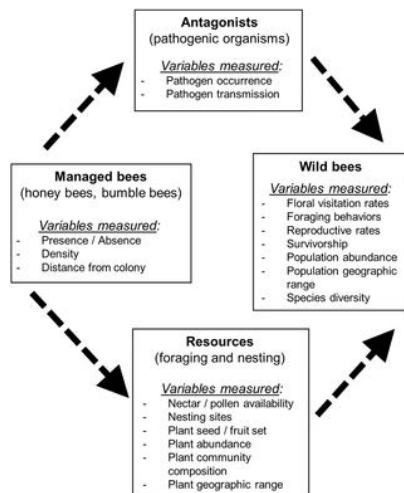


Fig 1. Hypothesized interactions between managed bees and wild bees.

Wild and managed bees may interact indirectly (dashed lines) through either bottom-up effects on shared resources (including pollen, nectar, and nesting sites), or by altering top-down interactions through shared antagonists such as pathogenic organisms.

<https://doi.org/10.1371/journal.pone.0189268.g001>

Managed bees could also affect resource availability for wild bees by changing plant community composition. Previous studies have shown that in some regions where managed bees are exotic, they preferentially forage on exotic plants [28–30]. These foraging preferences can form invasive mutualisms whereby exotic pollinators and plants facilitate each other's spread in non-native regions, subsequently reducing populations of native plants [29]. The decline of native plants could then disrupt plant-pollinator networks, potentially leading to a loss of native bee species [1, 31]. However, while some bee species are specialists and may therefore be sensitive to the loss of native plants, the majority of wild bees are generalists and may therefore be resilient to changes in plant community composition [32–34].

Finally, managed bees may affect wild bees through shared antagonists, specifically pathogenic organisms. Most managed bees, including honey bees and bumble bees, are social species and occur in high densities, potentially making them more likely to harbor pathogens than their solitary wild counterparts [35–36]. The movement of these managed bees across large regions for crop pollination could increase their potential to spread such pathogens to wild bees. Furthermore, managed bees are often deployed outside of their native ranges, and can thus introduce novel, invasive pathogens [11, 28, 37]. Transmission of infectious agents by managed bees to wild bees can occur via contaminated pollen [38], feces [39], or through contact on shared foraging resources [40]. Shared pathogens have been found between managed and wild bees of the same species, closely related species, and distantly related species, suggesting that transmission of antagonists is possible and has the potential to affect a broad wild bee community [41–46]. The extent to which managed bees transmit pathogens to wild bees, and the effects of such antagonists on wild bee fitness, is likely to vary with the density and health of managed bees as well as the type of pathogen.

Two previous review papers by Goulson [11] and Paini [12] on this general topic found much circumstantial evidence for competition between managed and wild bees, but very little evidence that such competition has population-level or long-term effects on wild bees. Additionally, Goulson [11] concluded that exotic managed bees negatively affect plant community composition through the pollination of invasive exotic weeds, but the effects of native managed bees on plant communities were not addressed [11]. Furthermore, the effect of managed bees on wild bees via the transmission of natural enemies, including pathogens and parasites, was not well-covered in either review because there were few studies to date on that topic. Since the publication of these reviews in 2003 and 2004, no systematic review has been conducted on the overall effects of managed bees on wild bees. And with the increasing use of managed bees to meet agricultural demand [13], the effects of managed bees on wild flora and fauna is a mounting issue. Managed bees may be necessary in agricultural landscapes as crop pollinators, and may also benefit from supplemental foraging in natural habitats. Thus, this topic is relevant not only for growers, beekeepers, and the commercial bee industry, but for public land managers who may be considering the placement of managed bees within conservation areas or other public lands.

In this paper, we synthesize the literature on the effects of managed bees, here restricted to honey bees *Apis* spp. and bumble bees *Bombus* spp., on wild bees. Though there are other species of managed bees, honey bees and bumble bees are the most commonly used worldwide and relatively well researched. We searched for and synthesized papers that fell into three broad topical areas by which managed bees can affect wild bees: 1) competition for shared resources; 2) changes in plant community composition, specifically an increase in exotic plants and a subsequent decline in native plants, which is both a conservation concern in itself and has the potential to negatively affect native wild bees, and 3) the transmission of shared pathogens. While there may be other pathways by which managed bees affect wild bees, such as interspecific mating [47], these three topical areas are relatively well-studied and encompass those covered in earlier reviews [11–12]. Our findings have implications for the management of pollinators in natural and agricultural systems and for the conservation of wild bees.

Materials and methods

We performed a systematic search of the literature using Web of Knowledge/Web of Science (ISI Thompson-Reuters, webofknowledge.com) to identify studies that examined the effects of managed bees on wild bees via competition, changes in plant communities, and transmission of pathogens. Due to the broad nature of our focal question, we synthesized the literature with a systematic review as opposed to a meta-analysis. In addition, the studies in our review measured different metrics associated with both managed bees and wild bees (e.g., bee visitation rates, abundance, diversity, reproductive rates) that would have been difficult to standardize in a meta-analysis (Fig. 1). Instead, as part of our systematic review, we used a vote-counting analysis to quantify the variables measured, and results found, across studies. We focused our review on the most common and widely used managed bees, honey bees and bumble bees. The use of other managed bees, including the orchard mason bee *Osmia lignaria* Say and alfalfa leafcutter bee *Megachile rotundata* Fabricius, is more limited to specific crops and geographic regions, resulting in fewer studies on these bees, and thus we excluded them from this systematic review.

To search for the effects of managed honey bees on wild bees via competition, changes in plant communities, and transmission of pathogens, including pathogenic parasites, we used the search terms: ("Apis mellifera" OR "honey bee" OR honeybee) AND (competition OR disease OR pathogen OR (pollin* AND (exotic OR invasive))). To identify studies that examined the effects of managed bumble bees, we used the search terms: (Bombus OR "bumble bee" OR bumblebee) AND (competition OR disease OR pathogen OR (pollin* AND (exotic OR invasive))). We additionally conducted a more general search to find studies that were not identified by the previous searches using the terms: "managed bee" AND (competition OR disease OR pathogen OR (pollin* AND (exotic OR invasive))). We included all papers returned by these searches beginning in 1900 and through the end of 2016. We additionally reviewed all articles that were cited by the two older non-systematic reviews on this topic [11–12], and searched for all recent articles that cited these two reviews [11–12].

We evaluated every article returned by our searches for whether or not it broadly addressed one of our three topical areas: competition between managed and wild bees, effects of managed bees on plant communities (natives vs. exotics), and transmission of pathogens, including pathogenic parasites, from managed to wild bees. Studies that did not broadly fall into the three topical areas, as well as review papers, were excluded. Additionally, we excluded papers that were not peer-reviewed (e.g. theses, conference proceedings) and papers not available in English. Furthermore, to be included in our review, studies needed to measure some response metric of either wild bees or plants (dependent variables, e.g., foraging behavior, abundance, reproductive rates) and relate that to a measured or assumed aspect of managed bee "intensity" (independent variable, e.g., presence/absence, before/after introduction, distance from colony, abundance). A study measuring pathogen presence in only managed bees, for example, would not be included if it did not also measure a wild bee response, regardless of any implications for wild bees discussed within the paper. For all studies, we recorded which topical area was addressed, the managed bee species examined and whether it was native to the study region, the wild bee taxa examined, the location and context of the study (e.g. field vs. lab), the independent managed bee variables measured, the dependent response variables measured (i.e. wild bee or plant metrics), and any additional explanatory or mechanism variables measured. We found a variety of independent and dependent variables across studies, and we did not discriminate among these variables for inclusion in this study. Furthermore, while we noted mechanistic or explanatory variables, studies did not need to measure such variables for inclusion in the study.

We additionally scored each article for whether the authors reported negative, positive, mixed, or no effects of managed bees. Consistent across all three topical areas, scores are from the perspective of native wild bees or native plants, where a negative score means that some measure of their performance decreases with managed bees, and a positive score means that performance improves with managed bees. Specifically, for competitive effects of managed bees on wild bees, "negative" (-) means that managed bees compete with wild bees and/or increased intra- or interspecific competition among wild bees, "no effect" (0) means that managed bees did not compete with wild bees and/or had no competitive effect on wild bees, and "mixed effects" means that responses varied across different wild bee species or different measures of competition. While we did not specifically search for studies examining mutualism or commensalism, a "positive" effect (+) in this area would include studies examining potential competitive effects but finding positive relationships between managed and wild bees (e.g. a positive correlation between abundances or visitation rates of managed and wild bees).

For the effects of managed bees on plant communities, "negative" (-) means that managed bees had a negative effect on native plants (e.g., decreased plant abundance) and/or a positive effect on exotic plants (e.g., increased plant abundance), "positive" (+) means that managed bees had a positive effect on native plants and/or a negative effect on exotic plants, "no effect" (0) means that managed bees had no effect on plant communities, and "mixed effects" means that responses varied by plant species or across different plant variables measured. Increases in native plants and/or decreases in exotic plants was considered to be a positive response because restoring native plant communities, a common bee conservation goal, is often associated with increases in native wild bees [48–49].

For evaluating the potential effects of managed bees on wild bees via pathogens, "negative" (-) means that managed bees increased pathogen occurrence in wild bees or that managed bee pathogens had a negative effect on wild bees including on fitness, abundance, diversity, etc., "no effect" (0) means that managed bees had no effect on the occurrence of pathogens in wild bees, or that managed bee pathogens had no effect on wild bees, and "mixed effects" means that effects varied across wild bee

species, pathogens, or response variables examined. As it is unlikely that managed bees could have a positive effect on wild bees in this area (e.g. decrease pathogen occurrence), and pathogens by definition do not have a positive effect on their host, there were no positive effects found in this category.

Results

Our search of the literature identified 146 studies that fit our inclusion criteria and broadly addressed the effects of managed bees on wild bees via competition, changes in plant communities (specifically changes in exotic and native plant populations), or transmission of pathogens (Fig 2, S1 References). Of these studies, 72 addressed competition, 41 addressed plant communities, 6 studied both competition and plant communities, and 27 addressed pathogens. The majority of studies examining competition and plant communities focused on managed honey bees *Apis* spp. (number of studies, $n = 59$ and 36 , respectively) with fewer studies on managed bumble bees ($n = 17$ and 6 , respectively) or on both ($n = 2$ and 5 , respectively) (Tables 1 and 2). However, studies on pathogens were more evenly split between those studying managed honey bees ($n = 15$) and managed bumble bees ($n = 10$) (Table 3).

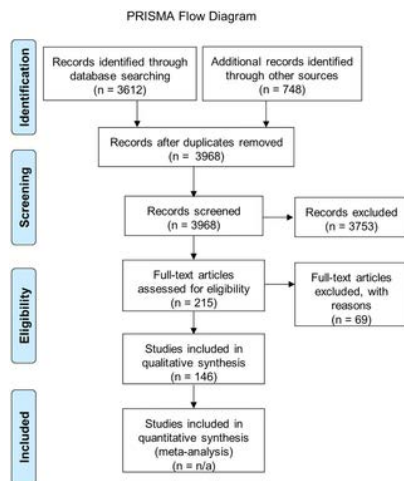


Fig 2. PRISMA flow diagram.

A flow diagram showing the process for a systematic review including the number of studies processed, reviewed, and analyzed at each step in the review process.

<https://doi.org/10.1371/journal.pone.0189268.g002>

Table 1. Studies published from 1900–2016 examining potential competitive effects of managed bees on wild bees.

For all studies, we recorded the species of managed and wild bees, and indicated whether managed bees were native or exotic to the study region, the location (continent and country) and context of the study including field (natural, semi-natural, developed, agricultural, or experimental plot), lab, or greenhouse, and all variables measured, including the managed bee metric (independent variable), wild bee metric (dependent variable), and any explanatory or mechanistic variables. The overall competitive effect of managed bees on wild bees, as reported by the study, is also recorded and noted as positive (+), neutral (0), negative (-), or mixed.

<https://doi.org/10.1371/journal.pone.0189268.t001>

Table 2. Studies published from 1900–2016 examining the potential effect of managed bees on wild bees through changes in plant communities, including the spread of exotic plants.

For all studies, we recorded the species of managed and wild bees, and indicated whether managed bees were native or exotic to the study region, the location (continent and country) and context of the study including field (natural, semi-natural, developed, agricultural, or experimental plot), lab, or greenhouse, and all variables measured, including the managed bee metric (independent variable), plant metric (dependent variable), and any explanatory or mechanistic variables. The overall effect of managed bees on plant communities, as reported by the study, is also recorded and noted as positive (+), neutral (0), negative (-), or mixed.

<https://doi.org/10.1371/journal.pone.0189268.t002>

Table 3. Studies published from 1900–2016 examining the potential transmission of pathogens from managed to wild bees.

For all studies, we recorded the species of managed and wild bees, and indicated whether managed bees were native or exotic to the study region, the location (continent and country) and context of the study including field (natural, semi-natural, developed, agricultural, or experimental plot), lab, or greenhouse, and all variables measured, including the managed bee metric (independent variable), wild bee metric (dependent variable), and any explanatory or mechanistic variables. The overall effect of managed bees on wild bees via pathogens, as reported by the study, is also recorded and noted as positive (+), neutral (0), negative (-), or mixed.

<https://doi.org/10.1371/journal.pone.0189268.t003>

Most competition studies were done in North America (n = 19) and Europe (n = 17), followed by South America (n = 14) and Asia (n = 12), with fewer done in Australia (n = 9), Africa (n = 4) or on smaller islands (n = 3) (Table 1). In contrast, of studies done on plant communities, the majority were conducted in Australia (n = 11) and North America (n = 10), followed by islands (n = 9), South America (n = 8), and Asia (n = 7), with few conducted in Europe (n = 2) and none in Africa (Table 2). Studies on pathogens were done primarily in North America (n = 12) and Europe (n = 8), with few in South America (n = 4) and Asia (n = 3), and none in Africa, Australia, or on smaller islands (Table 3). The vast majority of competition and plant studies were conducted in the field, specifically in natural/semi-natural habitats (69% and 85%, respectively, Tables 1 and 2). Pathogen studies were more variable, with many conducted in managed habitats including agricultural systems, or across multiple habitat types, or within the lab (Table 3). Studies on competition were published earlier and with greater frequency as compared to the other topical areas; competition studies began to be published at increasing rates around 1975, while studies on plant communities increased around 2000, and studies on pathogens were not published in notable numbers until 2005 (Fig 3).

Fig 3. Publication trends.

The total number of published studies over time from 1900–2016 that examined the effects of managed bees on wild bees via three reviewed mechanisms: competition for resources, changes in plant communities (specifically native and exotic plant populations), and transmission of pathogens. While the literature search began in 1900, the first publication within these topical areas did not occur until 1964.

<https://doi.org/10.1371/journal.pone.0189268.g003>

Competition

Of the studies that examined competition between managed bees and wild bees, the most commonly measured independent variables associated with managed bees were visitation rates (n = 27) and various aspects of foraging behaviors such as handling time, pollen vs. nectar collection, or nectar robbing (n = 26), followed by presence/absence (n = 23), and abundance or density (n = 14). Fewer studies analyzed competition as a function of the distance from managed bee colonies (n = 8). The most commonly examined wild bee responses to managed bees were visitation rates to flowers (n = 40) and other aspects of bee foraging behaviors (n = 34), with fewer studies examining bee abundance or density (n = 18), bee reproductive success (n = 12), or bee diversity (n = 4) as a function of managed bees. The majority of studies (n = 38) did not measure explanatory variables, or potential mechanisms for the observed results, though some looked at the degree of niche overlap between managed and wild bees (n = 24), depletion or availability of nectar and pollen (n = 12), or direct displacement interactions between managed and wild bees (n = 5) (Fig 4A–4C).

Fig 4. Reviewed effects of managed bees on wild bees through competition for shared resources.

Variables reported by studies examining the competitive effects of managed bees on wild bees including (A) managed bee metrics (independent variables), (B) potential mechanisms (explanatory variables), and (C) wild bee responses (dependent variables).

<https://doi.org/10.1371/journal.pone.0189268.g004>

Fifty-three percent of studies reported a negative effect of managed bees on wild bees via competition for shared resources while 28% reported no effect and 19% reported mixed effects (Fig 5A). Though no studies reported entirely positive effects, some positive effects were included in studies reporting mixed effects (Table 1). Negative effects were more common with managed bees outside of their native range (58% of studies) as compared to managed bees within their native range (37%), indicating that the use of managed bees outside of their native range is more likely to have negative competitive effects on wild bees (Fig 5A).

Fig 5. Reported results from reviewed studies on the effects of managed bees on wild bees.

The total number of reviewed studies that found positive (+), neutral (0), negative (-), or mixed effects of managed bees on wild bees through (A) competition for shared resources, (B) changes in plant communities, and (C) transmission of pathogens. Studies within each category are divided into those that examined managed bees within their native range, and those that studied managed bees within their introduced range.

<https://doi.org/10.1371/journal.pone.0189268.g005>

Plant communities

Among studies examining the potential effects of managed bees on wild bees through changes in plant communities, floral visitation rates were the most commonly measured independent variable associated with managed bees ($n = 38$) followed by other aspects of bee foraging behaviors ($n = 25$). Few studies examined plant responses as a function of managed bee presence/absence ($n = 11$), abundance ($n = 6$), or distance to managed bee colonies ($n = 1$). The majority of studies ($n = 32$) measured individual-level reproductive success of native or exotic plants as the response variable, such as fruit or seed set, while few studies ($n = 4$) examined population-level responses such as plant abundance or distribution. Most studies did not measure an explanatory or mechanistic variable, though a few studies measured pollen deposition or removal from managed bee visits ($n = 4$), or calculated pollinator efficacy ($n = 5$), a metric combining bee visitation rates, various aspects of bee foraging behavior, and/or plant reproductive success per pollinator visit (Fig 6A–6C).

Fig 6. Reviewed effects of managed bees on wild bees through changes in plant communities.

Variables reported by studies examining the effects of managed bees on plant communities including (A) managed bee metric (independent variable), (B) potential mechanism (explanatory variable), and (C) plant responses (dependent variable).

<https://doi.org/10.1371/journal.pone.0189268.g006>

An equal number of studies reported positive (36%) and negative (36%) effects of managed bees on native plant communities, with the remainder reporting mixed effects (17%) or no effects (11%) (Fig 5B). The vast majority of studies examined managed bees outside of their native range; only two studies examined managed bees within their native range, and these studies found positive or mixed effects of managed bees on native plant communities (Fig 5B).

Pathogens

Among studies examining the effect of managed bees on wild bees via transmission of pathogens, the occurrence of pathogens within managed bee populations was the most commonly measured independent variable, including the presence/absence of pathogens, frequency of pathogen detection within a population, and pathogen load or diversity per individual ($n = 11$). Fewer studies examined the effects of managed bees as a function of their abundance or density ($n = 5$) or presence/absence ($n = 4$). Furthermore, many studies did not measure any independent variable associated with managed bees ($n = 6$). That is, managed bees were assumed to occur in the study area or assumed to have a certain pathogen previously documented in other studies. The most commonly measured response variable was pathogen occurrence in wild bees ($n = 22$), followed by pathogen infectivity within wild bees (i.e. the ability of a pathogen to establish an infection) ($n = 6$), and with few studies measuring wild bee population-level responses such as wild bee abundance or geographic range ($n = 2$). The majority of studies ($n = 24$) did not measure potential mechanisms to explain their study findings and few ($n = 2$) documented transmission of pathogens from managed bees to wild bees (Fig 7A–7C).

Fig 7. Reviewed effects of managed bees on wild bees through transmission of pathogens.

Variables reported by studies examining the effects of managed bees on wild bees through pathogens including (A) managed bee metric (independent variable), (B) potential mechanisms (explanatory variable), and (C) wild bee responses (dependent variable).

<https://doi.org/10.1371/journal.pone.0189268.g007>

The majority of studies (70%) reported negative effects of managed bees on wild bees via pathogen transmission, with 15% reporting no effects and an additional 15% reporting mixed effects. As compared to the other topical areas, studies on pathogen transmission more frequently examined managed bees within their native ranges. Of studies done with managed bees in their native ranges, a greater proportion found negative effects (83%) as compared to studies done with managed bees outside of their native ranges (60%), indicating that pathogen transmission and subsequent negative effects on wild bees may be as or more likely with managed bees used in their native ranges (Fig 5C).

Discussion

In recent years, concern that managed bees have negative effects on wild bees has grown [3, 11, 12, 50], however no recent study has synthesized the research that examines these potential impacts. We found that across three mechanisms by which managed bees can affect wild bees (competition, changes in plant community composition, and pathogen transmission), the majority of

studies concluded that managed bees have the potential to negatively affect wild bees. These conclusions may support the use of the precautionary principle when employing managed bees, particularly in or near areas with species of conservation concern. However, most of these studies did not measure wild bee fitness, population, or community-level responses including reproductive rates, survival, abundance, or diversity, making it difficult to draw long-term or broad-scale conclusions about the effects of managed bees. Furthermore, some studies found positive effects of managed bees, particularly on native plant communities, indicating that in some contexts, managed bees may aid in restoration or conservation efforts. These findings suggest that even after several decades of research on these topics, there remains some uncertainty as to the magnitude of the effects that managed bees have on wild bees.

Our review reaches some of the same conclusions as previous reviews on this topic, particularly with regards to competition, though our conclusions differ on other points due to both the expansion of the literature in recent years as well as our systematic approach to reviewing studies. Like the previous reviews [11, 12], we conclude that there is evidence for the presence of competition between managed bees and wild bees, though there is little evidence that this competition can lead to wild bee population declines. For instance, the majority of competition studies examined how managed bees affect wild bee foraging behaviors, in particular visitation rates to different flowers. How changes in wild bee foraging behaviors translate to variation in wild bee abundance or diversity was rarely studied. Since many bees are generalist flexible foragers and can partition resources in the presence of other bee species [23–24, 51], changes in foraging behaviors may not necessarily have population-level effects. In order to fully assess the effects of competition on wild bee populations, more studies that include measures of wild bee reproductive success or abundance as a function of managed bees are needed. While it may be more challenging to document long-term or direct effects of competition on wild bees, relatively recent studies provide good examples of how wild bee fitness or population-level responses can be evaluated [52–57].

