

SAN JUAN COUNTY, COLORADO
BOARD OF COMMISSIONERS MEETING AGENDA

October 27, 2021

Due to the continuing COVID-19 emergency, San Juan County meetings will be conducted in a hybrid virtual/in-person format. All persons including Board Members, Staff and those with appointments scheduled on the agenda may meet in person or via zoom. Both the vaccinated and unvaccinated are strongly encouraged to wear a mask. We encourage community members to participate via zoom. The information necessary to connect to the public meeting is listed below.

CALL TO ORDER: 6:30 P.M.

BOCC Meeting Minutes for September 22 and October 13, 2021

APPOINTMENT

6:40 P.M. Helen Katish, Senator Hickenlooper's Southwest Manager,

7:20 P.M. Klem Branner – Silverton Single Track Society

7:40 P.M. Becky Joyce-Public Health Director, Jim Donovan-Office of Emergency Management, and DeAnne Gallegos-PIO

CORRESPONDENCE

OLD BUSINESS

NEW BUSINESS

Colorado Opioids Settlement Memorandum of Understanding

2022 Preliminary Budget

Treasurer's Report

Sales Tax Update

Attainable Housing Update

Public Comment

Commissioner and Staff Reports

Next Regular Meeting – November 10, 2021 8:30 A.M.

Join Zoom Meeting

<https://zoom.us/j/92136473203>

Meeting ID: 921 3647 3203

One tap mobile

+16699006833,,92136473203# US (San Jose)

+12532158782,,92136473203# US (Tacoma)

Dial by your location

+1 669 900 6833 US (San Jose)

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

+1 646 876 9923 US (New York)

+1 301 715 8592 US (Germantown)

+1 312 626 6799 US (Chicago)

Meeting ID: 921 3647 3203

SAN JUAN COUNTY BOARD OF COMMISSIONERS
REGULAR MEETING WEDNESDAY, SEPTEMBER 22, 2021
AT 6:30 P.M.

Call to Order: The regular meeting was called to order at 6:30 P.M. by Chairman Scott Fetchenhier. Present were Commissioners Ernest Kuhlman and Austin Lashley, County Attorney Dennis Golbicht and Administrator William Tookey. The general public attended via Zoom.

Commissioner Kuhlman moved to approve the minutes of September 8, 2021 with the correction of adding the word moved to the second sentence of the tenth paragraph. Commissioner Lashley seconded the motion. The motion passed unanimous.

Peter Butler of the CAG was present via Zoom to discuss a proposal to present to water commission for increasing the water quality designation of a portion of Mineral Creek.

Three Memorandum of Understanding with the Department of Revenue for Control of Confidential Data was presented to the Commissioners for their consideration. The MOU's would authorize County Administrator Tookey to manage the confidential sales tax reports for the Department of Revenue concerning sales tax, lodging tax and retail marijuana tax. Commissioner Lashley moved to approve the Memorandums of Understanding as presented. Commissioner Kuhlman seconded the motion. The motion passed unanimous.

Heidi Aggeler, Manager Director Root Policy Research presented the regional housing assessment and the San Juan County/Silverton Housing Assessment.

Resolution 2021-07 A Resolution Adopting A Policy Regarding The Handling Of Personal Identifying Information (PII) Including Protection, Destruction And Security Breach Reporting was presented to the Commissioners for their consideration. County Attorney Dennis Golbicht explained to the Commissioners that the policy was required by State Statute. Commissioner Lashley moved to approve Resolution 2021-07 as presented. Commissioner Fetchenhier seconded the motion. The motion passed with Commissioners Lashley and Fetchenhier voting yes and Commissioner Kuhlman voting no.

Planning Director Lisa Adair was present to provide the Commissioners with her staff report.

Having no further business, the meeting was adjourned at 8:47 P.M.

Scott Fetchenhier, Chairman

Ladonna L. Jaramillo, County Clerk

SAN JUAN COUNTY BOARD OF COMMISSIONERS
REGULAR MEETING WEDNESDAY, OCTOBER 13, 2021
AT 8:30 A.M.

Call to Order: The meeting was called to order by Chairman Scott Fetchenhier. Present were Commissioners Ernie Kuhlman and Austin Lashley, and Administrator William Tookey.

Payment of Bills: Commissioner Kuhlman moved to authorize payment of the warrants as presented. Commissioner Lashley seconded the motion. The motion passed unanimous.

Minutes: Due to the power outage there were no minutes presented to the Commissioners.

Emergency Manager Jim Donovan and PIO DeAnne Gallegos were present to provide the Commissioners with an update on the power outage/winter storm.

Ouray County Commissioner Ben Tisdell and representatives from the Division of Fire Protection and Control were present to discuss San Juan County returning as a participant of the Wildfire Emergency Response Fund. It was the consensus of the Commissioners to request an invoice from DFPC to participate in the fund.

Gilbert Archuleta and Clark Damron were present representing the Fire Authority to request that the County consider issuing permits for controlled burns in the county. They also suggested that it would be good if a system was set up in which seasonal cabin owners would provide a courtesy call to notify the county when they were using their cabins. It was the consensus of the Commissioners to amend the land use code or adopt an ordinance to require a controlled burn permit. It was also the consensus of the Commissioners to develop a program to encourage seasonal residents to notify the County when they were using their cabins.

Tyler George was present to provide the Commissioners with a presentation on the Ambulance Association and to request additional funding for the operation of the Ambulance Association and the development of a new station.

Having no further business, the meeting was adjourned at 12:20 P.M.

Scott Fetchenhier, Chairman

Ladonna L. Jaramillo, County Clerk

PHIL WEISER
Attorney General

NATALIE HANLON LEH
Chief Deputy Attorney General

ERIC R. OLSON
Solicitor General

ERIC T. MEYER
Chief Operating Officer



RALPH L. CARR
COLORADO JUDICIAL CENTER
1300 Broadway, 10th Floor
Denver, Colorado 80203
Phone (720) 508-6000

STATE OF COLORADO
DEPARTMENT OF LAW

October 1, 2021

City/County Manager/BoCC/Attorney
Address
City, CO Zip Code

Dear City/County Manager/BoCC/Attorney:

We are pleased to inform you that the Colorado Department of Law has come to an agreement with Colorado's local governments for distributing opioid settlement and recovery funds to local counties and municipalities. The attached Memorandum of Understanding ("MOU") is the product of a lengthy and complex negotiation between the Attorney General's Office, Colorado Counties, Inc. ("CCI"), Colorado Municipal League ("CML"), and many negotiating local governments detailing that distribution process.

As you may know, the State, as well as several Colorado local governments, have pursued litigation against various pharmaceutical companies for their role in causing the opioid epidemic in Colorado. That litigation recently resulted in settlements with Purdue Pharma, McKinsey & Co., Johnson & Johnson, AmerisourceBergen, Cardinal Health, and McKesson, resulting in up to approximately \$400 million in settlement funds for both the State and Colorado local governments to abate the opioid crisis.

To maximize the settlement funds within Colorado, it is important that all Colorado counties and municipalities participate in these settlements and the distribution process by signing the following four documents:

1. The MOU that lays out the allocation of Opioid recoveries in the State of Colorado;
 2. The Subdivision Settlement Participation Form that releases subdivisions' legal claims against Johnson & Johnson;
 3. The Subdivision Settlement Participation Form that releases subdivisions' legal claims against AmerisourceBergen, Cardinal Health, and McKesson;
- and

4. The Colorado Subdivision Escrow Agreement that ensures subdivisions' legal claims are released only when 95% participation by certain local governments has been reached. That 95% participation threshold is important because it triggers certain amounts of incentive payments under the settlements and signals to the settling pharmaceutical companies that the settlements have wide acceptance.

We are asking you to present the enclosed MOU, Subdivision Settlement Participation Forms, and Colorado Subdivision Escrow Agreement to the body or individual with authority to approve and execute the documents on behalf of your county or municipality. We request that you return the signed documents as detailed below by **November 5, 2021**. If you are unable to return the signed documents by this date, please contact Heidi Williams, Department of Law Director of Opioid Response, at Heidi.Williams@coag.gov. By promptly returning the signed documents, we will be able to put Colorado and our local governments in a position to maximize our share of the settlements and begin putting the settlement funds to use abating the crisis in our communities.

Please email or mail the signed documents to either CCI or CML at the following addresses:

<p>For Counties: Colorado Counties, Inc. 800 Grant, Ste 500 Denver, CO 80203</p> <p>Email: Kyley Burress KBurress@ccionline.org Katie First KFirst@ccionline.org</p>	<p>For Municipalities: Colorado Municipal League 1144 N. Sherman St. Denver, CO 80203</p> <p>Email: opiodsettlement@cml.org</p>
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For more information about the opioid response funds, please check out our website at www.coag.gov/opioids. If you have any questions about the Colorado MOU, the settlements, or this letter, please contact Heidi Williams, Department of Law Director of Opioid Response, at Heidi.Williams@coag.gov.

Thank you for your partnership and commitment to Colorado.

Phil Weiser
Attorney General

Colorado Opioids Settlement Memorandum of Understanding **Summary**

Below is a brief overview of the key provisions outlined in the Colorado Opioids Settlement Memorandum of Understanding (“Colorado MOU”). The Colorado MOU was signed by Colorado Attorney General Phil Weiser on August 26, 2021. In order to receive the full settlement payments for all of Colorado, strong participation by local governments signing on to the Colorado MOU is necessary.

Local governments and the State prepared the Colorado MOU, which prioritizes regionalism, collaboration, and abatement in the sharing and distribution of opioid settlement funds. The points below summarize the framework laid out in the Colorado MOU for distributing and sharing opioids settlement proceeds throughout Colorado. Please see the full Colorado MOU and exhibits for additional details.

While Colorado’s local governments are currently being asked to participate in recent settlements with the “Big 3” Distributors (AmerisourceBergen, Cardinal Health, and McKesson) and Johnson & Johnson, the Colorado MOU is intended to apply to all current and future opioid settlements.

A. Allocation of Settlement Funds

The Colorado MOU provides the framework for fairly dividing and sharing settlement proceeds among the state and local governments in Colorado. Under the Colorado MOU, settlement proceeds will be distributed as follows:

1. **10%** directly to the State (“State Share”)
2. **20%** directly to Participating Local Governments (“LG Share”)
3. **60%** directly to Regions (“Regional Share”)
4. **10%** to specific abatement infrastructure projects (“Statewide Infrastructure Share”)

Under the Colorado MOU, all settlement funds must be used only for “Approved Purposes,” a long and broad list that focuses on abatement strategies. These strategies emphasize prevention, treatment, and harm reduction. Some examples of these strategies include training health care providers on opioid use disorder (“OUD”) treatment and responsible prescribing, expanding telehealth and mobile services for treatment, and increasing naloxone and rescue breathing supplies. The list of Approved Purposes is broad enough to be flexible for local communities, while ensuring that settlement funds are used to combat the opioid epidemic. The list of Approved Purposes is attached as Exhibit A to the MOU, unless the term is otherwise defined in a settlement.

B. General Abatement Fund Council

A General Abatement Fund Council (the “Abatement Council”), consisting of representatives appointed by the State and Participating Local Governments, will ensure that the distribution of opioid funds complies with the terms of any settlement and the terms of the Colorado MOU. The Abatement Council will consist of 13 members, seven appointed by the State and six appointed by the Participating Local Governments.

C. Local Government Share (20%)

Twenty percent of settlement funds will be paid directly to Participating Local Governments. Exhibit D to the Colorado MOU lists the percentage to each County Area (that is, the county government plus the municipalities within that county), and Exhibit E further breaks down those allocations to an intracounty level using a default allocation.

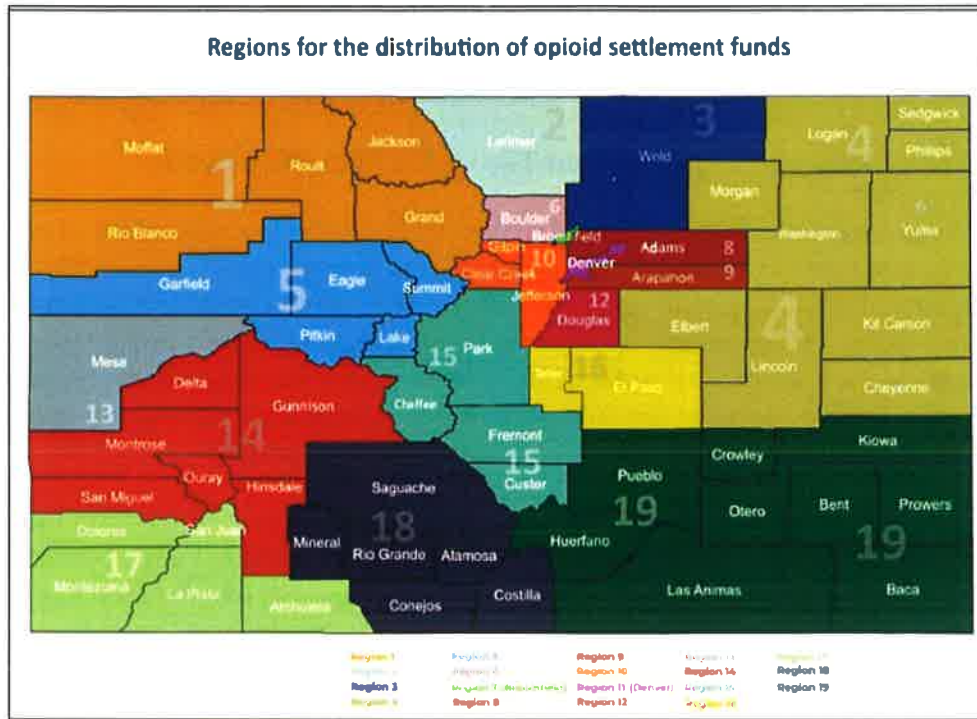
The allocations to each County Area in Exhibit D are based on three factors that address critical causes and effects of the opioid crisis: (1) the number of persons suffering opioid use disorder in the county; (2) the number of opioid overdose deaths that occurred in the county; and (3) the amount of opioids distributed within the county.

The intracounty allocations in Exhibit E are a default allocation that will apply unless the local governments in a County Area enter into a written agreement providing for a different allocation. These allocations are based on a model, developed by health economist experts, which uses data from the State and Local Government Census on past spending relevant to opioid abatement.

Participating Local Governments will provide data on expenditures from the LG Share to the Abatement Council on an annual basis. If a local government wishes, it may forego its LG Share and direct it to the Regional Share. A local government that chooses not to participate or sign onto the Colorado MOU will not receive funds from the LG Share and the portion of the LG Share that it would have received will instead be re-allocated to the Regional Share for the region where that local government is located.

D. Regional Share (60%)

Sixty percent of settlement funds will be allocated to single- or multi-county regions made up of local governments. These regions were drawn by local governments to make use of existing local infrastructure and relationships. The regional map is shown below, as well as in Exhibit C to the Colorado MOU:



Allocations to regions will be calculated according to the percentages in Exhibit F. Each region will create its own “Regional Council” to determine what Approved Purposes to fund with that region’s allocation from the Regional Share. Regional governance models are attached to the Colorado MOU as Exhibit G. Each region may draft its own intra-regional agreements, bylaws, or other governing documents to determine how the Regional Council will operate, subject to the terms of the Colorado MOU. Each Regional Council will provide expenditure data to the Abatement Council on an annual basis.

A local government that chooses not to participate or sign onto the Colorado MOU shall not receive any opioid funds from the Regional Share and shall not participate in the Regional Councils.

E. State Share (10%)

Ten percent of settlement funds will be allocated directly to the State for statewide priorities in combating the opioid epidemic. The State maintains full discretion over distribution of the State Share anywhere within the State of Colorado. On an annual basis, the State shall provide all data on expenditures from the State Share, including administrative costs, to the Abatement Council.

F. Statewide Infrastructure Share (10%)

Ten percent of the settlement funds will be allocated to a Statewide Infrastructure Share to promote capital improvements and provide operational assistance for the development or improvement of infrastructure necessary to abate the opioid crisis anywhere in Colorado.

The Abatement Council shall establish and publish policies and procedures for the distribution and oversight of the Statewide Infrastructure Share, including processes for local governments or regions to apply for opioid funds from the Statewide Infrastructure Share.

G. Attorneys' Fees and Expenses Paid Through a Back-Stop Fund

To a large extent, the national opioid settlements occurred because of the pressure that litigating entities and their counsel exerted on defendants through their lawsuits. The attorneys' fee provision equitably allocates the cost of attorneys' fees, while also allowing non-litigating entities to share in the 25% premium for releases by the litigating entities in the "Big 3" Distributor and Johnson & Johnson settlements. The work that was done by the litigating entities and their law firms in the litigation has substantially contributed to achieving the settlements that are currently being offered and those that are anticipated in the future.

The Attorney General and local governments have agreed to a "Back-Stop Fund" for attorneys' fees and costs. Before a law firm can apply to the Back-Stop Fund, it must first apply to any national common benefit fee fund. The Back-Stop Fund will only be used to pay the difference between what law firms are owed and the amount they have received from a national common benefit fee fund.

Attorneys' fees are limited to 8.7% of the total LG Share and 4.35% of the total Regional Share. No funds will be taken from the Statewide Infrastructure Share or State Share.

A committee will be formed to oversee payments from the Back-Stop Fund. The committee will include litigating and non-litigating entities. Importantly, any excess money in the Back-Stop fund, after attorneys' fees and costs are paid, will go back to the local governments.

H. Participation in the Colorado MOU and Expected Timeline

The MOU was designed to ensure that as many local governments as possible would agree to its terms. Strong participation from local governments is needed to receive the full settlement payments for all of Colorado. On August 26, 2021, Colorado Attorney General Phil Weiser signed the MOU. It is projected that settlement funds from the "Big 3" Distributor/Johnson & Johnson settlements could be made available as soon as July 2022 and will be distributed within Colorado according to the MOU.

Along with the MOU, each local government will need to sign a Subdivision Settlement Participation Form for each of the settlements (the "Big 3" Distributor settlement and the Johnson & Johnson settlement) releasing their legal claims and stating they are participating in the settlements. In addition, a Colorado Subdivision Escrow Agreement should be signed to ensure legal claims are released only when 95% participation by certain local governments has been reached. That 95% participation threshold is important because it triggers certain amounts of incentive payments under the settlements and signals to the settling pharmaceutical companies that the settlements have wide acceptance.

A copy of the MOU with signature pages for each local government, the Subdivision Settlement Participation Forms, and the Colorado Subdivision Escrow Agreement will be

provided by the Attorney General's Office. The documents should be executed by the individual or body with authority to do so on behalf of their respective county or municipality and submitted by mail or email to either CCI or CML at the following addresses:

<p><u>For Counties:</u></p> <p>Colorado Counties, Inc. 800 Grant, Ste 500 Denver, CO 80203</p> <p>Email: Kyley Burress at KBurress@ccionline.org Katie First at KFirst@ccionline.org</p>	<p><u>For Municipalities:</u></p> <p>Colorado Municipal League 1144 N. Sherman St. Denver, CO 80203</p> <p>Email: opioidsettlement@cml.org</p>
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If you have any questions, please reach out to Heidi Williams of the Colorado AG's office at Heidi.Williams@coag.gov.

Colorado Opioids Settlement MOU: Frequently Asked Questions

1. What does this “settle” and why does Colorado need an MOU?

Nationwide settlements have been reached with the “Big 3” opioid distributors (McKesson, Cardinal Health, and AmerisourceBergen) and opioid manufacturer Johnson & Johnson to resolve claims by state and local governments that these companies contributed to the opioid epidemic. The claims being settled include those raised by local governments in the national multi-district litigation (“MDL”), *In Re: National Prescription Opiate Litigation*, MDL 2804 (N.D. Ohio). More information about these settlements can be found at <https://nationalopioidsettlement.com/>.

The Colorado MOU establishes the framework for distributing and sharing these settlement proceeds throughout Colorado. Local governments and the State prepared the Colorado MOU, which prioritizes regionalism, collaboration, and abatement. It is expected that the Colorado MOU will also be used for settlements with other opioid defendants in the future, including any settlement from Purdue Pharma’s bankruptcy proceeding. Colorado Attorney General Phil Weiser signed the MOU on August 26, 2021. The Colorado MOU is included in this packet from the Attorney General’s Office and can also be found at www.coag.gov/opioids.

2. Who put together the Colorado MOU?

Local government officials from across Colorado were involved in the negotiation of the Colorado MOU with the Attorney General’s Office. County commissioners, mayors, county and city attorneys, and other stakeholders came together with the assistance of Colorado Counties, Inc. (“CCI”) and the Colorado Municipal League (“CML”) to establish the framework and negotiate the details of the Colorado MOU.

3. How much money will Colorado receive and over what period of time?

Funds from the Big 3 and Johnson & Johnson settlements will be distributed over a period of years. The Big 3 distributors will pay a maximum of \$21 billion over 18 years, while Johnson & Johnson will pay a maximum of \$5 billion over no more than nine years. In total, up to approximately \$22.8 billion in settlement proceeds will be payable to state and local subdivisions nationwide. Each state receives a percentage of that recovery, and Colorado’s maximum share from these settlements will likely be more than \$300 million.

However, as discussed more below, Colorado will receive its maximum share of settlement payments only if enough local governments sign on to the deal. Also, the settling defendants have the option to “walk away” from the deals if there is not enough participation, so it is important that a “critical mass” of local governments signs on soon. Otherwise, the entire deal could fall through.

4. How can we maximize Colorado's recovery?

The MOU was designed to ensure that as many local governments as possible would agree to its terms. The Big 3 Distributor and Johnson & Johnson settlements include incentive payments based on how many governments participate. Strong participation from local governments is needed to receive the full settlement payments for all of Colorado. Local governments should sign the Colorado Subdivision Escrow Agreement to ensure their legal claims are released only when 95% participation by local governments has been reached, which secures significant incentive payments under these settlement agreements. For more information on the incentive payments, please see the graphics below:

DISTRIBUTORS: Base and Incentives

	Incentive A	Incentive B	Incentive C	Incentive D																																						
<p>Base 55% Incentives 45% Net Abatement Amount</p> <p>Incentives are earned by obtaining releases from subdivisions and limiting additional subdivisions from filing suit.</p> <p>During the first two years, States that settle are treated as if receiving full base and Incentive.</p> <p><small>Illustrative only. Executed Agreements Control</small></p>	<p>Incentive A provides for payment of all but Incentive D payments in exchange for near full peace.</p> <p>Incentive A is earned by:</p> <ul style="list-style-type: none"> Passing a Statute or court ruling that terminates existing and bars future claims by subdivisions (including special districts); Receiving releases on behalf of (i) all general purpose subdivisions above 10,000 population, (ii) larger school and hospital/health districts, and (iii) all currently litigating subdivisions; or A combination of these approaches that results in a complete bar of existing and future claims (e.g., legislation barring future claims combined with 100% participation by litigating subdivisions). 	<ul style="list-style-type: none"> Incentive B is not relevant if a State earns Incentive A. Incentive B is up to 25%. Incentive B is earned by obtaining releases from litigating subdivisions. <p>Incentive B Sliding Scale:</p> <table border="1"> <thead> <tr> <th>Participation or Case-Specific Resolution Levels</th> <th>Incentive B Award</th> </tr> </thead> <tbody> <tr><td>85%</td><td>30%</td></tr> <tr><td>86-90%</td><td>40%</td></tr> <tr><td>91-94%</td><td>50%</td></tr> <tr><td>95-99%</td><td>60%</td></tr> <tr><td>99-99.9%</td><td>95%</td></tr> <tr><td>100%</td><td>100%</td></tr> </tbody> </table> <p>Not structured in time periods, as with Incentive B under the J&J Agreement</p>	Participation or Case-Specific Resolution Levels	Incentive B Award	85%	30%	86-90%	40%	91-94%	50%	95-99%	60%	99-99.9%	95%	100%	100%	<ul style="list-style-type: none"> Incentive C is not relevant if a State earns Incentive A. Incentive C is up to 15%. Incentive C is earned by getting larger (population of 30,000) non-litigating and any-sized litigating counties and cities to join the deal. <p>Incentive C Sliding Scale:</p> <table border="1"> <thead> <tr> <th>Participation, Release, or Resolution Levels</th> <th>Incentive C Award Levels</th> </tr> </thead> <tbody> <tr><td>60-69%</td><td>25%</td></tr> <tr><td>70-74%</td><td>35%</td></tr> <tr><td>75-79%</td><td>40%</td></tr> <tr><td>80-84%</td><td>45%</td></tr> <tr><td>85-89%</td><td>55%</td></tr> <tr><td>90-92%</td><td>60%</td></tr> <tr><td>93%</td><td>65%</td></tr> <tr><td>94%</td><td>75%</td></tr> <tr><td>95-97%</td><td>90%</td></tr> <tr><td>98-99%</td><td>95%</td></tr> <tr><td>100%</td><td>100%</td></tr> </tbody> </table> <p>There is no timing element.</p>	Participation, Release, or Resolution Levels	Incentive C Award Levels	60-69%	25%	70-74%	35%	75-79%	40%	80-84%	45%	85-89%	55%	90-92%	60%	93%	65%	94%	75%	95-97%	90%	98-99%	95%	100%	100%	<p>5% share of the State's total Abatement Fund allocation (see page 20). Payable starting in year 6 through year 18.</p> <p>Qualifying Criteria</p> <ul style="list-style-type: none"> State must have had no later Litigating Subdivisions bring suit and proceed past preliminary motions.
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JOHNSON & JOHNSON: Base and Incentives

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<p>Base 45%</p> <p>Incentives 55%</p> <p>Global Settlement Abatement Amount</p> <p>Incentives are earned by obtaining releases from subdivisions and limiting additional subdivisions from filing suit.</p> <p><small>Illustrative only. Executed Agreements Control</small></p>	<p>Incentive A provides for payment of all but Incentive D payments in exchange for near full peace.</p> <p>Earning Incentive A also causes substantial payments, the first three years of payments, accelerated and paid within 90 days.</p> <p>Incentive A is earned by:</p> <ul style="list-style-type: none"> Passing a Statute or court ruling that terminates existing and bars future claims by subdivisions (including special districts); Receiving releases on behalf of (i) all general purpose subdivisions above 10,000 population, (ii) larger school and hospital/health districts, and (iii) all currently litigating subdivisions; or A combination of these approaches that results in a complete bar of existing and future claims (e.g., legislation barring future claims combined with 100% participation by litigating subdivisions). 	<ul style="list-style-type: none"> Incentive B is not relevant if a State earns Incentive A. Incentive B is up to 30%. Incentive B is earned from obtaining releases from litigating subdivisions. <p>Incentive B Sliding Scale:</p> <table border="1"> <thead> <tr> <th>Participation or Case-Specific Resolution Levels</th> <th>Incentive B Award</th> </tr> </thead> <tbody> <tr><td>75%</td><td>50%</td></tr> <tr><td>76%</td><td>52%</td></tr> <tr><td>77%</td><td>54%</td></tr> <tr><td>78%</td><td>56%</td></tr> <tr><td>79%</td><td>58%</td></tr> <tr><td>80%</td><td>60%</td></tr> <tr><td>85%</td><td>70%</td></tr> <tr><td>90%</td><td>80%</td></tr> <tr><td>95%</td><td>90%</td></tr> <tr><td>100%</td><td>100%</td></tr> </tbody> </table> <p><small>Timing element: Incentive B is structured in three periods and states will receive a percentage of sliding scale payments depending on when they reach 75% of litigating subdivisions signed on: (a) 0-210 days = 100% of sliding scale; (b) 211-365 = 75% of sliding scale; and (c) 366-2 years from effective date = 50% of sliding scale.</small></p>	Participation or Case-Specific Resolution Levels	Incentive B Award	75%	50%	76%	52%	77%	54%	78%	56%	79%	58%	80%	60%	85%	70%	90%	80%	95%	90%	100%	100%	<ul style="list-style-type: none"> Incentive C is not relevant if a State earns Incentive A. Incentive C is up to 20%. It breaks Incentive C in two parts. Incentive C is earned by getting larger (population of 30,000) litigating and non-litigating counties and cities to join the deal. 5% is awarded for obtaining a State's ten largest general purpose subdivisions (cities and counties). <p>Incentive C Sliding Scale:</p> <table border="1"> <thead> <tr> <th>Participation, Release, or Resolution Levels</th> <th>Incentive C(1) Award</th> </tr> </thead> <tbody> <tr><td>60%</td><td>40%</td></tr> <tr><td>70%</td><td>45%</td></tr> <tr><td>80%</td><td>50%</td></tr> <tr><td>85%</td><td>55%</td></tr> <tr><td>90%</td><td>60%</td></tr> <tr><td>91%</td><td>65%</td></tr> <tr><td>92%</td><td>70%</td></tr> <tr><td>93%</td><td>80%</td></tr> <tr><td>94%</td><td>90%</td></tr> <tr><td>95%</td><td>100%</td></tr> </tbody> </table> <p><small>There is no timing element.</small></p>	Participation, Release, or Resolution Levels	Incentive C(1) Award	60%	40%	70%	45%	80%	50%	85%	55%	90%	60%	91%	65%	92%	70%	93%	80%	94%	90%	95%	100%	<p>5% share of the State's total Abatement Fund allocation (see page 20). Payable starting in year 6 through year 18.</p> <p>Qualifying Criteria</p> <ul style="list-style-type: none"> State must have had no later Litigating Subdivisions bring suit and proceed past preliminary motions in the 5 years following the Effective Date.
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Participation, Release, or Resolution Levels	Incentive C(1) Award																																															
60%	40%																																															
70%	45%																																															
80%	50%																																															
85%	55%																																															
90%	60%																																															
91%	65%																																															
92%	70%																																															
93%	80%																																															
94%	90%																																															
95%	100%																																															

5. Is participation limited to litigating entities?

No, participation is not limited to governments that filed suit in the opioid litigation. Money from these settlements will be used for opioid crisis abatement in communities across Colorado, regardless of whether they have chosen to sue. All Colorado local governments are eligible to participate in the settlements and join the MOU, and the MOU does **not** allocate more funds to cities and counties that chose to file suit—all cities and counties in Colorado are allocated funds based on the same objective factors.

6. How will settlement proceeds be divided within the state under the Colorado MOU?

Under the Colorado MOU, settlement proceeds will be distributed as follows:

- 10% directly to the State (“State Share”)
- 20% directly to Participating Local Governments (“LG Share”)
- 60% directly to Regions (“Regional Share”)
- 10% to specific abatement infrastructure projects (“Statewide Infrastructure Share”)

7. How will the money be spent?

Under the Colorado MOU, all settlement funds must be used only for “Approved Purposes,” a long and broad list that focuses on abatement strategies. These strategies emphasize prevention, treatment, and harm reduction. Some examples of these strategies include training health care providers on opioid use disorder (“OUD”) treatment and responsible prescribing, expanding telehealth and mobile services for treatment, and increasing naloxone and rescue breathing

supplies. The list of Approved Purposes is broad enough to be flexible for local communities, while ensuring that settlement funds are used to combat the opioid epidemic. The list of Approved Purposes is attached as Exhibit A to the MOU, unless the term is otherwise defined in a settlement.

To ensure that settlement funds are in fact used only for Approved Purposes, a General Abatement Fund Council (the “Abatement Council”) will be formed. This committee will consist of thirteen representatives appointed by the State and Participating Local Governments to ensure opioid funds are spent in compliance with the terms of the settlements and the Colorado MOU.

8. How will direct payments to local governments be allocated?

Under the Colorado MOU, 20% of the settlement funds will be paid directly to local governments. A list of the percentage of settlement funds that will be allocated to each County Area (that is, the county government plus the municipalities within that county) is Exhibit D to the Colorado MOU. Those allocations are further broken down to an intracounty level in Exhibit E, which is a default allocation.

The allocations to each County Area are based on three factors that address the relative severity of the opioid crisis: (a) the number of persons suffering from Opioid Use Disorder in the county; (b) the number of opioid overdose deaths in the county; and (c) the amount of opioids distributed within the county (measured in Morphine Milligram Equivalent units).

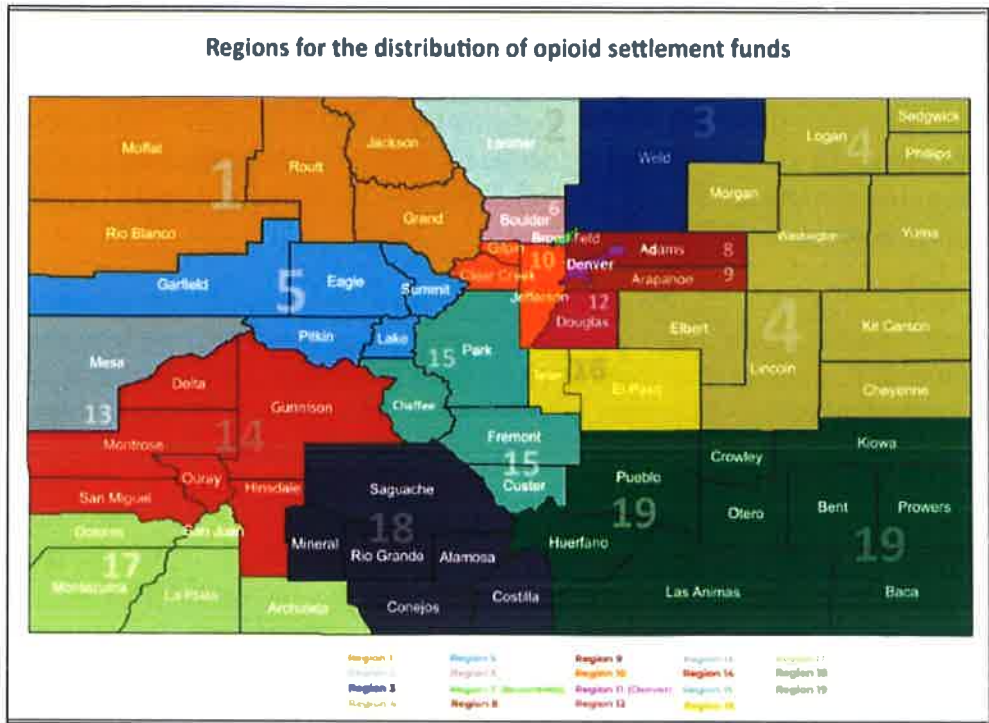
The intracounty allocations in Exhibit E are based on a default allocation model that will apply unless the local governments in a County Area enter into an agreement that provides for a different allocation model. These allocations are based on a model developed by health economist experts, which use data from the State and Local Governments Census on past spending relevant to opioid abatement.

To ensure transparency and that settlement funds are used for Approved Purposes, local governments that receive settlement funds directly will be required to provide expenditure data to the Abatement Council on an annual basis. Local governments that wish to join the MOU but do not wish to receive any direct payments have the option to redirect their payments to the Regional allocation described below.

A local government that chooses not to participate or sign onto the Colorado MOU will not receive funds from the LG Share and the portion of the LG share that it would have received will instead be re-allocated to the Regional Share described below.

9. How will payments to Regions be allocated?

Under the Colorado MOU, 60% of the settlement funds will be allocated to single- or multi-county regions made up of local governments. Local governments in Colorado worked collaboratively to develop the Regional Map, which emphasizes existing local infrastructure and relationships. The regional map is below, as well as included in the Colorado MOU as Exhibit C;



For more information on the percentages of settlement funds that will be allocated to each Region, please see Exhibit F of the Colorado MOU.

10. How will the Regions be governed?

Each Region will create its own “Regional Council” consisting of members from the constituent local governments to determine what Approved Purposes to fund with the Region’s allocation. The Regional Council will have the power to make spending decisions in the Region. The Regions will designate a fiscal agent prior to receiving any settlement funds. Regional governance models are attached to the Colorado MOU as Exhibit G. Each Region may draft its own intra-regional agreements, bylaws, or other governing documents to determine how the Regional Council will operate. Each Regional Council will provide expenditure data to the Abatement Council on an annual basis.

11. How will the Statewide Infrastructure Share work?

Many stakeholders have expressed a need for capital improvements across Colorado, and particularly in underserved areas, to abate the opioid crisis. The Colorado MOU directly addresses this by allocating 10% of settlement funds going to these projects. This money will be distributed by a statewide committee based on need. The Abatement Council will establish and publish policies and procedures for the distribution and oversight of the Statewide Infrastructure Share, including processes for local governments or regions to apply for opioid funds from the Statewide Infrastructure Share.

12. How will attorneys' fees and expenses be paid?

The Attorney General and local governments have agreed to a "Back-Stop Fund" for attorneys' fees and costs. The attorneys' fee provision in the Colorado MOU equitably allocates the cost of attorneys' fees across all local governments, while also allowing non-litigating entities to share in the 25% premium for releases signed by the litigating entities in the "Big 3" Distributor and Johnson & Johnson settlements.

Before a law firm can apply to the Back-Stop Fund, it must first apply to any national common benefit fee fund. The Back-Stop Fund will only be used to pay the difference between what law firms are owed and the amount they have received from a national common benefit fee fund. Attorneys' fees are limited to 8.7% of the total LG Share and 4.35% of the total Regional Share. No funds will be taken from the Statewide Infrastructure Share or State Share.

A committee will be formed to oversee payments from the Back-Stop Fund. The committee will include litigating and non-litigating entities. Importantly, any excess money in the Back-Stop fund, after attorneys' fees and costs are paid, will go back to the local governments.

13. Why is this a great result for local governments?

The Colorado MOU will ensure effective and efficient use of funds without dilution or diversion of opioid settlement money to unrelated purposes or unnecessary overhead expenses. In the Colorado MOU the local governments control 80% of the settlement funds.

- Bottom-Up Approach – The need is at the local level, so the resources should be, too.
- Local Voices – The communities bearing the brunt of this burden must have a meaningful seat at the table to make decisions about where resources go.
- Flexibility – The Colorado MOU provides an opportunity for local governments to decide how to entrust their own regional funds without unnecessary red tape.

14. How do I sign the MOU?

Local governments should sign four documents.

a. First is the MOU.

b. Next, each local government will need to sign a Subdivision Settlement Participation Form for each of the **two settlements** (the "Big 3" Distributor settlement and the Johnson & Johnson settlement) releasing their legal claims and stating they are participating in the settlements.

c. In addition, a Colorado Subdivision Escrow Agreement should be signed to ensure legal claims are released only when 95% participation by certain local governments has been reached, which secures a significant portion of the incentive payments described in FAQ 4, above. Under the terms of the Colorado Subdivision Escrow Agreement, CCI (for counties) or

CML (for municipalities) will hold the MOUs and the Subdivision Settlement Participation Forms for each of the settlements in escrow until 95% participation by local governments has been reached as to specified incentive payments under the respective settlement agreements.

Copies of the Subdivision Settlement Participation Forms, the MOU with signature pages for each local government, and the Colorado Subdivision Escrow Agreement will be provided by the Attorney General's Office. The documents should be executed by the individual or body with authority to do so on behalf of their respective county or municipality and submitted by mail or email to either CCI or CML at the following addresses:

<p><u>For Counties:</u> Colorado Counties, Inc. 800 Grant, Ste 500 Denver, CO 80203</p> <p>Email: Kyley Burress KBurress@ccionline.org Katie First KFirst@ccionline.org</p>	<p><u>For Municipalities:</u> Colorado Municipal League 1144 N. Sherman St. Denver, CO 80203</p> <p>Email: opioidsettlement@cml.org</p>
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If you have any questions, please reach out to Heidi Williams of the Colorado AG's office at Heidi.Williams@coag.gov.

**COLORADO OPIOIDS SETTLEMENT MEMORANDUM OF UNDERSTANDING
("MOU")**

Thursday, August 26, 2021

August 25, 2021 Attorney General version

A. Definitions

As used in this MOU:

1. "Approved Purpose(s)" shall mean forward-looking strategies, programming, and services to abate the opioid epidemic as identified by the terms of any Settlement. If a Settlement is silent on Approved Purpose(s), then Approved Purpose(s) shall mean those forward-looking strategies to abate the opioid epidemic identified in **Exhibit A** or any supplemental forward-looking abatement strategies added to **Exhibit A** by the Abatement Council. Consistent with the terms of any Settlement, "Approved Purposes" shall also include the reasonable administrative costs associated with overseeing and administering Opioid Funds from each of the four (4) Shares described in Section (B)(2). Reimbursement by the State or Local Governments for past expenses are not Approved Purpose(s). "Approved Purposes" shall include attorneys' fees and expenses incurred in the course of the opioid litigation that are paid through the process discussed below.
2. "County Area" shall mean a county in the State of Colorado plus the Local Governments, or portion of any Local Government, within that county.
3. "Effective Date" shall mean the date on which a court of competent jurisdiction, including any bankruptcy court, enters the first Settlement by order or consent decree. The Parties anticipate that more than one Settlement will be administered according to the terms of this MOU, but that the first entered Settlement will trigger the formation of the Abatement Council in Section (C) and the Regional Councils in Section (F)(5).¹
4. "General Abatement Fund Council," or "Abatement Council," shall have the meaning described in Section (C), below.

¹ For the avoidance of doubt, the McKinsey Settlement and any other Settlement that precedes the finalization of drafting this MOU are not considered a trigger for purposes of the calculation of "Effective Date."

5. "Local Government(s)" shall mean all counties in the State of Colorado and the municipalities, towns, and county and city municipal corporations that are listed in **Exhibit B**.
6. "National Opioid Settlement Administrative Fund" shall mean any fund identified by a Settlement for the national distribution of Opioid Funds.
7. "Opioid Funds" shall mean damage awards obtained through a Settlement.
8. "Opioid Settling Defendant" shall mean any person or entity, or its affiliates, that engages in or has engaged in the manufacture, marketing, promotion, distribution, or dispensing of licit opioids.
9. "Participating Local Government(s)" shall mean all Local Governments that sign this MOU, and if required under terms of a particular Settlement, who have executed a release of claims with the Opioid Settlement Defendant(s). For the avoidance of doubt, a Local Government must sign this MOU to become a "Participating Local Government." Local Governments may designate the appropriate individual from their entity to sign the MOU.
10. "Party" or "Parties" shall mean the State and/or Participating Local Government(s).
11. "Qualified Settlement Fund Account," or "QSF Account," shall mean an account set up as a qualified settlement fund, 468b fund, as authorized by Treasury Regulations 1.468B-1(c) (26 CFR §1.468B-1).
12. "Regional Council" shall have the meaning described in Section (F)(5), below.
13. "Settlement" shall mean the negotiated resolution of legal or equitable claims against an Opioid Settling Defendant when that resolution has been jointly entered into by the State and the Participating Local Governments, or by any individual Party or collection of Parties that opt to subject their Settlement to this MOU. Unless otherwise directed by an order from a United States Bankruptcy Court, "Settlement" shall also include distributions from any liquidation under Chapter 7 of the United States Bankruptcy Code or confirmed plan under Chapter 11 of the United States Bankruptcy Code that treats the claims of the State and Local Governments against an Opioid Settling Defendant.
14. "The State" shall mean the State of Colorado acting through its Attorney General and the Colorado Department of Law.

B. Allocation of Settlement Proceeds

1. All Opioid Funds shall be held in accordance with the terms of any Settlement. If a Settlement allows Opioid Funds to be held in a National Opioid Settlement Administrative Fund, then Opioid Funds shall be held in such National Opioid Settlement Administrative Fund. If a Settlement does not allow for Opioid Funds

to be held in a National Opioid Settlement Administrative Fund, Opioid Funds shall be held in a Colorado-specific QSF Account or, under the following limited circumstances, in the State's Custodial Account: 1) if at the time of a Settlement, a Colorado-specific QSF Account is not yet established, although in such case, the Opioid Funds shall be transferred to the Colorado-specific QSF Account once it is established or 2) where the Abatement Fund Council determines Opioids Funds cannot be legally held in a Colorado-specific QSF Account. Regardless of whether Opioid Funds are held in a National Administrative Fund, a Colorado-specific QSF Account, or in the State's Custodial Account, the Abatement Council shall appoint one of its members to serve as the point of contact in accordance Section (C)(4)(b)(i), below.

2. All Opioid Funds, at the time of a Settlement or at the time designated in the Settlement documents, shall be divided and distributed as follows:²
 - a. 10% directly to the State ("State Share") for Approved Purposes in accordance with Section (D), below;
 - b. 20% directly to Participating Local Governments ("LG Share") for Approved Purposes in accordance with Section (E), below;
 - c. 60% directly to Regions ("Regional Share") for Approved Purposes in accordance with Section (F), below; and
 - d. 10% to specific abatement infrastructure projects ("Statewide Infrastructure Share") for Approved Purposes in accordance with Section (G), below.
3. Distribution of the Shares in Section B(2)(a) – (d) shall be direct, meaning that funds held in accordance with Section B(1) shall be disbursed directly to the State, Participating Local Governments, Regions, and the Statewide Infrastructure Share according to the terms of this MOU.
4. All Opioid Funds, regardless of allocation, shall be used for Approved Purposes.
5. Participating Local Governments may elect to share, pool, or collaborate with their respective allocation of the LG or Regional Shares in any manner they choose, so long as such sharing, pooling, or collaboration is used for Approved Purposes and complies with the terms of this MOU and any Settlement.

C. General Abatement Fund Council

1. A General Abatement Fund Council (the "Abatement Council"), consisting of representatives appointed by the State and Participating Local Governments, shall

² This MOU treats multi-county health departments as county health departments for purposes of allocation and distribution of abatement proceeds and therefore multi-county health departments shall not receive any Opioid Funds directly. Third-Party Payors ("TPPs") are not Parties to this MOU.

be created to ensure the distribution of Opioid Funds complies with the terms of any Settlement and to provide oversight of the Opioid Funds in accordance with the terms of this MOU.