Furthermore, the degree of competition and the subsequent effects on wild bee populations is likely to vary with the density of managed bees [58], which was not manipulated or observed in most studies (but see [52, 57, 59–62]). Studies that examined competition as a function of inferred managed bee density (e.g. variable distances from managed bee nests), found that competitive effects were strongest close to managed bee colonies, generally under 800 m, with reduced or no effects at increasing distances up to 1200 m suggesting that the impact of managed bees may be relatively local (< 1 km from the managed bee source) [52, 57, 60–61]. Additionally, the degree of competition may depend on overall resource availability, having significant effects on wild bees in contexts where resources are scarce, such as homogeneous landscapes, but insignificant effects during periods of high resource availability or in heterogeneous landscapes [57, 63, but see 76]. Therefore, while there is evidence that managed bees compete with wild bees for shared resources, in contexts with abundant resources, both managed and wild bee populations may be able to coexist.

While a previous review [11] concluded that the effects of managed bees on native plant communities were generally negative, we found an equal number of studies showing managed bees to be important pollinators of native plants as those that showed them to pollinate exotic invasive plants. However, as in the studies on competition, most plant community studies showed potential effects, both positive and negative, but did not show direct or long-term effects of managed bees on plant community composition. For example, some studies compared managed bee and wild bee foraging behaviors, in particular their preferences for native vs. exotic plants, but did not measure the effects of such preferences on plant reproduction, abundance, or diversity. Even among studies that measured plant reproductive output as a function of managed bees, individual-level responses such as fruit and seed set were not followed to population-level responses such as plant abundance or geographic range expansion (e.g., [29–30, 64–67], but see [68]). Furthermore, while it was generally outside the scope of these studies, the consequences of such changes in plant community composition for wild bees has not been well examined, and will likely vary across plant communities and bee species, especially between generalists and specialists [1, 69]. Thus, based on the literature we reviewed, the overall effects of managed bees on wild bees via changes in plant communities remains speculative.

Since the publication of previous reviews, research on pathogen transmission from managed bees to wild bees has increased rapidly, and with it, a greater focus on managed bumble bees in addition to managed honey bees. The conclusions reached by these studies primarily indicate negative effects of managed bees. However, these studies have similar limitations to those on the other topics, including that they do not show direct, long-term, or population and community-level effects of managed bees on wild bees. In particular, most studies documented the presence of shared pathogens in populations of managed and wild bees, but did not measure the effects of such pathogens on wild bees. Of the few studies that measured pathogen disease symptoms, infectivity, survival or fitness within wild bees, results varied across pathogens and were furthermore specific to controlled laboratory conditions [41, 70, 71]. Additional studies showed correlations between pathogen presence and wild bee species decline, however, in these cases, the origin of the pathogen is unclear and may not have come from managed bees [37, 72–73]. Furthermore, few studies documented transmission directionality making it unclear whether pathogens spilled over from managed bees to wild bees or the reverse. Thus, to demonstrate with more certainty the negative effects of pathogen transmission from managed bees to wild bees, future research should include experimental manipulative approaches to confirm transmission, and measure wild bee health, survival, or overall fitness with pathogens from managed bees. Nevertheless, the literature to date suggests that managed bees can transmit pathogens to wild bees [41], and that these pathogens may be contributing to wild bee population declines [50].

While our review found a substantial amount of research on the interactions between managed bees and wild bees, the relative effects of managed bees compared to factors such as habitat loss or pesticide exposure on wild bee populations are unknown and potentially confounding [12]. For example, it is difficult to examine the effects of managed bees in cropping systems independent of other aspects of agricultural management such as the use of pesticides or reduced plant diversity. Studies that control for these additional factors and compare wild bee responses in the presence/absence of managed bees, such as before-after-control-impact (BACI) analyses, or with varying densities of managed bees, are needed (e.g., [74–76]). Additionally, meta-analyses that compare the relative effects of different disturbances on wild bees would shed important insight on the role of managed bees in wild bee population declines. Currently, most meta-analyses have included factors related to habitat loss, habitat management, and fragmentation, but have not included the impact of managed bees [9–10, 77]. Understanding the relative magnitude of various disturbance factors is crucial for informing wild bee conservation priorities and the use of managed bees across both agricultural and natural habitats.

Finally, our review provides important insights on the relative risks of managed bees within and outside of their native ranges. While competition studies showed that managed bees outside of their native ranges are more likely to have negative effects on wild bees, studies on pathogen transmission suggest the opposite, with managed bees having greater negative effects on wild bees within their native ranges. Managed bees outside of their native ranges may have a competitive advantage over native wild bees due to reduced pressure from natural enemies [78–80]. Alternatively, managed bees within their native ranges may be more likely to transmit natural enemies to closely-related native wild species due to similarities in their foraging behaviors that could enhance transmission via flowers or direct contact [38, 40]. Additionally, wild populations may be more susceptible to pathogens or parasites transmitted by closely-related managed bees used within their native ranges in contrast to pathogens transmitted by distantly-related, exotic managed bees [45, 81–82]. Therefore, managed bees used both within and outside of their native ranges have the potential to affect wild bees, but the mechanisms responsible for such effects (i.e. competition versus pathogen transmission) may differ.

Conclusions

Our review found that the majority of studies reach the conclusion that managed bees negatively affect, or have the potential to negatively affect, wild bees through competition, changes in plant communities, or transmission of pathogens. However, there was significant variability in study results, particularly in the areas of competition and plant communities, with some studies finding no or even positive effects of managed bees. We also found that many studies to date do not show direct or causal relationships between managed bees and wild bees. That is, studies lack controls or experimental manipulations, or do not measure critical parameters such as wild bee fitness, population-level, or community-level responses to managed bees. While such studies can be logistically challenging, thereby limiting their number, recent studies provide examples of novel approaches, large-scale experiments, and/or the use of long-term data in order to better understand the effects of managed bees [41, 54, 58, 63, 74–76, 82–87]. The conclusions of these recent, more comprehensive studies largely mirror the conclusions of the literature as a whole: competition studies were highly variable (55% reporting negative effects, 33% no effects, and 11% mixed effects), studies on pathogens provide strong evidence for the transmission of pathogens between managed and wild bees, but the effects of these pathogens on wild bee health and fitness are variable and/or unknown, and the effects of managed bees on native plant populations can be positive in some contexts.

Managed bees provide benefits to humans, including crop pollination, and these benefits may outweigh the risks to native ecosystems in some cases. In order to limit the impact of managed bees, public land managers should consider site-specific attributes such as the species of managed bee and whether it is native to the region, the proposed densities of managed bees, relative resource availability (i.e. landscape diversity), whether managed bee colonies have been evaluated for pathogens and parasites, and whether there are declining wild bee species of conservation concern in the region before allowing managed bees on public lands. Commercial bee producers, including rearing centers, can furthermore limit the impact of managed bees by frequent screening for and treatment of pathogens. Industry guidelines that regulate the movement of managed bees across large regions will reduce the potential for pathogen introduction and spread. Finally, growers that use managed bees in greenhouse contexts could limit negative effects by ensuring that managed bees cannot escape to the wild, and growers that use managed bees in field settings may be able to reduce their impact by placing colonies in the center of agricultural fields or at maximum distances from natural habitats.

Supporting information

S1 Checklist. PRISMA checklist for systematic reviews.

<https://doi.org/10.1371/journal.pone.0189268.s001>
(DOCX)

S1 References. Reference list of all studies included in this systematic review.

<https://doi.org/10.1371/journal.pone.0189268.s002>
(DOCX)

Acknowledgments

We thank Brian Spiesman, Dan Cariveau, Bryan Helm, Raphael Royaute, and three anonymous reviewers for feedback on early drafts. Additionally, we thank Savannah Bartel for help compiling and reviewing studies.

References

1. Biesmeijer JC, Roberts SPM, Reemer M, Ohlemüller R, Edwards M, Peeters T, et al. Parallel declines in pollinators and insect-pollinated plants in Britain and the Netherlands. *Science*. 2006; 313: 351–354. PMID:16857940
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
2. Colla SR, Packer L. Evidence for decline in eastern North American bumblebees (Hymenoptera: Apidae), with special focus on *Bombus affinis* Cresson. *Biodiversity & Conservation*. 2008; 17: 1379–1391.
[View Article](#) • [Google Scholar](#)
3. Potts SG, Biesmeijer JC, Kremen C, Neumann P, Schweiger O, Kunin WE. Global pollinator declines: trends, impacts and drivers. *Trends in Ecology & Evolution*. 2010; 25: 345–353. PMID:20188434
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)

4. Koh I, Lonsdorf EV, Williams NM, Brittain C, Isaacs R, Gibbs J, et al. Modeling the status, trends, and impacts of wild bee abundance in the United States. *Proceedings of the National Academy of Sciences USA*. 2015.
[View Article](#) • [Google Scholar](#)
5. Casey LM, Rebelo H, Rotheray E, Goulson D. Evidence for habitat and climatic specializations driving the long-term distribution trends of UK and Irish bumblebees. *Diversity & Distributions*. 2015; 21: 864–875.
[View Article](#) • [Google Scholar](#)
6. Michener CD. *The Bees of the World*. Baltimore: JHU Press; 2000.
7. O'Toole C, Raw A. *Bees of the World*. London: Blandford Press; 1991.
8. Delaplane KS, Mayer DF. *Crop Pollination by Bees*. Wallingford, Oxfordshire: CABI; 2000.
9. Winfree R, Aguilar R, Vázquez DP, LeBuhn G, Aizen MA. A meta-analysis of bees' responses to anthropogenic disturbance. *Ecology*. 2009; 90: 2068–2076. pmid:19739369
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
10. Kennedy CM, Lonsdorf E, Neel MC, Williams NM, Ricketts TH, Winfree R, et al. A global quantitative synthesis of local and landscape effects on wild bee pollinators in agroecosystems. *Ecology Letters*. 2013; 16: 584–599. pmid:23489285
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
11. Goulson D. Effects of introduced bees on native ecosystems. *Annual Review of Ecology, Evolution, and Systematics*. 2003; 1–26.
[View Article](#) • [Google Scholar](#)
12. Paini DR. Impact of the introduced honey bee (*Apis mellifera*) (Hymenoptera: Apidae) on native bees: a review. *Austral Ecology*. 2004; 29: 399–407.
[View Article](#) • [Google Scholar](#)
13. Aizen MA, Harder LD. The global stock of domesticated honey bees is growing slower than agricultural demand for pollination. *Current Biology*. 2009; 19: 915–918. pmid:19427214
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
14. Breeze TD, Vaissière BE, Bommarco R, Petanidou T, Seraphides N, Kozák L, et al. Agricultural policies exacerbate honeybee pollination service supply-demand mismatches across Europe. *PLoS ONE*. 2014; 9: e82996. pmid:24421873
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
15. Winfree R, Williams NM, Gaines H, Ascher JS, Kremen C. Wild bee pollinators provide the majority of crop visitation across land-use gradients in New Jersey and Pennsylvania, USA. *Journal of Applied Ecology*. 2008; 45: 793–802.
[View Article](#) • [Google Scholar](#)
16. Garibaldi LA, Steffan-Dewenter I, Winfree R, Aizen MA, Bommarco R, Cunningham SA, et al. Wild pollinators enhance fruit set of crops regardless of honey bee abundance. *Science*. 2013; 339: 1608–1611. pmid:23449997
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
17. Klein AM, Steffan-Dewenter I, Tscharntke T. Fruit set of highland coffee increases with the diversity of pollinating bees. *Proceedings of the Royal Society B-Biological Sciences*. 2003; 270: 955–961
[View Article](#) • [Google Scholar](#)
18. Hoehn P, Tscharntke T, Tylianakis JM, Steffan-Dewenter I. Functional group diversity of bee pollinators increases crop yield. *Proceedings of the Royal Society B-Biological Sciences*. 2008; 275: 2283–2291
[View Article](#) • [Google Scholar](#)
19. Mallinger RE, Gratton C. Species richness of wild bees, but not the use of managed honeybees, increases fruit set of a pollinator-dependent crop. *Journal of Applied Ecology*. 2015; 52: 323–330.
[View Article](#) • [Google Scholar](#)
20. Memmott J, Waser NM, Price MV. Tolerance of pollination networks to species extinctions. *Proceedings of the Royal Society of London B- Biological Sciences*. 2004; 271: 2605–2611. pmid:15615687
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
21. Fontaine C, Dajoz I, Meriguet J, Loreau M. Functional diversity of plant–pollinator interaction webs enhances the persistence of plant communities. *PLoS Biology*. 2005; 4: e1. pmid:16332160
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)

22. Fruend J, Dormann CF, Holzschuh A, Tscharnkte T. Bee diversity effects on pollination depend on functional complementarity and niche shifts. *Ecology*. 2013; 94: 2042–2054. PMID:24279275
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
23. Spiesman BJ, Gratton C. Flexible foraging shapes the topology of plant–pollinator interaction networks. *Ecology*. 2016; 97: 1431–1441. PMID:27459774
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
24. Di Pasquale GD, Salignon M, Conte YL, Belzunces LP, Decourtye A, Kretzschmar A, et al. Influence of pollen nutrition on honey bee health: do pollen quality and diversity matter? *PLoS ONE*. 2013; 8: e72016. PMID:23940803
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
25. Roulston TH, Cane JH. Pollen nutritional content and digestibility for animals. *Plant Systematics and Evolution*. 2000; 222: 187–209.
[View Article](#) • [Google Scholar](#)
26. Zurbuchen A, Cheesman S, Klaiber J, Müller A, Hein S, Dorn S. Long foraging distances impose high costs on offspring production in solitary bees. *Journal of Animal Ecology*. 2010; 79: 674–681. PMID:20233258
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
27. Dafni A, Kevan P, Gross CL, Goka K. *Bombus terrestris*, pollinator, invasive and pest: an assessment of problems associated with its widespread introductions for commercial purposes. *Applied Entomology and Zoology*. 2010; 45: 101–113.
[View Article](#) • [Google Scholar](#)
28. Goodell K. Invasive exotic plant-bee interactions. In: Pitts-Singer JR, Pitts-Singer T, editors. *Bee Pollination in Agricultural Ecosystems*. Oxford University Press; 2008. pp. 166–183.
29. Abe T, Wada K, Kato Y, Makino S, Okochi I. Alien pollinator promotes invasive mutualism in an insular pollination system. *Biological Invasions*. 2011; 13: 957–967.
[View Article](#) • [Google Scholar](#)
30. Barthell JF, Randall JM, Thorp RW, Wenner AM. Promotion of seed set in yellow star-thistle by honey bees: evidence of an invasive mutualism. *Ecological Applications*. 2001; 11: 1870–1883.
[View Article](#) • [Google Scholar](#)
31. Aizen MA, Morales CL, Morales JM. Invasive mutualists erode native pollination webs. *PLoS Biology*. 2008; 6: e31. PMID:18271628
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
32. Kearns CA, Inouye DW, Waser NM. Endangered mutualisms: the conservation of plant-pollinator interactions. *Annual Review of Ecology and Systematics*. 1998; 29: 83–112.
[View Article](#) • [Google Scholar](#)
33. Memmott J. The structure of a plant-pollinator food web. *Ecology Letters*. 1999; 2: 276–280.
[View Article](#) • [Google Scholar](#)
34. Waser NM, Chittka L, Price MV, Williams NM, Ollerton J. Generalization in pollination systems, and why it matters. *Ecology*. 1996; 77: 1043–1060.
[View Article](#) • [Google Scholar](#)
35. de Jong MCM, Diekmann O, Heesterbeek H. How does transmission of infection depend on population size? In Mollison D, editor. *Epidemic Models: their Structure and Relation to Data*. Cambridge: Cambridge University Press; 1995. pp. 84–94.
36. Chen Y, Evans J, Feldlaufer M. Horizontal and vertical transmission of viruses in the honey bee, *Apis mellifera*. *Journal of Invertebrate Pathology*. 2006; 92: 152–159. PMID:16793058
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
37. Cameron SA, Lim HC, Lozier JD, Duennes MA, Thorp R. Test of the invasive pathogen hypothesis of bumble bee decline in North America. *Proceedings of the National Academy of Sciences USA*. 2016; 113: 4386–4391. PMID:27044096
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
38. Singh R, Levitt AL, Rajotte EG, Holmes EC, Ostiguy N, vanEngelsdorp D, et al. RNA viruses in Hymenopteran pollinators: evidence of inter-taxa virus transmission via pollen and potential impact on non-*Apis* Hymenopteran species. *PLoS ONE*. 2010; 5: e14357. PMID:21203504
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
39. Whitehorn PR, Tinsley MC, Brown MJF, Goulson D. Investigating the impact of deploying commercial *Bombus terrestris* for crop pollination on pathogen dynamics in wild bumble bees. *Journal of Apicultural Research*. 2013; 52: 149–157.

[View Article](#) • [Google Scholar](#)

40. Durrer S, Schmid Hempel P. Shared use of flowers leads to horizontal pathogen transmission. *Proceedings of the Royal Society B-Biological Sciences*. 1994; 258: 299–302.
[View Article](#) • [Google Scholar](#)
41. Fürst MA, McMahon DP, Osborne JL, Paxton RJ, Brown MJF. Disease associations between honeybees and bumblebees as a threat to wild pollinators. *Nature*. 2014; 506: 364–366. pmid:24553241
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
42. Genersch E, Yue C, Fries I, de Miranda JR. Detection of Deformed Wing Virus, a honey bee viral pathogen, in bumble bees (*Bombus terrestris* and *Bombus pascuorum*) with wing deformities. *Journal of Invertebrate Pathology*. 2006; 91: 61–63. pmid:16300785
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
43. Kojima Y, Toki T, Morimoto T, Yoshiyama M, Kimura K, Kadowaki T. Infestation of Japanese native honey bees by tracheal mite and virus from non-native European honey bees in Japan. *Microbial Ecology*. 2011; 62: 895–906. pmid:21960435
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
44. Levitt AL, Singh R, Cox-Foster DL, Rajotte E, Hoover K, Ostiguy N, et al. Cross-species transmission of honey bee viruses in associated arthropods. *Virus Research*. 2013; 176: 232–240. pmid:23845302
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
45. Murray TE, Coffey MF, Kehoe E, Horgan FG. Pathogen prevalence in commercially reared bumble bees and evidence of spillover in conspecific populations. *Biological Conservation*. 2013; 159: 269–276.
[View Article](#) • [Google Scholar](#)
46. McMahon DP, Fürst MA, Caspar J, Theodorou P, Brown MJF, Paxton RJ. A sting in the spit: widespread cross-infection of multiple RNA viruses across wild and managed bees. *Journal of Animal Ecology*. 2015; 84: 615–624. pmid:25646973
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
47. Kanbe Y, Okada I, Yoneda M, Goka K, Tsuchida K. Interspecific mating of the introduced bumblebee *Bombus terrestris* and the native Japanese bumblebee *Bombus hypocrita sapporoensis* results in inviable hybrids. *Naturwissenschaften*. 2008; 95: 1003–1008. pmid:18594790
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
48. Isaacs R, Tuell J, Fiedler A, Gardiner M, Landis D. Maximizing arthropod-mediated ecosystem services in agricultural landscapes: the role of native plants. *Frontiers in Ecology and the Environment*. 2009; 7: 196–203.
[View Article](#) • [Google Scholar](#)
49. Williams NM, Ward KL, Pope N, Isaacs R, Wilson J, May EA, et al. Native wildflower plantings support wild bee abundance and diversity in agricultural landscapes across the United States. *Ecological Applications*. 2015; 25: 2119–2131. pmid:26910943
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
50. Graystock P, Blane EJ, McFrederick QS, Goulson D, Hughes WOH. Do managed bees drive parasite spread and emergence in wild bees? *International Journal for Parasitology: Parasites and Wildlife*. 2016; 5: 64–75. pmid:28560161
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
51. Johnson RA. Intraspecific resource partitioning in the bumble bees *Bombus ternarius* and *B. pennsylvanicus*. *Ecology*. 1986; 67: 133–138.
[View Article](#) • [Google Scholar](#)
52. Elbgami T, Kunin WE, Hughes WOH, Biesmeijer JC. The effect of proximity to a honeybee apiary on bumblebee colony fitness, development, and performance. *Apidologie*. 2014; 45: 504–513.
[View Article](#) • [Google Scholar](#)
53. Hudewenz A, Klein A-M. Competition between honey bees and wild bees and the role of nesting resources in a nature reserve. *Journal of Insect Conservation*. 2013; 17: 1275–1283.
[View Article](#) • [Google Scholar](#)
54. Hudewenz A, Klein AM. Red mason bees cannot compete with honey bees for floral resources in a cage experiment. *Ecology and Evolution*. 2015; 5: 5049–5056. pmid:26640681
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
55. Paini DR, Roberts JD. Commercial honey bees (*Apis mellifera*) reduce the fecundity of an Australian native bee (*Hylaeus alcyoneus*). *Biological Conservation*. 2005; 123: 103–112.