2. **Membership:** The Abatement Council shall consist of the following thirteen (13) members, who shall serve in their official capacity only.

a. **State Members:** Seven (7) members shall be appointed by the State, as authorized volunteers of the State, as follows:

- (i) A Chair to serve as a non-voting member, except in the event of a tie;
- (ii) Two (2) members who are licensed professionals with significant experience in substance use disorders;
- (iii) Three (3) members who are professionals with significant experience in prevention, education, recovery, treatment, criminal justice, rural public health issues, or government administration related to substance use disorders; and
- (iv) One (1) member or family member affected directly by the opioid crisis.

b. **Local Government Members:** Six (6) members shall be appointed by the Participating Local Governments. Local Government Members shall be a County Commissioner, Mayor, City or Town Council Member, or a professional with significant experience in prevention, education, recovery, treatment, criminal justice, rural public health issues, or governmental administration related to substance use disorders. A Participating Local Government may determine which Local Government Members are eligible (or ineligible) to serve on the General Abatement Fund Council. County Commissioners, City or Town Council Members, and/or Mayors from the Regions identified in **Exhibit C** shall collaborate to appoint Local Government Members as follows:

- (i) Two (2) Members from Regions 1, 5, 13, 14, 15, 17, 18;
- (ii) Two (2) Members from Regions 2, 6, 7, 8, 9, 10, 11, 12, 16; and
- (iii) Two (2) Members from Regions 3, 4, 19.

c. **Terms:** The Abatement Council shall be established within ninety (90) days of the Effective Date. In order to do so, within sixty (60) days of the Effective Date, the State shall appoint the State Members in accordance with Section (C)(2)(a), and after conferral with the Local Governments, CCI and CML shall jointly appoint six (6) Local Government Members for an initial term not to exceed one year. Thereafter, Members shall be

appointed in accordance with this Section and Sections (C)(2)(a) and (b) and may serve no more than two (2) consecutive two-year terms, for a total of four (4) consecutive years. Except that, beginning in the second year only, two (2) State Members and two (2) Local Government members shall be appointed for a three-year term and may serve one consecutive two-year term thereafter. The Chair shall have no term but may be replaced at the State's discretion.

- (i) If a State or Local Government Member resigns or is otherwise removed from the Abatement Council prior to the expiration of their term, a replacement Member shall be appointed within sixty (60) days in accordance with Sections (C)(2)(a) and (b).
- (ii) If a Local Government Member vacancy exists for more than sixty (60) days, the State shall appoint a replacement Local Government Member to serve until the vacancy is filled in accordance with Section (C)(2)(b).

3. **Duties:** The Abatement Council is primarily responsible for ensuring that the distribution of Opioid Funds complies with the terms of this MOU. The Abatement Council is also responsible for oversight of Opioid Funds from the Regional Share in accordance with Section (F), below, and for developing processes and procedures for the distribution and oversight of Opioid Funds from the Statewide Infrastructure Share in accordance with Section (G) below.
4. **Governance:** The Abatement Council shall draft its own bylaws or other governing documents, which must include appropriate conflict of interest and dispute resolution provisions, in accordance with the terms of this MOU and the following principles:
 - a. **Authority:** The Abatement Council does not have rulemaking authority. The terms of this MOU and any Settlement, as entered by any court of competent jurisdiction, including any bankruptcy court, control the authority of the Abatement Council and the Abatement Council shall not stray outside the bounds of the authority and power vested by this MOU and any Settlement.
 - b. **Administration:** The Abatement Council shall be responsible for an accounting of all Opioid Funds. The Abatement Council shall be responsible for releasing Opioid Funds in accordance with Section (B)(1) for the Regional and Statewide Infrastructure Shares in Sections (B)(2)(c) and (d) and shall develop policies and procedures for the release and oversight of such funds in accordance with Sections (F) and (G). Should the Abatement Council require assistance with providing an accounting of Opioid Funds, it may seek assistance from the State.

- (i) The Abatement Council shall appoint one of its members to serve as a point of contact for the purpose of communicating with the entity holding Opioid Funds in accordance with Section (B)(1) and in that role shall only act as directed by the Abatement Council.
- c. **Transparency:** The Abatement Council shall operate with all reasonable transparency and operate in a manner consistent with all Colorado laws relating to open records and meetings regardless of whether the Abatement Council is otherwise obligated to comply with them.
 - (i) The Abatement Council shall develop a centralized public dashboard or other repository for the publication of expenditure data from any Party or Regional Council that receives Opioid Funds in accordance with Sections (D)-(G).
 - (ii) The Abatement Council may also require outcome related data from any Party or Regional Council that receives Opioid Funds in accordance with Sections (D)-(G) and may publish such outcome related data in the centralized public dashboard or other repository described above. In determining which outcome related data may be required, the Abatement Council shall work with all Parties and Regional Councils to identify appropriate data sets and develop reasonable procedures for collecting such data sets so that the administrative burden does not outweigh the benefit of producing such outcome related data.
 - (iii) For purposes of funding the centralized public dashboard or other repository described above, the Abatement Council shall make good faith efforts to seek funding from outside sources first, otherwise the State shall provide such funding.
- d. **Collaboration:** The Abatement Council shall facilitate collaboration between the State, Participating Local Governments, Regional Councils, and other stakeholders for the purposes of sharing data, outcomes, strategies, and other relevant information related to abating the opioid crisis in Colorado.
- e. **Decision Making:** The Abatement Council shall seek to make all decisions by consensus. In the event consensus cannot be achieved, unless otherwise required in this MOU, the Abatement Council shall make decisions by a majority vote of its Members. The Chair shall only vote in the event of a tie.
- f. **Due Process:** The Abatement Council shall develop the due process procedures required by Section (G)(3)(d) for Parties to dispute or challenge remedial actions taken by the Abatement Council for Opioid Funds from the Statewide Infrastructure Share. The Abatement Council

shall also abide by the due process principles required by Section (F)(12)-(13) for Regions to dispute or challenge remedial actions taken by the Abatement Council for Opioid Funds from the Regional Share.

- g. **Legal Status:** The Abatement Council shall not constitute a separate legal entity.
- h. **Legal Representation:** To the extent permitted by law, the State shall provide legal counsel to State Members for all legal issues arising from those State Members' work on the Abatement Council. At all times, Local Government Members of the Abatement Council are entitled to receive legal representation from their respective governmental entities. In the event of a conflict, the Abatement Council and its members may retain the services of other legal counsel.
- i. **Compensation:** No member of the Abatement Council shall be compensated for their work related to the Abatement Council.

D. State Share

- 1. In accordance with Sections (B)(1) and (B)(2)(a), and the terms of any Settlement, the State Share shall be paid directly to the State in accordance with the terms of this Section (D).
- 2. The State maintains full discretion over distribution of the State Share anywhere within the State of Colorado, however, the State Share shall be used for Approved Purposes only. The State will work to reduce administrative costs as much as practicable.
- 3. On an annual basis, as determined by the Abatement Council, the State shall provide all expenditure data, including administrative costs, from the State Share to the Abatement Council for purposes of maintaining transparency in accordance with Section (C)(4)(c)(i). The Abatement Council may require the State to provide additional outcome-related data in accordance with Section (C)(4)(c)(ii) and the State shall comply with such requirements.
- 4. If the State disputes the amount of Opioid Funds it receives from the State Share, the State shall alert the Abatement Council within sixty (60) days of discovering the information underlying the dispute. Failure to alert the Abatement Council within this time frame shall not constitute a waiver of the State's right to seek recoupment of any deficiency in its State Share.

E. LG Share

- 1. In accordance with Sections (B)(1) and (B)(2)(b), and the terms of any Settlement, the LG Share shall be paid directly to Participating Local Governments in accordance with the terms of this Section (E).

2. Allocations to Participating Local Governments from the LG Share shall first be determined using the percentages shown in **Exhibit D**.
3. The LG Share for each County Area shall then be allocated among the county and the other Participating Local Governments within it. **Exhibit E** reflects the default allocation that will apply unless the Participating Local Governments within a County Area enter into a written agreement providing for a different allocation. The Participating Local Governments may elect to modify the allocation for a County Area in **Exhibit E**, but such modification to the allocation in **Exhibit E** shall not change a County Area's total allocation under Section (E)(2).
4. A Local Government that chooses not to become a Participating Local Government will not receive a direct allocation from the LG Share. The portion of the LG Share that would have been allocated to a Local Government that is not a Participating Local Government will instead be re-allocated to the Regional Share for the Region where the Local Government is located, in accordance with Section (F), below.
5. In the event a Participating Local Government dissolves or ceases to exist during the term of any Settlement, the allocation for that Participating Local Government from the LG Share shall be re-allocated as directed by any Settlement, and if not specified, be re-allocated to the Regional Share for the Region in which the Participating Local Government was located, in accordance with Section (F). If a Participating Local Government merges with another Participating Local Government, the allocation for that Participating Local Government from the LG Share shall be re-allocated as directed by any Settlement, and if not specified, shall be re-allocated to the successor Participating Local Government's allocation of the LG Share. If a Participating Local Government merges with a Local Government that is not a Participating Local Government, the allocation for that Participating Local Government from the LG Share shall be re-allocated as directed by any Settlement, and if not specified, be re-allocated to the Region in which the merging Participating Local Government was located, in accordance with Section (F), below.
6. A Participating Local Government may forego its allocation of the LG Share and direct its allocation to the Regional Share for the Region where the Participating Local Government is located, in accordance with Section (F) below, by affirmatively notifying the Abatement Council on an annual basis of its decision to forego its allocation of the LG Share. A Participating Local Government's election to forego its allocation of the LG Share shall carry over to the following year unless the Participating Local Government notifies the Abatement Council otherwise. If a Participating Local Government elects to forego its allocation of the LG Share, the Participating Local Government shall be excused from the reporting requirements required by Section (E)(8).
7. Participating Local Governments maintain full discretion over the distribution of their allocation of the LG Share anywhere within the State of Colorado, however,

all Participating Local Governments shall use their allocation from the LG Share for Approved Purposes only. Reasonable administrative costs for a Participating Local Government to administer its allocation of the LG Share shall not exceed actual costs or 10% of the Participating Local Government's allocation of the LG Share, whichever is less.

8. On an annual basis, as determined by the Abatement Council, all Participating Local Governments shall provide all expenditure data, including administrative costs, from their allocation of the LG Share to the Abatement Council for purposes of maintaining transparency in accordance with Section (C)(4)(c)(i). The Abatement Council may require Participating Local Governments to provide additional outcome related data in accordance with Section (C)(4)(c)(ii) and all Participating Local Governments shall comply with such requirements.
9. If any Participating Local Government disputes the amount of Opioid Funds it receives from its allocation of the LG Share, the Participating Local Government shall alert the Abatement Council within sixty (60) days of discovering the information underlying the dispute. Failure to alert the Abatement Council within this time frame shall not constitute a waiver of the Participating Local Government's right to seek recoupment of any deficiency in its LG Share.

F. Regional Share

1. In accordance with Sections (B)(1) and (B)(2)(c), and the terms of any Settlement, the Regional Share shall be paid to the Regions in accordance with the terms of this Section (F).
2. Participating Local Governments shall organize themselves into the Regions depicted in **Exhibit C**. Municipalities located in multiple Regions may join all or some of the Regions in which they are located according to **Exhibit C**.
3. Allocations to Regions will be distributed according to **Exhibit F**. For multi-county Regions, each Region's share listed in **Exhibit F** is calculated by summing the individual percentage shares listed in **Exhibit D** for the counties within that Region. The percentages in **Exhibit F** are based on the assumption that every Local Government in each Region becomes a Participating Local Government.
4. In the event a city, town, or other municipality that is a Participating Local Government merges, dissolves, or ceases to exist during the term of any Settlement, the allocation of the Regional Share owed to the Region in which that Participating Local Government existed shall be re-allocated as directed by any Settlement, and if not specified, shall not be modified from **Exhibit F**. If a county that is a Participating Local Government merges with another county within its Region, the allocation of the Regional Share owed to the Region in which that county existed shall be re-allocated as directed by any Settlement, and if not specified, shall not be modified from **Exhibit F**. If a county that is a Participating Local Government merges with a county in a different Region during the term of

any Settlement, the allocation of the Regional Share owed to the Region in which that county existed shall be re-allocated as directed by any Settlement, and if not specified, shall be re-allocated to the Region in which that Participating Local Government merged in accordance with **Exhibit F**.

5. Each Region must create its own Regional Council while giving consideration to the regional governance models illustrated in **Exhibit G**. The Regional Council must be formed by the Participating Local Governments within the Region and each Regional Council shall designate a fiscal agent for the Region. Regional fiscal agents shall be county or municipal governments only. All funds from the Regional Share shall be distributed to the Regional Council's identified fiscal agent for the benefit of the entire Region.
 - a. Subject to this Section F(5), each Region may draft its own intra-regional agreements, bylaws, or other governing documents to determine how the Regional Council will operate. However, each voting member of a Regional Council shall be an employee or elected official of a Participating Local Government within the applicable Region. In the case of Denver, the voting members of its Regional Council shall be appointed by the Mayor. In the case of Broomfield, the voting members of its Regional Council shall be appointed by the Broomfield City and County Manager.
 - b. The Region shall not receive any Opioid Funds from the Regional Share until the Region certifies to the Abatement Council that its Regional Council has been formed and a fiscal agent has been designated. Such certification shall be in a simple form adopted by the Region and may be made via email, so long as it includes the names and affiliations of the Regional Council's members and the designated fiscal agent.
 - c. If a Region does not form and certify its Regional Council and designate its fiscal agent within one-hundred and eighty (180) days of the Effective Date, the Abatement Council shall appoint members to the Region's Regional Council. Regional Council members appointed by the Abatement Council shall serve until the Region certifies the formation of its Regional Council to the Abatement Council.
 - d. A Region shall submit a renewed certification required by Section (F)(5)(b), above, when its membership changes.
 - e. If a membership vacancy exists on a Regional Council for more than ninety (90) days and the Regional Council is unable to fill the vacancy by its regular procedures during that time, the Abatement Council shall appoint a replacement member to serve until the Region fills the vacancy.

6. A Local Government that chooses not to become a Participating Local Government shall not receive any Opioid Funds from the Regional Share or participate in the Regional Councils described in Section (F)(5) above.
7. Each Regional Council shall make requests to the Abatement Council for Opioid Funds from their allocation of the Regional Share. Each Regional Council's request for Opioid Funds from the Regional Share shall be accompanied by a 2-year plan identifying the Approved Purposes for which the requested funds will be used by the Region anywhere within the State of Colorado. A Regional Council's 2-year plan may be amended so long as such amendments comply with the terms of this MOU and any Settlement. Any Regional Council may seek assistance from the Abatement Council for purposes of developing its 2-year plan.
8. Reasonable administrative costs for a Regional Council to administer its Region's allocation of the Regional Share shall not exceed actual costs or 10% of the Region's allocation of the Regional Share, whichever is less.
9. The Abatement Council shall release funds requested by a Regional Council in accordance with Section (B)(1) if the Regional Council's 2-year plan complies with the Approved Purposes, the terms of this MOU, and the terms of any Settlement. The Abatement Council shall not deny any funding request from a Regional Council on the basis that the Abatement Council does not approve or agree with the Approved Purposes for which a Regional Council requests Opioid Funds from the Regional Share. Nor may the Abatement Council hold up, delay, or make unreasonable requests for additional or supporting information of the Regional Council prior to releasing the requested Opioid Funds. The purpose of this MOU is to facilitate Opioid Funds to their intended recipients quickly and efficiently with minimal administrative procedure.
10. On an annual basis, as determined by the Abatement Council, each Regional Council's fiscal agent shall provide to the Abatement Council the Regional Council's expenditure data, including administrative costs, from their allocation of the Regional Share and certify to the Abatement Council that the Regional Council's expenditures were for Approved Purposes and complied with its 2-year plan. The Regional Council shall subject itself to an accounting at the Abatement Council's discretion.
 - a. The Abatement Council shall review a Regional Council's expenditure data and certification to ensure compliance with the Regional Council's 2-year plan, the Approved Purposes, and the terms of this MOU and any Settlement.
 - b. The Abatement Council shall publish the Regional Council's expenditure data, including administrative costs, from the Regional Share in accordance with Section (C)(4)(c)(i). The Abatement Council may require Regional Councils to provide additional outcome related data in

accordance with Section (C)(4)(c)(ii) and all Regional Councils shall comply with such requirements.

11. If any Regional Council disputes the amount of Opioid Funds it receives from its allocation of the Regional Share, the Regional Council shall alert the Abatement Council within sixty (60) days of discovering the information underlying the dispute. Failure to alert the Abatement Council within this time frame shall not constitute a waiver of the Regional Council's right to seek recoupment of any deficiency in its Regional Share.
12. If the Abatement Council has reason to believe a Region's expenditure of its allocation of the Regional Share did not comply with the Region's 2-year Plan, the Approved Purposes, the terms of this MOU or any Settlement, as described in this Section (F), or that the Region otherwise misused its allocation of the Regional Share, the Abatement Council may take remedial action against the alleged offending Region. Such remedial action is left to the discretion of the Abatement Council and may include but not be limited to, withholding future Opioids Funds owed to the offending Region or requiring the offending Region to reimburse improperly expended Opioid Funds to the Regional Share.
13. Within one hundred and twenty (120) days of the Abatement Council being formed, in accordance with Section (C)(2)(c) above, the Abatement Council shall develop and publish due process procedures for allowing a Region to challenge or dispute any remedial action taken by the Abatement Council, including timelines during which the Region may engage in such a challenge or dispute. Such due process procedures shall reflect, at a minimum, the following principles:
 - a. Upon learning of any conduct that may warrant remedial action against a Region, the Abatement Council shall first provide notice to the Region of the conduct at issue, provide the Region an opportunity to respond, and, if appropriate, cure the alleged offending conduct. If after providing the Region such notice and opportunities to respond and cure, the Abatement Council continues to believe remedial action is warranted, the Abatement Council may take such remedial action.
 - b. If the Abatement Council decides to take remedial action against an alleged offending Region, such action may only occur by a two-thirds supermajority vote of the Abatement Council. Thus, an Abatement Council made up of twelve (12) voting members requires a vote of eight (8) Members prior to taking remedial action against an alleged offending Region.
 - c. Prior to taking any remedial action against an alleged offending Region, the Abatement Council shall first provide notice to the alleged offending Region of the remedial action to be taken and the facts underlying such remedial action. The Abatement Council shall then provide the alleged

offending Region an opportunity to challenge or dispute the remedial action in accordance with, at a minimum, the principles below:

- i. The alleged offending Region may request revisions or modifications to the proposed remedial action;
 - ii. The alleged offending Region may submit a written response to and/or request a hearing before the Abatement Council, or a third-party hearing officer,³ regarding the alleged offending conduct and proposed remedial action; and
 - iii. After such written responses are submitted and reviewed and/or a hearing is conducted, the alleged offending Region may submit an appeal to the Abatement Council of the decision to take remedial action.
- d. Remedial actions taken by the Abatement Council, in accordance with the due process principles detailed above, shall be considered final non-appealable orders and offending Regions may not seek judicial relief from remedial action taken by the Abatement Council, except as provided in Section (H), below.
 - e. Subject to Section (H)(2), below, if any Party(ies) believes the Abatement Council violated the terms of this MOU, such Party(ies) may seek to enforce the terms of this MOU.

14. If the Abatement Council has reason to believe a Region's conduct, or the conduct of any Participating Local Government or individual in that Region, amounts to a violation of any criminal law, the Abatement Council shall refer such matters to the appropriate authorities and may consider such conduct in its determination of any remedial action to be taken.

15. If the Abatement Council has reason to believe that an individual involved in the receipt or administration of Opioid Funds from the Regional Share has violated any applicable ethics rules or codes, the Abatement Council shall not attempt to adjudicate such a violation. In such instances, the Abatement Council shall lodge a complaint with the appropriate forum for handling such ethical matters, such as a local home rule municipality's ethics board.

16. Costs associated with the Abatement Council's distribution and oversight of the Regional Share, as described above in this Section (F), including costs associated with any remedial action by the Abatement Council, shall be paid from the Statewide

³ Only an alleged offending Region may request the appointment of a third-party hearing officer to review any written responses and conduct any requested hearings. If an alleged offending Region makes such a request, the Abatement Council has sole discretion to appoint the third-party hearing officer and the alleged offending Region shall bear the cost of such review and/or hearing by the third-party hearing officer.

Infrastructure Share. The Abatement Council shall make all good faith efforts to limit such costs to the greatest extent possible.

G. Statewide Infrastructure Share

1. In accordance with Sections B(1) and (B)(2)(d), and the terms of any Settlement, the Statewide Infrastructure Share shall be paid to any Party or Regional Council in accordance with this Section (G).
2. The purpose of the Statewide Infrastructure Share is to promote capital improvements and provide operational assistance for developing or improving the infrastructure necessary to abate the opioid crisis anywhere within the State of Colorado. The Statewide Infrastructure Share is intended to supplement Opioid Funds received by any Party or Region.
3. Prior to distributing any Opioid Funds from the Statewide Infrastructure Share, the Abatement Council shall establish and publish policies and procedures for the distribution and oversight of the Statewide Infrastructure Share, including processes for Parties or Regions to apply for Opioid Funds from the Statewide Infrastructure Share. The Abatement Council's policies and procedures shall, at a minimum, reflect the following principles:
 - a. Opioid Funds from the Statewide Infrastructure Share shall be used for Approved Purposes only;
 - b. Opioid Funds from the Statewide Infrastructure Share shall be paid directly to the appropriate state agencies (including but not limited to the Colorado Department of Law), Regional fiscal agents, or Participating Local Governments only;
 - c. Distribution and oversight of the Statewide Infrastructure Share shall comply with the terms of this MOU and any Settlement;
 - d. Appropriate processes for remedial action will be taken against Parties or Regions that misuse Opioid Funds from the Statewide Infrastructure Share. Such processes shall include procedures for alleged offending Parties or Regions to challenge or dispute such remedial action; and
 - e. Limitations on administrative costs to be expended by recipients for administering Opioid Funds received from the Statewide Infrastructure Fund, not to exceed actual costs expended by the recipient or 10% of the amount received, whichever is less.
4. The distribution and oversight policies and procedures developed by the Abatement Council, in accordance with Section (G)(3), shall be non-appealable orders and no Party or Region may seek judicial relief related to the distribution and oversight of the Statewide Infrastructure Share.

5. On an annual basis, as determined by the Abatement Council, any Party or Regional Council that receives funds from the Statewide Infrastructure Share shall provide all expenditure data, including administrative costs, related to any Opioid Funds it received from the Statewide Infrastructure Share and subject itself to an accounting as required by the Abatement Council. The Abatement Council shall publish all expenditure data from the Statewide Infrastructure Share in accordance with Section (C)(4)(c)(i). The Abatement Council may require the Parties or Regional Councils that receive funds from the Statewide Infrastructure Share to provide additional outcome related data in accordance with Section (C)(4)(c)(ii) and the Parties or Regional Councils shall comply with such requirements.
6. Costs associated with the Abatement Council's distribution and oversight of the Statewide Infrastructure Share, as described in this Section (G), shall be paid for from the Statewide Infrastructure Share. The Abatement Council shall make all good faith efforts to limit such costs to the greatest extent possible.

H. General Terms

1. All Parties and Regional Councils shall maintain all records related to the receipt and expenditure of Opioid Funds for no less than five (5) years and shall make such records available for review by the Abatement Council, any other Party or Regional Council, or the public. Records requested by the public shall be produced in accordance with Colorado's open records laws. Records requested by the Abatement Council or another Party or a Regional Council shall be produced within twenty-one (21) days of the date the record request was received. This requirement does not supplant any Party or Regional Council's obligations under Colorado's open records laws.
2. If any Party(ies) believes the Abatement Council has violated the terms of this MOU, the alleging Party(ies) may seek to enforce the terms of this MOU, provided the alleging Party(ies) first provides notice to the Abatement Council of the alleged violation and a reasonable opportunity to cure the alleged violation. In such an enforcement action, the alleging Party(ies) may only seek to enforce the terms of the MOU against the State and the Participating Local Governments from which the Local Government Members of the Abatement Council were appointed and may only seek declaratory and/or injunctive relief. In defense of such an enforcement action, the State's Members of the Abatement Council shall be represented by the State and the Local Government Members shall be represented by the Participating Local Governments from which the Local Government Members were appointed. In the event of a conflict, the Abatement Council and its Members may seek outside representation to defend itself against such an enforcement action.
3. If any Party(ies) believes another Party(ies), not including the Abatement Council, violated the terms of this MOU, the alleging Party(ies) may seek to enforce the terms of this MOU in the court in which any applicable Settlement(s) was entered, provided the alleging Party(ies) first provide the alleged offending Party(ies)

notice of the alleged violation(s) and a reasonable opportunity to cure the alleged violation(s). In such an enforcement action, any alleging Party or alleged offending Party(ies) may be represented by their respective public entity in accordance with Colorado law.

4. Nothing in this MOU shall be interpreted to waive the right of any Party to seek judicial relief for conduct occurring outside the scope of this MOU that violates any Colorado law. In such an action, the alleged offending Party(ies), including the Abatement Council, may be represented by their respective public entities in accordance with Colorado law. In the event of a conflict, any Party, including the Abatement Council and its Members, may seek outside representation to defend itself against such an action.
5. If any Party(ies) believes another Party(ies), Region(s), or individual(s) involved in the receipt, distribution, or administration of Opioids Funds has violated any applicable ethics codes or rules, a complaint shall be lodged with the appropriate forum for handling such matters, such as a local home rule municipality's ethics board.
6. If any Party(ies) believes another Party(ies), Region(s), or individual(s) involved in the receipt, distribution, or administration of Opioid Funds violated any Colorado criminal law, such conduct shall be reported to the appropriate criminal authorities.
7. Venue for any legal action related to this MOU shall be in a court of competent jurisdiction where any applicable Settlement(s) is entered.
8. Because recovery under the terms of different Settlement(s) may vary depending on the number of Parties required to effectuate a Settlement, the Parties may conditionally agree to sign on to the MOU through a letter of intent, resolution or similar written statement, declaration or pronouncement declaring their intent to sign on to the MOU if the threshold for Party participation in a specific Settlement is achieved.⁴
9. This MOU may be executed in two or more counterparts, each of which shall be deemed an original, but all of which shall constitute one and the same instrument. The Parties approve the use of electronic signatures for execution of this MOU. All use of electronic signatures shall be governed by the Uniform Electronic Transactions Act, C.R.S. §§ 24-71.3-101, *et seq.* The Parties agree not to deny the legal effect or enforceability of the MOU solely because it is in electronic form or

⁴ For instance, the July 21, 2021 "Distributor Settlement Agreement" includes a "Subdivision Settlement Agreement Form" that, once filled out and executed, is meant to indicate that Local Government's (or Subdivision's) election to participate in that Distributor Settlement and also, to require that Local Government to take steps to formally release any claim it may have against the Settling Distributors. With regard to the Distributor Settlement Agreement or any other Settlements that include a form similar to the Subdivision Settlement Agreement Form, the Parties may still conditionally agree to sign on to the MOU if, for instance, the threshold for Party participation in a specific Settlement is achieved.

because an electronic record was used in its formation. The Parties agree not to object to the admissibility of the MOU in the form of an electronic record, or a paper copy of an electronic document, or a paper copy of a document bearing an electronic signature, on the ground that it is an electronic record or electronic signature or that it is not in its original form or is not an original.

10. Each party represents that all procedures necessary to authorize such Party's execution of this MOU have been performed and that the person signing for such Party has been authorized to execute the MOU.

I. Payment of Counsel and Litigation Expenses Through a Back-Stop Fund

1. Some Settlements, including the McKesson Corporation, Cardinal Health, Inc., and AmerisourceBergen Corporation ("Distributor") and Johnson & Johnson/Janssen ("J&J") settlements, may provide for the payment of all or a portion of the fees and litigation expenses owed by Participating Local Governments to counsel specifically retained to file suit in the opioid litigation. If any Settlement is insufficient to cover the fee obligations of the Participating Local Governments (as discussed and modified by Judge Polster's Order of August 6 regarding fees for the Distributor and J&J settlements), the deficiencies will be covered as set forth in further detail below.
2. The Parties also recognize that, as in the Distributor and J&J settlements, certain Opioid Settling Defendants may offer premiums benefiting the entire state of Colorado when Participating Local Governments agree to the Settlement(s), thereby settling their claims in their on-going lawsuits. For example, below is the chart illustrating how Incentive Payment B (a 25% premium to the entire state) works in the Distributor Settlement at Section IV.F.2.b (p. 20):

Percentage of Litigating Subdivision Population that is Incentive B Eligible Subdivision Population⁵	Incentive Payment B Eligibility Percentage
Up to 85%	0%
85%+	30%
86+	40%
91+	50%
95+	60%
99%+	95%
100%	100%

3. If the court in *In Re: National Prescription Opiate Litigation*, MDL No. 2804 (N.D. Ohio), or if a Settlement establishes a common benefit fund or similar device to compensate attorneys for services rendered and expenses incurred that have benefited plaintiffs generally in the litigation (the "Common Benefit Fund"),

and/or requires certain governmental plaintiffs to pay a share of their recoveries from defendants into the Common Benefit Fund (“Court-Ordered Common Benefit Fund Assessment”), then the Participating Local Governments shall be required to first seek to have their attorneys’ fees and expenses paid through the Common Benefit Fund.

4. For the Distributor and J&J settlements only, counsel for Participating Local Governments shall have their expenses otherwise recoverable from Colorado Participating Local Governments compensated only through the Common Benefit Fund(s) established in those settlement(s). For the avoidance of doubt, counsel for Participating Local Governments may recover their attorneys’ fees through the Distributor and J&J settlements and through the other applicable provisions of this Section (I).
5. In addition, as a means of covering any deficiencies in paying counsel for Participating Local Governments, a supplemental Colorado Attorney Fee Back-Stop Fund shall be established. The Colorado Attorney Fee Back-Stop Fund is to be used to compensate counsel for Participating Local Governments that filed an initial complaint in the opioid litigation by September 1, 2020 (“Litigating Participating Local Governments”).
6. Payments out of the Colorado Attorney Fee Back-Stop Fund shall be determined by a committee (the “Opioid Fee and Expense Committee”). The Opioid Fee and Expense Committee shall consist of the following five (5) members:
 - a. One (1) member appointed by CCI from a litigating county or from a litigating county and city municipal corporation;
 - b. One (1) member appointed by CML from a litigating city;
 - c. One (1) member appointed jointly by CCI and CML from a non-litigating county or city;
 - d. One (1) member appointed by the Attorney General’s Office; and
 - e. One (1) neutral member jointly appointed by all of the other members listed above.
7. The Colorado Attorney Fee Back-Stop Fund shall be funded as follows from any Settlement, excluding settlements involving McKinsey and payments resulting from the Purdue or Mallinckrodt bankruptcy. For purposes only of calculating the funding of the Colorado Attorney Fee Back-Stop Fund, the Parties deem 58% of the total LG Share and Regional Share to be attributable to the Litigating Local Governments. The Colorado Attorney Fee Back-Stop Fund shall be funded by 8.7% of the total LG Share and 4.35% of the total Regional Share at the time such funds are actually received. No funds deposited into the Colorado Attorney Fee Back-Stop Fund will be taken from the Statewide Infrastructure Share or State Share.

8. Counsel for Litigating Participating Local Governments may apply to the Colorado Attorney Fee Back-Stop Fund only after applying to the Common Benefit Fund.
9. Counsel for Litigating Participating Local Governments may apply to the Colorado Attorney Fee Back-Stop Fund for only a shortfall – that is, the difference between what their fee agreements would entitle them to (as limited by this Section (I)) minus what they have already collected from the Common Benefit Fund (including both the “common benefit” and “contingency fee” calculations, if any). If they receive fees/costs for common benefit work in the national fee fund, these fees/costs will be allocated proportionately across all their local government opioid clients based on the allocation model used in the Negotiation Class website to allocate the appropriate portion to Colorado clients.
10. Counsel for Litigating Participating Local Governments are limited to being paid, at most, and assuming adequate funds are available in any Common Benefit Fund and Colorado Attorney Fee Back-Stop Fund, fees in an amount equal to 15% of the LG Share and 7.5% of the Regional Share attributable to their Colorado clients.
11. Any funds remaining in the Colorado Attorney Fee Back-Stop Fund in excess of the amounts needed to cover the fees and litigation expenses owed by Litigating Participating Local Governments to their respective counsel shall revert to the Participating Local Governments according to the allocations described in Sections (E) and (F). Every two years, the Opioid Fee and Expense Committee shall assess the amount remaining in the Colorado Attorney Fee Back-Stop Fund to determine if it is overfunded.
12. Despite the fact that a litigating entity bonus benefits the entire state, no portion of the State Share shall be used to fund the Colorado Attorney Fee Back-Stop Fund or in any other way to fund any Participating Local Government’s attorneys’ fees and expenses. Because the state did not hire outside counsel, any funds for attorneys fees that the state receives from the J&J and Distributor settlement will be deposited into the State Share.
13. To participate in the Colorado Attorney Fee Back-Stop Fund, counsel must follow the requirements of C.R.S. § 13-17-304.

This Colorado Opioids Settlement Memorandum of Understanding is signed

this 26 day of August, 2021 by:



Colorado Attorney General Philip J. Weiser

Exhibit A

This Colorado Opioids Settlement Memorandum of Understanding is signed
this 27th day of October, 2021 by:

Name & Title Scott Fetchenier, Chairman

On behalf of SAN JUAN COUNTY

POTENTIAL OPIOID ABATEMENT APPROVED PURPOSES

I. TREATMENT

A. TREATMENT OF OPIOID USE DISORDER AND ITS EFFECTS

1. Expand availability of treatment, including Medication-Assisted Treatment (MAT), for Opioid Use Disorder (OUD) and any co-occurring substance use or mental health issues.
2. Supportive housing, all forms of FDA-approved MAT, counseling, peer-support, recovery case management and residential treatment with access to medications for those who need it.
3. Treatment of mental health trauma issues that resulted from the traumatic experiences of the opioid user (e.g., violence, sexual assault, human trafficking) and for family members (e.g., surviving family members after an overdose or overdose fatality).
4. Expand telehealth to increase access to OUD treatment, including MAT, as well as counseling, psychiatric support, and other treatment and recovery support services.
5. Fellowships for addiction medicine specialists for direct patient care, instructors, and clinical research for treatments.
6. Scholarships for certified addiction counselors.
7. Clinicians to obtain training and a waiver under the federal Drug Addiction Treatment Act to prescribe MAT for OUD.
8. Training for health care providers, students, and other supporting professionals, such as peer recovery coaches/recovery outreach specialists, including but not limited to training relating to MAT and harm reduction.
9. Dissemination of accredited web-based training curricula, such as the American Academy of Addiction Psychiatry's Provider Clinical Support Service-Opioids web-based training curriculum and motivational interviewing.
10. Development and dissemination of new accredited curricula, such as the American Academy of Addiction Psychiatry's Provider Clinical Support Service Medication-Assisted Treatment.
11. Development of a multistate/nationally accessible database whereby health care providers can list currently available in-patient and out-patient OUD treatment services that are accessible on a real-time basis.

12. Support and reimburse services that include the full American Society of Addiction Medicine (ASAM) continuum of care for OUD.
13. Improve oversight of Opioid Treatment Programs (OTPs) to assure evidence-informed practices such as adequate methadone dosing.

B. INTERVENTION

1. Ensure that health care providers are screening for OUD and other risk factors and know how to appropriately counsel and treat (or refer, if necessary) a patient for OUD treatment.
2. Fund Screening, Brief Intervention and Referral to Treatment (SBIRT) programs to reduce the transition from use to disorder.
3. Training and long-term implementation of SBIRT in key systems (health, schools, colleges, criminal justice, and probation), with a focus on the late adolescence and young adulthood when transition from misuse to opioid disorder is most common.
4. Purchase automated versions of SBIRT and support ongoing costs of the technology.
5. Training for emergency room personnel treating opioid overdose patients on post-discharge planning, including community referrals for MAT, recovery case management and/or support services.
6. Support work of Emergency Medical Systems, including peer support specialists, to connect individuals to treatment or other appropriate services following an opioid overdose or other opioid-related adverse event.
7. Create school-based contacts whom parents can engage to seek immediate treatment services for their child.
8. Develop best practices on addressing OUD in the workplace.
9. Support assistance programs for health care providers with OUD.
10. Engage non-profits and faith community as a system to support outreach for treatment.

C. CRIMINAL-JUSTICE-INVOLVED PERSONS

1. Address the needs of persons involved in the criminal justice system who have OUD and any co-occurring substance use disorders or mental health (SUD/MH) issues.

2. Support pre-arrest diversion and deflection strategies for persons with OUD and any co-occurring SUD/MH issues, including established strategies such as:
 - a. Self-referral strategies such as Angel Programs or the Police Assisted Addiction Recovery Initiative (PAARI);
 - b. Active outreach strategies such as the Drug Abuse Response Team (DART) model;
 - c. “Naloxone Plus” strategies, which work to ensure that individuals who have received Naloxone to reverse the effects of an overdose are then linked to treatment programs;
 - d. Officer prevention strategies, such as the Law Enforcement Assisted Diversion (LEAD) model; or
 - e. Officer intervention strategies such as the Leon County, Florida Adult Civil Citation Network.
3. Support pre-trial services that connect individuals with OUD and any co-occurring SUD/MH issues to evidence-informed treatment, including MAT, and related services.
4. Support treatment and recovery courts for persons with OUD and any co-occurring SUD/MH issues, but only if they provide referrals to evidence-informed treatment, including MAT.
5. Provide evidence-informed treatment, including MAT, recovery support, harm reduction, or other appropriate services to individuals with OUD and any co-occurring SUD/MH issues who are incarcerated, on probation, or on parole.
6. Provide evidence-informed treatment, including MAT, recovery support, harm reduction, or other appropriate re-entry services to individuals with OUD and any co-occurring SUD/MH issues who are leaving jail or prison or who have recently left jail or prison.
7. Support critical time interventions (CTI), particularly for individuals living with dual-diagnosis OUD/serious mental illness, and services for individuals who face immediate risks and service needs and risks upon release from correctional settings.

D. WOMEN WHO ARE OR MAY BECOME PREGNANT

1. Evidence-informed treatment, including MAT, recovery, and prevention services for pregnant women or women who could become pregnant and have OUD.
2. Training for obstetricians and other healthcare personnel that work with pregnant women and their families regarding OUD treatment.

3. Other measures to address Neonatal Abstinence Syndrome, including prevention, care for addiction and education programs.
4. Child and family supports for parenting women with OUD.
5. Enhanced family supports and child care services for parents receiving treatment for OUD.

E. PEOPLE IN TREATMENT AND RECOVERY

1. The full continuum of care of recovery services for OUD and any co-occurring substance use or mental health issues, including supportive housing, residential treatment, medical detox services, peer support services and counseling, community navigators, case management, and connections to community-based services.
2. Identifying successful recovery programs such as physician, pilot, and college recovery programs, and providing support and technical assistance to increase the number and capacity of high-quality programs to help those in recovery.
3. Training and development of procedures for government staff to appropriately interact and provide social and other services to current and recovering opioid users, including reducing stigma.
4. Community-wide stigma reduction regarding treatment and support for persons with OUD, including reducing the stigma on effective treatment.
5. Engaging non-profits and faith community as a system to support family members in their efforts to help the opioid user in the family.

II. PREVENTION

F. PRESCRIBING PRACTICES

1. Training for health care providers regarding safe and responsible opioid prescribing, dosing, and tapering patients off opioids.
2. Academic counter-detailing.
3. Continuing Medical Education (CME) on prescribing of opioids.
4. Support for non-opioid pain treatment alternatives, including training providers to offer or refer to multi-modal, evidence-informed treatment of pain.
5. Fund development of a multistate/national prescription drug monitoring program (PDMP) that permits information sharing while providing appropriate safeguards on sharing of private information, including but not limited to:

- a. Integration of PDMP data with electronic health records, overdose episodes, and decision support tools for health care providers relating to OUD.
 - b. Ensuring PDMPs incorporate available overdose/naloxone deployment data, including the United States Department of Transportation's Emergency Medical Technician overdose database.
6. Educating dispensers on appropriate opioid dispensing.

G. MISUSE OF OPIOIDS

1. Corrective advertising/affirmative public education campaigns.
2. Public education relating to drug disposal.
3. Drug take-back disposal or destruction programs.
4. Fund community anti-drug coalitions that engage in drug-abuse prevention efforts.
5. School-based programs that have demonstrated effectiveness in preventing drug misuse and seem likely to be effective in preventing the uptake and use of opioids.
6. Support community coalitions in implementing evidence-informed prevention, such as reduced social access and physical access, stigma reduction – including staffing, educational campaigns, or training of coalitions in evidence-informed implementation.
7. School and community education programs and campaigns for students, families, school employees, school athletic programs, parent-teacher and student associations, and others.
8. Engaging non-profits and faith community as a system to support prevention.

H. OVERDOSE DEATHS AND OTHER HARMS

1. Increasing availability and distribution of naloxone and other drugs that treat overdoses to first responders, overdose patients, opioid users, families and friends of opioid users, schools, community navigators and outreach workers, drug offenders upon release from jail/prison, and other members of the general public.
2. Training and education regarding naloxone and other drugs that treat overdoses for first responders, overdose patients, patients taking opioids, families, schools, and other members of the general public.

3. Developing data tracking software and applications for overdoses/naloxone revivals.
4. Public education relating to emergency responses to overdoses.
5. Free naloxone for anyone in the community.
6. Public education relating to immunity and Good Samaritan laws.
7. Educating first responders regarding the existence and operation of immunity and Good Samaritan laws.
8. Syringe service programs, including supplies, staffing, space, peer support services, and the full range of harm reduction and treatment services provided by these programs.
9. Expand access to testing and treatment for infectious diseases such as HIV and Hepatitis C resulting from intravenous opioid use.

III. ADDITIONAL AREAS

I. SERVICES FOR CHILDREN

1. Support for children's services: Fund additional positions and services, including supportive housing and other residential services, relating to children being removed from the home and/or placed in foster care due to custodial opioid use.

J. FIRST RESPONDERS

1. Law enforcement expenditures relating to the opioid epidemic.
2. Educating first responders regarding appropriate practices and precautions when dealing with fentanyl or other drugs.
3. Increase electronic prescribing to prevent diversion and forgery.

K. COMMUNITY LEADERSHIP

1. Regional planning to identify goals for opioid reduction and support efforts or to identify areas and populations with the greatest needs for treatment intervention services.
2. Government dashboard to track key opioid-related indicators and supports as identified through collaborative community processes.

L. STAFFING AND TRAINING

1. Funding for programs and services regarding staff training and networking to improve staff capability to abate the opioid crisis.
2. Support infrastructure and staffing for collaborative cross-systems coordination to prevent opioid misuse, prevent overdoses, and treat those with OUD (e.g., health care, primary care, pharmacies, PDMPs, etc.).

M. RESEARCH

1. Funding opioid abatement research.
2. Research improved service delivery for modalities such as SBIRT that demonstrate promising but mixed results in populations vulnerable to OUD.
3. Support research for novel harm reduction and prevention efforts such as the provision of fentanyl test strips.
4. Support for innovative supply-side enforcement efforts such as improved detection of mail-based delivery of synthetic opioids.
5. Expanded research for swift/certain/fair models to reduce and deter opioid misuse within criminal justice populations that build upon promising approaches used to address other substances (e.g. Hawaii HOPE and Dakota 24/7).
6. Research expanded modalities such as prescription methadone that can expand access to MAT.

N. OTHER

1. Administrative costs for any of the approved purposes on this list.

Exhibit B

Colorado Local Governments*

Government Name	County	Gov't Type	Multi-County
Adams County	Adams	County	
Arvada	Adams	City	2 counties
Aurora	Adams	City	3 counties
Bennett	Adams	City	2 counties
Brighton	Adams	City	2 counties
Commerce City	Adams	City	
Federal Heights	Adams	City	
Lochbuie	Adams	City	2 counties
Northglenn	Adams	City	2 counties
Thornton	Adams	City	2 counties
Westminster	Adams	City	2 counties
Alamosa County	Alamosa	County	
Alamosa	Alamosa	City	
Hooper	Alamosa	City	
Arapahoe County	Arapahoe	County	
Aurora	Arapahoe	City	3 counties
Bennett	Arapahoe	City	2 counties
Bow Mar	Arapahoe	City	2 counties
Centennial	Arapahoe	City	
Cherry Hills Village	Arapahoe	City	
Columbine Valley	Arapahoe	City	
Deer Trail	Arapahoe	City	
Englewood	Arapahoe	City	
Foxfield	Arapahoe	City	
Glendale	Arapahoe	City	
Greenwood Village	Arapahoe	City	
Littleton	Arapahoe	City	3 counties
Sheridan	Arapahoe	City	
Archuleta County	Archuleta	County	
Pagosa Springs	Archuleta	City	
Baca County	Baca	County	
Campo	Baca	City	
Pritchett	Baca	City	
Springfield	Baca	City	
Two Buttes	Baca	City	
Vilas	Baca	City	
Walsh	Baca	City	
Bent County	Bent	County	
Las Animas	Bent	City	
Boulder County	Boulder	County	
Boulder	Boulder	City	
Erie	Boulder	City	2 counties
Jamestown	Boulder	City	
Lafayette	Boulder	City	

Colorado Local Governments*

Government Name	County	Gov't Type	Multi-County
Longmont	Boulder	City	2 counties
Louisville	Boulder	City	
Lyons	Boulder	City	
Nederland	Boulder	City	
Superior	Boulder	City	2 counties
Ward	Boulder	City	
Broomfield	Broomfield	City/County	
Chaffee County	Chaffee	County	
Buena Vista	Chaffee	City	
Poncha Springs	Chaffee	City	
Salida	Chaffee	City	
Cheyenne County	Cheyenne	County	
Cheyenne Wells	Cheyenne	City	
Kit Carson	Cheyenne	City	
Clear Creek County	Clear Creek	County	
Central City	Clear Creek	City	2 counties
Empire	Clear Creek	City	
Georgetown	Clear Creek	City	
Idaho Springs	Clear Creek	City	
Silver Plume	Clear Creek	City	
Conejos County	Conejos	County	
Antonito	Conejos	City	
La Jara	Conejos	City	
Manassa	Conejos	City	
Romeo	Conejos	City	
Sanford	Conejos	City	
Costilla County	Costilla	County	
Blanca	Costilla	City	
San Luis	Costilla	City	
Crowley County	Crowley	County	
Crowley	Crowley	City	
Olney Springs	Crowley	City	
Ordway	Crowley	City	
Sugar City	Crowley	City	
Custer County	Custer	County	
Silver Cliff	Custer	City	
Westcliffe	Custer	City	
Delta County	Delta	County	
Cedaredge	Delta	City	
Crawford	Delta	City	
Delta	Delta	City	
Hotchkiss	Delta	City	
Orchard City	Delta	City	
Paonia	Delta	City	