[View Article](#) • [Google Scholar](#)

56. Steffan-Dewenter I, Tscharnkte T. Resource overlap and possible competition between honey bees and wild bees in central Europe. *Oecologia*. 2000; 122: 288–296. PMID:28308384
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
57. Thomson DM. Detecting the effects of introduced species: a case study of competition between *Apis* and *Bombus*. *Oikos*. 2006; 114: 407–418.
[View Article](#) • [Google Scholar](#)
58. Cane JH, Tepedino VJ. Gauging the effect of honey bee pollen collection on native bee communities. *Conservation Letters*. 2017; 10: 205–210.
[View Article](#) • [Google Scholar](#)
59. Kuhn J, Hamm A, Schindler M, Wittmann D. Resource partitioning between the oligolectic leafcutter bee *Megachile lapponica* (Hymenoptera, Apiformes) and other visitors on flowers of *Epilobium angustifolium* (Onagracea). *Mitteilungen der Deutschen Gesellschaft für allgemeine und angewandte Entomologie*. 2006; 15: 389–392
[View Article](#) • [Google Scholar](#)
60. Neumayer J. Influence of honey-bees on nectar supply and native flower visitors. *Entomologica Austriaca*. 2006; 13: 7–14
[View Article](#) • [Google Scholar](#)
61. Thomson D. Competitive interactions between the invasive European honey bee and native bumble bees. *Ecology*. 2004; 85: 458–470.
[View Article](#) • [Google Scholar](#)
62. Walther-Hellwig K, Fokul G, Frankl R, Buechler R, Ekschmitt K, Wolters V. Increased density of honeybee colonies affects foraging bumblebees. *Apidologie*. 2006; 37: 517–532.
[View Article](#) • [Google Scholar](#)
63. Herbertsson L, Lindström SAM, Rundlöf M, Bommarco R, Smith HG. Competition between managed honeybees and wild bumblebees depends on landscape context. *Basic and Applied Ecology*. 2016.
[View Article](#) • [Google Scholar](#)
64. Cayuela L, Ruiz-Arriaga S, Ozers CP. Honeybees increase fruit set in native plant species important for wildlife conservation. *Environmental Management*. 2011; 48: 910–919. PMID:21519875
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
65. Gross CL, Mackay D. Honeybees reduce fitness in the pioneer shrub *Melastoma affine* (Melastomataceae). *Biological Conservation*. 1998; 86: 169–178.
[View Article](#) • [Google Scholar](#)
66. Sun S-G, Huang S-Q, Guo Y-H. Pollinator shift to managed honeybees enhances reproductive output in a bumblebee-pollinated plant. *Plant Systematics and Evolution*. 2013; 299: 139–150.
[View Article](#) • [Google Scholar](#)
67. Gross CL, Gorrell L, Macdonald MJ, Fatemi M. Honeybees facilitate the invasion of *Phyla canescens* (Verbenaceae) in Australia—no bees, no seed! *Weed Research*. 2010; 50: 364–372.
[View Article](#) • [Google Scholar](#)
- Goulson D, Rotheray EL. Population dynamics of the invasive weed *Lupinus arboreus* in Tasmania, and interactions with two non-native pollinators. *Weed Research*. 2012; 52: 535–541.
[View Article](#) • [Google Scholar](#)
69. Schweiger O, Biesmeijer JC, Bommarco R, Hickler T, Hulme PE, Klotz S, et al. Multiple stressors on biotic interactions: how climate change and alien species interact to affect pollination. *Biological Reviews*. 2010; 85: 777–795. PMID:20184567
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
70. Graystock P, Yates K, Darvill B, Goulson D, Hughes WOH. Emerging dangers: deadly effects of an emergent parasite in a new pollinator host. *Journal of Invertebrate Pathology*. 2013; 114: 114–119. PMID:23816821
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
71. Graystock P, Yates K, Evison SEF, Darvill B, Goulson D, Hughes WOH. The Trojan hives: pollinator pathogens, imported and distributed in bumblebee colonies. *Journal of Applied Ecology*. 2013; 50: 1207–1215.
[View Article](#) • [Google Scholar](#)

72. Koch JB, Strange JP. The status of *Bombus occidentalis* and *B. moderatus* in Alaska with special focus on *Nosema bombi* incidence. *Northwest Science*. 2012; 86: 212–220.
[View Article](#) • [Google Scholar](#)
73. Szabo ND, Colla SR, Wagner DL, Gall LF, Kerr JT. Do pathogen spillover, pesticide use, or habitat loss explain recent North American bumblebee declines? *Conservation Letters*. 2012; 5: 232–239.
[View Article](#) • [Google Scholar](#)
74. Paini DR, Williams MR, Roberts JD. No short-term impact of honey bees on the reproductive success of an Australian native bee. *Apidologie*. 2005; 36: 613–621.
[View Article](#) • [Google Scholar](#)
75. Roubik DW, Wolda H. Do competing honey bees matter? Dynamics and abundance of native bees before and after honey bee invasion. *Population Ecology*. 2001; 43: 53–62.
[View Article](#) • [Google Scholar](#)
76. Lindstrom SAM, Herbertsson L, Rundlof M, Bommarco R, Smith HG. Experimental evidence that honeybees depress wild insect densities in a flowering crop. *Proceedings of the Royal Society B-Biological Sciences*. 2016; 283. pmid:27881750
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
77. Scheper J, Holzschuh A, Kuussaari M, Potts SG, Rundlöf M, Smith HG, et al. Environmental factors driving the effectiveness of European agri-environmental measures in mitigating pollinator loss—a meta-analysis. *Ecology Letters*. 2013; 16: 912–920. pmid:23714393
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
78. Connell JH. On the role of natural enemies in preventing competitive exclusion in some marine animals and in rain forest trees. In: Den Boer PJ, Gradwell GR, editors. *Dynamics of Populations*. Wageningen, The Netherlands: Centre for Agricultural Publishing and Documentation; 1971. pp. 298–312.
79. Hanks LM, Denno RF. Natural enemies and plant water relations influence the distribution of an armored scale insect. *Ecology*. 1993; 74: 1081–1091.
[View Article](#) • [Google Scholar](#)
80. Sakai AK, Allendorf FW, Holt JS, Lodge DM, Molofsky J, With KA, et al. The population biology of invasive species. *Annual Review of Ecology and Systematics*. 2001; 32: 305–332.
[View Article](#) • [Google Scholar](#)
81. Otterstatter MC, Thomson JD. Does pathogen spillover from commercially reared bumble bees threaten wild pollinators? *PLoS ONE*. 2008; 3: e2771. pmid:18648661
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
82. Dolezal AG, Hendrix SD, Scavo NA, Carrillo-Tripp J, Harris MA, Wheelock MJ, et al. Honey bee viruses in wild bees: viral prevalence, loads, and experimental inoculation. *PLoS ONE*. 2016; 11. pmid:27832169
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
83. Graystock P, Goulson D, Hughes WOH. The relationship between managed bees and the prevalence of parasites in bumblebees. *PeerJ*. 2014; 2. pmid:25165632
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
84. Smith-Ramírez C, Ramos-Jiliberto R, Valdovinos FS, Martínez P, Castillo JA, Armesto JJ. Decadal trends in the pollinator assemblage of *Eucryphia cordifolia* in Chilean rainforests. *Oecologia*. 2014; 176: 157–169. pmid:25001339
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)
85. Hermansen TD, Britton DR, Ayre DJ, Minchinton TE. Identifying the real pollinators? Exotic honeybees are the dominant flower visitors and only effective pollinators of *Avicennia marina* in Australian temperate mangroves. *Estuaries and Coasts*. 2014; 37: 621–635.
[View Article](#) • [Google Scholar](#)
86. Balfour NJ, Gandy S, Ratnieks FLW. Exploitative competition alters bee foraging and flower choice. *Behavioral Ecology and Sociobiology*. 2015; 69: 1731–1738.
[View Article](#) • [Google Scholar](#)
87. Thomson DM. Local bumble bee decline linked to recovery of honey bees, drought effects on floral resources. *Ecology Letters*. 2016; 19: 1247–1255. pmid:27539950
[View Article](#) • [PubMed/NCBI](#) • [Google Scholar](#)

The national magazine of the Sierra Club

GO



How the Honeybee Buzz Hurts Wild Bees

Public understanding of pollinator issues is limited—and that’s a problem

EXTREME MAGNIFICATION OF A HONEYBEE | PHOTO BY CONSTANTINCORNEL/ISTOCK

BY [SAM SCHIPANI \(/SIERRA/AUTHORS/SAM-SCHIPANI\)](#) | MAY 29 2018

“Save the bees” is a rallying cry we’ve been hearing for years now—one that conjures up images of fuzzy black and yellow honeybees, sipping nectar from colorful flowers or swarming with their bee brethren among tessellated combs while human defenders spread the word about dwindling bee populations. But honeybees are at no risk of dying off. While disease, parasites, and other threats are certainly real problems for beekeepers, the total number of managed honeybees worldwide has risen by 45

percent over the last half century ([https://www.cell.com/current-biology/fulltext/S0960-9822\(09\)00982-8](https://www.cell.com/current-biology/fulltext/S0960-9822(09)00982-8)).

“Honeybees are not going to go extinct,” says Scott Black, executive director of the Xerces Society (<https://xerces.org/>). “We have more honeybee hives than we’ve ever had and that’s simply because we manage honeybees. Conserving honeybees to save pollinators is like conserving chickens to save the birds.”

Contrary to public perception, die-offs in honeybee colonies are an agricultural problem, not a conservation issue. First domesticated about 9,000 years ago (<https://www.nature.com/articles/nature18451>), honeybees are not all that different from livestock. They are also not native to the United States; they were imported from Europe to help pollinate crops around 1622.

Meanwhile, native bees—of which there are over 20,000 species varying in size, shape, and color—are experiencing incredible losses. Of the nearly 4,000 native bee species in the United States alone, four native bumblebee species have declined 96 percent (<http://www.pnas.org/content/108/2/662>) in the last 20 years, and three others are believed to have gone extinct (<http://www.xerces.org/pollinator-redlist/>). In the last 100 years, 50 percent of Midwestern native bee species disappeared (<http://dx.doi.org/10.1126%2Fscience.1232728>) from their historic ranges.

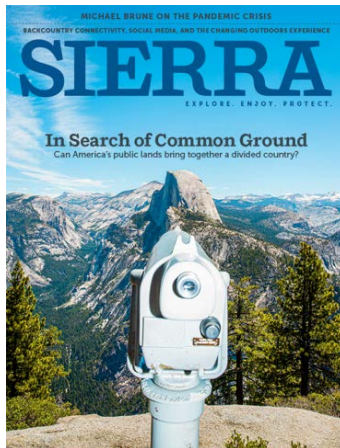
Scott Black dates widespread confusion about exactly which bees are at risk to around 2006, when the news of commercial honeybee colonies decimated by colony collapse disorder hit fever pitch.

The plight of the honeybees was elevated in the national conversation, but since this was the first time that pollinators had entered the public consciousness (the country’s nosediving monarch populations (<https://www.sierraclub.org/sierra/study-shows-western-monarchs-have-dropped-97-35-years>) had not yet made national news), the issue lacked clarity or nuance. At the time, Black recalls well-meaning activists and politicians who were shocked to learn that there were other pollinators besides honeybees.

Juan P. Gonzalez-Varo, a scientist from the University of Cambridge, says (<http://science.sciencemag.org/content/359/6374/392>) that the “lack of distinction” in public understanding between the agricultural problems faced by honeybees and the biodiversity issues related to wild pollinators is also fuelled by misguided charity campaigns and media reports. He cites campaigns like Greenpeace’s S.O.S. Bees (<http://sos-bees.org/>), which only features honeybees in its visual materials and lumps the issues facing wild bees and honeybees together under the umbrella of ecological conservation.

“They are doing many things right and they are raising awareness,” says Gonzalez-Varo. “The problem is the misconception of the role of managed honeybees in ecosystems.”

The national concern for honeybees led to an explosion in research on honeybee loss and the dangers posed to crops. But comparatively little research has been done to understand wild native pollinator declines. Honeybee research is generally easier than wild bee research, because many wild bees can’t survive outside of the narrow slice of habitat that they’ve adapted to. “You can do many things in research with honeybees because it’s a domesticated animal,” says Gonzalez-Varo. “It’s totally the opposite when you are dealing with wild pollinators, where you have to work with real landscapes and communities.”



LIKE WHAT YOU READ? SIGN UP FOR DAILY UPDATES FROM
SIERRA MAGAZINE.

SIGN UP

TAKE ACTION

(<https://www.addup.org/campaigns/help-save-our-bees-and-the-planet?promoid=70131000001uhJzAAI>)

Help Save Our Bees and the Planet!

(<https://www.addup.org/campaigns/help-save-our-bees-and-the-planet?promoid=70131000001uhJzAAI>)

Get Congress to pass critical protections for pollinators.

The lack of research into wild pollinators is especially problematic considering research that shows managed honeybees can negatively impact native bees. When they are not completing agricultural pollination jobs, commercial beekeepers often keep their honeybees on public land. Honeybees forage year-round, traveling for miles to gather pollen and nectar from wildflowers in areas that native bees rely on for food.

Wild species, which are often solitary and have shorter active seasons, cannot always compete (<https://www.annualreviews.org/doi/abs/10.1146/annurev-ento-120709-144802?journalCode=ento>) with the sheer number of honeybees in commercial hives, especially in low-rainfall years when wildflowers are scarce. A study of wild bumblebee populations along the California coast (<https://onlinelibrary.wiley.com/doi/abs/10.1111/ele.12659>), where managed honeybees are critical to pollinating almond orchards, found that an increase in honeybees in a particular area was correlated with a drop in bumblebees.

The problem with spillover goes beyond competition—diseases from commercial hives can be transferred to wild species when the populations feed from the same flowers. As with other intensively farmed animals, overcrowding and homogenous diets have increased the level of pathogens and parasites in managed honeybee colonies. Researchers have found elevated disease rates in wild bees living near greenhouses that use managed bees in Canada (<http://www.sciencedirect.com/science/article/pii/S0006320705004994>), Ireland (<http://www.sciencedirect.com/science/article/pii/S0006320712004417>) and England (<https://peerj.com/articles/522/>). According to the International Union for Conservation of Nature (<http://www.iucnredlist.org/details/44937399/0>), the rusty patched bumblebee, which was listed as endangered in early 2017 after declining more than 90 percent over the last decade, may owe that disappearance to diseases spread by commercial bees.

This is bad news for both bees and crops. Even in the presence of honeybees (<http://science.sciencemag.org/content/339/6127/1608>), wild bees play a crucial role in agricultural systems, ensuring stable crop production (<https://onlinelibrary.wiley.com/doi/abs/10.1111/j.1461-0248.2011.01669.x>), boosting yields (<http://science.sciencemag.org/content/351/6271/388>), and pollinating crops, like tomatoes (http://www.xerces.org/wp-content/uploads/2008/10/factsheet_cherry_tomato_pollination.pdf), that honeybees either avoid for lack of nectar, or have pollen that is difficult for honeybees to reach.

Raising public awareness about the risks that pesticides and loss of habitat pose to bees is a good thing, says Gonzalez-Varo. In the United States, beekeepers now lose about 40 percent (<https://beeinformed.org/results/colony-loss-2014-2015-preliminary-results/>) of their colonies each year, and some of that is due to factors that are also a problem to native

bees, like pesticides (<https://www.sierraclub.org/sierra/why-eu-chose-bees-over-pesticides-neonicotinoid>), insecticides, and diseases. But real awareness would recognize that what is good for honeybees is not always good for wild pollinators. “The main change that I would like to see is that beekeeping is truly considered an extractive activity,” he says. “Many other extractive activities are allowed in protected areas like hunting and cattle grazing, but all of them are regulated. Until now, conservationists have been very permissive with beekeepers.”

When it comes to differentiating between honeybees and wild bees, some “Save the Bees” campaigns have tried to right earlier wrongs. The Honey Nut Cheerios Bring Back the Bees campaign (<https://www.cheerios.com/bring-back-the-bees/>), came under fire last year for giving away seed packets that could spread non-native plants and displace food sources for wild bee populations (<https://mashable.com/2017/03/19/cheerios-bee-campaign-controversy/#SrudyCnXGPqj>). Since then, General Mills has donated to the Xerces Society and University of Minnesota bee scholar, Dr. Marla Spivak, to help research and restore wild pollinator habitat.

“Although the brand’s famous spokesbee, BuzzBee, and his honeybee friends may not be in danger of extinction like some other pollinators, Honey Nut Cheerios is committed to helping all pollinators thrive,” a spokesperson from General Mills wrote in an email to *Sierra*.

But there is more work to be done. For starters, campaigns to save the bees, whether they are run by international environmental organizations, cereal companies, or government entities, could feature the amazing diversity of bees instead of the pervasive (and often fallacious) honeybee. Gonzalez-Varo lauds campaigns like Toronto’s Pollinator Protection Strategy (<https://www.toronto.ca/services-payments/water-environment/environmentally-friendly-city-initiatives/reports-plans-policies-research/draft-pollinator-strategy/>), which proudly features a metallic green sweat bee (also Toronto’s Official Bee (<https://www.toronto.ca/services-payments/water-environment/live-green-toronto/torontos-official-bee/>)) across its website’s banner.

“As with many other environmental issues,” says Gonzalez-Varo, “education is the key.”

This article has been modified since its original posting.

LIKE WHAT YOU READ? SIGN UP FOR DAILY UPDATES FROM SIERRA MAGAZINE.

email

SIGN UP

Gauging the Effect of Honey Bee Pollen Collection on Native Bee Communities

James H. Cane , Vincent J. Tepedino

First published: 16 May 2016

<https://doi.org/10.1111/conl.12263>

Citations: 36

Abstract

Experimental demonstration of direct exploitative competition between foraging honey bees and native bees in wildlands has proven elusive, due to problems of experimental design, scale, and context-dependence. We propose a different approach that translates floral resources collected by a honey bee colony into progeny equivalents of an average solitary bee. Such a metric is needed by public land managers confronting migratory beekeeper demands for insecticide-free, convenient, resource-rich habitats for summering. We calculate that, from June–August, a strong colony gathers as much pollen as could produce 100,000 progeny of an average solitary bee. Analogous to the animal unit month (AUM) for livestock, a hive unit month (HUM) is therefore 33,000 native bee progeny. By this calculation, a 40-hive apiary residing on wildlands for 3 months collects the pollen equivalent of four million wild bees. We introduce a rapid assessment metric to gauge stocking of honey bees, and briefly highlight alternative strategies to provide quality pasture for honey bees with minimal impact on native bees.

Introduction

Mounting concern over pollinator decline and recognition of the need for pollinator conservation have been much in the scientific and public mind in recent years. Countries of the European Union have responded by implementing farmland programs to protect biodiversity; among pollinators, common floral generalists are the chief beneficiaries (Kleijn *et al.* 2006). In the United States, threats to pollinators that include pesticides, Colony Collapse Disorder, and ongoing habitat losses are being addressed by new programs. A Presidential Memorandum (2014) and its follow-up Pollinator Health Strategy

(<https://www.whitehouse.gov/sites/default/files/microsites/ostp/Pollinator%20Health%20Strategy%202015.pdf>) directs federal agencies to enact programs that benefit both managed honey bees and native bees. Numerous other bee conservation efforts around the world are summarized at the North American Pollinator Protection Campaign website (pollinator.org/nappc/international.htm).

Competition to exploit finite pollen resources can also contribute to pollinator declines, meriting policy consideration. Both honey bees and native bees feed protein-rich pollen to their progeny. Pollen availability is thought to regulate wild bee populations more than any other factor (Roulston & Goodell [2010](#)). Where commingled with large numbers of honey bees, native bees may experience competition for limited pollen resources. Our concern that honey bees compete with wild bee communities for finite floral resources pertains neither to croplands, where honey bees are employed precisely because native bees are sparse, nor to regions with abundant feral honey bees that are already naturalized and therefore unmanageable (e.g., eastern United States). At issue are vast western U.S. wildlands that host rich, diverse and robust native bee communities, where managed honey bee hives may be placed after midsummer (e.g., Rocky Mountains, Sierra Nevada, and the Great Basin). This scenario and concern has lately arisen in other countries too, such as New Zealand (Beard [2015](#)).

By contesting for finite pollen and nectar resources in natural and semi-natural environs, honey bees can affect native bees in at least seven documented ways: **(1) pollen/nectar depletion**. At some context-specific stocking density, honey bees will daily deplete the pollen and nectar produced in a local plant community, a direct cost to native bee reproduction (e.g., Roubik *et al.* [1986](#); Carneiro & Martins [2012](#)); **(2) prolonged foraging**. Resource depletion by too many honey bees forces native bee females to devote more time to foraging over greater distances. Scarce forage slows their assembly of larval food masses and reduces lifetime progeny production (Minckley *et al.* [1994](#); Thomson [2004](#); Zurbuchen *et al.* [2010](#)); **(3) skewed sex ratio**. Nonsocial females with limited or distant floral resources produce fewer daughters and more sons (Peterson & Roitberg [2006](#); Bosch [2008](#)), males usually being the smaller sex. Excess male production retards population growth; **(4) smaller progeny**. Smaller provisions yield smaller offspring that are more likely to starve and die during the winter than better-fed siblings (Tepedino & Torchio [1982](#); Bosch [2008](#)); **(5) enhanced parasitism**. Prolonged absence of solitary mother bees from their nests risks greater progeny mortality, as nest parasites and predators are more likely to attack unguarded nests (Goodell [2003](#)); **(6) floral host pre-emption**. Honey bees can competitively displace native solitary bees from preferred pollen hosts, as when African honey bees invaded Mexico (Roubik & Villanueva-Gutierrez [2009](#)); **(7) pathogen spillover**.

RNA viruses and some other honey bee pathogens have been recovered from neighboring wild bee communities; virus propagules were likely transmitted to native bees via pollen at shared floral hosts (e.g., Fürst *et al.* [2014](#)). This disease transmission involves pollen foraging, but is not a competitive effect per se.

Despite these documented effects of honey bees on native bees, several reviews (e.g., Goulson [2003](#); Paini [2004](#)) failed to find consistent field evidence for competition between honey bees and native bees, perhaps because only short-term experiments at small spatial scales are available. Extrapolating insignificant effects requires caution, as they reflect local, ephemeral or intermittent conditions, such as temporally fluctuating floral abundance (e.g., Tepedino & Stanton [1980](#)). Convincing field demonstrations of detrimental bee competition are generally uncommon (but see Thomson [2004](#)) due to the difficulty in arranging for replicated field trials with multiple apiaries deployed at suitably large spatial scales. Moreover, excluding feral honey bees from such field studies is at best difficult, as is balancing realistic numbers of native bees and free-flying honey bees to use in experiments.

We offer a different and tractable remedy to the impasse left by the conventional, but logistically daunting, experimental approach for estimating the reproductive costs imposed by honey bee colonies on native bee populations. Our measure directly converts the number of loads of pollen removed by foragers of honey bee colonies from natural habitats into progeny-equivalents of native bees; the magnitude of floral resources withdrawn is thus quantified in terms of progeny equivalents of native bees. For this calculation, we need only know: (1) the daily influx and weight of pollen loads collected by the average honey bee colony in wildlands; (2) the number of honey bee colonies pastured on public wildlands; (3) the season and number of weeks that hived honey bees will reside among wild bee communities; and (4) a formula for converting corbicular pollen pellets of honey bees into progeny equivalents of solitary bees.

Methods

Pollen flow into honey bee colonies

The number and weight of pollen pellets collected by honey bee colonies while pastured in wildland communities is available in Winston ([1987](#)) and Seeley ([1995](#)). Individual pollen pellets carried by a returning honey bee forager (Fig. [1](#)) averaged 15 mg (fresh weight) (Seeley [1995](#); range 8–29 mg, Winston [1987](#)). Over the course of a foraging season (6 months), a wildland colony accumulates >1,300,000 pollen pellets weighing 20 kg (Seeley [1995](#)). Other, usually less conservative, estimates range from 1.1 to 3.6 million pollen pellets with a cumulative weight of 15–55 kg (O'Neal & Waller [1984](#); Winston [1987](#)).