Colorado Local Governments*

Government Name	County	Gov't Type	Multi-County
Denver	Denver	City/County	
Dolores County	Dolores	County	
Dove Creek	Dolores	City	
Rico	Dolores	City	
Douglas County	Douglas	County	
Aurora	Douglas	City	3 counties
Castle Pines	Douglas	City	
Castle Rock	Douglas	City	
Larkspur	Douglas	City	
Littleton	Douglas	City	3 counties
Lone Tree	Douglas	City	
Parker	Douglas	City	
Eagle County	Eagle	County	
Avon	Eagle	City	
Basalt	Eagle	City	2 counties
Eagle	Eagle	City	
Gypsum	Eagle	City	
Minturn	Eagle	City	
Red Cliff	Eagle	City	
Vail	Eagle	City	
El Paso County	El Paso	County	
Calhan	El Paso	City	
Colorado Springs	El Paso	City	
Fountain	El Paso	City	
Green Mountain Falls	El Paso	City	2 counties
Manitou Springs	El Paso	City	
Monument	El Paso	City	
Palmer Lake	El Paso	City	
Ramah	El Paso	City	
Elbert County	Elbert	County	
Elizabeth	Elbert	City	
Kiowa	Elbert	City	
Simla	Elbert	City	
Fremont County	Fremont	County	
Brookside	Fremont	City	
Cañon City	Fremont	City	
Coal Creek	Fremont	City	
Florence	Fremont	City	
Rockvale	Fremont	City	
Williamsburg	Fremont	City	
Garfield County	Garfield	County	
Carbondale	Garfield	City	
Glenwood Springs	Garfield	City	
New Castle	Garfield	City	

Colorado Local Governments*

Government Name	County	Gov't Type	Multi-County
Parachute	Garfield	City	
Rifle	Garfield	City	
Silt	Garfield	City	
Gilpin County	Gilpin	County	
Black Hawk	Gilpin	City	
Central City	Gilpin	City	2 counties
Grand County	Grand	County	
Fraser	Grand	City	
Granby	Grand	City	
Grand Lake	Grand	City	
Hot Sulphur Springs	Grand	City	
Kremmling	Grand	City	
Winter Park	Grand	City	
Gunnison County	Gunnison	County	
Crested Butte	Gunnison	City	
Gunnison	Gunnison	City	
Marble	Gunnison	City	
Mount Crested Butte	Gunnison	City	
Pitkin	Gunnison	City	
Hinsdale County	Hinsdale	County	
Lake City	Hinsdale	City	
Huerfano County	Huerfano	County	
La Veta	Huerfano	City	
Walsenburg	Huerfano	City	
Jackson County	Jackson	County	
Walden	Jackson	City	
Jefferson County	Jefferson	County	
Arvada	Jefferson	City	2 counties
Bow Mar	Jefferson	City	2 counties
Edgewater	Jefferson	City	
Golden	Jefferson	City	
Lakeside	Jefferson	City	
Lakewood	Jefferson	City	
Littleton	Jefferson	City	3 counties
Morrison	Jefferson	City	
Mountain View	Jefferson	City	
Superior	Jefferson	City	2 counties
Westminster	Jefferson	City	2 counties
Wheat Ridge	Jefferson	City	
Kiowa County	Kiowa	County	
Eads	Kiowa	City	
Haswell	Kiowa	City	
Sheridan Lake	Kiowa	City	
Kit Carson County	Kit Carson	County	

Colorado Local Governments*

Government Name	County	Gov't Type	Multi-County
Bethune	Kit Carson	City	
Burlington	Kit Carson	City	
Flagler	Kit Carson	City	
Seibert	Kit Carson	City	
Stratton	Kit Carson	City	
Vona	Kit Carson	City	
La Plata County	La Plata	County	
Bayfield	La Plata	City	
Durango	La Plata	City	
Ignacio	La Plata	City	
Lake County	Lake	County	
Leadville	Lake	City	
Larimer County	Larimer	County	
Berthoud	Larimer	City	2 counties
Estes Park	Larimer	City	
Fort Collins	Larimer	City	
Johnstown	Larimer	City	2 counties
Loveland	Larimer	City	
Timnath	Larimer	City	2 counties
Wellington	Larimer	City	
Windsor	Larimer	City	2 counties
Las Animas County	Las Animas	County	
Aguilar	Las Animas	City	
Branson	Las Animas	City	
Cokedale	Las Animas	City	
Kim	Las Animas	City	
Starkville	Las Animas	City	
Trinidad	Las Animas	City	
Lincoln County	Lincoln	County	
Arriba	Lincoln	City	
Genoa	Lincoln	City	
Hugo	Lincoln	City	
Limon	Lincoln	City	
Logan County	Logan	County	
Crook	Logan	City	
Fleming	Logan	City	
Iliff	Logan	City	
Merino	Logan	City	
Peetz	Logan	City	
Sterling	Logan	City	
Mesa County	Mesa	County	
Collbran	Mesa	City	
De Beque	Mesa	City	
Fruita	Mesa	City	

Colorado Local Governments*

Government Name	County	Gov't Type	Multi-County
Grand Junction	Mesa	City	
Palisade	Mesa	City	
Mineral County	Mineral	County	
City of Creede	Mineral	City	
Moffat County	Moffat	County	
Craig	Moffat	City	
Dinosaur	Moffat	City	
Montezuma County	Montezuma	County	
Cortez	Montezuma	City	
Dolores	Montezuma	City	
Mancos	Montezuma	City	
Montrose County	Montrose	County	
Montrose	Montrose	City	
Naturita	Montrose	City	
Nucla	Montrose	City	
Olathe	Montrose	City	
Morgan County	Morgan	County	
Brush	Morgan	City	
Fort Morgan	Morgan	City	
Hillrose	Morgan	City	
Log Lane Village	Morgan	City	
Wiggins	Morgan	City	
Otero County	Otero	County	
Cheraw	Otero	City	
Fowler	Otero	City	
La Junta	Otero	City	
Manzanola	Otero	City	
Rocky Ford	Otero	City	
Swink	Otero	City	
Ouray County	Ouray	County	
Ouray	Ouray	City	
Ridgway	Ouray	City	
Park County	Park	County	
Alma	Park	City	
Fairplay	Park	City	
Phillips County	Phillips	County	
Haxtun	Phillips	City	
Holyoke	Phillips	City	
Paoli	Phillips	City	
Pitkin County	Pitkin	County	
Aspen	Pitkin	City	
Basalt	Pitkin	City	2 counties
Snowmass Village	Pitkin	City	
Prowers County	Prowers	County	

Colorado Local Governments*

Government Name	County	Gov't Type	Multi-County
Granada	Prowers	City	
Hartman	Prowers	City	
Holly	Prowers	City	
Lamar	Prowers	City	
Wiley	Prowers	City	
Pueblo County	Pueblo	County	
Boone	Pueblo	City	
Pueblo	Pueblo	City	
Rye	Pueblo	City	
Rio Blanco County	Rio Blanco	County	
Meeker	Rio Blanco	City	
Rangely	Rio Blanco	City	
Rio Grande County	Rio Grande	County	
Center	Rio Grande	City	2 counties
Del Norte	Rio Grande	City	
Monte Vista	Rio Grande	City	
South Fork	Rio Grande	City	
Routt County	Routt	County	
Hayden	Routt	City	
Oak Creek	Routt	City	
Steamboat Springs	Routt	City	
Yampa	Routt	City	
Saguache County	Saguache	County	
Bonanza	Saguache	City	
Center	Saguache	City	2 counties
Crestone	Saguache	City	
Moffat	Saguache	City	
Saguache	Saguache	City	
San Juan County	San Juan	County	
Silverton	San Juan	City	
San Miguel County	San Miguel	County	
Mountain Village	San Miguel	City	
Norwood	San Miguel	City	
Ophir	San Miguel	City	
Sawpit	San Miguel	City	
Telluride	San Miguel	City	
Sedgwick County	Sedgwick	County	
Julesburg	Sedgwick	City	
Ovid	Sedgwick	City	
Sedgwick	Sedgwick	City	
Summit County	Summit	County	
Blue River	Summit	City	
Breckenridge	Summit	City	
Dillon	Summit	City	

Colorado Local Governments*

Government Name	County	Gov't Type	Multi-County
Frisco	Summit	City	
Montezuma	Summit	City	
Silverthorne	Summit	City	
Teller County	Teller	County	
Cripple Creek	Teller	City	
Green Mountain Falls	Teller	City	2 counties
Victor	Teller	City	
Woodland Park	Teller	City	
Washington County	Washington	County	
Akron	Washington	City	
Otis	Washington	City	
Weld County	Weld	County	
Ault	Weld	City	
Berthoud	Weld	City	2 counties
Brighton	Weld	City	2 counties
Dacono	Weld	City	
Eaton	Weld	City	
Erie	Weld	City	2 counties
Evans	Weld	City	
Firestone	Weld	City	
Fort Lupton	Weld	City	
Frederick	Weld	City	
Garden City	Weld	City	
Gilcrest	Weld	City	
Greeley	Weld	City	
Grover	Weld	City	
Hudson	Weld	City	
Johnstown	Weld	City	2 counties
Keenesburg	Weld	City	
Kersey	Weld	City	
La Salle	Weld	City	
Lochbuie	Weld	City	2 counties
Longmont	Weld	City	2 counties
Mead	Weld	City	
Milliken	Weld	City	
Northglenn	Weld	City	2 counties
Nunn	Weld	City	
Pierce	Weld	City	
Platteville	Weld	City	
Raymer (New Raymer)	Weld	City	
Severance	Weld	City	
Thornton	Weld	City	2 counties
Timnath	Weld	City	2 counties
Windsor	Weld	City	2 counties

Colorado Local Governments*

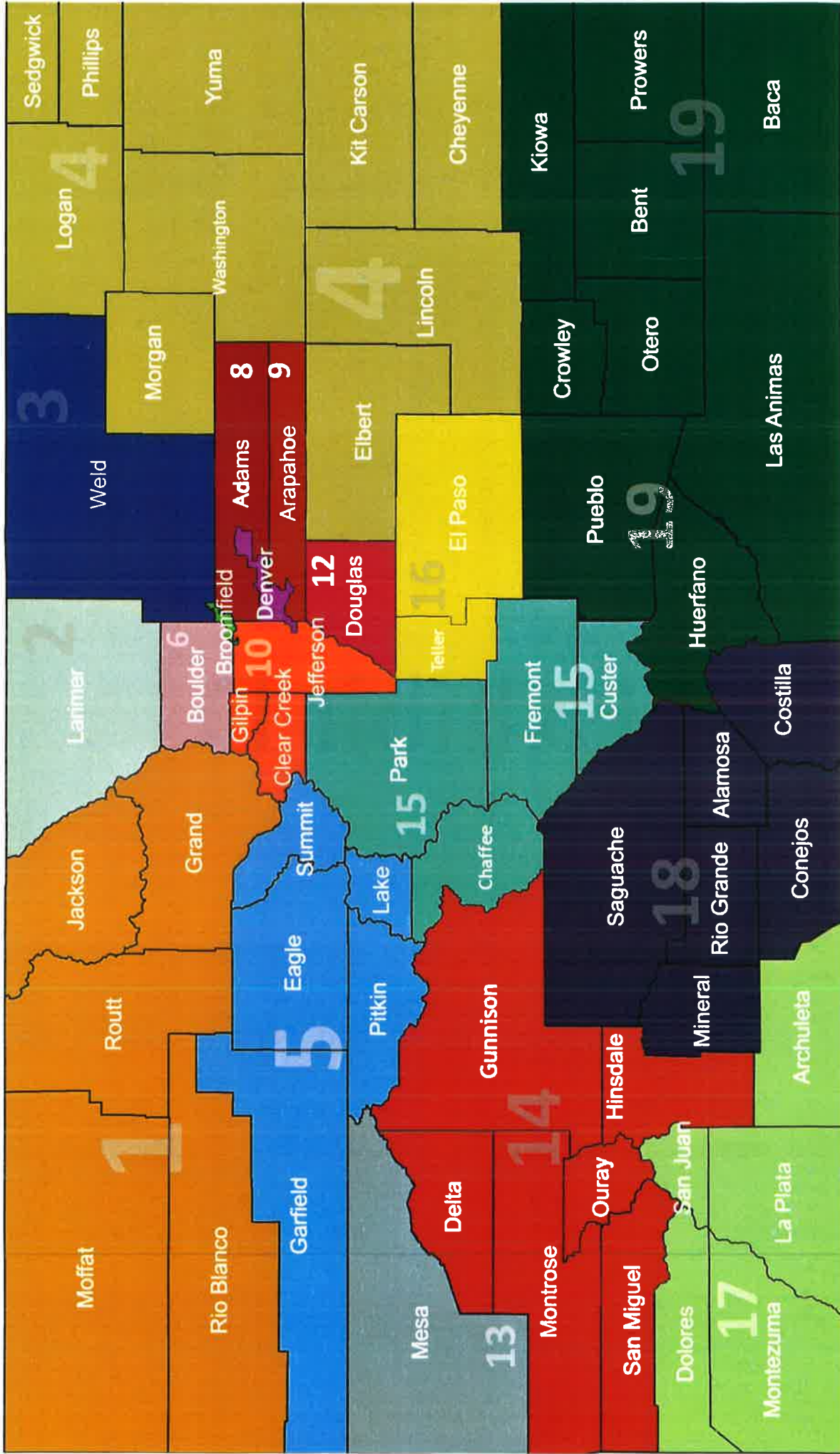
Government Name	County	Gov't Type	Multi-County
Yuma County	Yuma	County	
Eckley	Yuma	City	
Wray	Yuma	City	
Yuma	Yuma	City	

*This list includes all 64 Colorado counties and all 271 municipalities listed in the 2019 Census. Cities located in multiple counties are listed under each corresponding county subheading. City and County of Denver and City and County of Broomfield are counted in both the city and county totals. The City of Carbonate is not included in this list, as there was no population in the 2019 Census data.

This list will be reconciled as necessary to be consistent with the terms of Settlement(s) with Opioid Settling Defendant(s)

Exhibit C

Regions for the distribution of opioid settlement funds



- Region 1
- Region 2
- Region 3
- Region 4
- Region 5
- Region 6
- Region 7 (Broomfield)
- Region 8
- Region 9
- Region 10
- Region 11 (Denver)
- Region 12
- Region 13
- Region 14
- Region 15
- Region 16
- Region 17
- Region 18
- Region 19

Exhibit D

Exhibit D - Allocations to Colorado County Areas

County	Percentage of LG Share
Adams	9.4247%
Alamosa	0.5081%
Arapahoe	10.8071%
Archuleta	0.1370%
Baca	0.0592%
Bent	0.1133%
Boulder	5.7936%
Broomfield	1.0014%
Chaffee	0.3604%
Cheyenne	0.0159%
Clear Creek	0.1380%
Conejos	0.2108%
Costilla	0.0552%
Crowley	0.0934%
Custer	0.0412%
Delta	0.5440%
Denver	15.0042%
Dolores	0.0352%
Douglas	3.6696%
Eagle	0.6187%
El Paso	11.9897%
Elbert	0.2804%
Fremont	0.9937%
Garfield	0.8376%
Gilpin	0.0561%
Grand	0.2037%
Gunnison	0.1913%
Hinsdale	0.0112%
Huerfano	0.2505%
Jackson	0.0310%
Jefferson	10.5173%
Kiowa	0.0142%
Kit Carson	0.0940%
La Plata	0.8127%
Lake	0.0990%
Larimer	6.5211%
Las Animas	0.6304%
Lincoln	0.0819%
Logan	0.3815%
Mesa	2.8911%
Mineral	0.0039%
Moffat	0.2326%
Montezuma	0.4429%

Montrose	0.5695%
Morgan	0.4677%
Otero	0.4486%
Ouray	0.0535%
Park	0.1674%
Phillips	0.0714%
Pitkin	0.1747%
Prowers	0.1727%
Pueblo	5.6757%
Rio Blanco	0.1013%
Rio Grande	0.2526%
Routt	0.3837%
Saguache	0.0666%
San Juan	0.0097%
San Miguel	0.1005%
Sedgwick	0.0618%
Summit	0.3761%
Teller	0.6219%
Washington	0.0357%
Weld	3.8908%
Yuma	0.0992%
TOTAL	100.0000%

Exhibit E

Exhibit E - Intracounty Allocations^{1,2}

The below chart depicts the default percentage that each Local Government will receive from the LG Share amount attributed to its County Area, as described in Section (E)(3) of the MOU. The chart assumes full participation by all Local Governments

Government Name	Intracounty Share
Adams County	68.3372%
Arvada (2 Counties)	0.2632%
Aurora (3 Counties)	4.6336%
Bennett (2 Counties)	0.1670%
Brighton (2 Counties)	1.4527%
Commerce City	4.7314%
Federal Heights	1.1457%
Lochbuie (2 Counties)	0.0001%
Northglenn (2 Counties)	2.0913%
Thornton (2 Counties)	10.6435%
Westminster (2 Counties)	6.5342%

Alamosa County	85.3075%
Alamosa	14.6818%
Hooper	0.0108%

Arapahoe County	42.7003%
Aurora (3 Counties)	35.5997%
Bennett (2 Counties)	0.0324%
Bow Mar (2 Counties)	0.0159%
Centennial	0.4411%
Cherry Hills Village	0.6685%
Columbine Valley	0.1601%
Deer Trail	0.0003%
Englewood	5.5850%
Foxfield	0.0372%
Glendale	1.2289%
Greenwood Village	2.8305%
Littleton (3 Counties)	8.5654%
Sheridan	2.1347%

Archuleta County	90.0864%
Pagosa Springs	9.9136%

Baca County	85.9800%
Campo	2.4443%
Pritchett	1.5680%
Springfield	7.0100%

Government Name	Intracounty Share
Two Buttes	0.4766%
Vilas	0.9070%
Walsh	1.6141%

Bent County	80.9608%
Las Animas	19.0392%

Boulder County	47.6311%
Boulder	31.7629%
Fire (2 Counties)	0.3634%
Jamestown	0.0086%
Lafayette	3.3203%
Longmont (2 Counties)	14.6833%
Louisville	1.4455%
Lyons	0.5916%
Nederland	0.1646%
Superior (2 Counties)	0.0258%
Ward	0.0030%

Broomfield County/City	100.0000%
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Chaffee County	74.8440%
Buena Vista	5.8841%
Poncha Springs	4.2369%
Salida	15.0350%

Cheyenne County	66.8002%
Cheyenne Wells	0.8586%
Kit Carson	32.3412%

Clear Creek County	92.2164%
Central City (2 Counties)	0.0000%
Empire	0.3364%
Georgetown	1.9063%
Idaho Springs	4.7625%
Silver Plume	0.7784%

Conejos County	77.1204%
Antonito	4.6338%
La Jara	2.4313%
Manassa	1.0062%
Romeo	2.4270%
Sanford	12.3812%

Government Name	Intracounty Share
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Costilla County	97.3454%
Blanca	1.2036%
San Luis	1.4509%

Crowley County	80.7081%
Crowley	4.3597%
Olney Springs	8.3683%
Ordway	0.1853%
Sugar City	6.3786%

Custer County	96.6858%
Silver Cliff	0.7954%
Westcliffe	2.5188%

Delta County	76.3512%
Cedaredge	3.6221%
Crawford	0.4938%
Delta	16.2658%
Hotchkiss	1.0963%
Orchard City	0.1473%
Paonia	2.0236%

Denver County/City	100.0000%
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Dolores County	76.3307%
Dove Creek	17.3127%
Rico	6.3566%

Douglas County	71.8404%
Aurora (3 Counties)	0.2099%
Castle Pines	0.2007%
Castle Rock	13.5204%
Larkspur	0.0856%
Littleton (3 Counties)	0.0156%
Lone Tree	5.2786%
Parker	8.8487%

Eagle County	60.8236%
Avon	7.6631%
Basalt (2 Counties)	2.2311%
Eagle	3.1376%
Gypsum	1.7469%
Minturn	0.7771%

Government Name	Intracounty Share
Red Cliff	0.0957%
Vail	23.5250%

El Paso County	18.4181%
Calhan	0.0228%
Colorado Springs	80.1161%
Fountain	0.9892%
Green Mountain Falls (2 Counties)	0.0149%
Manitou Springs	0.2411%
Monument	0.1492%
Palmer Lake	0.0455%
Ramah	0.0033%

Elbert County	86.5840%
Elizabeth	10.2633%
Kiowa	1.5455%
Simla	1.6072%

Fremont County	60.7882%
Brookside	0.0348%
Cañon City	30.9017%
Coal Creek	0.0476%
Florence	8.0681%
Rockvale	0.0687%
Williamsburg	0.0907%

Garfield County	76.3371%
Carbondale	2.4698%
Glenwood Springs	11.8141%
New Castle	1.4295%
Parachute	1.0653%
Rifle	5.2733%
Silt	1.6110%

Gilpin County	46.8613%
Black Hawk	46.3909%
Central City (2 Counties)	6.7478%

Grand County	80.1046%
Fraser	2.4903%
Granby	5.4008%
Grand Lake	0.3174%
Hot Sulphur Springs	0.1431%
Kremmling	2.9284%

Government Name	Intracounty Share
Winter Park	8.6154%

Gunnison County	88.9185%
Crested Butte	2.3562%
Gunnison	5.9501%
Marble	0.1714%
Mount Crested Butte	2.5657%
Pitkin	0.0381%

Hinsdale County	76.0940%
Lake City	23.9060%

Huerfano County	68.2709%
La Veta	11.0719%
Walsenburg	20.6572%

Jackson County	61.5339%
Walden	38.4661%

Jefferson County	58.2140%
Arvada (2 Counties)	11.9733%
Bow Mar (2 Counties)	0.0087%
Edgewater	0.6604%
Golden	3.4815%
Lakeside	0.0030%
Lakewood	15.9399%
Littleton (3 Counties)	0.6176%
Morrison	0.2205%
Mountain View	0.1344%
Superior (2 Counties)	0.0000%
Westminster (2 Counties)	5.4779%
Wheat Ridge	3.2689%

Kiowa County	93.2138%
Eads	5.3777%
Haswell	0.6402%
Sheridan Lake	0.7682%

Kit Carson County	86.3178%
Bethune	0.1841%
Burlington	12.0640%
Flagler	0.4264%
Seibert	0.0291%
Stratton	0.9012%

Government Name	Intracounty Share
Vona	0.0775%

La Plata County	66.8874%
Bayfield	1.6292%
Durango	29.2985%
Ignacio	2.1849%

Lake County	73.4523%
Leadville	26.5477%

Larimer County	56.0589%
Berthoud (2 Counties)	0.4139%
Estes Park	0.3502%
Fort Collins	18.5702%
Johnstown (2 Counties)	0.0711%
Loveland	23.4493%
Timnath (2 Counties)	0.2964%
Wellington	0.3653%
Windsor (2 Counties)	0.4248%

Las Animas County	77.8076%
Aguilar	0.0751%
Branson	0.0101%
Cokedale	0.0188%
Kim	0.0101%
Starkville	0.0087%
Trinidad	22.0696%

Lincoln County	91.3222%
Arriba	0.3444%
Genoa	0.2222%
Hugo	1.4778%
Limon	6.6333%

Logan County	72.7982%
Crook	0.0931%
Fleming	0.3413%
Iliff	0.0095%
Merino	0.4702%
Peetz	0.2029%
Sterling	26.0848%

Mesa County	60.8549%
Collbran	0.0920%

Government Name	Intracounty Share
De Beque	0.0123%
Fruita	1.6696%
Grand Junction	37.1505%
Palisade	0.2208%

Mineral County	87.6744%
City of Creede	12.3256%

Moffat County	91.7981%
Craig	8.1862%
Dinosaur	0.0157%

Montezuma County	79.6682%
Cortez	18.6459%
Dolores	0.6106%
Mancos	1.0753%

Montrose County	92.8648%
Montrose	6.5980%
Naturita	0.1551%
Nucla	0.0703%
Olathe	0.3118%

Morgan County	61.6991%
Brush	8.5522%
Fort Morgan	27.8214%
Hillrose	0.1986%
Log Lane Village	0.6424%
Wiggins	1.0863%

Otero County	60.8168%
Cheraw	0.1888%
Fowler	1.0413%
La Junta	25.9225%
Manzanola	0.6983%
Rocky Ford	8.8215%
Swink	2.5109%

Ouray County	76.0810%
Ouray	17.6541%
Ridgway	6.2649%

Park County	96.3983%
Alma	0.7780%

Government Name	Intracounty Share
Fairplay	2.8237%

Phillips County	52.3463%
Haxtun	13.9505%
Holyoke	33.1803%
Paoli	0.5228%

Pitkin County	47.1379%
Aspen	42.0707%
Basalt (2 Counties)	1.1156%
Snowmass Village	9.6757%

Prowers County	70.4524%
Granada	0.9965%
Hartman	0.3164%
Holly	4.9826%
Lamar	21.5860%
Wiley	1.6661%

Pueblo County	54.6622%
Boone	0.0019%
Pueblo	45.3350%
Rye	0.0008%

Rio Blanco County	78.2831%
Meeker	9.1326%
Rangely	12.5843%

Rio Grande County	68.0724%
Center (2 Counties)	0.7713%
Del Norte	6.7762%
Monte Vista	20.4513%
South Fork	3.9288%

Routt County	58.5353%
Hayden	1.0679%
Oak Creek	0.6360%
Steamboat Springs	39.4499%
Yampa	0.3109%

Saguache County	92.8796%
Bonanza	0.1367%
Center (2 Counties)	6.3687%
Crestone	0.0137%

Government Name	Intracounty Share
Moffat	0.3553%
Saguache	0.2460%

San Juan County	87.0423%
Silverton	12.9577%

San Miguel County	48.7493%
Mountain Village	25.7930%
Norwood	0.4078%
Ophir	0.0816%
Sawpit	0.0272%
Telluride	24.9411%

Sedgwick County	98.7331%
Julesburg	0.3830%
Ovid	0.0295%
Sedgwick	0.8544%

Summit County	57.0567%
Blue River	0.5011%
Breckenridge	26.1112%
Dillon	4.1421%
Frisco	6.5096%
Montezuma	0.0169%
Silverthorne	5.6623%

Teller County	66.1557%
Cripple Creek	17.2992%
Green Mountain Falls (2 Counties)	0.0322%
Victor	3.1685%
Woodland Park	13.3445%

Washington County	99.1320%
Akron	0.7659%
Otis	0.1021%

Weld County	51.9387%
Ault	0.3202%
Berthoud (2 Counties)	0.0061%
Brighton (2 Counties)	0.0927%
Dacono	0.6104%
Eaton	0.4573%
Eric (2 Counties)	0.8591%
Evans	4.5121%

Government Name	Intracounty Share
Firestone	1.4648%
Fort Lupton	0.8502%
Frederick	1.2228%
Garden City	0.1514%
Gilcrest	0.1580%
Greeley	30.6922%
Grover	0.0852%
Hudson	0.0066%
Johnstown (2 Counties)	1.5416%
Keenesburg	0.0215%
Kersey	0.1378%
La Salle	0.4128%
Lochbuie (2 Counties)	0.4004%
Longmont (2 Counties)	0.0154%
Mead	0.0941%
Milliken	1.5373%
Northglenn (2 Counties)	0.0030%
Nunn	0.2558%
Pierce	0.0948%
Platteville	0.3712%
Raymer (New Raymer)	0.0597%
Severance	0.0403%
Thornton (2 Counties)	0.0000%
Timnath (2 Counties)	0.0000%
Windsor (2 Counties)	1.5865%

Yuma County	75.5598%
Eckley	2.5422%
Wray	10.2148%
Yuma	11.6832%

¹ These allocations are based on the allocation model used in the Negotiation Class website. The allocation model is the product of prolonged and intensive research, analysis, and discussion by and among members of the court-appointed Plaintiffs' Executive Committee and Settlement Committee and their retained public health and health economics experts, as well as a series of meetings with scores of cities, counties and subdivisions. Additional information about the allocation model is available on the Negotiation Class website.

The allocations in the Negotiation Class website use two different methodologies:

County-Level Allocation

The allocation model uses three factors, based on reliable, detailed, and objective data collected and reported by the federal government, to determine the share of a settlement fund that each county will receive. The three factors are: (1) the amount of opioids shipped to the county, (2) the number of opioid deaths in that county, and (3) the number of people who suffer opioid use disorder in that county.

County/Municipal-Level Allocation

The county/municipal-level allocation is a default allocation to be used if another agreement is not reached between the county and its constituent cities. The formula uses U.S. Census Bureau data on local government spending. This data covers cities and counties for 98% of the U.S. population. If a jurisdiction lacked this data, it was extrapolated based on available data.

² The municipalities of Bow Mar, Johnstown, and Timnath were not reflected as being in multiple counties in the Negotiation Class website. The estimated allocations to those cities are based on the same methodology used in the website, in consultation with the expert. For cities in multiple counties, please see each county in which that city lies.

Exhibit F

Regional Allocations		
Region Number	Region Description	Total State Share
1	Northwest	0.9522%
2	Larimer	6.5211%
3	Weld	3.8908%
4	Logan	1.5896%
5	North Central	2.1061%
6	Boulder	5.7936%
7	Broomfield	1.0014%
8	Adams	9.4247%
9	Arapahoe	10.8071%
10	Jefferson	10.7114%
11	Denver	15.0042%
12	Douglas	3.6696%
13	Mesa	2.8911%
14	Southwest	1.4700%
15	Central	1.5627%
16	El Paso/Teller	12.6116%
17	Southwest Corner	1.4375%
18	South Central	1.0973%
19	Southeast	7.4580%
Total		100.0000%

Exhibit G

Regional Governance Models

A. Membership Structure

Single-County Regions

1. Voting Members (Recommended List: Participating Local Governments to Decide)
 - 1 or 2 representatives appointed by the county (can be commissioners)
 - 1 representative appointed from the public health department
 - 1 representative from the county human services department
 - 1 representative appointed from law enforcement within region (sheriff, police, local city or town district attorney, etc.)
 - 1 representative appointed from a municipal or county court system within region
 - 1-3 representatives (total) appointed by the cities within the county (or other city or cities agreed upon) (can be councilmembers and mayors)
 - Such other representatives as participating counties/cities agree on (not to include providers who may be recipients of funds)
2. Non-Voting Members (Optional but strongly encouraged)
 - Representatives from behavioral health providers
 - Representatives from health care providers
 - Recovery/treatment experts
 - Other county or city representatives
 - A representative from the Attorney General's Office
 - Community representative(s), preferably those with lived experience with the opioid crisis
 - Harm reduction experts

Multi-County Regions

1. Voting Members (Recommended List: Participating Local Governments to Decide)
 - 1 representative appointed by each county (can be commissioners)
 - 1 representative appointed by a rotating city within each county (or other city agreed upon) (can be councilmembers and mayors)
 - 1 representative from each public health department within the region
 - 1 representative from a county human services department
 - At least 1 representative appointed from law enforcement within region (sheriff, police, local city or town district attorney, etc.)
 - 1 representative from a municipal or county court system within region
 - Such other representatives as participating counties/cities agree on (not to include providers who may be recipients of funds)
2. Non-Voting Members (Optional)
 - Representatives from behavioral health providers

- Representatives from health care providers
- Recovery/treatment experts
- Other county or city representatives
- A representative from the Attorney General’s Office
- Community representative(s), preferably those with lived experience with the opioid crisis.
- Harm reduction experts

Single-County Single-City Regions (Denver & Broomfield)

1. Voting Members (Recommended List: Participating Local Government to Decide)¹

- 1 representative appointed by the city and county
- 1 representative appointed from the public health department
- 1 representative from the county human services department
- 1 representative appointed from law enforcement within region (sheriff, police, district attorney, etc.)
- 1 representative appointed from a municipal or county court system within region
- Such other representatives as participating counties/cities agree on (not to include providers who may be recipients of funds)

2. Non-Voting Members (Optional)

- Representatives from behavioral health providers
- Representatives from health care providers
- Recovery/treatment experts
- Other county or city representatives
- A representative from the Attorney General’s Office
- Community representative(s), preferably those with lived experience with the opioid crisis.
- Harm reduction experts

B. Member Terms

- Regions may establish terms of appointment for members. Appointment terms may be staggered.

C. Procedures

- Regions will be governed by an intergovernmental agreement (“IGA”) or memorandum of understanding (“MOU”).
- Regions may adopt the Model Colorado Regional Opioid Intergovernmental Agreement, attached here as Exhibit G-1, in its entirety or alter or amend it as they deem appropriate.

¹ In Denver, the Mayor shall make voting member appointments to the Regional Council. In Broomfield, the City and County Manager shall make voting member appointments to the Regional Council.

- Regions may establish their own procedures through adoption of bylaws (model bylaws to be made available).
- Meetings of regional board/committee shall be open to the public and comply with the Colorado Open Meetings Law (including requirement to keep minutes).

D. Financial Responsibility/Controls

- A local government entity shall nominate and designate a fiscal agent for the Region.
- A Regional fiscal agent must be appointed by the Regional Council on an annual basis. A Regional fiscal agent may serve as long as the Regional Council determines is appropriate, including the length of any Settlement that contemplates the distribution of Opioid Funds within Colorado. However, the Regional fiscal agent also can change over time.
- Regional fiscal agents must be a board of county commissioners or a city or town council or executive department, such as a department of finance.
- Yearly reporting by fiscal agent (using standard form) to the Abatement Council.
- All documents subject to CORA.

E. Conflicts of Interest

- Voting members shall abide by the conflict-of-interest rules applicable to local government officials under state law.

F. Ethics Laws

- Voting members shall abide by applicable state or local ethics laws, as appropriate.

G. Authority

- The Regional Council for each region shall have authority to decide how funds allocated to the region shall be distributed in accordance with the Colorado MOU and shall direct the fiscal agent accordingly.
- Any necessary contracts will be entered into by the fiscal agent, subject to approval by the Regional Council.

H. Legal Status

- The region shall not be considered a separate legal entity, unless the Participating Local Governments decide, through an IGA, to create a separate governmental entity.

Exhibit G-1

MODEL COLORADO REGIONAL OPIOID
INTERGOVERNMENTAL AGREEMENT²

THIS MODEL COLORADO REGIONAL OPIOID INTERGOVERNMENTAL AGREEMENT (the “Regional Agreement”) is made between _____, a Participating Local Government, as defined in the Colorado MOU, in the _____ Region (“_____”) and _____, a Participating Local Government in the _____ Region, (“_____”), individually herein a “Regional PLG” and collectively the “Regional PLGs.””

RECITALS

WHEREAS, the State of Colorado and Participating Local Governments executed the Colorado Opioids Summary Memorandum of Understanding on _____ 2021 (the “Colorado MOU”), establishing the manner in which Opioid Funds shall be divided and distributed within the State of Colorado;

WHEREAS, the Regional Agreement assumes and incorporates the definitions and provisions contained in the Colorado MOU, and the Regional Agreement shall be construed in conformity with the Colorado MOU³;

WHEREAS, all Opioid Funds, regardless of allocation, shall be used for Approved Purposes;

WHEREAS, Participating Local Governments shall organize themselves into Regions, as further depicted in **Exhibit E** to the Colorado MOU;

² This Model Regional Agreement is meant to serve as an example for the various Regions and to facilitate the flow of Opioid Funds to their intended purposes. Regions are free to adopt this Regional Agreement in its entirety or alter or amend it as they deem appropriate.

³ When drafting agreements like this Regional Agreement, Regional PLGs should be conscious of the definitions used therein so as not to confuse such definitions with those used in the Colorado MOU. The Definitions in the Colorado MOU shall supersede any definitions used by Regional PLGs in a Regional Agreement.

WHEREAS, Regions may consist of Single-County Regions, Multi-County Regions, or Single County-Single City Regions (Denver and Broomfield).

WHEREAS, there shall be a 60% direct allocation of Opioid Funds to Regions through a Regional Share;

WHEREAS, each Region shall be eligible to receive a Regional Share according to **Exhibit C** to the Colorado MOU;

WHEREAS, the Colorado MOU establishes the procedures by which each Region shall be entitled to Opioid Funds from the Abatement Council and administer its Regional Share allocation;

WHEREAS, the procedures established by the Colorado MOU include a requirement that each Region shall create its own Regional Council;

WHEREAS, all aspects of the creation, administration, and operation of the Regional Council shall proceed in accordance with the provisions of the Colorado MOU;

WHEREAS, each such Regional Council shall designate a fiscal agent from a county or municipal government within that Region;

WHEREAS, each such Regional Council shall submit a two-year plan to the Abatement Council that identifies the Approved Purposes for which the requested funds will be used, and the Regional Council's fiscal agent shall provide data and a certification to the Abatement Council regarding compliance with its two-year plan on an annual basis;

WHEREAS, the Regional Agreement pertains to the procedures for the Regional PLGs to establish a Regional Council, designate a fiscal agent, and request and administer Opioid Funds in a manner consistent with the Colorado MOU;

NOW, THEREFORE, in consideration of the mutual covenants and agreements hereinafter set forth and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Regional PLGs incorporate the recitals set forth above and agree as follows:

1. **DEFINITIONS.** The defined terms used in this Regional Agreement shall have the same meanings as in the Colorado MOU⁴. Capitalized terms used herein and not otherwise defined within the Regional Agreement or in the Colorado MOU shall have the meanings ascribed to them in the body of the Regional Agreement.
2. **OBLIGATIONS OF THE REGIONAL PLGS.** The Regional PLGs shall perform their respective obligations as set forth in the Regional Agreement, the Colorado MOU and the accompanying exhibits to the Colorado MOU and incorporated herein by reference.
3. **REGIONAL COUNCIL.**
 - 3.1. **Purpose:** In accordance with the Colorado MOU, a Regional Council, consisting of representatives appointed by the Regional PLGs, shall be created to oversee the procedures by which a Region may request Opioid Funds from the Abatement Council and the procedures by which the allocation of its Region's Share of Opioid Funds are administered.
 - 3.2. **Membership:** The Regional Council of a Multi-County or Single County Region shall consist of the following:
 - a. **Multi-County Region:**
 - (i) **Voting Members.** Voting Members shall be appointed by the Regional PLGs. The Regional PLGs shall collaborate to appoint Regional Council members and to the extent practicable, Voting Members shall be selected from different counties and cities. No single county or city should dominate the make-up of the Regional Council. Voting Members shall be selected as follows:
 - (1) 1 representative appointed by each county (can be commissioners).
 - (2) 1 representative appointed from a rotating city within each county (or other city agreed upon) (can be councilmembers and mayors). A rotating city member shall be selected by majority vote of the cities within each county who do not have a Voting Member currently sitting on the Regional

⁴ See FN 2, *supra*.

Council.

- (3) 1 representative from each public health department within the region.
- (4) 1 representative from a county human services department.
- (5) At least 1 representative appointed from law enforcement within the region (sheriff, police, local city or town district attorney, etc.).
- (6) 1 representative from a municipal or county court system within the region.

b. **Single-County Region:**

- (i) **Voting Members.** Voting Members shall be appointed by the Regional PLGs. The Regional PLGs shall collaborate to appoint Regional Council members and to the extent practicable, Voting Members shall be selected from different cities within the region. No single city should dominate the make-up of the Regional Council. Voting Members shall be selected as follows:
 - (1) 1 or 2 representatives appointed by the county (can be commissioners)
 - (2) 1 representative appointed from the public health department
 - (3) 1 representative from the county human services department
 - (4) 1 representative appointed from law enforcement within region (sheriff, police, local city or town district attorney, etc.)
 - (5) 1 representative appointed from a municipal or county court system within region
 - (6) 1-3 representatives (total) appointed by rotating cities within the county (or other city or cities agreed upon) (can be councilmembers and mayors). Rotating city members shall be selected by majority vote of the cities who do not have a Voting Member currently sitting on the Regional Council.
 - (7) Such other representatives as participating counties/cities agree on (not to include providers who may be recipients of

funds)

- c. **Non-Voting Members.** For both Multi-County and Single County Regions, Non-Voting Members are optional but are strongly encouraged. Non-voting members shall serve in an advisory capacity. Any Non-Voting Members shall be appointed by the Regional PLGs and may be comprised of all or some of the following, not to include potential recipients of funds:
 - (i) Representatives from behavioral health providers.
 - (ii) Representatives from health care providers.
 - (iii) Recovery/treatment experts.
 - (iv) Other county or city representatives.
 - (v) A representative from the Attorney General's Office.
 - (vi) Community representative(s), preferably those with lived experience with the opioid crisis.
 - (vii) Harm reduction experts.
- d. **Acting Chair:** The Voting Members for both Multi-County and Single-County Regions shall appoint one member to serve as Acting Chair of the Regional Council. The Acting Chair's primary responsibilities shall be to schedule periodic meetings and votes of the Regional Council as needed and to serve as the point of contact for disputes within the Region. The Acting Chair must be either a Member from a county within a Region, such as a county commissioner or their designee, or a Member from a city or town within a Region, such as a mayor or city or town council member or their designee.
- e. **Non-Participation:** A Local Government that chooses not to become a Participating Local Government in the Colorado MOU shall not receive any Opioid Funds from the Regional Share or participate in the Regional Council.
- f. **Terms:** The Regional Council shall be established within ninety (90) days of the first Settlement being entered by a court of competent jurisdiction, including any bankruptcy court. In order to do so, within sixty (60) days of the first Settlement being entered, CCI and CML shall jointly recommend six (6) Voting Members, and so long as such recommendations comply with the terms of Section 3.2 (a) or (b), the Regional Council shall consist of CCI/CML's recommended Members for

an initial term not to exceed one year.⁵ Thereafter, Voting Members shall be appointed in accordance with Section 3.2 (a) or (b) and shall serve two-year terms. Following the expiration of that two-year term, the Regional PLGs, working in concert, shall reappoint that Voting Member, or appoint a new Voting Member according to Section 3.2 (a) or (b).

- (i) If a Voting Member resigns or is otherwise removed from the Regional Council prior to the expiration of their term, a replacement Voting Member shall be appointed within sixty (60) days in accordance with Section 3.2 (a) or (b) to serve the remainder of the term. If the Regional PLGs are unable to fill a Voting Member vacancy within sixty (60) days, the existing Voting Members of the Regional Council at the time of the vacancy shall work collectively to appoint a replacement Voting Member in accordance with Section 3.2 (a) or (b). At the end of his or her term, the individual serving as that replacement Voting Member may be reappointed by the Regional PLGs to serve a full term consistent with this Section.
- (ii) The purpose of the two-year term is to allow Regional PLGs an increased opportunity to serve on the Regional Council. However, Regional Council members who have already served on the Regional Council may be appointed more than once and may serve consecutive terms if appointed to do so by the Regional Council.

3.3. Duties: The Regional Council is primarily responsible for engaging with the Abatement Council on behalf of its Region and following the procedures outlined in the Colorado MOU for requesting Opioid Funds from the Regional Share, which shall include developing 2-year plans, amending those plans as appropriate, and providing the Abatement Council with data through its fiscal agent regarding Opioid Fund expenditures. Upon request from the Abatement Council, the Regional Council may also be subject to an accounting from the Abatement Council.

3.4. Governance: A Regional Council may establish its own procedures through adoption of bylaws if needed. Any governing documents must be consistent with the other provisions in this section and the Colorado MOU.

3.5. Authority: The terms of the Colorado MOU control the authority of a Regional Council and a Regional Council shall not stray outside the bounds of the authority and power vested by the Colorado MOU. Should a Regional Council require legal assistance in determining its authority,

⁵ Local Governments within Multi-County or Single County Regions may decide to select initial Voting Members of the Regional Council between themselves and without CCI and CML involvement. However, the Regional Council must be established within ninety (90) days of the first Settlement being entered by a court of competent jurisdiction, including any bankruptcy court.

it may seek guidance from the legal counsel of the county or municipal government of the Regional Council's fiscal agent at the time the issue arises.

3.6. Collaboration: The Regional Council shall facilitate collaboration between the State, Participating Local Governments within its Region, the Abatement Council, and other stakeholders within its Region for the purposes of sharing data, outcomes, strategies, and other relevant information related to abating the opioid crisis in Colorado.

3.7. Transparency: The Regional Council shall operate with all reasonable transparency and abide by all Colorado laws relating to open records and meetings. To the extent the Abatement Council requests outcome-related data from the Regional Council, the Regional Council shall provide such data in an effort to determine best methods for abating the opioid crisis in Colorado.

3.8. Conflicts of Interest: Voting Members shall abide by the conflict-of-interest rules applicable to local government officials under state law.

3.9. Ethics Laws: Voting Members shall abide by their local ethics laws or, if no such ethics laws exist, by applicable state ethics laws.

3.10. Decision Making: The Regional Council shall seek to make all decisions by consensus. In the event consensus cannot be achieved, the Regional Council shall make decisions by a majority vote of its Members.

4. REGIONAL FISCAL AGENT

4.1. Purpose: According to the Colorado MOU, the Regional Council must designate a fiscal agent for the Region prior to the Region receiving any Opioid funds from the Regional Share. All funds from the Regional Share shall be distributed to the Regional Council's fiscal agent for the benefit of the entire Region.

4.2. Designation: The Regional Council shall nominate and designate a fiscal agent for the Region by majority vote. Regional fiscal agents must be a board of county commissioners or a city or town council or executive department, such as a department of finance.

4.3. Term: A Regional fiscal agent must be appointed by the Regional Council on an annual basis. A Regional fiscal agent may serve as long as the Regional Council determines is appropriate, including the length of any Settlement that contemplates the distribution of Opioid Funds within Colorado.

4.4. Duties: The Regional fiscal agent shall receive, deposit, and make available Opioid Funds distributed from the Abatement Council and provide expenditure reporting data to the

Abatement Council on an annual basis. In addition, the Regional fiscal agent shall perform certain recordkeeping duties outlined below.

- a. **Opioid Funds:** The Regional fiscal agent shall receive all Opioid Funds as distributed by the Abatement Council. Upon direction by the Regional Council, the Regional fiscal agent shall make any such Opioid Funds available to the Regional Council.
- b. **Reporting:** On an annual basis, as determined by the Abatement Council, the Regional fiscal agent shall provide to the Abatement Council the Regional Council's expenditure data from their allocation of the Regional Share and certify to the Abatement Council that the Regional Council's expenditures were for Approved Purposes and complied with its 2-year plan.
- c. **Recordkeeping:** The Regional fiscal agent shall maintain necessary records with regard the Regional Council's meetings, decisions, plans, and expenditure data.

4.5. Authority: The fiscal agent serves at the direction of the Regional Council and in service to the entire Region. The terms of the Colorado MOU control the authority of a Regional Council, and by extension, the Regional fiscal agent. A Regional fiscal agent shall not stray outside the bounds of the authority and power vested by the Colorado MOU.