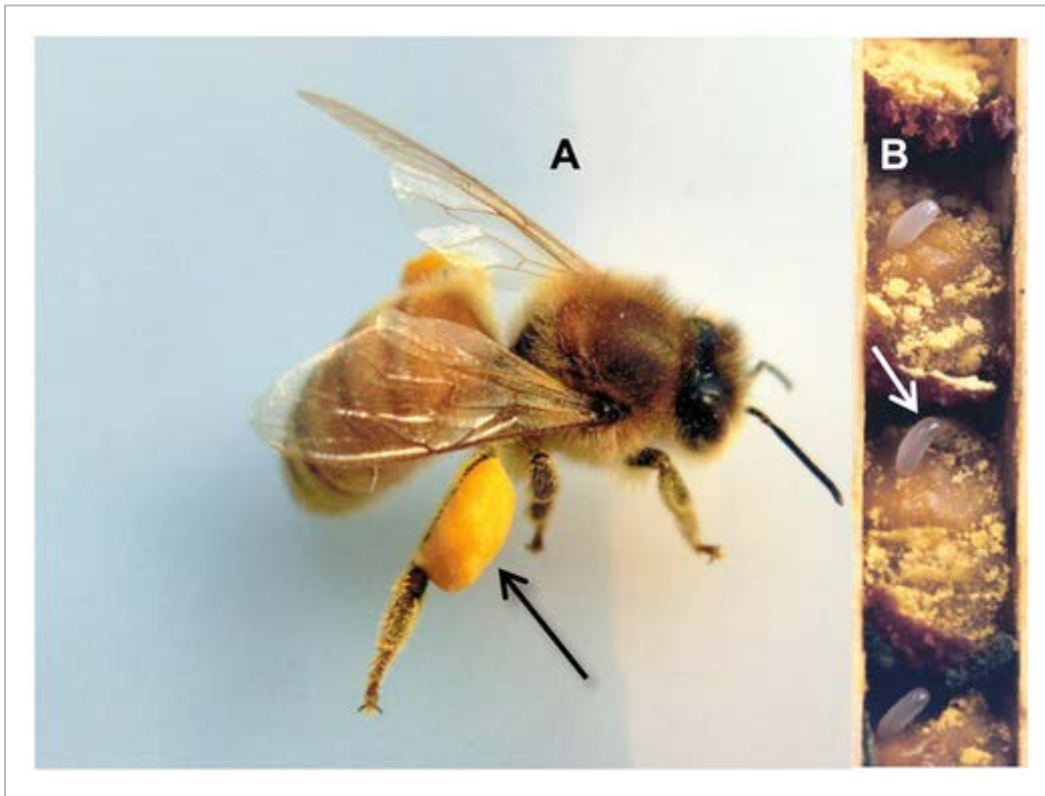


Figure 1

[Open in figure viewer](#) | [↓ PowerPoint](#)

The biological units of accumulated nectar-moistened pollen used for calculations. A. Worker honey bee showing a large rounded pollen pellet on its hind leg (see arrow). B. Three individual mass provisions cached in the linear nest cavity of a solitary bee (*Osmia ribifloris*), each with a freshly-laid sausage-shaped egg atop (see arrow). Images not to scale.

Duration of seasonal competition

Commercial honey bee colonies vie with native bee communities on public lands for about 3 months, from July to September, after spending the previous 3–5 months fulfilling pollination contracts for spring orchard and row crops. During wildland deployment, each colony collects roughly 217,000 pollen pellets per month ($1,300,000/6$) for a seasonal total of 650,000 pollen pellets (range: 550,000–1,800,000).

Compositional equivalence of *Apis* pollen pellets and larval mass provisions of solitary bees

To estimate the impact of honey bee foraging on wild bees, we propose converting honey bee pollen pellets directly to solitary bee provisions (Fig. 1) on a weight-for-weight basis. In

so doing, we recognize that pollen pellets consist not only of pollen, but of nectar sugar and water as well, and that the proportions of these components may differ from their proportions in solitary bee provisions. This is because pollen pellets are individually moistened with nectar by worker honey bees while foraging, whereas many solitary bee females transport their pollen dry (Thorp, 1979) and incorporate nectar into the provision in the nest, frequently after several pollen-collecting trips (Malyshev [1935](#)). Thus, we must show that the pollen, nectar sugar and water components of pollen pellets and provisions are roughly equivalent.

We justify our conversion with the few available weight estimates of water, nectar sugar and pollen fractions for both fresh corbicular pellets and fresh provisions of solitary bees. We are aware of only one study that reports the nectar sugar contribution to the weights of pollen pellets. Schmidt and Buchmann ([1986](#)) found that nectar sugar constituted 30% of the dry weight of pellets stripped from returning honey bees foraging at saguaro cactus in the Sonoran desert. Collected pollen pellets dried before recovery, precluding measurement of water or pollen fractions. We found water constituting 15% of pellet weight, measured using 100 pollen pellets freshly trapped at a colony in Logan during June 2015. There are several measures of these constituents in solitary bee provisions. The bee *Megachile rotundata* (Megachilidae) nests in above-ground cavities and forages on alfalfa, from which it amasses larval provisions weighing 90 ± 26 mg, consisting of $47 \pm 11\%$ nectar sugar, $33 \pm 5\%$ pollen, and $20 \pm 3\%$ nectar water by weight (Klostermeyer *et al.* [1973](#); Cane *et al.* [2011](#)). The unrelated *Nomia melanderi* (Halictidae) also forages on alfalfa, amassing provisions of similar water content ($26 \pm 1.4\%$, $n = 30$, Cane, unpublished), although nesting in damp soil. Another cavity-nesting megachild bee, *Osmia cornuta*, foraging in almonds also amassed provisions with similar water content (30%) (Bosch & Vicens [2002](#)). Thus, available evidence supports our presumption that the pollen/nectar ratio of a honey bee pollen pellet is roughly equivalent to that of a larval provision of a solitary bee regardless of bee taxonomy or floral host.

Choosing a representative solitary bee

Proper conversion of honey bee pollen loads into wild bee offspring equivalents requires a representative solitary bee of average body size for which we have fresh provision mass weights. The alfalfa leafcutting bee, *M. rotundata*, represents the average-sized bee in the only two published studies of thoroughly-sampled, size-measured bee communities of which we are aware. Bullock ([1999](#)) measured body sizes of the 220 bee species of a Mexican dry forest community using intertegular span (ITS; the distance between wing bases), a measure that closely correlates with bee dry weight (Cane, [1987](#)). Bullock ([1999](#))

reported a modal ITS of 2-3 mm. Centered in that modal range is the ITS distance of 2.5 mm that we have measured for *M. rotundata*.

In a second study, Stubblefield *et al.* (1993) measured head widths of >2700 bee prey taken from nests of the bee wolf, *Philanthus sanbornii*. Head width is a good proxy for bee size (Bullock 1999). Head width of *M. rotundata* (2.5 mm) is centered in the size range of both the species and individual bee prey collected by this indiscriminate bee predator. Lastly, similar results were found for the bee community of Wyoming shortgrass prairie (Seger, Burner, and Tepedino, unpublished). Because provision masses of solitary bees scale to adult size across a large range of body sizes (Malyshev 1935; Müller *et al.* 2006), provision masses of *M. rotundata* are a reasonable representation of the amount of pollen needed to make an offspring of an average-sized individual in a wild bee community.

Results

We estimate that six fresh honey bee pollen pellets (15 mg each) equal one 90 mg provision of an average-sized solitary bee, *Megachile rotundata*. A honey bee colony collects 650,000 pollen loads (pellets) weighing 10 kg during the 3 summer months it is pastured on wildland (Winston 1987, Seeley 1995). Therefore, each colony collects enough pollen to feed about 110,000 progeny of an average-sized solitary bee (range 92,000–300,000). A typical apiary (40 colonies) therefore collects the equivalent of 4,000,000 (range 3.7–12 million) larval mass provisions of wild bees while summered on wildlands.

Discussion

The claim that honey bees do not compete with native bees tacitly assumes that, with honey bees absent, surplus pollen and nectar remains by day's end in a plant community. Although this assumption has not been directly addressed, three available studies using different oligolectic bees and their floral hosts reported that 97–99% of available pollen was removed daily by native bees alone (Schlindwein *et al.* 2005; Larsson 2006; Larsson & Franzen 2007). In two other studies, foraging native bees removed 43% of each flower's pollen by midday (Müller *et al.* 2006), or 80% before midmorning (Carvalho & Schlindwein 2011). Native bees (21 species) collecting pollen from wild sunflowers removed nearly all pollen by late morning; honey bees constituted <1% of that forager guild (Minckley *et al.* 1994). Diminished bloom in 1 year required females of an abundant sunflower specialist, *Dieunomia triangulifera*, to take longer foraging flights to distant (3 km) sunflower patches. This pollen paucity yielded 1/3 fewer offspring (Minckley *et al.* 1994). Although more studies are needed to quantify daily pollen depletion of bee-pollinated wildflowers, extant evidence indicates that pollen is frequently a limiting resource in these wild bee communities.

The effect of wildland apiaries on native bee communities will be contextual in part. The many solitary bee species with a single spring generation, as well as overwintered queens of native social species, are spared competition for forage with managed honey bees because most migratory beekeepers do not move their hives to wildlands until mid-summer. Also exempt from competition are native bees that use flowers that honey bees ignore, such as nectarless flowers of “buzz-pollinated” plants (Buchmann [1983](#)). A few other zygomorphic flower types (e.g., *Aconitum*) also discourage honey bees, but these are generally uncommon where U.S. beekeepers pasture their colonies.

At greatest potential risk are wild native bees active in summer, especially oligolectic bee species whose foraging choices overlap with honey bees. Unlike generalists, specialists cannot shift floral hosts to escape competition with honey bees (Roubik & Villanueva-Gutierrez [2009](#)). Especially vulnerable are the many summer and early fall oligoleges that rely on species of Asteraceae for pollen. Just sunflowers (*Helianthus*) host 280 native bee species, half of which are Asteraceae specialists (Hurd *et al.* [1980](#)). Managed honey bees in western U.S. montane meadows also collect asteraceous pollen in abundance (e.g., O'Neal & Waller [1984](#)).

Also vulnerable are gynes (future queens) of bumblebees and social sweat bees (Halictini) that emerge in late summer and must quickly accumulate fat reserves to endure the winter. They reemerge the following spring to begin new colonies. Such gynes commonly gorge at species of Asteraceae. For example, in Scandinavia, goldenrod (*Solidago*) attracted more bumblebees in autumn than any coflowering plant (Teräs [1976](#)). The responses of bumblebee colonies placed near trios of honey bee hives included prolonged foraging flights, shifts to more nectar foraging, and production of fewer, smaller gynes and drones than more isolated colonies (Thomson [2004](#)). Smaller gynes presumably risk greater overwintering mortality.

The likely competition for pollen between native wildland bees and managed colonies of honey bees poses a dilemma for at least three groups: (1) public land managers, who are charged with promoting multiple-use while managing habitats for biodiversity at a time when native bee declines have been acknowledged by the White House Pollinator Task Force (2015); (2) conservationists, who lobby for native species preservation; and (3) commercial, mostly migratory beekeepers who must find good floral “pasture” for their bees when not contracted to pollinate crops. The value of honey bees as crop pollinators is threatened when inadequate summer floral pasture results in poor colony nutrition, reduced brood rearing, and scant winter food stores, circumstances that undermine the

health of many managed commercial colonies (e.g., Di Pasquale *et al.* [2013](#)) in the months after completing their primary crop pollination duties.

The magnitude of apiary impacts on native bee communities reflects local circumstances, including hive numbers and strengths, native bee abundances, and host bloom densities, all difficult measures to obtain for land managers charged with local apiary stocking decisions. What is needed is a practical rapid assessment method to gauge bee numbers within the area of potential competition. Most foragers fly <1.7–2.2 km (95% within 6 km) and the average colony's foraging range is 12–15 km² in mixed forest (summarized in Roubik [1989](#); Seeley [1995](#)). Couvillon *et al.* ([2014](#)) showed that honey bees generally foraged on the most productive, nearby floral patches, rarely venturing longer distances where nearby resources were abundant. With this in mind, the senior author has begun evaluating a protocol that uses relative bee abundances at a locally widespread wildflower species known to attract both honey- and native bees. Briefly, patches of the target wildflower are sought at incremental distances from the apiary (e.g., 1, 2, 4, and 8 km). Honey bees and all visiting natives (as a group) are counted during walking surveys in the patches (Cane & Love, in press). For instance, we found 15 honey bees for every native bee at 120 *Astragalus filipes* plants growing 4 km from a 90-hive apiary (radius for 16 km²). At 7 km, honey bees were absent, but natives were 17× more abundant than they were at 4 km. This rapid assessment integrates floral and bee abundances, showing land managers the spatial extent across which local apiaries exert marked resource competition with native bee communities, and from our calculated hive unit month, the cost in native bee reproduction. Smaller, more widely spaced apiaries should dilute competition with native bees, as should avoiding areas with rich native plant diversity, where more diverse native bee communities can be expected.

Fortunately, such fraught decisions may soon be unnecessary. The plight of U.S. pollinators is attracting attention and generating tentative solutions, which include expansion of the Conservation Reserve Program (CRP) on fallowed farmland (White House Pollinator Health Strategy 2015; see Supplement). Balancing the summer dietary needs of commercial honey bees and those of wildland bee communities is a problem whose resolution is within reach.

References

Beard, C. (2015). Honeybees (*Apis mellifera*) on public conservation lands: a risk analysis. Department of Conservation, Wellington. 21 p.
[Google Scholar](#)

Bosch, J. (2008). Production of undersized offspring in a solitary bee. *Anim. Behav.*, **75**, 809- 816.
[Crossref](#) | [Web of Science®](#) | [Google Scholar](#)

Bosch, J. & Vicens, N. (2002). Body size as an estimator of production costs in a solitary bee. *Ecol. Entomol.*, **27**, 129- 137.
[Wiley Online Library](#) | [Web of Science®](#) | [Google Scholar](#)

Buchmann, S.L. (1983). Buzz pollination in angiosperms. Pages 73- 113 in C. E. Jones, R. J. Little, editors. *Handbook of experimental pollination biology*. Van Nostrand Reinhold Co., New York.
[Google Scholar](#)

Bullock, S.H. (1999). Relationships among body size, wing size and mass in bees from a tropical dry forest in Mexico. *J. Kansas Entomol. Soc.*, **72**, 426- 439.
[Web of Science®](#) | [Google Scholar](#)

Cane, J.H. (1987). Estimation of bee size using intertegular span (Apoidea). *J. Kansas Entomol. Soc.*, **60**, 145- 147.
[Web of Science®](#) | [Google Scholar](#)

Cane, J.H., Gardner, D.R. & Harrison, P.A. (2011). Nectar and pollen sugars constituting larval provisions of the alfalfa leaf-cutting bee (*Megachile rotundata*) (Hymenoptera: Apiformes: Megachilidae). *Apidologie*, **42**, 401- 408.
[Crossref](#) | [CAS](#) | [Web of Science®](#) | [Google Scholar](#)

Cane, J.H. & Love, B. (2016). Floral guilds of bees in sagebrush-steppe: comparing bee usage of wildflowers available for post-fire restoration. *Nat. Areas J.* in press.
[Crossref](#) | [Web of Science®](#) | [Google Scholar](#)

Carneiro, L.T. & Martins, C.F. (2012). Africanized honey bees pollinate and preempt the pollen of *Spondias mombin* (Anacardiaceae) flowers. *Apidologie*, **43**, 474- 486.
[Crossref](#) | [Web of Science®](#) | [Google Scholar](#)

Carvalho, A.T. & Schlindwein, C. (2011). Obligate association of an oligolectic bee and a seasonal aquatic herb in semi-arid north-eastern Brazil. *Biol. J. Linn. Soc.*, **102**, 355- 368.
[Wiley Online Library](#) | [Web of Science®](#) | [Google Scholar](#)

Couvillon, M.J., Schurch, R. & Ratnieks, F.L.W. (2014) Waggle dance distances as integrative indicators of seasonal foraging challenges. *Plos One*, **9**(4), e93495.
[Crossref](#) | [PubMed](#) | [Web of Science®](#) | [Google Scholar](#)

Di Pasquale, G., Salignon, M., Le Conte, Y. *et al.* (2013). Influence of pollen nutrition on honey bee health: do pollen quality and diversity matter? *Plos One*, **8**(8), e72016.

[Crossref](#) | [Web of Science®](#) | [Google Scholar](#)

Fürst, M.A., McMahon, D.P., Osborne, J.L., Paxton, R.J. & Brown, M.J.F. (2014). Disease associations between honeybees and bumblebees as a threat to wild pollinators. *Nature*, **506**, 364- 366.

[Crossref](#) | [CAS](#) | [PubMed](#) | [Web of Science®](#) | [Google Scholar](#)

Goodell, K. (2003). Food availability affects *Osmia pumila* (Hymenoptera: Megachilidae) foraging, reproduction, and brood parasitism. *Oecol.*, **134**, 518- 527.

[Crossref](#) | [PubMed](#) | [Web of Science®](#) | [Google Scholar](#)

Goulson, D. (2003). Effects of introduced bees on native ecosystems. *Annu. Rev. Ecol. Evol. Syst.*, **34**, 1- 26.

[Crossref](#) | [Web of Science®](#) | [Google Scholar](#)

Hurd, P.D., LaBerge, W.E. & Linsley, E.G. (1980). Principal sunflower bees of North America with emphasis on the southwestern United States (Hymenoptera: Apoidea). *Smithsonian Contrib. Zool.*, **310**, 158 pp.

[Google Scholar](#)

Kleijn, D., Baquero, R.A., Clough, Y., et al & . (2006). Mixed biodiversity benefits of agri-environment schemes in five European countries. *Ecol. Lett.*, **9**, 243- 254.

[Wiley Online Library](#) | [CAS](#) | [PubMed](#) | [Web of Science®](#) | [Google Scholar](#)

Klostermeyer, E.C., Mech, S.J., Jr. & Rasmussen, W.B. (1973). Sex and weight of *Megachile rotundata* (Hymenoptera: Megachilidae) progeny associated with provision weights. *J. Kansas Entomol. Soc.*, **46**, 536- 548.

[Google Scholar](#)

Larsson, M. (2006). *To bee or not to be: critical floral resources of wild-bees*. Dissertation. Univ. Uppsala, Sweden.

[Google Scholar](#)

Larsson, M. & Franzen, M. (2007). Critical resource levels of pollen for the declining bee *Andrena hattorfiana* (Hymenoptera, Andrenidae). *Biol. Conserv.*, **134**, 405- 414.

[Crossref](#) | [Web of Science®](#) | [Google Scholar](#)

Malyshev, S.I. (1935). The nesting habits of solitary bees: a comparative study. *EOS (Madrid).Revista Espanola de Entomologia*, **11**, 201- 309.

[Google Scholar](#)

Minckley, R.L., Wcislo, W.T., Yanega, D. & Buchmann, S.L. (1994). Behavior and phenology of a specialist bee (*Dieunomia*) and sunflower (*Helianthus*) pollen availability. *Ecology*, **75**, 1406- 1419.
[Wiley Online Library](#) | [Web of Science®](#) | [Google Scholar](#)

Müller, A., Diener, S., Schnyder, S., Stutz, K., Sedivy, C. & Dorn, S. (2006). Quantitative pollen requirements of solitary bees: implications for bee conservation and the evolution of bee-flower relationships. *Biol. Conserv.*, **130**, 604- 615.
[Crossref](#) | [Web of Science®](#) | [Google Scholar](#)

O'Neal, R.J. & Waller, G.W. (1984). On the pollen harvest by the honey bee (*Apis mellifera* L.) near Tucson, Arizona (1976-1981). *Desert Plants*, **6**, 81- 109.
[Google Scholar](#)

Paini, D.R. (2004). Impact of the introduced honey bee (*Apis mellifera*) (Hymenoptera: Apidae) on native bees: a review. *Austral Ecol.*, **29**, 399- 407.
[Wiley Online Library](#) | [Web of Science®](#) | [Google Scholar](#)

Peterson, J.H. & Roitberg, B.D. (2006). Impacts of flight distance on sex ratio and resource allocation to offspring in the leafcutter bee, *Megachile rotundata*. *Behav. Ecol. Sociobiol.*, **59**, 589- 596.
[Crossref](#) | [Web of Science®](#) | [Google Scholar](#)

Roubik, D.W. (1989). *Ecology and natural history of tropical bees*. Cambridge Univ. Press, Cambridge.
[Google Scholar](#)

Roubik, D.W. & Villanueva-Gutierrez, R. (2009). Invasive Africanized honey bee impact on native solitary bees: a pollen resource and trap nest analysis. *Biol. J. Linn. Soc.*, **98**, 152- 160.
[Wiley Online Library](#) | [Web of Science®](#) | [Google Scholar](#)

Roubik, D.W., Moreno, J.E., Vergara, C. & Wittmann, D. (1986). Sporadic food competition with the African honey bee: projected impact on neotropical social bees. *J. Tropical Ecol.*, **2**, 97- 111.
[Crossref](#) | [Google Scholar](#)

Roulston, T.H. & Goodell, K. (2010). The role of resources and risks in regulating wild bee populations. *Annu. Rev. Entomol.*, **56**, 293- 312.
[Crossref](#) | [CAS](#) | [Web of Science®](#) | [Google Scholar](#)

Schindwein, C., Wittmann, D., Martins, C.F. *et al.* (2005). Pollination of *Campanula rapunculus* L. (Campanulaceae): how much pollen flows into pollination and into reproduction of oligolectic pollinators? *Plant Syst. Evol.*, **250**, 147- 156.

Schmidt, J.O. & Buchmann, S.L. (1986). Floral biology of the saguaro (*Cereus giganteus*). I. Pollen harvest by *Apis mellifera*. *Oecol.*, **69**, 491- 498.

[Crossref](#) | [PubMed](#) | [Web of Science®](#) | [Google Scholar](#)

Seeley, T.D. (1995). *The wisdom of the hive*. Harvard Univ. Press, Cambridge, MA.

[Google Scholar](#)

Stubblefield, J.W., Seger, J., Wenzel, J.W. & Heisler, M.M. (1993). Temporal, spatial, sex-ratio and body-size heterogeneity of prey species taken by the beewolf *Philanthus sanbornii* (Hymenoptera: Sphecidae). *Phil. Trans. Roy. Soc. London B Biol. Sci.*, **339**, 397- 423.

[Crossref](#) | [CAS](#) | [PubMed](#) | [Web of Science®](#) | [Google Scholar](#)

Tepedino, V.J. & Stanton, N.L. (1980). Spatiotemporal variation in phenology and abundance of floral resources on shortgrass prairie. *Great Basin Natur.*, **40**, 197- 215.

[Google Scholar](#)

Tepedino, V.J. & Torchio, P.F. (1982). Temporal variability in the sex ratio of a non-social bee, *Osmia lignaria propinqua*: extrinsic determination or tracking of an optimum? *Oikos*, **38**, 177- 182.

[Crossref](#) | [Web of Science®](#) | [Google Scholar](#)

Teräs, I. (1976). Flower visits of bumblebees, *Bombus* Latr. (Hymenoptera, Apidae), during one summer. *Ann. Zool. Fennici*, **13**, 200- 232.

[Google Scholar](#)

Thomson, D. (2004). Competitive interactions between the invasive European honey bee and native bumble bees. *Ecology*, **85**, 458- 470.

[Wiley Online Library](#) | [Web of Science®](#) | [Google Scholar](#)

Thorp, R.W. (1979) Structural, behavioral, and physiological adaptations of bees (Apoidea) for collecting pollen. *Ann. Missouri Bot. Gard.*, **66**, 788- 812.

[Crossref](#) | [Web of Science®](#) | [Google Scholar](#)

Winston, M.L. (1987). *The biology of the honey bee*. Harvard Univ. Press, Cambridge, MA.

[Google Scholar](#)

Zurbuchen, A., Cheesman, S., Klaiber, J., Müller, A., Hein, S. & Dorn, S. (2010). Long foraging distances impose high costs on offspring production in solitary bees. *J. Anim. Ecol.*, **79**, 674- 681.

[Wiley Online Library](#) | [CAS](#) | [PubMed](#) | [Web of Science®](#) | [Google Scholar](#)

Number of times cited according to CrossRef: 36

Diane M Thomson, Maureen L Page, The importance of competition between insect pollinators in the Anthropocene, *Current Opinion in Insect Science*, 10.1016/j.cois.2019.11.001, (2020).

[Crossref](#)

Brice B. Hanberry, Sandra J. DeBano, Thomas N. Kaye, Mary M. Rowland, Cynthia R. Hartway, Donna Shorrock, Pollinators of the Great Plains: Disturbances, stressors, management, and research needs, *Rangeland Ecology & Management*, 10.1016/j.rama.2020.08.006, (2020).

[Crossref](#)

Emma Jeavons, Joan van Baaren, Cécile Le Lann, Resource partitioning among a pollinator guild: A case study of monospecific flower crops under high honeybee pressure, *Acta Oecologica*, 10.1016/j.actao.2020.103527, **104**, (103527), (2020).

[Crossref](#)

Océane Bartholomée, Amandine Aullo, Juliette Becquet, Clémence Vannier, Sandra Lavorel, Pollinator presence in orchards depends on landscape-scale habitats more than in-field flower resources, *Agriculture, Ecosystems & Environment*, 10.1016/j.agee.2019.106806, **293**, (106806), (2020).

[Crossref](#)

Mickaël Henry, Guy Rodet, The apiary influence range: A new paradigm for managing the cohabitation of honey bees and wild bee communities, *Acta Oecologica*, 10.1016/j.actao.2020.103555, **105**, (103555), (2020).

[Crossref](#)

Damon M Hall, Dino J Martins, Human dimensions of insect pollinator conservation, *Current Opinion in Insect Science*, 10.1016/j.cois.2020.04.001, (2020).

[Crossref](#)

Phillip L. Stephenson, Ashley P.G. Dowling, David G. Kremenetz, Bee Communities of Emergent Wetlands under Restoration in the Lower Mississippi Alluvial Valley of Arkansas, *Southeastern Naturalist*, 10.1656/058.019.0303, **19**, 3, (472), (2020).

[Crossref](#)

Diana Carabali-Banguero, James Montoya-Lerma, Arturo Carabalí-Muñoz, Cargas polínicas en entomofauna visitante floral de *Persea americana* (Lauraceae) cv. Hass, *Caldasia*, 10.15446/caldasia.v42n1.77136, **42**, 1, (2020).

Crossref

Olivia Kline, Neelendra K. Joshi, Mitigating the Effects of Habitat Loss on Solitary Bees in Agricultural Ecosystems, *Agriculture*, 10.3390/agriculture10040115, **10**, 4, (115), (2020).

[Crossref](#)

Letícia Vanessa Graf, Rafael Dudeque Zenni, Rodrigo Barbosa Gonçalves, Ecological impact and population status of non-native bees in a Brazilian urban environment, *Revista Brasileira de Entomologia*, 10.1590/1806-9665-rbent-2020-0006, **64**, 2, (2020).

[Crossref](#)

Gordon Fitch, Caleb J. Wilson, Paul Glaum, Chatura Vaidya, Maria-Carolina Simao, Mary A. Jamieson, Does urbanization favour exotic bee species? Implications for the conservation of native bees in cities, *Biology Letters*, 10.1098/rsbl.2019.0574, **15**, 12, (20190574), (2019).

[Crossref](#)

Fabrice Requier, Lionel Garnery, Patrick L. Kohl, Henry K. Njovu, Christian W.W. Pirk, Robin M. Crewe, Ingolf Steffan-Dewenter, The Conservation of Native Honey Bees Is Crucial, *Trends in Ecology & Evolution*, 10.1016/j.tree.2019.04.008, (2019).

[Crossref](#)

Alfredo Valido, María C. Rodríguez-Rodríguez, Pedro Jordano, Honeybees disrupt the structure and functionality of plant-pollinator networks, *Scientific Reports*, 10.1038/s41598-019-41271-5, **9**, 1, (2019).

[Crossref](#)

Keng-Lou James Hung, Jennifer M. Kingston, Adrienne Lee, David A. Holway, Joshua R. Kohn, Non-native honey bees disproportionately dominate the most abundant floral resources in a biodiversity hotspot, *Proceedings of the Royal Society B: Biological Sciences*, 10.1098/rspb.2018.2901, **286**, 1897, (20182901), (2019).

[Crossref](#)

Jerrold Penn, Wuyang Hu, Hannah J. Penn, Support for Solitary Bee Conservation among the Public versus Beekeepers, *American Journal of Agricultural Economics*, 10.1093/ajae/aaz050, **101**, 5, (1386-1400), (2019).

[Wiley Online Library](#)

Daniel P. Silva, Ana Carrollina F. Castro, Bruno Vilela, Xin Rui Ong, Jennifer C. Thomas, Abdulaziz S. Alqarni, Michael S. Engel, John S. Ascher, Colonizing the east and the west: distribution and niche properties of a dwarf Asian honey bee invading Africa, the Middle East, the Malay Peninsula, and Taiwan, *Apidologie*, 10.1007/s13592-019-00711-x, (2019).

[Crossref](#)

Susma Giri, Basant Giri, Michael E. Dillon, An optimized approach for extraction and quantification of energy reserves in differentially fed bumble bees (*Bombus*), Journal of Apicultural Research, 10.1080/00218839.2019.1614728, (1-11), (2019).

[Crossref](#)

undefined Belsky, undefined Joshi, Impact of Biotic and Abiotic Stressors on Managed and Feral Bees, Insects, 10.3390/insects10080233, **10**, 8, (233), (2019).

[Crossref](#)

Jonas Geldmann, Juan P. González-Varo, Conserving honey bees does not help wildlife, Science, 10.1126/science.aar2269, **359**, 6374, (392-393), (2018).

[Crossref](#)

Juan P. González-Varo, Jonas Geldmann, Response—"Bee conservation: Key role of managed bees" and "Bee conservation: Inclusive solutions", Science, 10.1126/science.aat3746, **360**, 6387, (390-390), (2018).

[Crossref](#)

Fernanda S. Valdovinos, Eric L. Berlow, Pablo Moisset de Espanés, Rodrigo Ramos-Jiliberto, Diego P. Vázquez, Neo D. Martinez, Species traits and network structure predict the success and impacts of pollinator invasions, Nature Communications, 10.1038/s41467-018-04593-y, **9**, 1, (2018).

[Crossref](#)

Tsunashi Kamo, Yoshinobu Kusumoto, Yoshinori Tokuoka, Satoru Okubo, Hiroshi Hayakawa, Mikio Yoshiyama, Kiyoshi Kimura, Akihiro Konuma, A DNA barcoding method for identifying and quantifying the composition of pollen species collected by European honeybees, *Apis mellifera* (Hymenoptera: Apidae), Applied Entomology and Zoology, 10.1007/s13355-018-0565-9, **53**, 3, (353-361), (2018).

[Crossref](#)

Petr Bogusch, Jakub Horák, Saproxylic Bees and Wasps, Saproxylic Insects, 10.1007/978-3-319-75937-1_7, (217-235), (2018).

[Crossref](#)

Clint R. V. Otto, Haochi Zheng, Alisa L. Gallant, Rich Iovanna, Benjamin L. Carlson, Matthew D. Smart, Skip Hyberg, Past role and future outlook of the Conservation Reserve Program for supporting honey bees in the Great Plains, Proceedings of the National Academy of Sciences, 10.1073/pnas.1800057115, **115**, 29, (7629-7634), (2018).

[Crossref](#)

Mickaël Henry, Guy Rodet, Controlling the impact of the managed honeybee on wild bees in protected areas, *Scientific Reports*, 10.1038/s41598-018-27591-y, **8**, 1, (2018).

[Crossref](#)

Wyatt A. Shell, Sandra M. Rehan, Invasive range expansion of the small carpenter bee, *Ceratina dentipes* (Hymenoptera: Apidae) into Hawaii with implications for native endangered species displacement, *Biological Invasions*, 10.1007/s10530-018-1892-z, (2018).

[Crossref](#)

Olivia Messinger Carril, Terry Griswold, James Haefner, Joseph S. Wilson, Wild bees of Grand Staircase-Escalante National Monument: richness, abundance, and spatio-temporal beta-diversity, *PeerJ*, 10.7717/peerj.5867, **6**, (e5867), (2018).

[Crossref](#)

Sheila R. Colla, J. Scott MacIvor, Questioning public perception, conservation policy, and recovery actions for honeybees in North America, *Conservation Biology*, 10.1111/cobi.12839, **31**, 5, (1202-1204), (2017).

[Wiley Online Library](#)

Juan P. González-Varo, Montserrat Vilà, Spillover of managed honeybees from mass-flowering crops into natural habitats, *Biological Conservation*, 10.1016/j.biocon.2017.06.018, **212**, (376-382), (2017).

[Crossref](#)

S Hollis Woodard, Shalene Jha, Wild bee nutritional ecology: predicting pollinator population dynamics, movement, and services from floral resources, *Current Opinion in Insect Science*, 10.1016/j.cois.2017.05.011, **21**, (83-90), (2017).

[Crossref](#)

Ainhoa Magrach, Juan P. González-Varo, Mathieu Boiffier, Montserrat Vilà, Ignasi Bartomeus, Honeybee spillover reshuffles pollinator diets and affects plant reproductive success, *Nature Ecology & Evolution*, 10.1038/s41559-017-0249-9, **1**, 9, (1299-1307), (2017).

[Crossref](#)

Erik Stange, Grazia Zulian, Graciela Rusch, David Barton, Megan Nowell, Ecosystem services mapping for municipal policy: ESTIMAP and zoning for urban beekeeping, *One Ecosystem*, 10.3897/oneeco.2.e14014, **2**, (e14014), (2017).

[Crossref](#)

Rachel E. Mallinger, Hannah R. Gaines-Day, Claudio Gratton, Do managed bees have negative effects on wild bees?: A systematic review of the literature, *PLOS ONE*,

10.1371/journal.pone.0189268, **12**, 12, (e0189268), (2017).

[Crossref](#)

Sandra A. M. Lindström, Lina Herbertsson, Maj Rundlöf, Riccardo Bommarco, Henrik G. Smith, Experimental evidence that honeybees depress wild insect densities in a flowering crop, Proceedings of the Royal Society B: Biological Sciences, 10.1098/rspb.2016.1641, **283**, 1843, (20161641), (2016).

[Crossref](#)

Laura Russo, Positive and Negative Impacts of Non-Native Bee Species around the World, Insects, 10.3390/insects7040069, **7**, 4, (69), (2016).

[Crossref](#)

Jenna Braun, Christopher J. Lortie, Facilitation with a grain of salt: reduced pollinator visitation is an indirect cost of association with the foundation species creosote bush (*Larrea tridentata*), American Journal of Botany, 10.1002/ajb2.1533, **0**, 0, (undefined).

[Wiley Online Library](#)

[Download PDF](#)



[ABOUT SCB](#)

[MEMBERSHIP](#)

[CONTACT US](#)

© 2020 The Society for Conservation Biology

About Wiley Online Library

[Privacy Policy](#)

[Terms of Use](#)

Cookies
Accessibility

Help & Support

Contact Us

Opportunities

Subscription Agents
Advertisers & Corporate Partners

Connect with Wiley

The Wiley Network
Wiley Press Room



TOWN OF JEROME
POST OFFICE BOX 335, JEROME, ARIZONA 86331
OFFICE (928) 634-7943 FAX (928) 634-0715

**ZONING ADMINISTRATOR ANALYSIS
COUNCIL STAFF REPORT
November 10, 2020**

ITEM 11A: **Parking Permit Requirements**
Recommendation: Discussion/Possible direction to staff
Prepared by: John Knight, Zoning Administrator

Background and Discussion: The residential parking ordinance was recently amended to restrict the issuance of a parking permit for dwelling units that have existing off-street parking. The ordinance includes a provision that allows the Zoning Administrator to issue the permit if there is off-street parking, but the parking is substandard in terms of size or is determined to be unsafe.

The specific provision of the ordinance is included below.

Except as herein provided, residential parking permits shall not be issued to dwelling units with off-street parking on their property, provided that the number of off-street spaces is consistent with the current parking requirements of the Jerome Zoning Ordinance.

- a. *Should the off-street parking spaces be less than number required by the zoning ordinance or be substandard in terms of the size of the space, the applicant may be eligible for a residential parking permit. This will be determined by the Zoning Administrator on a case by case basis.*
- b. *Should the off-street spaces be difficult to use due to safety reasons, the applicant may be eligible for a residential parking permit. This will be determined by the Zoning Administrator on a case by case basis.*

Staff would like to have some direction from the Council regarding this issue on a specific permit that has recently been submitted for 537 School Street. The School Street property has off-street parking that could be suitable for parking, but the applicant has raised several safety issues on why the off-street parking can not be used.

Staff has also included pictures of other off-street parking situations to help facilitate the discussion.

Action: Discussion and possible direction to staff regarding the School Street permit request as well as other potential off-street parking situations.

Attachments –

- 537 School Street safety concerns raised by applicant
- Pictures of various types of off-street parking

Situation: 537 School Street Requires Two curb-side parking permits for its residents. ***Up until August, police provided two permits (Historical Precedent)***

Driveway is not safe or efficient (Video/photos available)

- BlindSpots when pulling in/out
- Narrow - Not created for modern day automobiles
- Traffic/Pedestrians not paying attention to surroundings

Duplex Determination: 537 School Street meets definition of duplex

- Two Separate financial households
- USPS considers this residence as two dwellings and supplies a PO Box for each dwelling
- Separate Kitchens, Bathrooms and entrances with no internal stairwell
- Town maintains two billing accounts (water)

Complications:

- Inconsistent Parking Policies:
 - Not well marked
 - Poor Parking Etiquette
 - Cars used for storage not cited
 - Storing "items" in street
 - Loading/Unloading Zones Time Limit not enforced
 - Air B and B parking

Implications:

- Personal and Public Safety
 - Historic Plaque/Map Draws additional foot traffic placing public at risk
- Interruption of expected conveniences of everyday
 - Trash Disposal
 - Window Access
 - Fire Safety
 - Access to residence
- Poor Neighborly relations

Position:

We would like the town to honor the precedent and approve two residential parking permits and not enforce the use of the driveway, because there is substantial space located along the eastern facing portion of School Street

Desired Action:

Jerome Police Dept will provide two permits beginning in the month of November

Benefit:

Provide a safe and pleasant environment, honoring goal 1 in Jerome's Land Use Document

[Jerome.az.gov/documents/76/2018_General_Plan_Final_reduced.pdf](https://jerome.az.gov/documents/76/2018_General_Plan_Final_reduced.pdf) (Page 25)

537 School Street



Other examples of potential off-street parking

1



2



3



4



5



6



7



8



9



10



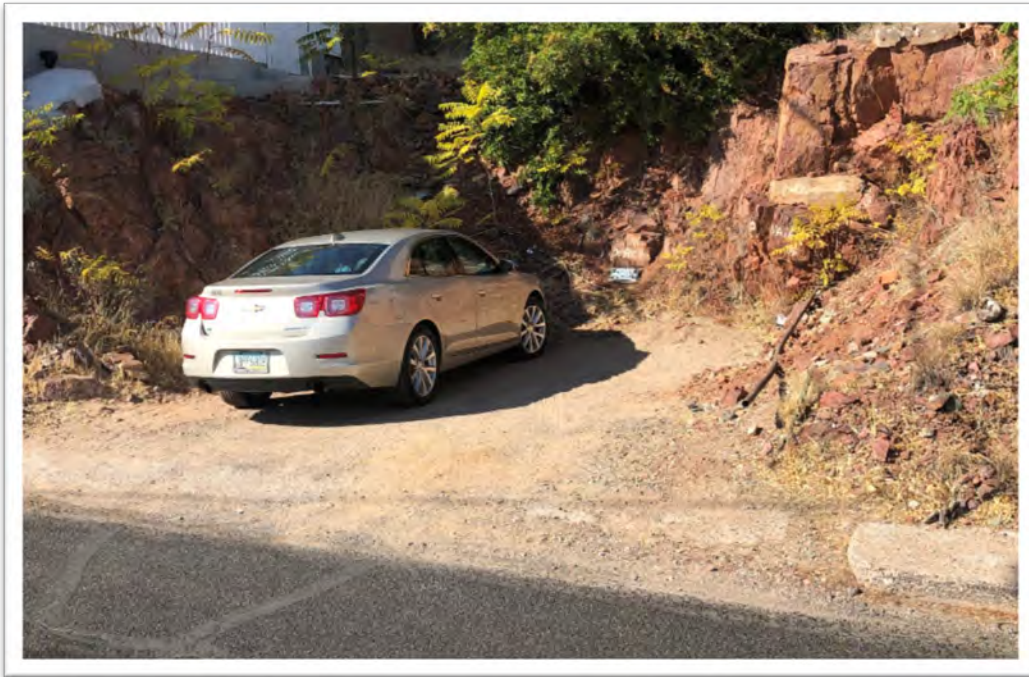
11



12



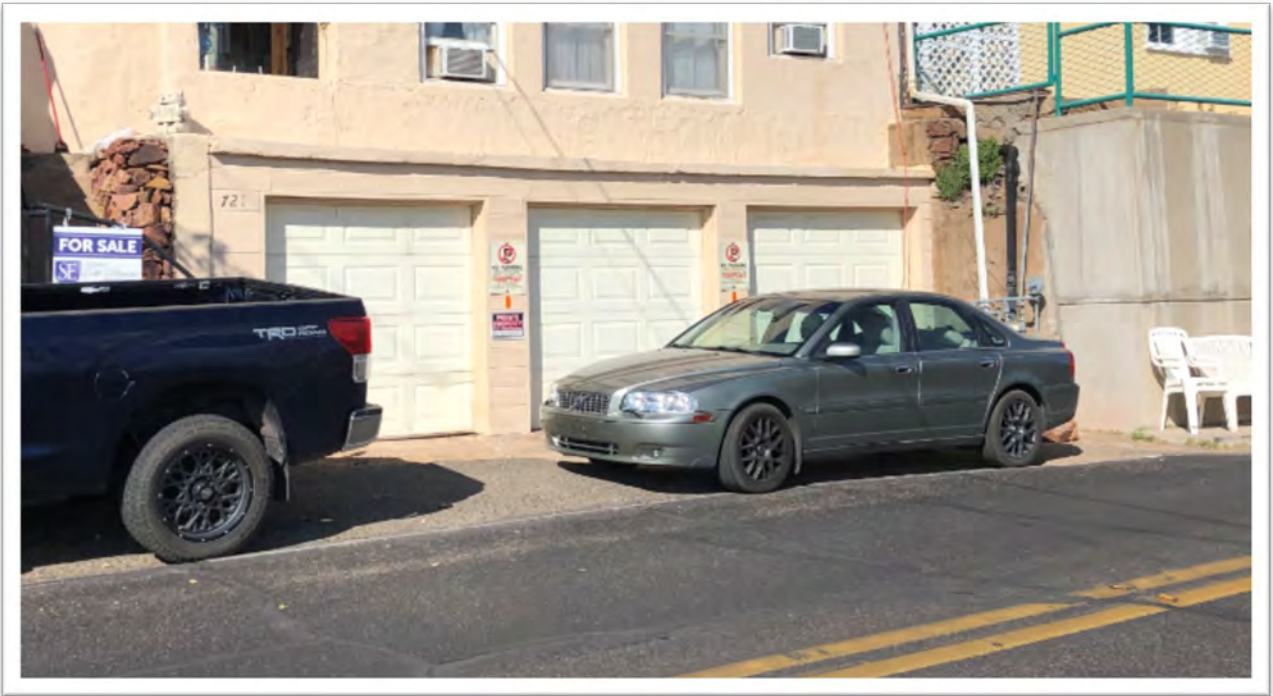
13



14



15



16





TOWN OF JEROME
POST OFFICE BOX 335, JEROME, ARIZONA 86331
OFFICE (928) 634-7943 FAX (928) 634-0715

**ZONING ADMINISTRATOR ANALYSIS
COUNCIL STAFF REPORT
November 10, 2020**

ITEM 11B: **District Signs**
Recommendation: Discussion/Possible direction to staff
Prepared by: John Knight, Zoning Administrator

Background and Discussion: A few years ago, the chamber of commerce, town staff and local businesses worked together to develop a district sign program (see attached pictures). These district signs are currently showing signs of wear and may need to be updated or changed.