5. REGIONAL TWO-YEAR PLAN

5.1. Purpose: According to the Colorado MOU, as part of a Regional Council's request to the Abatement Council for Opioid Funds from its Regional Share, the Regional Council must submit a 2-year plan identifying the Approved Purposes for which the requested funds will be used.

5.2 Development of 2-Year Plan: In developing a 2-year plan, the Regional Council shall solicit recommendations and information from all Regional PLGs and other stakeholders within its Region for the purposes of sharing data, outcomes, strategies, and other relevant information related to abating the opioid crisis in Colorado. At its discretion, a Regional Council may seek assistance from the Abatement Council for purposes of developing a 2-year plan.

5.3 Amendment: At any point, a Regional Council's 2-year plan may be amended so long as such amendments comply with the terms of the Colorado MOU and any Settlement.

6. DISPUTES WITHIN REGION. In the event that any Regional PLG disagrees with a decision of the Regional Council, or there is a dispute regarding the appointment of Voting or Non-Voting Members to the Regional Council, that Regional PLG shall inform the Acting Chair of its dispute at the earliest

possible opportunity. In Response, the Regional Council shall gather any information necessary to resolve the dispute. Within fourteen (14) days of the Regional PLG informing the Acting Chair of its dispute, the Regional Council shall issue a decision with respect to the dispute. In reaching its decision, the Regional Council may hold a vote of Voting Members, with the Acting Chair serving as the tie-breaker, or the Regional Council may devise its own dispute resolution process. However, in any disputes regarding the appointment of a Voting Member, that Voting Member will be recused from voting on the dispute. The decision of the Regional Council is a final decision.

7. **DISPUTES WITH ABATEMENT COUNCIL.** If the Regional Council disputes the amount of Opioid Funds it receives from its allocation of the Regional Share, the Regional Council shall alert the Abatement Council within sixty (60) days of discovering the information underlying the dispute. However, the failure to alert the Abatement Council within this time frame shall not constitute a waiver of the Regional Council's right to seek recoupment of any deficiency in its Regional Share.
8. **RECORDKEEPING.** The acting Regional fiscal agent shall be responsible for maintaining records consistent with the Regional Agreement.
9. **AUTHORIZED REPRESENTATIVES.** Each Regional PLGs' representative designated below shall be the point of contact to coordinate the obligations as provided herein. The Regional PLGs designate their authorized representatives under this Regional Agreement as follows:
 - 9.1. _____ designates the ____ of the _____ or their designee(s).
 - 9.2. _____ designates the ____ of the _____ or their designee(s).
10. **OBLIGATIONS OF THE REGIONAL PLGS.** The Regional PLGs shall perform their respective obligations as set forth in the Regional Agreement, the Colorado MOU and the accompanying exhibits to the Colorado MOU and incorporated herein by reference.
11. **TERM.** The Regional Agreement will commence on _____, and shall expire on the date the last action is taken by the Region, consistent with the terms of the Colorado MOU and any Settlement. (the "Term").
12. **INFORMATIONAL OBLIGATIONS.** Each Regional PLG hereto will meet its obligations as set forth in § 29-1-205, C.R.S., as amended, to include information about this Regional Agreement in a filing with the Colorado Division of Local Government; however, failure to do so shall in no way affect the validity of this Regional Agreement or any remedies available to the Regional PLGs hereunder.
13. **CONFIDENTIALITY.** The Regional PLGs, for themselves, their agents, employees and representatives, agree that they will not divulge any confidential or proprietary information they receive from another Regional PLG or otherwise have access to, except as may be required by law. Nothing in this Regional

Agreement shall in any way limit the ability of the Regional PLGs to comply with any laws or legal process concerning disclosures by public entities. The Regional PLGs understand that all materials exchanged under this Regional Agreement, including confidential information or proprietary information, may be subject to the Colorado Open Records Act., § 24-72-201, *et seq.*, C.R.S., (the "Act"). In the event of a request to a Regional PLG for disclosure of confidential materials, the Regional PLG shall advise the Regional PLGs of such request in order to give the Regional PLGs the opportunity to object to the disclosure of any of its materials which it marked as, or otherwise asserts is, proprietary or confidential. If a Regional PLG objects to disclosure of any of its material, the Regional PLG shall identify the legal basis under the Act for any right to withhold. In the event of any action or the filing of a lawsuit to compel disclosure, the Regional PLG agrees to intervene in such action or lawsuit to protect and assert its claims of privilege against disclosure of such material or waive the same. If the matter is not resolved, the Regional PLGs may tender all material to the court for judicial determination of the issue of disclosure.

14. **GOVERNING LAW; VENUE**. This Regional Agreement shall be governed by the laws of the State of Colorado. Venue for any legal action relating solely to this Regional Agreement will be in the applicable District Court of the State of Colorado for the county of the Region's fiscal agent. Venue for any legal action relating to the Colorado MOU shall be in a court of competent jurisdiction where a Settlement or consent decree was entered, as those terms are described or defined in the Colorado MOU. If a legal action relates to both a Regional Agreement and the Colorado MOU, venue shall also be in a court of competent jurisdiction where a Settlement or consent decree was entered.
15. **TERMINATION**. The Regional PLGs enter into this Regional Agreement to serve the public interest. If this Regional Agreement ceases to further the public interest, a Regional PLG, in its discretion, may terminate their participation in the Regional Agreement, in whole or in part, upon written notice to the other Regional PLGs. Each Regional PLG also has the right to terminate the Regional Agreement with cause upon written notice effective immediately, and without cause upon thirty (30) days prior written notice to the other Regional PLGs. A Regional PLG's decision to terminate this Regional Agreement, with or without cause, shall have no impact on the other Regional PLGs present or future administration of its Opioid Funds and the other procedures outlined in this Regional Agreement. Rather, a Regional PLG's decision to terminate this Regional Agreement shall have the same effect as non-participation, as outlined in Section 3.2 (e).
16. **NOTICES**. "Key Notices" under this Regional Agreement are notices regarding default, disputes, or termination of the Regional Agreement. Key Notices shall be given in writing and shall be deemed

received if given by confirmed electronic transmission that creates a record that may be retained, retrieved and reviewed by a recipient thereof, and that may be directly reproduced in paper form by such a recipient through an automated process, but specifically excluding facsimile transmissions and texts when transmitted, if transmitted on a business day and during normal business hours of the recipient, and otherwise on the next business day following transmission; certified mail, return receipt requested, postage prepaid, three business days after being deposited in the United States mail; or overnight carrier service or personal delivery, when received. For Key Notices, the Regional PLGs will follow up any electronic transmission with a hard copy of the communication by the means described above. All other communications or notices between the Regional PLGs that are not Key Notices may be done via electronic transmission. The Regional PLGs agree that any notice or communication transmitted by electronic transmission shall be treated in all manner and respects as an original written document; any such notice or communication shall be considered to have the same binding and legal effect as an original document. All Key Notices shall include a reference to the Regional Agreement, and Key Notices shall be given to the Regional PLGs at the following addresses:

17. GENERAL TERMS AND CONDITIONS

- 17.1. Independent Entities.** The Regional PLGs enter into this Regional Agreement as separate, independent governmental entities and shall maintain such status throughout.
- 17.2. Assignment.** This Regional Agreement shall not be assigned by any Regional PLG without the prior written consent of all Regional PLGs. Any assignment or subcontracting without such consent will be ineffective and void and will be cause for termination of this Regional Agreement.
- 17.3. Integration and Amendment.** This Regional Agreement represents the entire agreement between the Regional PLGs and terminates any oral or collateral agreement or understandings. This Regional Agreement may be amended only by a writing signed by the Regional PLGs. If any provision of this Regional Agreement is held invalid or unenforceable, no other provision shall be affected by such holding, and the remaining provision of this Regional Agreement shall continue in full force and effect.

- 17.4. No Construction Against Drafting Party.** The Regional PLGs and their respective counsel have had the opportunity to review the Regional Agreement, and the Regional Agreement will not be construed against any Regional PLG merely because any provisions of the Regional Agreement were prepared by a particular Regional PLG.
- 17.5. Captions and References.** The captions and headings in this Regional Agreement are for convenience of reference only and shall not be used to interpret, define, or limit its provisions. All references in this Regional Agreement to sections (whether spelled out or using the § symbol), subsections, exhibits or other attachments, are references to sections, subsections, exhibits or other attachments contained herein or incorporated as a part hereof, unless otherwise noted.
- 17.6. Statutes, Regulations, and Other Authority.** Any reference in this Regional Agreement to a statute, regulation, policy or other authority shall be interpreted to refer to such authority then current, as may have been changed or amended since the execution of this Regional Agreement.
- 17.7. Conflict of Interest.** No Regional PLG shall knowingly perform any act that would conflict in any manner with said Regional PLG's obligations hereunder. Each Regional PLG certifies that it is not engaged in any current project or business transaction, directly or indirectly, nor has it any interest, direct or indirect, with any person or business that might result in a conflict of interest in the performance of its obligations hereunder. No elected or employed member of any Regional PLG shall be paid or receive, directly or indirectly, any share or part of this Regional Agreement or any benefit that may arise therefrom.
- 17.8. Inurement.** The rights and obligations of the Regional PLGs to the Regional Agreement inure to the benefit of and shall be binding upon the Regional PLGs and their respective successors and assigns, provided assignments are consented to in accordance with the terms of the Regional Agreement.
- 17.9. Survival.** Notwithstanding anything to the contrary, the Regional PLGs understand and agree that all terms and conditions of this Regional Agreement and any exhibits that require continued performance or compliance beyond the termination or expiration of this Regional Agreement shall survive such termination or expiration and shall be enforceable against a Regional PLG if such Regional PLG fails to perform or comply with such term or condition.
- 17.10. Waiver of Rights and Remedies.** This Regional Agreement or any of its provisions may not be waived except in writing by a Regional PLG's authorized representative. The failure of a

Regional PLG to enforce any right arising under this Regional Agreement on one or more occasions will not operate as a waiver of that or any other right on that or any other occasion.

17.11. No Third-Party Beneficiaries. Enforcement of the terms of the Regional Agreement and all rights of action relating to enforcement are strictly reserved to the Regional PLGs. Nothing contained in the Regional Agreement gives or allows any claim or right of action to any third person or entity. Any person or entity other than the Regional PLGs receiving services or benefits pursuant to the Regional Agreement is an incidental beneficiary only.

17.12. Records Retention. The Regional PLGs shall maintain all records, including working papers, notes, and financial records in accordance with their applicable record retention schedules and policies. Copies of such records shall be furnished to the Parties request.

17.13. Execution by Counterparts; Electronic Signatures and Records. This Regional Agreement may be executed in two or more counterparts, each of which shall be deemed an original, but all of which shall constitute one and the same instrument. The Regional PLGs approve the use of electronic signatures for execution of this Regional Agreement. All use of electronic signatures shall be governed by the Uniform Electronic Transactions Act, C.R.S. §§ 24-71.3-101, *et seq.* The Regional PLGs agree not to deny the legal effect or enforceability of the Regional Agreement solely because it is in electronic form or because an electronic record was used in its formation. The Regional PLGs agree not to object to the admissibility of the Regional Agreement in the form of an electronic record, or a paper copy of an electronic document, or a paper copy of a document bearing an electronic signature, on the ground that it is an electronic record or electronic signature or that it is not in its original form or is not an original.

17.14. Authority to Execute. Each Regional PLG represents that all procedures necessary to authorize such Regional PLG's execution of this Regional Agreement have been performed and that the person signing for such Regional PLG has been authorized to execute the Regional Agreement.

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EXHIBIT K

Settlement Participation Form

Governmental Entity:	State:
Authorized Official:	
Address 1:	
Address 2:	
City, State, Zip:	
Phone:	
Email:	

The governmental entity identified above (“Governmental Entity”), in order to obtain and in consideration for the benefits provided to the Governmental Entity pursuant to the Settlement Agreement dated July 21, 2021 (“Janssen Settlement”), and acting through the undersigned authorized official, hereby elects to participate in the Janssen Settlement, release all Released Claims against all Released Entities, and agrees as follows.

1. The Governmental Entity is aware of and has reviewed the Janssen Settlement, understands that all terms in this Election and Release have the meanings defined therein, and agrees that by this Election, the Governmental Entity elects to participate in the Janssen Settlement and become a Participating Subdivision as provided therein.
2. The Governmental Entity shall, within 14 days of the Reference Date and prior to the filing of the Consent Judgment, dismiss with prejudice any Released Claims that it has filed.
3. The Governmental Entity agrees to the terms of the Janssen Settlement pertaining to Subdivisions as defined therein.
4. By agreeing to the terms of the Janssen Settlement and becoming a Releasor, the Governmental Entity is entitled to the benefits provided therein, including, if applicable, monetary payments beginning after the Effective Date.
5. The Governmental Entity agrees to use any monies it receives through the Janssen Settlement solely for the purposes provided therein.
6. The Governmental Entity submits to the jurisdiction of the court in the Governmental Entity’s state where the Consent Judgment is filed for purposes limited to that court’s role as provided in, and for resolving disputes to the extent provided in, the Janssen Settlement.
7. The Governmental Entity has the right to enforce the Janssen Settlement as provided therein.

8. The Governmental Entity, as a Participating Subdivision, hereby becomes a Releasor for all purposes in the Janssen Settlement, including but not limited to all provisions of Section IV (Release), and along with all departments, agencies, divisions, boards, commissions, districts, instrumentalities of any kind and attorneys, and any person in their official capacity elected or appointed to serve any of the foregoing and any agency, person, or other entity claiming by or through any of the foregoing, and any other entity identified in the definition of Releasor, provides for a release to the fullest extent of its authority. As a Releasor, the Governmental Entity hereby absolutely, unconditionally, and irrevocably covenants not to bring, file, or claim, or to cause, assist or permit to be brought, filed, or claimed, or to otherwise seek to establish liability for any Released Claims against any Released Entity in any forum whatsoever. The releases provided for in the Janssen Settlement are intended by the Parties to be broad and shall be interpreted so as to give the Released Entities the broadest possible bar against any liability relating in any way to Released Claims and extend to the full extent of the power of the Governmental Entity to release claims. The Janssen Settlement shall be a complete bar to any Released Claim.
9. In connection with the releases provided for in the Janssen Settlement, each Governmental Entity expressly waives, releases, and forever discharges any and all provisions, rights, and benefits conferred by any law of any state or territory of the United States or other jurisdiction, or principle of common law, which is similar, comparable, or equivalent to § 1542 of the California Civil Code, which reads:

General Release; extent. A general release does not extend to claims that the creditor or releasing party does not know or suspect to exist in his or her favor at the time of executing the release that, if known by him or her, would have materially affected his or her settlement with the debtor or released party.

A Releasor may hereafter discover facts other than or different from those which it knows, believes, or assumes to be true with respect to the Released Claims, but each Governmental Entity hereby expressly waives and fully, finally, and forever settles, releases and discharges, upon the Effective Date, any and all Released Claims that may exist as of such date but which Releasors do not know or suspect to exist, whether through ignorance, oversight, error, negligence or through no fault whatsoever, and which, if known, would materially affect the Governmental Entities' decision to participate in the Janssen Settlement.

10. Nothing herein is intended to modify in any way the terms of the Janssen Settlement, to which Governmental Entity hereby agrees. To the extent this Election and Release is interpreted differently from the Janssen Settlement in any respect, the Janssen Settlement controls.

I have all necessary power and authorization to execute this Election and Release on behalf of the Governmental Entity.

Signature: _____

Name: _____

Title: _____

Date: _____

EXHIBIT K

Subdivision Settlement Participation Form

Governmental Entity: <i>SAN JUAN COUNTY</i>	State: <i>Colorado</i>
Authorized Official: <i>Scott Fetchenwier</i>	
Address 1: <i>P.O. Box 466</i>	
Address 2:	
City, State, Zip: <i>Silverton, CO 81433</i>	
Phone: <i>970-387-5766</i>	
Email: <i>SANJUANCOUNTY@Frontier.net</i>	

The governmental entity identified above ("*Governmental Entity*"), in order to obtain and in consideration for the benefits provided to the Governmental Entity pursuant to the Settlement Agreement dated July 21, 2021 ("*Distributor Settlement*"), and acting through the undersigned authorized official, hereby elects to participate in the Distributor Settlement, release all Released Claims against all Released Entities, and agrees as follows.

1. The Governmental Entity is aware of and has reviewed the Distributor Settlement, understands that all terms in this Participation Form have the meanings defined therein, and agrees that by signing this Participation Form, the Governmental Entity elects to participate in the Distributor Settlement and become a Participating Subdivision as provided therein.
2. The Governmental Entity shall, within 14 days of the Reference Date and prior to the filing of the Consent Judgment, secure the dismissal with prejudice of any Released Claims that it has filed.
3. The Governmental Entity agrees to the terms of the Distributor Settlement pertaining to Subdivisions as defined therein.
4. By agreeing to the terms of the Distributor Settlement and becoming a Releasor, the Governmental Entity is entitled to the benefits provided therein, including, if applicable, monetary payments beginning after the Effective Date.
5. The Governmental Entity agrees to use any monies it receives through the Distributor Settlement solely for the purposes provided therein.
6. The Governmental Entity submits to the jurisdiction of the court in the Governmental Entity's state where the Consent Judgment is filed for purposes limited to that court's role as provided in, and for resolving disputes to the extent provided in, the Distributor Settlement. The Governmental Entity likewise agrees to arbitrate before the National Arbitration Panel as provided in, and for resolving disputes to the extent otherwise provided in, the Distributor Settlement.

7. The Governmental Entity has the right to enforce the Distributor Settlement as provided therein.
8. The Governmental Entity, as a Participating Subdivision, hereby becomes a Releasor for all purposes in the Distributor Settlement, including, but not limited to, all provisions of Part XI, and along with all departments, agencies, divisions, boards, commissions, districts, instrumentalities of any kind and attorneys, and any person in their official capacity elected or appointed to serve any of the foregoing and any agency, person, or other entity claiming by or through any of the foregoing, and any other entity identified in the definition of Releasor, provides for a release to the fullest extent of its authority. As a Releasor, the Governmental Entity hereby absolutely, unconditionally, and irrevocably covenants not to bring, file, or claim, or to cause, assist or permit to be brought, filed, or claimed, or to otherwise seek to establish liability for any Released Claims against any Released Entity in any forum whatsoever. The releases provided for in the Distributor Settlement are intended by the Parties to be broad and shall be interpreted so as to give the Released Entities the broadest possible bar against any liability relating in any way to Released Claims and extend to the full extent of the power of the Governmental Entity to release claims. The Distributor Settlement shall be a complete bar to any Released Claim.
9. The Governmental Entity hereby takes on all rights and obligations of a Participating Subdivision as set forth in the Distributor Settlement.
10. In connection with the releases provided for in the Distributor Settlement, each Governmental Entity expressly waives, releases, and forever discharges any and all provisions, rights, and benefits conferred by any law of any state or territory of the United States or other jurisdiction, or principle of common law, which is similar, comparable, or equivalent to § 1542 of the California Civil Code, which reads:

General Release; extent. A general release does not extend to claims that the creditor or releasing party does not know or suspect to exist in his or her favor at the time of executing the release, and that if known by him or her would have materially affected his or her settlement with the debtor or released party.

A Releasor may hereafter discover facts other than or different from those which it knows, believes, or assumes to be true with respect to the Released Claims, but each Governmental Entity hereby expressly waives and fully, finally, and forever settles, releases and discharges, upon the Effective Date, any and all Released Claims that may exist as of such date but which Releasors do not know or suspect to exist, whether through ignorance, oversight, error, negligence or through no fault whatsoever, and which, if known, would materially affect the Governmental Entities' decision to participate in the Distributor Settlement.

11. Nothing herein is intended to modify in any way the terms of the Distributor Settlement, to which Governmental Entity hereby agrees. To the extent this Participation Form is interpreted differently from the Distributor Settlement in any respect, the Distributor Settlement controls.

I have all necessary power and authorization to execute this Participation Form on behalf of the Governmental Entity.

Signature: _____

Name: Scott Fetchenhier

Title: Chairman

Date: 10/27/21

Colorado Subdivision Escrow Agreement

Governmental Entity: <i>SAN JUAN COUNTY</i>	State: CO
Authorized Official: <i>Scott Fetchenwier</i>	
Address 1: <i>P.O. Box 466</i>	
Address 2:	
City, State, Zip: <i>Silverton, CO 81433</i>	
Phone: <i>970-387-5766</i>	
Email: <i>SANJUANCOUNTY@FRONTIER.NET</i>	

The governmental entity identified above (“*Governmental Entity*”) hereby provides Colorado Counties, Inc. (for counties) or the Colorado Municipal League (for municipalities) (“*Escrow Agent*”) the enclosed copies of the Governmental Entity’s endorsed Subdivision Settlement Participation Forms and the Colorado Opioids Settlement Memorandum of Understanding (“*Colorado MOU*”), to be held in escrow. The Subdivision Settlement Participation Forms apply respectively to (1) the National Settlement Agreement with McKesson Corporation, Cardinal Health, Inc., and AmerisourceBergen Corporation, dated July 21, 2021 (“*Distributor Settlement*”); and (2) the National Settlement Agreement with Janssen Pharmaceuticals, Inc., and its parent company Johnson & Johnson, dated July 21, 2021 (“*J&J Settlement*”). Pursuant to this Agreement, the Subdivision Settlement Participation Forms and the Colorado MOU will be released only if there is 95% participation by local governments in Colorado as further explained below.

Purpose of this Agreement

By endorsing a Subdivision Settlement Participation Form in the Distributor Settlement and the J&J Settlement, a governmental entity agrees to participate in those settlements and release any legal claims it has or may have against those settling pharmaceutical companies. This Colorado Subdivision Escrow Agreement is meant to ensure that the legal claims of governmental entities in Colorado will be released only when 95% participation by certain governmental entities has been reached. That 95% participation threshold is important because it signals to the settling pharmaceutical companies that the settlement has wide acceptance which will then secure significant incentive payments under these settlement agreements.

Escrow

The Escrow Agent shall promptly report the receipt of any Governmental Entity’s endorsed Subdivision Settlement Participation Forms and Colorado MOUs to the Colorado Attorney General’s Office and to the law firm of Keller Rohrback L.L.P. These documents shall be released by the Escrow Agent to the Colorado Attorney General’s Office if and when the Escrow Agent is notified by the Attorney General’s Office and Keller Rohrback that that the threshold 95% participation levels have been reached for both the Distributor Settlement and the J&J Settlement, as further described below. If by December 29, 2021, the Escrow Agent has not received notification that the threshold 95% levels have been reached for both the Distributor Settlement and the J&J Settlements, then the documents being escrowed shall be returned to the Governmental Entities and all copies shall be destroyed.

Distributor Settlement

The Attorney General's Office and Keller Rohrback shall jointly submit a written notification to the Escrow Agent when it has been determined that the percentages of populations eligible for Incentives B and C, as described in Sections IV.F.2 and IV.F.3 of the Distributor Settlement, are each 95% or more. For purposes of this Escrow Agreement, the percentages of populations eligible for Incentives B and C under the Distributor Settlement will include governmental entities that sign a Subdivision Settlement Participation Form subject to an escrow agreement and governmental entities that sign a Subdivision Settlement Participation Form that is not subject to an escrow agreement.