In addition to the wear, concerns have been raised regarding the usefulness of the signs. The individual slats have the business names, but many don't include addresses or directions to the business. Visitors may see the name of the business they would like to go to, but they have no idea how to get there. As a result, many visitors just ignore the district signs. The signs could be improved with the addition of a map handout that could be attached similar the flyers that are used for real estate signs.

And finally, there's some question as to who is responsible for the ownership and maintenance of the signs. Should it be the chamber, the town, the individual businesses or all of the above? If the town is going to take over the maintenance and responsibility of the signs, it may be appropriate to upgrade them with more durable materials, add the town logo and include a district map.

Action: Discussion and possible direction to staff regarding potential changes to the district signs and clarification on who is responsible for maintenance of the signs.

Attachments – Pictures of the district signs

At Middle Park – missing panels on top and peeling



Close up of Middle Park sign showing peeling paint and peeling sign



Close up of Middle Park sign showing poor quality paint



District sign on Main St. (across from Police Station) - separating panels, missing top panels, and peeling



District sign on way up to Grand Hotel



Sign panel stapled into place by business owner



Peeling paint on blank panel



District sign across from Bobby D's – note separating panels





Founded 1876
Incorporated 1899

TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 FAX (928) 634-0715

STAFF SUMMARY REPORT

FROM: Candace Gallagher, Town Manager/Clerk

ITEM: ITEM #11C: GHOST PEPPER LEASE

MEETING DATE: November 10, 2020

The three-year lease at 500 Main Street to Susan and William Sotiros (dba the Jerome Ghost Pepper Co.) expired on October 31, 2020 and, by the terms of the lease is continuing temporarily on a month-to-month basis.

Mr. and Mrs. Sotiros are in the process of selling the business and would like for the new owner to have the opportunity to enter into a lease with the Town for that property.

Council needs to decide:

1. Whether to allow the new owner to enter into a lease with the Town or, alternatively, to advertise the space and accept bids.

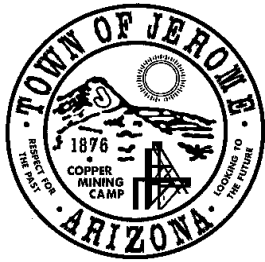
This is an unusual situation. When a business owner opts not to renew their lease, we then advertise the space and award a new lease based on proposals received. In situations where a lease has expired and the business owner wishes to continue, we have simply renewed the lease. In this instance, the business will continue with a new owner, and the sale of that business may be contingent upon their securing this lease with the town.

2. If entering into a lease with the new owner, whether to continue the same price and terms.

The current lease price is \$1,200 per month, with an option reserved (but not yet exercised) by Council to increase the rental price by up to 10% per year.

On the following page is a schedule of all leases currently held by the Town. We will be addressing the Artists Co-op lease at our December meeting.

		Lease Expires	Rent	SQ. FT.	rate per sq ft
<i>Hotel Jerome Ground Floor Rentals</i>					
Tenant	Room #				
Artists Co op		11/30/20	1,832.74	2,696	0.68
Jerome Ghost Pepper Co.		10/31/20	1,200.00	806	1.49
<i>Hotel Jerome Basement Rentals</i>					
Tenant	Room #				
Nicole Lahti	B1	Month to month	52.97	185	0.29
Chad Hembrough	B2	03/31/22	55.25	221	0.25
Bonnie Caron	B3	Month to month	56.95	901	0.06
<i>Old Town Hall Rental</i>					
Tenant	Room #				
Passion Cellars	n/a	09/14/22	2,586.00	1,269	2.04
				includes patio	
<i>Jerome Civic Center Rentals</i>					
Tenant	Room #				
Christy Fisher	Studio 1	03/31/22	243.20	608	0.40
Carrie Mae Rose	Studio 2	07/05/23	252.00	630	0.40
Ginger MacKenzie	Studio 3	03/31/22	264.40	661	0.40



TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 FAX (928) 634-0715

Founded 1876
Incorporated 1899

APPLICATION TO SERVE AS MEMBER OF DESIGN REVIEW BOARD, PLANNING & ZONING COMMISSION OR BOARD OF ADJUSTMENT

We understand you are interested in serving on one of the Town boards or commissions. We appreciate your volunteering. Such service is vital to the community and we hope this will reward you with a better understanding of your local government and a sense that, through your efforts, Jerome will be a better place to live. We are delighted to hear of your willingness to help.

Name: **MIKE PARRY** Date: **10/29/2020**

Mailing Address: **P.O. BOX 966**

Physical Address: **687 MAIN**

Home phone: Cell phone: **602-430-5544**

Email: **sonpac@man.com**

Which board or commission would you prefer to join? **p&z**

How long have you resided in Jerome? **13 years**

Have you read Jerome's present Zoning Ordinance? **yes**

Have you read Jerome's Comprehensive Plan? **yes**

Do you have previous experience on any of our boards or commissions? If yes, which ones? Have you served on similar committees, councils, boards, etc. in other communities? Which? When? Where?

HAVE BEEN ON BOTH P&Z AND DESIGN REVIEW FOR 3 1/2 YEARS HERE PRIOR

Please list any or all background information that would enhance your qualifications to serve.

HELP PRESERVE OUR TOWN, IT IS PRECIOUS.....

Briefly state your reasons for wanting to serve at this time.

For Planning & Zoning Commission and Board of Adjustment Applicants only:

What attracted you to Jerome?

THE HISTORY, THE QURKINESS, THE PEOPLE AND THE VIEW

What concerns, if any, do you have regarding the impact of growth on the town and its infrastructure?

SEVEN YEARS AGO I HELPED INTRODUCE PAID PARKING TO HAVE THE TOWN
BE ABLE TO AFFORD FIXING THE INFRASTRUCTURE.....

What is your long-term "vision" for Jerome? Please explain your answer.

MAINTAIN AND PERSEVERE

How important or not is the Historic Landmark Status of Jerome?

EXTREMELY IMPORTANT

If there were one major change you would like to see happen in this town, what would it be?

LESS TRAFFIC, AND MORE SILENCE

What qualities and qualifications do you feel you have that would make you an excellent member of the Planning & Zoning Commission or Board of Adjustment?

I TRY TO DEAL WITH THE FACTS AND BE FAIR

We feel it is very important to be knowledgeable about the laws, concepts and reasoning behind our Zoning Ordinance and general plan. Are you free enough and willing to read published materials and go to occasional conferences to enhance your ability to do a good job on the commission?

YES, KNOWLEDGE IS ESSENTIAL TO REASONING AND UNDERSTANDING.

Do you understand that your duty as a Commissioner or Board member is to give a fair and impartial hearing to each proposal or appeal based on its meeting the requirements of the Jerome Zoning Ordinance?

ALWAYS

Give an example of a situation in which you have had to handle something under pressure that would relate to serving on this board.

TRYING TO CONVINCE A TOWN THAT IT NEEDS TO GENERATE MORE INCOME, WHILE
NOT ANNOYING BUSINESS OWNERS THAT ARE YOUR FRIENDS(PAID PARKING)



Founded 1876
Incorporated 1899

TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 FAX (928) 634-0715

APPLICATION TO SERVE AS MEMBER OF DESIGN REVIEW BOARD, PLANNING & ZONING COMMISSION OR BOARD OF ADJUSTMENT

We understand you are interested in serving on one of the Town boards or commissions. We appreciate your volunteering. Such service is vital to the community and we hope this will reward you with a better understanding of your local government and a sense that, through your efforts, Jerome will be a better place to live. We are delighted to hear of your willingness to help.

Name: **Michael Harvey**

Date: **11/02/2020**

Mailing Address: **PO Box 1241 Jerome AZ 86331**

Physical Address: **645 Verde Ave Jerome AZ 86331**

Home phone: **928-301-2855**

Cell phone:

Email: **maharvey54@gmail.com**

Which board or commission would you prefer to join? **Planning & Zoning**

How long have you resided in Jerome? **6 years**

Have you read Jerome's present Zoning Ordinance? **Yes**

Have you read Jerome's Comprehensive Plan? **Yes**

Do you have previous experience on any of our boards or commissions? If yes, which ones? Have you served on similar committees, councils, boards, etc. in other communities? Which? When? Where?

No

Please list any or all background information that would enhance your qualifications to serve.

40 year carpenter - Residential & Commercial (35 yrs in the Verde Valley), capable of reading Blue Prints

Briefly state your reasons for wanting to serve at this time.

I feel my experience may be of use to Town and there has been an empty seat on P&Z for a while now.

For Planning & Zoning Commission and Board of Adjustment Applicants only:

What attracted you to Jerome?

The people, history, art and the view. And my wife of course.

What concerns, if any, do you have regarding the impact of growth on the town and its infrastructure?

Without oversight we could easily over build. I am aware that our systems are near capacity now and without proper oversight could fail.

What is your long-term "vision" for Jerome? Please explain your answer.

To help keep Jerome Jerome with "responsible" growth management

How important or not is the Historic Landmark Status of Jerome?

It is absolutly important, it needs to remain historic. I helps maintain the continuity of town.

If there were one major change you would like to see happen in this town, what would it be?

Affordable Housing

What qualities and qualifications do you feel you have that would make you an excellent member of the Planning & Zoning Commission or Board of Adjustment?

As a 40 year carpenter I have extensive knowlege of building, the materials and the applications.

We feel it is very important to be knowledgeable about the laws, concepts and reasoning behind our Zoning Ordinance and general plan. Are you free enough and willing to read published materials and go to occasional conferences to enhance your ability to do a good job on the commission?

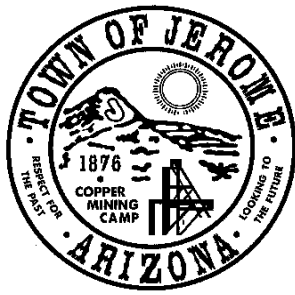
Yes

Do you understand that your duty as a Commissioner or Board member is to give a fair and impartial hearing to each proposal or appeal based on its meeting the requirements of the Jerome Zoning Ordinance?

Yes

Give an example of a situation in which you have had to handle something under pressure that would relate to serving on this board.

I was superintendent of a large scale HVAC company with five different jobs going at the same time, all on deadlines with fines if not completed on time.



Founded 1876
Incorporated 1899

TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 FAX (928) 634-0715

STAFF SUMMARY REPORT

FROM: Candace Gallagher, Town Manager/Clerk

ITEM: **ITEM #11E: APPOINTMENTS TO PSPRS BOARD**

MEETING DATE: November 10, 2020

There is a need for Council to approve the service of the Mayor or Mayor's Designee as Chair of the local PSPRS (Public Safety Personnel Retirement System) board, and to make an appointment of a citizen member.

Currently, Sage Harvey (as Mayor's Designee) serves as Chair and Nancy Smith serves as the citizen appointee whose term will expire on November 22.

The Town began participating in this system effective November 20, 2003.

Per statute, the local board is comprised as follows:

Membership category	Initial appt. term	Subsequent appt. terms	Appointee	Term Exp.
MAYOR or MAYOR'S DESIGNEE (Chair, approved by Council)			Sage Harvey	With expiration of her term
MEMBER EMPLOYEE elected by secret ballot - #1	2 years from effective date of Town's participation	4 years	Sgt. Rusty San Felice	11/20/23
MEMBER EMPLOYEE elected by secret ballot - #2	4 years from effective date of Town's participation	4 years	Officer Kerry Lee	11/20/23
CITIZEN (appointed by Mayor and approved by Council) - #1	2 years from effective date of Town's participation	4 years	Ian Haney	11/20/23
CITIZEN (appointed by Mayor and approved by Council) - #2	4 years from effective date of Town's participation	4 years	Nancy Smith	11/22/20

JEROME TOWN COUNCIL MEETING

November 10, 2020

PACKET ADDENDUM #1

- For ITEM 4 – Police Staff Report
- For ITEM 6 – October 13/14, 2020 Council meeting minutes
- For ITEM 10B – Staff report and draft ordinance regarding the keeping of bees
- For ITEM 11B – Email from Kevin Savage regarding district signage



JEROME POLICE DEPARTMENT

ALLEN L. MUMA, CHIEF
305 MAIN STREET
POST OFFICE BOX 335
JEROME, ARIZONA 86331
(928) 634-8992
FAX (928) 649-2776



November 2, 2020

TO: Honorable Mayor and Jerome Town Council

FROM: Allen Muma, Chief of Police

Attached please find the police activity reports for October 2020.

The October "Calls for Service" report contained no significant calls. Total call volume is running about average. The volume of people seems to be above average.

The parking kiosks brought in \$24,678.75 (this does not count people who pay cash at the PD) for the month of October. The total annual income from the kiosks for one year is \$174,088.20 (this does not count people who pay cash at the PD). I have attached a copy of the transaction report by daily volume. 139 parking citations were issued for the month of October.

COVID related masking complaints continue to come into the PD, most related to persons not wanting to wear a mask and the business not wanting to let them in. So far no significant altercations between parties involved. I would judge mask wearing to be around 85% of the people I see on the streets, even without social distancing taken into effect.

Halloween had larger than expected crowds, but no significant events due to this. I personally worked until 1 AM on Halloween night until the streets had cleared.

I was on vacation through the first three weeks of October. I did handle a number police related items via the phone or computer while on vacation.

I am at the point that I can retire at any time, I am fully vested and have completed my twenty years in the state retirement system. While I am not considering retirement until at least November of 2021, I may consider a longer period depending on the wishes of the Town Council and the citizens of Jerome. I would like to discuss options at some point in the near future.

We received an unexpected distribution from RICO in the amount of \$15,000.00

Respectfully,

Allen L. Muma, Chief of Police

Smartfolio®

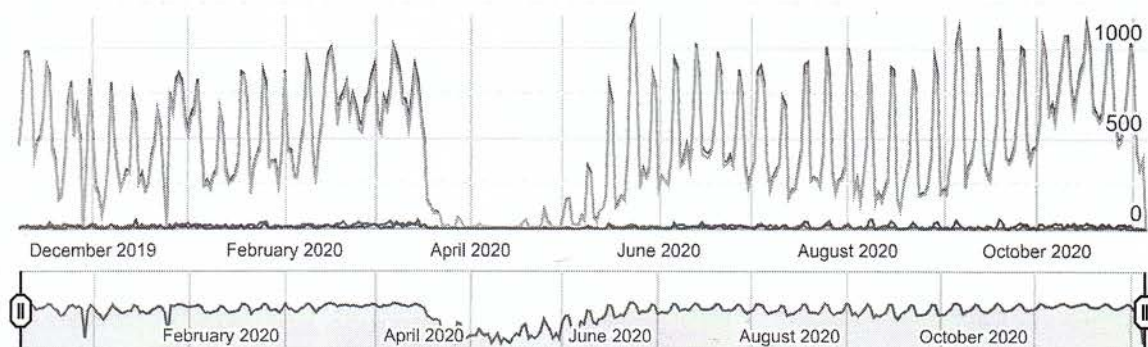
BASICS

Transactions :

Jerome, AZ - Daily transaction totals by payment type

Zoom: 1h 1d 5d 1w 1m 3m 6m 1y max

totals
COINS
Credit Card
MPP





JEROME POLICE DEPARTMENT
305 MAIN STREET
JEROME, AZ 86331
(928) 634-8992

Date : 11/04/2020
Page : 1
Agency : JPD

Calls For Service Totals By Call Type

10/01/2020 to 10/31/2020

Call Type	Totals
215 Drug Related	2
247 Civil Problem	1
415C Juvenile Disturbance	1
487 Theft	2
500 Welfare Check	3
585 Traffic Hazard	1
647A Suspicious Person	2
903 Follow-Up	8
908F Found Property	7
927 Unknown Trouble	1
961 Accident - No injuries	2
AA Agency Assist	5
AAMB Assist Ambulance	1
ACPD Assist Clarkdale PD	5
ADPS Assist DPS	1
AYCSO Assist YCSO	5
CA Citizen Assist	4
DIS Disorderly Conduct	2
DRAL Dogs Running at Large	1
ES Escort Services	2
FPF Fingerprinting	1
HUC 911 Hang Up Call	1
INFO Information	1
LIT Littering	1
ME Medical Emergency	2
MISC Miscellaneous	1
NV Noise Violation / Town Code	1
OC Open Intoxicants in Public Place	1
OT Oversize Truck	9
PARK Parking Complaint	4
PARKV Parking Violation	25
PE Parking Enforcement	18
PKM Parking Kiosk Maintenance	1
REC Reckless Driver	1
SC Security Check	2
SLC Street Light Check	2
T/S Traffic Stop	1
TF Trip & Fall / Slip & Fall	1



JEROME POLICE DEPARTMENT
305 MAIN STREET
JEROME, AZ 86331
(928) 634-8992

Date : 11/04/2020
Page : 2
Agency : JPD

Calls For Service Totals By Call Type

10/01/2020 to 10/31/2020

Call Type		Totals
TO	Traffic Offense	3
TRN	Training	2
VM	Vehicle Maintenance	1
WA	Warrant Arrest	1
Grand Total for all calls		136

From: [Kevin Savage](#)
To: [Alex Barber](#); [Sage Harvey](#); [Mandy Worth](#); [Jane Moore](#); [Jack Dillenberg](#)
Cc: [Candace Gallagher](#); [John Knight](#); [Donna Chesler](#)
Subject: Jerome Chamber
Date: Tuesday, October 13, 2020 11:36:00 AM

Hello,

I had planned to attend tonight's meeting, although ended up unavailable.

I wanted to address a some items, etc.

First, thank you all for working with us again for this years tourism tax allocation. This has certainly been a strange and challenging year, to say the least.

Second, congratulations on everyone's re-election. I takes quite a commitment to volunteer for such an important role. Authorities may change, but you're all still together which should help with new endeavors for the town.

Thirdly, I recently spoke with John about our previous commitment toward the District Sign project. As previously mentioned, this was never the Chamber's idea, we were only attempting to make it fair and logical for everyone. To make a long story short; the Chamber will commit to the 6 sign headers with an expense close to \$1,000. These will be a simplistic design that is paten'ed metal mounted directly on top of each. Basically, it will show a slotted mountain shape of Jerome with a "J" on it and below, state one word, "Welcome". Next, rather than doing this large business district side-mounted sign which is going to have to be changed as the town changes businesses, we have a much simpler and more permanent scenario. We also are trying to avoid the whole "mall directory feel" by this change.

Instead, we will do a side map 8"x11" that will show basics town functions; where they are, restroom and defibrillator locations, police and fire stations, town hall, library?..plus, museums and visitors center (where they can get a more detailed town map). The Chamber already provides this map and hopefully will continue in the future. I will wait to hear back from John if he agrees, as we do not want to spend any monies needlessly.

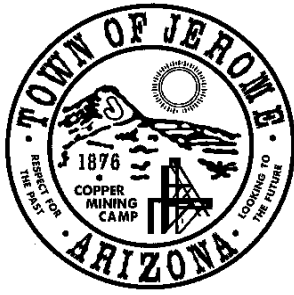
Fourthly, there is a growing concern for lack of volunteerism in Jerome. Not only the Chamber struggles, but we have heard that it is having a future impact on the Humane Society.

We are basically putting our Chamber into dormancy for a while...Still paying bills, employee and providing essentials for a period of time until more volunteers arrive.

Lastly, the Light Up the Mountain has been cancelled, as I'm sure everyone assumes. Maybe decorate one tree in the park.

We do not see the town dinner occurring as usual either. We would like to propose the following for the Chamber to host an "Adios 2020 Town Chilli Cook Off" in the upper park. BYOB, some music and people bring their special chill for a good ole fashioned contest! What do ya think?

Thanks,
Kevin



Founded 1876
Incorporated 1899

TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 FAX (928) 634-0715

STAFF SUMMARY REPORT

FROM: Candace Gallagher, Town Manager/Clerk

ITEM: **ITEM #10B: DRAFT ORDINANCE TO AMEND THE JEROME TOWN CODE REGARDING THE KEEPING OF BEES WITHIN TOWN LIMITS**

MEETING DATE: November 10, 2020

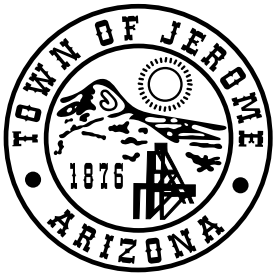
At the October 13 meeting, the Mayor and I were asked to come back to Council with a draft ordinance regarding beekeeping.

Mayor Barber provided sample ordinances from Queen Creek, Sedona and Winslow, with certain provisions highlighted that she would like to see included. I have created the attached draft ordinance using those provisions.

I noted that there was a provision in Sedona's "Standards for the Keeping of Bees" (also included in this draft) which required notification to property owners within 100 feet prior to the issuance of a beekeeping license, yet there was no reference to what would happen if those owners objected. In Sedona's Land Development Code, beekeeping is considered an "accessory use."

Council may want to consider whether, in addition to establishing the new Code Article set forth in this draft, beekeeping should be listed as a Conditional Use in selected zones as part of our Zoning Ordinance, which could then trigger a neighborhood meeting and allow conditions to be set at P&Z and Council's discretion. If Council so wishes, I can draft an accompanying ordinance to that effect.

There is no great urgency at this point, as cold weather is about to set in. However, if Council wishes to establish beekeeping regulations, we should have something in place by early spring.



TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943 www.jerome.az.gov

ORDINANCE NO. xxx

AN ORDINANCE OF THE TOWN COUNCIL OF THE TOWN OF JEROME, YAVAPAI COUNTY, ARIZONA, AMENDING THE JEROME TOWN CODE BY THE ADDITION OF NEW ARTICLE 6-6, "BEES AND BEE KEEPING"

BE IT ORDAINED BY THE TOWN COUNCIL OF THE TOWN OF JEROME, YAVAPAI COUNTY, ARIZONA, AS FOLLOWS:

Section 1. The Jerome Town Code is hereby amended by the addition of NEW Article 6-6, "Bees and Bee Keeping," to read as set forth on Exhibit A, attached hereto and made a part hereof.

Section 2. Following its adoption, this Ordinance shall be published by the Town Clerk in accordance with the requirements of A.R.S. § 39-203 *et seq.*

Section 3. All ordinances or parts of ordinances that are in conflict with the provisions of this Ordinance are hereby repealed to the extent of their inconsistency herewith.

Section 4. Should any section or provision of this Ordinance be declared invalid by a court of competent jurisdiction, such decision shall not affect the validity of this Ordinance, any provision incorporated by reference and any other provision of the Town Code as a whole or any part thereof other than the part so declared invalid.

PASSED AND ADOPTED BY THE TOWN COUNCIL OF THE TOWN OF JEROME, YAVAPAI COUNTY, ARIZONA, THIS ____ DAY OF _____ 2020.

Mayor

ATTEST:

APPROVED AS TO FORM:

Candace Gallagher, Town Manager/Clerk

William J. Sims, Esq.
Town Attorney

Date of first reading: _____

Dates of publication: _____

Date of adoption: _____

Date of posting: _____

Voting record at adoption:

	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN
BARBER						
DILLENBERG						
HARVEY						
MOORE						
WORTH						

ARTICLE 6-6: **Bees and Bee Keeping**

- 6-6-1 Definitions
- 6-6-2 License Required
- 6-6-3 Requirements
- 6-6-4 Violations; Penalty
- 6-6-5 Abandoned Hives, Colonies and Apiaries
- 6-6-6 Town Liability

Section 6-6-1 **Definitions**

As used in this Article:

“Apiary” means one or more hives or colonies of bees at one location.

“Colony” means the inhabitation of the hive, including the queen, drones, worker bees and brood.

“Hives” means the domicile of bees, including any receptacles or containers inhabited by the bees.

“Swarm” means a population of transient bees that have not permanently established themselves.

Section 6-6-2 **License Required**

- A. Prior to the keeping of any hive, colony or apiary bees within the town limits, all persons shall be required to obtain a beekeeping license issued by the Town Clerk. The application form for the license shall include the name, address and telephone number of the person seeking the license as well as the name, address and telephone number of the property owner. If the applicant is other than the property owner, then the application shall also include written permission of the owner for the use of the property for keeping a hive, colony or apiary. The form shall also include a drawing of the property indicating the location for the keeping of the hive, colony or apiary and an acknowledgement that, prior to the placing of the hive, colony or apiary upon the property, an adequate supply of water is available on the property in close proximity to the hive, colony or apiary.
- B. Upon receipt of a beekeeping license application, and 15 days prior to issuing any beekeeping license, public notification shall be mailed by the Town to properties within 100 feet of the subject property.
- C. An annual fee of [REDACTED] dollars (\$ [REDACTED]) shall be charged and collected for the issuance of each license, and a separate license shall be required for each parcel at which beekeeping will occur.

Section 6-6-3 **Requirements**

- A. No more than two hives shall be allowed on a parcel.
- B. Hives shall be located in the area behind the primary structure and in front of the rear lot line, and set back from the side and rear property lines a minimum of five feet.

- C. Each beekeeper shall ensure that a constant and easily accessible supply of fresh water and other nutrients of sufficient quantity to meet the needs of all bees being maintained or kept is available to the bees at all times so that they are discouraged from congregating at pet water bowls, birdbaths, pools, spas or other water sources where they may cause human or domestic pet contact.
- D. Initial hives shall contain a queen selected from stock bred for gentleness and non-swarmling characteristics. If a colony becomes aggressive or swarms, the beekeeper shall re-queen the colony with a queen selected from stock bred for gentleness and non-swarmling characteristics.
- E. Any receptacle or container inhabited by bees shall be marked on the outside to reflect the license number issued by the Town.

Section 6-6-4 Violations; Penalty

- A. The first violation of this Article shall be treated as a petty offense. All subsequent violations within a succeeding two-year period shall be treated as Class I misdemeanors, subject to penalties as set forth in Article 1-8 of the Jerome Town Code.
- B. The provisions of this Section shall not apply to any property owner upon whose property a swarm of transient bees is attempting to or has established a domicile.

Section 6-6-5 Abandoned Hives, Colonies and Apiaries

- A. Any honeybee colony not residing in a structure intended for beekeeping, or any swarm of bees or colony residing in a standard or homemade hive that, by virtue of its condition, has obviously been abandoned by the beekeeper, or any hive, colony or apiary which does not contain the marking requirements of Section 6-6-3 (E), the water and nutrient requirements of Section 6-6-3 (C), and for which no license required by Section 6-6-2 has been issued, is unlawful and shall be deemed a public nuisance.
- B. The Town, upon a complaint, may take all action necessary to remove the abandoned hive, colony or apiary from the property.

Section 6-6-6 Town Liability

The Town shall bear no liability or responsibility for the keeping of bees within the Town limits.



TOWN OF JEROME

POST OFFICE BOX 335, JEROME, ARIZONA 86331
(928) 634-7943

MINUTES

REGULAR MEETING OF THE JEROME TOWN COUNCIL JEROME CIVIC CENTER - 600 CLARK STREET - COUNCIL CHAMBERS TUESDAY, OCTOBER 13, 2020, AT 7:00 P.M. (CONTINUED TO WEDNESDAY, OCTOBER 14, 2020 AT 7:00 P.M.)

ITEM #1:
10/13 – 7:09 (2:38)
10/14 – 7:02

CALL TO ORDER/ROLL CALL

Mayor/Chairperson to call meeting to order.
Mayor Alex Barber called the meeting to order at 7:09 p.m.
Town Clerk to call and record the roll.
Town Manager/Clerk Candace Gallagher called the roll. Present were Mayor Barber, Vice Mayor Sage Harvey, councilmembers Jane Moore, Mandy Worth, and Dr. Jack Dillenberg. Also present were Town Attorney Bill Sims, Accounting Clerk Melanie Atkin, Zoning Administrator John Knight, Fire Chief Rusty Blair, Police Lieutenant Rusty San Felice, and Deputy Clerk Rosa Cays.

ITEM #2:
7:10 (3:24)

FINANCIAL REPORTS

Financial reports for September 2020
Mayor Barber commented on the parking kiosk revenue.

Motion to Approve the August 2020 Financial Reports

COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN
BARBER			X			
DILLENBERG			X			
HARVEY		X	X			
MOORE			X			
WORTH	X		X			

ITEM #3:
7:10 (4:15)

STAFF AND COUNCIL REPORTS

Written staff reports by the Town Manager/Clerk, Deputy Town Clerk, Utilities Clerk, Accounting Clerk, Public Works Department, Building Inspector, Library, Municipal Court, Police Chief, and Fire Chief, and verbal reports from Council members.

Ms. Gallagher announced she had just passed her eleventh anniversary as Town Manager/Clerk of Jerome. She then read from her staff report, highlighting the continuing COVID pandemic meetings and the bright side of working more closely with other local municipalities. She listed the different grants in process, including the CLG SHPO grant, which the town recently received and can match with staff time. Ms. Gallagher acknowledged Zoning Administrator John Knight for writing an excellent grant application. She also reported that the town has also been granted \$381K+ in funding from CDBG for work on the waterlines on Dundee Ave., Deception Ln., and Holly Ave. She mentioned that the Town Code and resolutions are now up to date on the town website; that the APS solar panels are going in at the 300-level parking lot, and that sales tax revenue for September was just below what was earned the year before, even with some businesses closed.
Mayor Barber said there are two COVID-19 conference calls per week. The vice mayor has bowed out and Dr. Dillenberg is now attending the meetings. She said she attended a Zoom meeting with wastewater consultant Henry MacVittie, the town engineers, and a representative from ADEQ to discuss the wastewater treatment plant. The mayor gave thanks to former Councilmember Hunter Bachrach for his work on Hotel Jerome and said the lead paint abatement is done on floor 2 and is moving up to floor 3. She also reported that she and Councilmember Worth had met with Chloe Van Hoose and Mr. Bachrach and discussed the available grants to support the renovation of the building.
Ms. Worth had a question about the utilities staff report regarding three unpaid accounts due to tenants vacating the premise: Is there a procedure or timeline for forwarding the unpaid bill to the owner of the premise?
Ms. Gallagher replied that the state law says the owners are not responsible for the tenants' utility debts. Ms. Worth asked if the landlord could at least be made aware of the unpaid bill, to which Ms. Gallagher replied yes.
Vice Mayor Harvey suggested sending the accounts to collections. Ms. Worth and Mayor Barber agreed.

Motion to Approve the October 2020 Staff Reports

COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN
BARBER	X		X			
DILLENBERG		X	X			
HARVEY			X			
MOORE		X	X			
WORTH			X			

ITEM #4: 7:19 (12:27)	ZONING ADMINISTRATOR'S PLANNING AND ZONING AND DESIGN REVIEW REPORT AND MINUTES Minutes are provided for the information of Council and do not require action. Mr. Knight said work sessions were held at the September 16 P&Z meeting on various code amendments including lodging, temporary signage, and mixed use in C1. He also reported that at the October 5 DRB meeting, the Rich Street garage (owned by Don Feher) and the Kelts' stair repair/renovation were approved. Mr. Knight said he is still working on the streetlight on School Street at Janet Bustrin's house; the problem is there is no good location to relocate it. Mr. Knight listed a few other code amendments being discussed: Prop 207 (recreational marijuana), telecommunications, stairs and setbacks, code enforcement, and the appeals process. Mr. Knight reminded everyone there is still a vacancy on the P&Z commission. He also mentioned someone has called interested in renovating the Mohawk on Highway 89A and gave a brief update on the community garden and acknowledged the volunteers. He said a few of the beds are still available. Dr. Dillenberg thanked Mr. Knight for his leadership on the garden and thanked the volunteers. Mayor Barber also expressed her appreciation.																																																																																				
ITEM #5: 7:24 (17:21)	APPROVAL OF MINUTES September 8 regular meeting; September 21 special meeting Motion to Approve the September 8, 2020 regular Council meeting minutes <table><tr><th>COUNCILMEMBER</th><th>MOVED</th><th>SECONDED</th><th>AYE</th><th>NAY</th><th>ABSENT</th><th>ABSTAIN</th></tr><tr><td>BARBER</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>DILLENBERG</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>HARVEY</td><td>X</td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>MOORE</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>WORTH</td><td></td><td>X</td><td>X</td><td></td><td></td><td></td></tr></table> Motion to Approve the September 21 special Council meeting minutes <table><tr><th>COUNCILMEMBER</th><th>MOVED</th><th>SECONDED</th><th>AYE</th><th>NAY</th><th>ABSENT</th><th>ABSTAIN</th></tr><tr><td>BARBER</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>DILLENBERG</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>HARVEY</td><td>X</td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>MOORE</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>WORTH</td><td></td><td>X</td><td>X</td><td></td><td></td><td></td></tr></table>	COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN	BARBER			X				DILLENBERG			X				HARVEY	X		X				MOORE			X				WORTH		X	X				COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN	BARBER			X				DILLENBERG			X				HARVEY	X		X				MOORE			X				WORTH		X	X			
COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN																																																																															
BARBER			X																																																																																		
DILLENBERG			X																																																																																		
HARVEY	X		X																																																																																		
MOORE			X																																																																																		
WORTH		X	X																																																																																		
COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN																																																																															
BARBER			X																																																																																		
DILLENBERG			X																																																																																		
HARVEY	X		X																																																																																		
MOORE			X																																																																																		
WORTH		X	X																																																																																		
ITEM #6: 7:24 (18:08)	PETITIONS FROM THE PUBLIC (18:56) Jerome resident David Soule moved to town in 1986 when there were about five homes served on Dundee Avenue [audio issues]; there are 20 homes now. He said the bottom of Dundee is very rutted and that it is hard to pick up speed, and that the top of the road is smoother. He would like to see the speed limit (5 mph) enforced, a speed bump put in, and speed limit signs. He then thanked the councilmembers for their service. Mayor Barber suggested putting this on a future agenda, as other roads in town have the same issues. (22:31) Jerome resident Lacy Ritter said she has talked to Ms. Worth and Mr. Knight about permit parking on School Street and the designation for 537 School St. parking specifically. Ms. Worth said this was more of a direction to staff than an item to add to the agenda. She suggested she talk to Mr. Knight and Janice Pontious of the JPD to work out a solution. Mr. Knight said he has talked to Ms. Ritter about the parking, and that this is not the only property with this unique situation. He suggested presenting these to the Council so they can see how they're being handled. Mayor Barber asked that Mr. Knight and Ms. Pontious resolve the issue, then present to Council how it was addressed.																																																																																				
ITEM #7: 7:33 (26:44)	PRESENTATIONS ITEM #7A: SCHOOL CONSOLIDATION ON THE BALLOT Council will hear presentations from Stephen Renard of Save Our Independent School Districts and Denise Kennedy and Andy Groseta from the Committee for Better Upper Verde Valley Schools about school consolidation, which will be on the November ballot. Mayor Barber introduced the item and the representatives from each group. Ms. Worth, who sponsored the item, explained that these presentations were for constituents' information only and that the Council would not be taking a stance. Both groups then presented their points of view and related information. The "Pro" consolidation representatives were Denise Kennedy and Andy Groseta (27:45), and the "Con" consolidation group was represented by Stephen Renard and Jason Teague (35:23). Each group was allowed seven minutes for their presentation¹. Ms. Worth then led a question/answer segment with prepared questions as well as questions from constituents regarding classroom impact, representation, and fiscal issues. (1:02:37) As this portion of the discussion continued, Dr. Dillenberg interjected to ask how much time had been allocated for the presentations. He reminded the Council that they had a full agenda ahead of them. Ms. Worth replied that the topic was important to constituents and taxpayers. She continued with three additional questions. Councilmember Moore thanked all participants, and each group offered their 3-minute closing remarks.																																																																																				

¹ Zoom video of the full presentations regarding the consolidation issue and the budget override are available in a video posted to the Town's YouTube channel. A link to that channel is on the home page of our website.

<p>8:29 (1:22:31)</p>	<p>ITEM #7B: CLARKDALE-JEROME SCHOOL DISTRICT OVERRIDE</p> <p>Danny Brown, Superintendent of the Clarkdale-Jerome Elementary School District, will provide information regarding the budget override that will be on the November ballot.</p> <p><i>Superintendent Danny Brown announced that it was time for Clarkdale-Jerome School District to renew its override. He said if passed, the override would continue to support the arts program, which he described in more detail. Mr. Brown said the override also helps fund physical education, the full-day kindergarten program, paraprofessionals, intervention, and mediation. He said this was not a new tax but rather a continuation of the override in place since 2011. He said the average taxpayer invests \$83.15 per year or \$7 a month.</i></p> <p><i>Ms. Worth clarified that the override would continue programs as they are and would not change the current tax levy on constituents.</i></p> <p><i>Mr. Dillenberg asked about the duration of the override. Mr. Brown said it would be in place for seven years.</i></p>
<p>ITEM #8:</p> <p>8:34 (1:27:59)</p>	<p>UNFINISHED BUSINESS</p> <p>ITEM #8A: BEEKEEPING IN JEROME</p> <p>Council will review ordinances from other jurisdictions regarding the keeping of bees and may direct staff regarding the creation of an ordinance in that regard to be placed on a future meeting agenda.</p> <p><i>Mayor Barber stated that two letters regarding the bee problem in Jerome came from a bee steward and an unhappy resident. She invited Dr. Dillenberg to start the discussion as he was the sponsor of this item.</i></p> <p><i>Dr. Dillenberg revisited some of the issues talked about at the last meeting. He thought it could simply be discussed for now since the end of the season was approaching. He asked Ms. Gallagher if she'd heard any more about the bees, then he asked the vice mayor. Ms. Gallagher said she had not received any further complaints.</i></p> <p><i>Vice Mayor Harvey said she was still getting swarmed every day, as did Ms. Worth.</i></p> <p><i>Dr. Dillenberg said the Council needs to get an ordinance in place.</i></p> <p><i>Mayor Barber pointed out that bee ordinances from Queen Creek, Sedona, and Winslow were in the agenda packet.</i></p> <p><i>Ms. Worth suggested taking best practices from those codes, especially Sedona, and draft a code for Jerome to present to the Council.</i></p> <p><i>Mayor Barber volunteered to work with Ms. Gallagher on drafting a code amendment.</i></p> <p><i>Dr. Dillenberg said he was willing to assist also.</i></p> <p><i>Vice Mayor Harvey said she had done research and though not many Arizona towns address bees, other areas of the country consider bees as undomesticated animals and prohibited in commercial areas. She said her concern is that bringing hives into Jerome is creating an overpopulation of bees and that she knows of several residents who have beehives. She said she was speaking for Danny and LaDonna Smith who could not join the meeting and that Michael Thompson was not happy with his \$1,000 medical bill from being stung. She said the town needed to do something before it is held liable for the bee problem.</i></p> <p><i>Chief Blair said part of the problem is the placement of the recycling wagon full of soda and beer cans.</i></p> <p><i>Mayor Barber said the recycling bins need to be close to the bars and tasting rooms or it would not be used. She said perhaps turnstile lids on the trashcans would be helpful.</i></p>
<p>8:47 (1:40:42)</p>	<p>ITEM #8B: COVID-19</p> <p>Council will again discuss plans and timeline for reopening Town Hall, resuming the weekend shuttle service, and conducting in-person public meetings.</p> <p><i>Mayor Barber introduced the item then asked Ms. Gallagher how she felt about the situation.</i></p> <p><i>Ms. Gallagher said she felt cautious now that the number of cases is rising again. She said she saw no reason to rush with this and that business was being carefully conducted and residents are being served regardless of Town Hall being closed. Ms. Gallagher said she has not received any complaints from residents about being underserved. The pandemic is still not over.</i></p> <p><i>Vice Mayor Harvey agreed with Ms. Gallagher.</i></p> <p><i>Mayor Barber agreed, then asked how everyone felt about the weekend shuttle service.</i></p> <p><i>Ms. Gallagher said she had heard from Jerome resident and president of the local chamber of commerce, Kevin Savage, who wants to resume the weekend shuttle.</i></p> <p><i>Chief Blair said proper ventilation is key and didn't think it was a good idea to resume the shuttle for tourists who are coming from everywhere.</i></p> <p><i>Ms. Gallagher clarified that the Wednesday shuttle for residents to Cottonwood is back in service. She said driver Leo Shakespeare is being careful and limiting ridership. She said she agreed with Chief Blair that the shuttle is unnecessary for the weekends.</i></p> <p><i>Vice Mayor Harvey elaborated on the risks of tourists on a shuttle van, which could also open the town to lawsuits.</i></p> <p><i>Ms. Gallagher said some visitors are refusing to wear masks—we don't want our drivers to have to deal with that sort of confrontation.</i></p> <p><i>Ms. Worth agreed with how town services are working and added that opening the weekend shuttle makes her nervous. The Wednesday shuttle for residents is much more controllable. She said she would like to see meetings done in public, but the way things have been seems to be working.</i></p> <p><i>Ms. Moore and Dr. Dillenberg both agreed on no shuttle on the weekends. Ms. Moore wished meetings could be in town hall to allow the public more say.</i></p>

	Mayor Barber said town staff and the Council would keep doing what we have been doing, not resume the weekend shuttle, keep meeting on Zoom, revisit a timeline for reopening at the next meeting, and "keep kicking the COVID can down the road" until things are safe again.																																										
ITEM #9: 8:57 (1:50:44)	<div>NEW BUSINESS</div> <div>ITEM #9A: RESOLUTION NO. 605, AUTHORIZING INTERGOVERNMENTAL AGREEMENT WITH YAVAPAI COUNTY FOR EMERGENCY MANAGEMENT SERVICES</div> <p>Council may approve Resolution No. 605, authorizing a renewed agreement with Yavapai County for emergency management services.</p> <p>Ms. Worth asked if this changed the current agreement. Ms. Gallagher said it hasn't changed for several years, including the rate, and that Chief Allen Muma of the JPD, Chief Blair, and Town Attorney Bill Sims have approved the agreement.</p> <p>Motion to Approve Resolution No. 605</p> <table><tr><th>COUNCILMEMBER</th><th>MOVED</th><th>SECONDED</th><th>AYE</th><th>NAY</th><th>ABSENT</th><th>ABSTAIN</th></tr><tr><td>BARBER</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>DILLENBERG</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>HARVEY</td><td></td><td>X</td><td>X</td><td></td><td></td><td></td></tr><tr><td>MOORE</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>WORTH</td><td>X</td><td></td><td>X</td><td></td><td></td><td></td></tr></table>	COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN	BARBER			X				DILLENBERG			X				HARVEY		X	X				MOORE			X				WORTH	X		X			
COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN																																					
BARBER			X																																								
DILLENBERG			X																																								
HARVEY		X	X																																								
MOORE			X																																								
WORTH	X		X																																								
8:58 (1:51:53)	<div>ITEM #9B: RESOLUTION NO. 606, A RESOLUTION OF THE TOWN COUNCIL OF THE TOWN OF JEROME, ARIZONA, DECLARING THE SECOND MONDAY OF OCTOBER AS INDIGENOUS PEOPLES' DAY IN THE TOWN OF JEROME</div> <p>Council may approve Resolution No. 606, declaring the holiday once known as Columbus Day to be known hereafter as Indigenous Peoples' Day in the Town of Jerome.</p> <p>Mayor Barber introduced the item then shared a story of the Yavapai-Apache Nation. In 1875 they were forced to walk the Trail of Tears from the Verde Valley to San Carlos. They were allowed to return in the 1900s.</p> <p>Ms. Worth expressed her sentiments about the item.</p> <p>Motion to Approve Resolution No. 606</p> <table><tr><th>COUNCILMEMBER</th><th>MOVED</th><th>SECONDED</th><th>AYE</th><th>NAY</th><th>ABSENT</th><th>ABSTAIN</th></tr><tr><td>BARBER</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>DILLENBERG</td><td></td><td>X</td><td>X</td><td></td><td></td><td></td></tr><tr><td>HARVEY</td><td>X</td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>MOORE</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr><tr><td>WORTH</td><td></td><td></td><td>X</td><td></td><td></td><td></td></tr></table>	COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN	BARBER			X				DILLENBERG		X	X				HARVEY	X		X				MOORE			X				WORTH			X			
COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN																																					
BARBER			X																																								
DILLENBERG		X	X																																								
HARVEY	X		X																																								
MOORE			X																																								
WORTH			X																																								
9:01 (1:54:20)	<div>ITEM #9C: USE OF WILDLANDS REVENUES</div> <p>Council may approve a request by the Fire Chief for the use of certain wildlands revenues earned by the Fire Department.</p> <p>Chief Blair said he would like to have access to discretionary funds earned by the Fire Department's wildlands activities to spend on behalf of the fire department and that \$15K had been spent on public works and \$3K on the fire department from contingency funds. He talked about how much money the truck has brought in and how some of it has not been used for the JFD. He elaborated on how he could best use the discretionary funds for fire abatement and for possibly setting up a "fire company" to pay a daily stipend to volunteers on call during the weekends. He said he does have some money in the budget to help pay for this.</p> <p>Vice Mayor Harvey said she supported Chief Blair and asked if the Ford Expedition is what he drives.</p> <p>Chief Blair confirmed this and said there was another one that could use a new engine; he also would like funding for incidentals.</p> <p>Vice Mayor Harvey said the chief was working with a tighter budget this year and supported giving him contingency funds to help pay for the new engine and for incidentals.</p> <p>Mayor Barber asked for more details about the "fire company."</p> <p>Chief Blair said it was a suggestion from volunteer firefighter Matt Poe, with the idea that a captain, firefighters, and EMTs would be designated to be on call on scheduled weekends. He said as fire chief, and with this year's financial windfall, he is considering the idea, although he is in favor of volunteerism.</p> <p>Mayor Barber asked if he was asking for \$30K for discretionary funding.</p> <p>Chief Blair said to allocate \$20K would be enough and that the truck is still going out on calls and making extra money. The chief talked further about future funding possibilities.</p> <p>Ms. Moore said she would like an accounting of how the money will be spent. If part of the monies would be spent on staffing the fire station, Ms. Moore said she would like to know how time is utilized, on and off calls. She also asked if money was needed to maintain the truck.</p> <p>Chief Blair said that maintenance is covered partly by the wildland funds and under general vehicle maintenance but that it could be paid for with the available contingency funds. He said that every time the truck is deployed, it is serviced. The JFD does have a second, similar truck, so the town is covered, and it also gives the volunteers deployed an opportunity to hone their skills. The second truck also brings in added revenue for the town.</p> <p>Ms. Moore asked if there would be any conflict between volunteers on call and someone paid to be at the fire station.</p> <p>Chief Blair said he was willing to try this suggestion, but the bottom line is that it is always the same six people who show up for the calls. He is hoping this will get some of the other volunteers to step up.</p> <p>Ms. Worth made a few comments of support and requested a review in December to see how the contingency funds have been spent.</p>																																										

Chief Blair explained how he would report on the spending, although he still needed to work out the logistics. Ms. Gallagher said that a good way to report the spending would be to do a formal transfer from the contingency fund to the general fund and show some of the spending as general fund revenues and some as fire department expenses. This would lay it out for Council at the end of the fiscal year.

Chief Blair said if the fire company idea did not pan out, those monies could be saved to get a new truck; the truck used now is a 2008.

Mayor Barber motioned that \$20K of Wildlands revenues be allotted to Chief Blair and the JFD for the purposes discussed, with records kept of how money was spent and a review in six months.

Motion to Approve \$20K of Wildlands revenues for contingency funds with a review in six months

COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN
BARBER	X		X			
DILLENBERG			X			
HARVEY		X	X			
MOORE			X			
WORTH			X			

9:19 (2:12:58)

ITEM #9D: RECREATIONAL MARIJUANA

Council will review a model ordinance provided by the League of Cities and Towns regarding recreational marijuana establishments and/or testing facilities and may direct staff regarding the creation of an ordinance to be forwarded to the Planning & Zoning Commission for review. Part of this discussion may take place in closed session with the Town Attorney, pursuant to A.R.S. § 38-431.03 (A)(3).

Mayor Barber introduced the item. Vice Mayor Harvey requested that Council take a break before discussing it.

Motion to break at 9:20 p.m. and return to session at 9:30 p.m.

COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN
BARBER			X			
DILLENBERG		X	X			
HARVEY	X		X			
MOORE			X			
WORTH			X			

Councilmembers returned at 9:30. Town Attorney Bill Sims joined the meeting. [The first two minutes of the discussion were inadvertently not recorded]

Ms. Gallagher reviewed details of the ordinance and said she had met with Mayor Barber, Vice Mayor Barber, Lt. Rusty San Felice, and John Knight to discuss the options in front of them and to pare down the model ordinance, shared by the League of Arizona Cities and Towns as a guideline.

Ms. Moore asked Mr. Sims if Council could prohibit sales in the C-1 zone for now and change the ordinance later. She said she would like to see how it goes in other communities first and that she was okay with personal use in the residential districts.

Mr. Sims said it could be split and Council could allow private and not commercial use.

Dr. Dillenberg asked, if the proposition passes on November 3, could the town delay implementation and not start December 1? Mr. Sims said the town could delay implementation, but that someone could potentially open a shop between December 1 and January 1.

Ms. Worth said some business owners would be on top of this and likely do this. She asked if the town currently prohibits medical marijuana facilities. Ms. Gallagher said it does not.

Ms. Worth said she would like to see specific clarification for the industrial zone. She approved of private use and cultivation, but said if retail is allowed, marijuana use will take place in the commercial zone. For safety reasons, Ms. Worth said she was opposed to testing facilities in buildings in town but would be okay with retail if there is no extraction on site, which needs a warehouse-controlled environment.

Discussion ensued about what to include and exclude from the model ordinance.

Mr. Sims urged the Council to decide boldly on what they want, but to keep in mind that if there is no ordinance established by mid-January, they will have trouble controlling marijuana sales in town. He said the Council could call it a nuisance ordinance rather than a zoning ordinance and wait, and because of the short timeline should the proposition pass, it might be best to allow private use and not the rest (i.e., retail, cultivation, testing, etc.).

Ms. Worth said she would like codicils about private use in place, such as safety guidelines and making sure the owner of the home is informed of use. She said she does not want to give up local control to the state.

Ms. Moore said she had not researched what is happening in other towns and what issues could arise, but if Jerome is the only place with retail in the Verde Valley, she wondered if the traffic and crowds would increase.

(2:16:06) Dr. Dillenberg asked if people could buy marijuana in the commercial district, would they be allowed to smoke it in public? Mayor Barber read from the model ordinance and said no smoking would be allowed in public. Dr. Dillenberg asked Lt. San Felice for his opinion.

Lt. San Felice said that the police would prefer to say no to sales in Jerome. He suggested the town could designate an area in town where adults could smoke. He said safety is a concern but so is the odor if residents are cultivating and smoking at home next to someone who is anti-marijuana. He said if the proposition passes, lawful use at home cannot be prohibited. If retail is allowed, it would be opening a can of worms.

Ms. Gallagher said in the proposed new law, public smoking or in a car would be prohibited.

Vice Mayor Harvey said it would also be considered a petty offense with a fine of \$300. She also addressed the number of allowable retail shops and dispensaries within the county. She opined that only allowing personal use in the residential areas would likely be the best route to take at this point. Discussion ensued.

Ms. Gallagher asked if it would be redundant for the town to have an ordinance regarding personal use if the proposition is passed, as it will be permitted and regulated by state law.

Mr. Sims replied that the town would not need the ordinance but said it would be simplest to prohibit marijuana sales across the board and just rule it out as a nuisance. He then went into a full explanation should the town want to allow retail and the short timeline they would have to establish an ordinance.

Ms. Worth acknowledged Ms. Moore's concern about traffic and crowds and said the town has been able to manage this with other retail shops and events in the past. She said the enthusiasm would likely be short-lived and that her concern is loss of local control. She asked where the decision came from on the six- to twelve-plant limit on private cultivation and if the town could instill stricter laws than the state on marijuana use. Mr. Sims said the town could not. Ms. Worth continued with her concerns about the state taking municipal control of decisions for Jerome.

Ms. Moore said her recollection of the vacation rental issue was that Council tried to set up an ordinance to limit the number of vacation rentals when the Goldwater Institute stepped in and quashed this. She said if retail were to be limited to one shop in town and the state changes the statute and takes over regulation, how would that be better than simply prohibiting retail. Discussion ensued.

Vice Mayor Harvey asked Mr. Sims if the town were to prohibit all aspects of marijuana sales now and later decide to allow some, could Jerome change their ordinance. Mr. Sims said yes. The vice mayor moved to prohibit all but residential use.

Discussion ensued with concerns about how prohibition could infringe on people's rights.

Dr. Dillenberg said the Council could simply say no now and keep it as no and not have to worry about it. He then explained why he would be in support of no retail yet allow private use. He said he did not want to make Jerome a "marijuana town."

Ms. Worth stated point of procedure; that this item was up for direction, not action.

Mr. Sims asked if the Council wanted to prohibit marijuana sales as a matter of zoning or as a nuisance.

Dr. Dillenberg asked Mr. Sims for his recommendation, who replied that, if the Council wanted to split out retail and allow it and not the other uses, then approach it as a zoning matter. The other option would be to consider it a nuisance.

He said the Council could give direction to Ms. Gallagher, Mr. Knight, and him to come up with an ordinance to allow retail only in the C-1 zone or bring back a nuisance action.

Mayor Barber asked Ms. Gallagher for her input, who said that Council would need to weigh the risk. She said if the Council wants to allow retail in the future, then they need to work toward a zoning ordinance amendment. If the Council knows they don't want to allow retail, then adopt a nuisance ordinance. Ms. Gallagher said personal use would already be covered in the state statute.

Dr. Dillenberg asked the councilmembers if anyone felt strongly about having a retail store selling marijuana product in town.

Ms. Worth said her concern was relinquishing control to the state and said if the Council does nothing, that is essentially what they are doing, now and in the future, should Jerome decide to allow retail down the road.

Mayor Barber read from the model ordinance and asked the Council if they wanted P&Z's input.

Ms. Worth said yes, if P&Z is asked to also read the minutes or listen to the audio of Council's discussion.

Lt. San Felice commended regarding a nuisance ordinance, and

Mr. Sims added that if the Council decides to take the nuisance "path," they will make it more difficult for their successors to undo the ordinance than if they wrote it as a zoning ordinance.

Dr. Dillenberg said he did not want people to come to Jerome just to buy pot; that the town has other selling points. He said he would like to take the nuisance route.

Ms. Moore asked for clarification from Mr. Sims, that if marijuana is prohibited, Jerome runs the risk of not being able to regulate it, but if it's prohibited as a nuisance, then the town is in a stronger position.

Mr. Sims said the zoning ordinance would be more flexible than a nuisance one.

Ms. Gallagher asked for further clarification from Mr. Sims on treating this as a nuisance versus a zoning matter, who then deduced that it seemed safest to prohibit marijuana sales as a nuisance.

Ms. Worth said that if the nuisance language is strong enough, she would be willing to concede.

Vice Mayor Harvey also requested clarification and asked if the town could be stricter about regulation if the ordinance is established before the state statute. Mr. Sims confirmed this.

Lt. San Felice said the decision comes down to setting a precedent now to prohibit and keep it that way, or to regulate and figure out how to regulate. He said from a police perspective, prohibition is the way to go.

Discussion continued. The mayor brought up sending the ordinance to P&Z once again. Ms. Worth said input from the public would be good since they would be the future councilmembers of Jerome.

(2:56:05) Jerome resident Lacy Ritter said that she agreed with Ms. Worth's concerns and that she would like Jerome to preserve its control for the future.

(2:57:08) Jerome resident Carol Wittner thanked the Council for working so hard on this item. She agreed that it was a hard decision but that it is important to keep control of what we've got.

Mr. Knight said it is unlikely Jerome would get a retail store, but that if the town does not regulate, it could have a problem similar to the telecom ordinance: no local control if something is not in place prior to a state statute. He said taking the zoning angle would be smart.

Ms. Barber said she wanted to forward the model ordinance to P&Z after addressing some of the language. Discussion ensued as councilmembers shared their opinions on what should be changed, stricken, or kept.

Mr. Sims said the Council was going down a "dangerous" path by dissecting the model ordinance.

Ms. Worth suggested giving councilmembers 48 hours to ruminate on the ordinance language. Discussion turned to availability, deadlines, and lack of consensus. Mr. Sims discouraged Council from putting this in P&Z's court without more clarity on a direction. Mayor Barber suggested they end the meeting and reconvene at another time. Discussion continued. Ms. Worth asked if the Council would have to re-notice if they reconvened at another time. Mr. Sims said no. Ms. Gallagher suggested the next evening, Wednesday, October 14, at 7 p.m.

Motion to reconvene on October 14, 2020 at 7 p.m.

COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT	ABSTAIN
BARBER	X		X			
DILLENBERG			X			
HARVEY		X	X			
MOORE			X			
WORTH			X			

October 14, 2020 – CONTINUATION

Mayor Barber called the meeting to order at 7:02 p.m.

Ms. Gallagher called the roll. Present were Mayor Barber, Vice Mayor Harvey, councilmembers Jane Moore, Mandy Worth, and Dr. Jack Dillenberg. Also present were Town Attorney Bill Sims, Zoning Administrator John Knight, Police Lieutenant Rusty San Felice, Police Officer Kerry Lee, and Deputy Clerk Rosa Cays.

Ms. Gallagher gave a synopsis of what was discussed at the meeting the previous night. She referred to a memo she had drafted and emailed to councilmembers that afternoon and explained the options that the Council could pursue. She said the Council didn't seem adamant about allowing retail but was concerned about future decisions, which the state could override no matter what. She said the only scenario in which it made sense to regulate via zoning was if the Council thought retail would be valuable for the town at some point in the future. In that case, we would want regulations in place before the state statute is in effect. That would protect the town from Prop 207 claims but not from the state overriding any town regulations. Ms. Gallagher urged the Council to make their decision based solely on if they want retail as an option. If not, she suggested they go with the nuisance code. She said if the state law passes, Jerome residents will be able to use and cultivate marijuana in their homes, regardless of what Jerome decides.

Vice Mayor Harvey thanked Ms. Gallagher for the memo and then stated she would prefer to adopt a nuisance ordinance. She said the town's public safety is already stretched without adding more to the police department's workload. She said it would not make it impossible for future councils to reverse this and suggested the Council consider the next two years and doing what is best for the constituents now, not two years from now.

Dr. Dillenberg said he agreed with the vice mayor and does not want retail marijuana in Jerome—like with groceries, residents can go down to Cottonwood to buy weed. He said the nuisance option is a good strategy and the path of least resistance, and that the Council has other work to do and not put so much energy into just this issue.

Ms. Worth said after more time to research, she felt the nuisance route would be the best to handle commercial enterprises but was still concerned about residential use. She asked if the town would have the ability to add to the state statute or if Jerome would be superseded by the state.

Mr. Sims said the town would be superseded by the state. He said if Ms. Worth was asking if the town can impose requirements over and above what the state does, it would be a narrow list of things like imposing a minimum distance to schools for marijuana use or odor control in public areas, for example.

Ms. Worth said her concerns include landlord approval should a tenant be a marijuana user, and that some states allow "gifting," which she would like to know more about. She also wanted to get clarification on "residential use" and if it would be just in residential areas or would it include mixed use, conditional use, etc.

Vice Mayor Harvey read from a section of the model ordinance in response to Ms. Worth's concerns.

Ms. Worth said she was under the impression that an ordinance was unnecessary if they were going to treat this issue as a nuisance. Ms. Gallagher said an ordinance would still be needed to declare retail sales a nuisance.

Ms. Moore said she was behind treating marijuana sales as a nuisance.

Ms. Barber said it seemed all councilmembers wanted to go with the nuisance route and not allow retail. She did have one question about the proposition, which Ms. Worth clarified for her.

Ms. Barber then gave direction as to what the ordinance would generally state: retail, cultivation, testing, or manufacturing would be considered a nuisance in Jerome, and that the state law, should it pass, would make residential use and cultivation legal. Ms. Gallagher said she understood the direction.

Ms. Sims said to the mayor that this would be direction only if the act is approved.

7:02 (0:36)

7:21 (20:11)

ITEM #9E: TRAFFIC NOISE AND SPEEDING

Council will discuss traffic noise and speeding in Jerome and may direct staff in this regard.

Mayor Barber commented that traffic noise and speeding has become a problem on most Jerome streets [audio issues].

Ms. Gallagher read two letters aloud, one from Jerome resident Margie Hardie and one from Jerome resident Carol Yacht, which were complaints about the noise from ATVs, cars, and motorcycles and requests to have the JPD enforce the town noise ordinance.

Mayor Barber commented on the effects of the pandemic including a rise in loud vehicles driving through Jerome.

Ms. Moore played a short video of the loud sounds of vehicles driving up to Jerome.

	<p>Dr. Dillenberg said the town need to determine how to monitor this and support the JPD in their efforts. He suggested contacting the ATV rental companies to talk to them about the noise issues in Jerome. He said motorcycles have been driven up to Jerome for years, but the blaring stereos are a nuisance. Dr. Dillenberg suggested bigger, better signage and having the Rangers come up to town to also help out our police department.</p> <p>Ms. Gallagher read a letter from Jerome resident Ginger Mackenzie who has lived and worked along Main Street for six years. She said the noise level has increased exponentially, and that the speed and stereo volume on ATVs and motorcycles are a problem. Ms. Mackenzie's letter also addressed safety and the many near misses near Ghost City Inn and listed several suggestions to tackle the problem.</p> <p>Lt. San Felice said he would talk about noise and speeding but started out with his impression that "COVID" quieted things down quite a bit in Jerome for a long time, so now it seems the noise level is greater. He said the JPD has received only six calls about noise since January, which had nothing to do with vehicles; they were mostly parties and a generator. He said the problem with noise enforcement is that when it's a group of motorcycles, it's hard to tell who the culprit is. He said the JPD needs calls (and witnesses) with the specifics of the violator. He said the signage needs to be improved and added to the motorcycle parking lot across from the Connor Hotel, in the lower parking lot, and a third one across from the police station on Main Street. Lt. San Felice stressed that residents need to call and be willing to be a witness and provide details on violators.</p> <p>Lt. San Felice then shared statistics on speeding: 317 people have been stopped this year, with 112 warnings and the rest citations. He said the challenge on Gulch Rd and Dundee—and he has been here eight years—is that the residents are the ones speeding and neighbors don't want to snitch. Lt. San Felice suggested sending an anonymous letter to the JPD and they can follow up with the person at fault. He said on Gulch Rd they will cite for speeding and for nonresidents who ignore the LOCAL TRAFFIC ONLY sign.</p> <p>Lt. San Felice also addressed passing in no passing zones, which he said was "egregious and aggressive." He said the JPD has made 47 stops this year and shared a few other statistics. He said they have also given out 7 warnings for racing situations. He also said through grant funding, the JPD has been able to get extra help from local municipalities on the weekends. He said with better signage and more support from the residents, they stand a better chance of stopping the violators.</p> <p>Ms. Worth reminded council that the transportation committee of the Arizona League of Cities and Towns has considered a resolution to address safety on municipal highways, so Jerome may get help from the League on this.</p> <p>Dr. Dillenberg said he would like to see a sign <u>before</u> drivers get to town on the stretch below the high school that says SPEED LIMIT STRICTLY ENFORCED. He also liked the idea of sending letters to ATV companies to advise them of Jerome's speed limits.</p> <p>Lt. San Felice said this was a great idea and that they'd get a letter out to the ATV rental companies once Chief Muma was back in town. He said they also had a radar trailer at the town yard that could possibly get set up, although it may need repair.</p> <p>Mayor Barber said a letter from the JPD would likely carry more impact. She then brought up Ginger's crosswalk suggestion, but her understanding was that crosswalks cannot be put on the highway. She asked if this was a law.</p> <p>Ms. Gallagher said ADOT has discouraged crosswalks in the past because they give a false sense of security.</p> <p>Lt. San Felice said he was not sure if it was law, but that it would be hard to convince ADOT to install a crosswalk.</p> <p>Mayor Barber said more signage seemed to be one answer, as well as installing the radar trailer.</p> <p>Dr. Dillenberg said Sedona has crosswalks on 89A. Mayor Barber noted that Sedona now owns those areas.</p> <p>Ms. Moore said visibility from both directions is key for a crosswalk, which is why ADOT would not put one by the fire station.</p> <p>Vice Mayor Harvey said the areas in Sedona with crosswalks are all at intersections and not owned by Sedona.</p> <p>Jerome resident Suzy Mound suggested running an article in the town newsletter, so residents are informed about reporting noise and speed offenders to the police department.</p> <p>Jerome resident Lace Ritter complained about motorcycles sitting in parking spaces along Main Street while they're idling, which is noisy and noxious. She said this causes a disturbance for the shops and tourists. She also mentioned that the signs on School Street are ignored by much of the traffic. She suggested they be moved closer to the street entrance so they're more visible. She said people also drive down School Street from the wrong direction.</p> <p>Lt. San Felice said to Ms. Mound not to hesitate to call 911 to get an immediate response for a traffic ordinance infraction. He also mentioned that there is an idling ordinance, so he encouraged Ms. Ritter to call the police on those infractions. Lt. San Felice said the sign on School Street that says RESIDENTS ONLY should be larger, and that noise signs can go with the motorcycle parking signs.</p>
8:01 (1:00:08)	<p>ITEM #10: TO AND FROM THE COUNCIL</p> <p>Council may direct staff regarding items to be placed on a future agenda.</p> <p>Dr. Dillenberg said he plans to have an update on Friends of Jerome at the next meeting.</p> <p>Ms. Moore said she has been asked about the street repairs on Center Avenue. Ms. Gallagher said she would talk to Public Works Director Marty Boland about filling potholes.</p> <p>Vice Mayor Harvey shared that she has been taking a grant-writing class and really enjoying it.</p> <p>Ms. Worth announced she was going on a NACOG retreat to the Grand Canyon the following week. She talked about the scheduled activities.</p> <p>Mayor Barber said the Forest Service would be doing work on Forest Service Rd. 413 near Allen Springs Rd. She said she wrote an email to District Ranger Todd Willard and cc'd Yavapai County Supervisor Randy Garrison, with whom she has talked to about a public meeting on public use of public lands. She said Mr. Garrison wanted to wait until after the upcoming election. Mayor Barber asked Ms. Gallagher to forward her email to the other councilmembers</p>

	and asked that the topic of Allen Springs Road be added to the next Council meeting agenda, along with springs maintenance and security. She thanked the Council about their deliberation over Prop 207.					
ITEM #11:	ADJOURNMENT October 13 - 11:03 p.m. and October 14 - 8:06 p.m. <u>Motion to Adjourn at 11:03 p.m. on October 13 and at 8:06 p.m. on October 14</u>					
	COUNCILMEMBER	MOVED	SECONDED	AYE	NAY	ABSENT
	BARBER	X		X		
	DILLENBERG			X		
	HARVEY		X	X		
	MOORE			X		
	WORTH			X		

APPROVE:

ATTEST:

 Mayor

 Candace B. Gallagher, CMC, Town Manager/Clerk

Date: _____