J&J Settlement

The Attorney General's Office and Keller Rohrback shall jointly submit a written notification to the Escrow Agent when it has been determined that the Participation or Case-Specific Resolution Levels for Incentives B and C, as described in Sections V.E.5 and V.E.6 of the J&J Settlement, are each 95% or more. For purposes of this Escrow Agreement, the percentages or populations eligible for Incentives B and C under the J&J Settlement will include governmental entities that sign a Subdivision Settlement Participation Form subject to an escrow agreement and governmental entities that sign a Subdivision Settlement Participation Form that is not subject to an escrow agreement.

Colorado Subdivision Name SAN JUAN COUNTY

Authorized Signature 10/27/21
Date

PRELIMINARY 2022

ANNUAL BUDGET FOR
SAN JUAN COUNTY, COLORADO
FOR THE FISCAL YEAR ENDING
DECEMBER 31, 2021

10/27/22

2022 BUDGET
SAN JUAN COUNTY, COLORADO

TABLE OF CONTENTS

BUDGET MESSAGE	A
RESOLUTION TO ADOPT BUDGET	B
RESOLUTION TO LEVY TAXES.....	C
RESOLUTION TO APPROPRIATE MONEY TO FUNDS	D
CERTIFICATION OF TAX LEVIES (FORM DLG 70).....	E
SUMMARY OF ALL FUNDS	1
Mill Levies.....	2
County Mill Levy Comparison.....	3
TABOR	4
General Fund Grants.....	5
Lease – Purchase Agreements.....	6
5 Year Capital Improvements Plan	7
REVENUE	
Summary of Funds.....	8
General Fund.....	9
Road & Bridge Fund.....	10
Contingency - Emergency - Conservation Trust - Noxious Weed Funds	11
Social Services – County Lodging Tax Funds	12
EXPENDITURES	
Summary of Funds.....	13
General Fund.....	14
Commissioners.....	15
Clerk & Recorder.....	16
Treasurer.....	17
Assessor.....	18
Sheriff.....	19
Administrator.....	20
Custodian.....	21
Nurse.....	22
Miscellaneous Offices.....	23
Intergovernment.....	24
Road & Bridge Fund.....	25
Contingency - Emergency - Conservation Trust - Noxious Weed Funds	26
Social Services - County Lodging Tax Funds	27
Emergency Services Fund.....	28
PERSONNEL	29 thru 38
MISCELLANEOUS DOCUMENTS.....	39 thru 48
2022 BOCC Meeting Calendar	
2022 County Holidays	
Town-County Law Enforcement Contract	
Governmental Services Agreement	
Town County Expenditures	
Emergency Vehicle List	
Public Notice	

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

SOCIAL SERVICES - EXPENDITURES

	2019	2020	Budget 2021	Year End Est.	Budget 2022
Personnel	Distributed	Distributed	Distributed	Distributed	Distributed
Regular Administration	30,909	55,000	82,000		69,000
Case Services					
Fraud					
LEAP Administration	180	1,500	1,500		1,200
Leap Basic	42				
CORE Services 80/20%	44	8,724			24,000
Child Support	253	2,000	1,500		600
CORE Services 100%	15,956	15,276	24,000		
Child Welfare 100%	1,758	2,937			
CSBG Grant		1,000	1,000		1,000
County Only					
Child Care EBT	1,139				
Kinship Funds					
Child Care Admin	998	8,525	9,300		
Child Welfare 80/20	1,999	39,711	26,000		12,000
OAP	619	2,000	2,000		2,000
Medicaid Transport		5,000			
Adult Protection	1,508	3,530	4,000		2,220
San Juan Seniors					
CO Works/TANF	19,716	44,697	58,000		75,000
CWEST F/C EBT					
Quality Child Care	7,101	14,000			2,000
Miscellaneous					
TOTAL	82,222	203,900	209,300	74,325	189,020

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

CONTINGENCY FUND - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Treasurer Fees	0	0	10	0	0	10
Miscellaneous	0	0	9,990	0	0	9,990
TOTAL	0	0	10,000	0	0	0

COUNTY LODGING TAX EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Tourism Advertising	80000	100000	100,000	65,000	100,000	150,000

CONSERVATION TRUST - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Capital Improvements	0	0	6,000	0	0	6,000
Treasurer Fees	0	0	0	0	0	0
TOTAL	0	0	6,000	0	0	6,000

TABOR AMENDMENT EMERGENCY FUND - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Treasurer Fees	0	0	0	0	0	0
Miscellaneous	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0

NOXIOUS WEED FUND - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Treasurer Fees	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0

ANVIL MOUNTAIN WORKFORCE HOUSING - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
TOTAL	0	156,856	118,000	70,877	118,000	105,000

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

ROAD & BRIDGE - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Personnel	242,336	243,454	249,927	182,322	249,927	249,927
Administration	0	0	0	0	0	0
Liability Insurance (CTSI)	8,418	10,977	9,000	0	9,000	9,500
Workers Comp. Insurance (CTSI)	12,077	11,302	14,500	0	14,500	15,000
Travel	30	0	300	0	0	300
Utilities	8,245	10,596	9,000	5,619	8,000	9,000
Supplies	11,446	10,395	13,000	6,067	10,000	11,000
Coal/Propane	6,886	7,714	7,200	6,092	8,200	8,500
Building Maintenance	890	77	1,000	0	250	1,000
Safety - Signs	0	1,123	3,000	0	1,000	3,000
Fuel	57,614	25,574	38,000	27,757	38,000	38,000
Oil - Antifreeze	2,510	0	2,500	0	1,000	2,500
Tires	0	11,239	4,500	3,690	4,500	4,500
Equipment Repair	59,301	24,487	28,000	21,712	28,000	28,000
Magnesium Chloride	0	0	20,000	36,800	36,800	40,000
Avalanche Control	6,233	0	2,500	1,434	1,434	2,500
Rock Work - Blasting	0	0	0	0	0	0
Culverts	0	4,905	3,500	10,461	10,461	3,500
Gravel - Permit	331	331	350	0	331	331
Snow Removal	5,400	8,460	7,050	4,050	7,050	7,050
Bridge Maintenance	0	0	2,000	0	0	2,000
Equipment Payment	0	0	0	0	0	0
CDL Physicals/License	0	0	200	0	0	200
Clothing Allowance	0	400	600	0	400	600
Asphalt Materials & Striping	0	0	1,000	0	0	1,000
Miscellaneous	26,816	2,821	873	3,107	3,107	592
Sub-Total	448,534	373,857	418,000	309,112	431,960	438,000
Treasurer's Fees	5,881	4,993	4,000	4,511	5,000	5,000
Transfer to Escrows	0	160,000	139,000	0	139,000	155,000
Transfer to School	45,718	54,380	45,000	0	0	0
Sub-Total	500,134	593,229	606,000	313,623	575,960	598,000
Escrow Expenditures	97,812	136,303	139,000	0	139,000	139,000
TOTAL	597,947	729,531	745,000	313,623	714,960	737,000

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

INTERGOVERNMENT - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
San Juan Basin Health	4,543	0	5,000	14,896	14,896	10,164
Planning Commission	400	0	400	0	400	400
Area Agency on Aging	850	0	850	0	850	850
Club 20	300	0	300	300	300	300
NACO	450	450	450	450	450	450
Volunteers of America	300	0	300	0	300	300
Region 9 E.D. District	373	425	425	425	425	425
Cemetery Donation	250	0	250	0	250	250
Fire Dept. Donations (Santa)	600	0	100	0	100	100
San Juan Development Assoc.	2,699	0	5,000	0	5,000	5,000
Social Services	54,413	55,226	54,202	46,124	61,500	59,354
SWRETAC	0	0	0	0	0	0
San Juan RC&D	0	0	0	0	0	0
Town Shared Services	16,485	32,010	63,357	0	63,357	35,938
School - Subdivision Fees	0	0	0	0	0	0
Durango Mtn Resort Costs	0	0	0	0	0	0
Annual Audit	9,800	10,500	10,000	0	11,500	11,500
Liability Insurance (CTSI)	33,086	44,616	36,000	0	36,000	36,000
Workers Comp. Insurance (CTSI)	3,968	4,100	6,000	0	6,000	6,000
Transportation Dues	0	0	450	0	450	450
Housing Solutions Grant	0	0	500	0	500	500
AXIS Mental Health	500	0	500	0	500	500
CCI Dues	6,175	6,226	6,226	6,000	6,000	6,226
Preschool Loan	3,200	3,200	6,000	6,000	6,000	6,000
MSI	0	0	1,000	0	1,000	1,000
SWCOG	2,697	5,380	4,000	3,691	3,691	4,000
Four Corners Film Office	0	0	0	0	0	0
Fire Works Donation	500	0	500	0	0	250
Alpine Ranger	0	0	0	0	0	0
Cascade Village Fiber	0	0	0	0	0	0
Silverton Youth Center	500	0	500	0	500	500
Sub-Total	142,089	162,133	202,310	77,886	219,969	186,457
GRANTS						
DOLA Hospital Building	117,390	0	0	0	0	0
SHF - Hospital Building	27,583	98,853	0	65,870	65,870	5,000
DOLA Courthouse	0	0	167,537	149,763	160,000	7,537
DOLA Apartments	0		0			
DOH Apartments	0		0			
Emergency Management	0		0			
OHV State Trail Grant	0		0			
CDPHE Communications Liaisor	45,409	50,809	52,000	34,394	46,000	54,161
EPA Grant	0		0	0	0	0
Housing Solutions CDBG	58,314	70,089	185,000	108,216	144,288	150,000
SHF - Courthouse	0	2,920	170,000			198,990
Underfunded Courthouse	399,456	104,048	100,000	33,306	33,306	0
DOLA Firetruck	0	267,500	0	0	0	0
Clerks Electronic Technology		115,176	75,000	4,650	5,000	0
REDI MSI			32,953		32,953	0
REDI SJDA			85,000	25,099	45,000	40,000
CARES						
Misc. Grants	4,596	17,417	25,000			25,000
Sub-Total	652,748	726,811	892,490	421,298	532,417	480,688
TOTAL	794,837	888,944	1,094,800	499,184	752,386	667,145

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

MISCELLANEOUS COUNTY OFFICES - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
CORONER						
Personnel	15,118	15,116	15,118	11,339	15,118	15,118
Miscellaneous	18,964	8,386	10,000	12,517	15,000	13,000
	34,082	23,502	25,118	23,855	30,118	28,118
Surveyor						
Personnel	1,518	0	2,500	0	2,500	2,500
Miscellaneous	600	0	0	0	0	0
	2,118	0	2,500	0	2,500	2,500
COUNTY ATTORNEY						
Personnel	36,888	33,595	40,000	24,755	35,000	40,000
Miscellaneous	333	0	0	0	0	0
	37,221	33,595	40,000	24,755	35,000	40,000
DISTRICT ATTORNEY						
	19,882	20,234	22,891	16,648	22,891	24,789
La Plata Courthouse Remodel	2,701	2,401	2,701	2,701	2,701	2,701
	22,583	22,635	25,592	19,348	25,592	27,490
VETERANS OFFICER						
Personnel	1,031	1032.61	1,052	2,558	3,900	5,331
Miscellaneous	0	0	0	0	0	0
	1,031	1,033	1,052	2,558	3,900	5,331
EMERGENCY PREPAREDNESS						
Personnel	58,132	88,256	51,552	80,391	104,500	48,372
PIO		25,951		2,715	2,715	0
Miscellaneous	13,152	20,536	20,000	7,418	8,000	8,000
	71,284	134,743	71,552	90,524	115,215	56,372

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

HEALTH DEPARTMENT - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Personnel Total	112,488	187,742	265,210	160,473	265,210	294,141
Personnel Paid By Grants	95,045	162,742	235,210	140,473	235,210	273,352
Personnel Paid By General Fund	17,443	25,000	30,000	20,000	30,000	20,789
Supplies	1,428	3,051	1,000	1,271	1,500	1,000
Postage	107	88	100	0	0	100
Telephone	0	0	0	1,002	1,200	200
Travel - Training	1,561	117	100	107	200	100
Dues - Meetings	391	781	400	468	468	500
Licenses & Certifications	0	111	0	269	269	270
Vaccines	533	343	500	148	250	500
Miscellaneous	1,813	1,479	500	556	600	541
Total Operations	23,275	30,971	32,600	23,821	34,487	24,000
Emergency Planning PHEP	7,166	411	15,875	0	15,875	15,875
Ebola	0	0	0	0	0	0
SIM	0		0	0	0	0
Health Care Program Grant MCH/HCI	24	1,000	47,325	315	47,325	47,325
PDD	0		0	0	0	0
STEPP	8,788	4,995	36,800	0	36,800	36,800
CHAPS/PHIP	0		0	0	0	0
OPPI	0		0	0	0	0
Immunizations	0		0	0	0	0
Miscellaneous Grants	901	46,513	5,000	283	5,000	5,000
SJBHD			0	0	0	0
WINN			5,000	0	5,000	0
Covid 19			150,000	88,157	150,000	100,000
Total Grants	16,878	52,918	260,000	88,755	260,000	478,352
TOTAL	40,154	83,889	292,600	112,575	294,487	502,352

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

CUSTODIAN - EXPENDITURES

COURTHOUSE	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Personnel	23206	27785.87	33,945	19,882	26,509	33,945
Supplies	735	1328.12	1,000	783	1,050	1,000
Maintenance	4739	4523	3,500	896	1,400	2,500
Repairs	2136	3585.31	1,500	341	500	1,000
Utilities	17245	19867.01	17,000	9,334	13,000	17,000
Propane/Coal	16485	17507.6	12,000	8,443	12,000	14,000
Vehicle Maintenance	846	0	500	174	500	500
Miscellaneous	0	420	500	30	100	200
Sub-Total	65,393	75,017	69,945	39,884	55,059	70,145
HOSPITAL						
Personnel	15,015	16,529	16,972	9,793	14,000	16,972
Supplies	332	742	700	293	500	600
Maintenance	2,144	2,408	1,500	2,700	3,500	3,500
Repairs	-	1,376	500	0	0	500
Utilities	5,165	4,436	7,000	2,379	3,173	7,000
Coal	12,775	15,986	12,000	5,033	7,200	9,000
Miscellaneous	-	-	500	0	100	283
Sub-Total	35,430	41,476	39,172	20,198	28,473	37,855
TOTAL	100,823	116,493	109,117	60,082	83,532	108,000

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

ADMINISTRATOR - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Personnel	107267	116455.45	120,757	84,981	113,308	120,757
Supplies	601	408.4	500	440	500	500
Telephone/Internet	1147	1111.93	1,100	1,202	1,600	1,600
Postage	100	0	50	0	0	50
Travel	2454	839.27	3,000	297	500	2,500
Training	1547	0	1,000	0	0	1,000
Electronic Equipment	0	0	0	0	0	0
Equipment Repair/Maint.	0	0	0	0	0	0
Subscription - Dues	100	199	100	100	100	100
Miscellaneous	797	0	493	0	100	493
TOTAL	114,014	119,014	127,000	87,020	116,108	127,000

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

SHERIFF - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Personnel	269,285	279,676	379,008	221,535	295,380	380,454
Workers Comp Ins.	9,552	9,085	10,000	0	10,000	10,500
Supplies	14,785	13,313	8,500	11,423	14,000	14,000
Telephone/Internet	6,518	6,055	6,500	5,839	6,500	6,500
Postage	437	299	400	229	305	350
Printing	413	0	100	744	744	250
Training	0	690	2,500	1,833	2,000	2,500
Dues - Meetings	1,299	145	2,500	1,238	1,500	2,500
Ads - Legal Notices	0	0	300	0	0	300
Bonds	0	0	0	0	0	0
Vehicle Maintenance	10,647	7,016	6,000	7,185	8,000	7,000
Gasoline	13,135	9,426	16,000	10,194	13,600	15,000
Transient Persons	0	0	500	0	0	500
Dispatch Services	8,957	8,957	18,000	37,957	37,957	19,000
Vehicle Insurance	2,507	2,999	2,400	2,400	2,400	2,400
Matching Grant Funds	0	0	0	0	0	0
Rescues	0	3,360	150	0	0	150
Communications Towers	6,882	7,118	6,500	5,173	7,000	7,000
Special Events (4th of July)	1,000	0	4,000	0	0	4,000
Miscellaneous	2,546	1,640	424	9,330	9,500	596
Sub-Total	347,963	349,779	463,782	315,079	408,886	473,000
JAIL	14,320	2,405	20,000	10,075	15,000	20,000
TOTAL	362,283	352,184	483,782	325,154	423,886	493,000

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

ASSESSOR - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Personnel	104,576	114,616	107,551	84,007	112,009	107,551
Supplies	5,762	6,152	6,000	7,669	8,000	6,000
Telephone/Internet	0	0	250	0	0	100
Postage	300	288	300	220	300	300
Printing	1,230	0	0	381	381	400
Travel	4,349	882	2,887	570	700	2,500
Dues	520	630	703	0	703	703
Computer Lease	8,580	40,497	15,113	13,529	13,529	15,000
Mapping	15,250	2,100	3,000	0	0	1,000
Master Touch	0	205	2,500	1,892	1,892	2,500
Equipment	2,925	225	1,000	0	0	1,000
Consulting	9,358	4,708	10,000	40,988	40,988	10,000
Miscellaneous	976	890	500	787	850	446
TOTAL	153,824	171,193	149,804	150,044	179,353	147,500

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

TREASURER - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Personnel	90,365	89,117	95,169	73,432	97,909	95,169
Supplies	1,263	108	750	161	350	750
Telephone/Internet	0	0	100	143	143	100
Postage	265	1,125	750	1,115	1,200	1,200
Printing	5,465	2,408	4,500	2,096	2,500	4,500
Travel	1,671	0	1,250	414	500	1,250
Dues - Meetings	1,312	550	1,000	550	700	1,000
Computer Lease	8,580	40,947	15,000	14,459	14,459	15,000
Electronic Equipment	1,052	0	0	0	0	0
Maps	0	0	0	0	0	0
Miscellaneous	0	0	0	0	0	531
TOTAL	109,973	134,254	118,519	92,371	117,762	119,500

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

CLERK & RECORDER - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Personnel	104,243	110,853	111,660	84,018	111,660	111,660
Supplies	1,234	2,115	1,500	2,248	2,500	1,500
Telephone/Internet	0	0	100	95	95	100
Postage	1,458	1,316	1,500	1,506	1,600	1,500
Printing	352	410	500	623	831	900
Travel - Training	60	227	1,000	0	0	1,000
Dues - Meetings	725	797	800	797	797	800
Recording Service and Maintenanc	3,420	11,010	7,000	4,110	7,500	8,200
Recorder's Equipment Replacemen	0	14,445	0	0	0	0
Miscellaneous	1,192	760	493	0	100	340
TOTAL	112,683	141,933	124,553	93,397	125,083	126,000

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

COMMISSIONERS - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Personnel	120,316	115,811	139,653	103,144	137,525	139,653
Supplies	1,097	3,453	1,000	779	1,000	1,000
Telephone	69	0	100	48	65	100
Postage	0	0	25	63	63	50
Printing	1,188	2,652	1,000	658	875	1,000
Travel	1,824	0	2,000	0	0	2,000
Miscellaneous	1,931	1,490	722	132	200	325
TOTAL	126,424	123,406	144,500	104,824	139,729	144,128

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

GENERAL FUND - EXPENDITURES

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Commissioners	126,424	123,406	144,500	104,824	139,729	144,128
Clerk & Recorder	112,683	141,933	124,553	93,397	125,083	126,000
Elections	3,269	18,421	5,000	9	5,000	11,000
Treasurer	109,973	134,254	118,519	92,371	117,762	119,500
Assessor	153,824	171,193	149,804	150,044	179,353	147,500
Sheriff	347,963	349,779	463,782	315,079	408,886	473,000
Jail	14,320	2,405	20,000	10,075	15,000	20,000
Administrator	114,014	119,014	127,000	87,020	116,108	127,000
Custodian	100,823	116,493	109,117	60,082	83,532	108,000
Health Dept.	40,154	83,889	292,600	112,575	294,487	502,352
Ambulance	86,400	86,400	86,400	64,800	86,400	86,400
Fire Department	35,082	33,572	37,572	28,179	37,572	37,572
Coroner	34,082	23,502	25,118	23,855	30,118	28,118
County Attorney	37,221	33,595	40,000	24,755	35,000	40,000
District Attorney	19,882	22,635	25,592	16,648	25,592	27,490
Veterans Officer	1,031	1,033	1,052	2,558	3,900	5,331
Surveyor	2,118	0	2,500	0	2,500	2,500
Office of Emergency Preparedness	71,284	134,743	71,552	90,524	115,215	56,372
Intergovernmental	142,089	162,133	202,310	77,886	219,969	186,457
Miscellaneous	41,776	57,574	15,000	32,777	40,000	30,000
Sub-Total	1,594,411	1,815,973	2,061,971	1,387,459	2,081,206	2,278,720
Grants	652,748	726,811	892,490	421,298	532,417	480,688
Sub-Total	2,247,160	2,542,784	2,954,461	1,808,757	2,613,623	2,759,408
Treasurer's Fees	0	61,438	52,000	55,631	60,000	60,000
Transfer to Escrow	0	137,972	35,000	0	35,000	8,000
Transfer to Emergency Service Fun	0	0	121,482	0	121,482	43,200
Sub-Total	2,247,160	2,742,194	3,162,943	1,864,388	2,830,105	2,870,608
Escrow Expenditures	8,449	435,562	56,000	0	56,000	8,000
TOTAL	2,255,608	3,177,756	3,218,943	1,864,388	2,886,105	2,878,608

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

SOCIAL SERVICES FUND REVENUE

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Property Tax	12,973	12,900	12,900	13,096	13,200	15,664
Delinquent Property Tax	-2	50	25	0	12	10
Penalties/Interest on Tax	81	0	25	51	60	25
S.O. Tax A, B, C, F	1,165	1,100	850	906	1,000	1,000
Administration	40,527	44,000	70,000	91,193	121,591	55,000
TANF Collections	211					
Case Services						
LEAP	986	1,500	1,500			1,200
100% Core Services	15,372	23,256	23,254			
Child Support	227	1,390	990			400
Core Service 80/20	6,919					24,000
Child Welfare 100%	2,625	34,704	23,506			10,000
State Incentives C/S	71					
State Fraud Ince	2,131					240
Federal Incentives	4					
Federal Incentive Fraud	100					
SEP Home Care	1,198					
Child Care	7,631	20,820	8,390			1,600
Kinship Funds						
Child Welfare 80/20	2,722					
OAP	3,786	2,000	1,700			1,200
Adult Protection	1,859	2,824	3,202			1,848
SNAP Incentives						
Colorado Works	4,088	35,758	52,093			63,750
Child Welfare	15					
Child Care TANF	17,899					
Refund Administration						
Refund Medicaid Collections						
Refund Expend Food Assistance	145		50			
Refund LEAP Admin						
Refund Child Support Admin						
Refund CSBG Grant	999	1,000	1,000			1,000
Refund AND	70					
Refund OAP	-110					
Refund Medicaid Transportation		5,000				
Refund San Juan Seniors						
Refund Donations		500	500			
Refund FEMA Grant						
Refund EOC	585					
MISCELLANEOUS				0		
TOTAL	124,277	186,802	199,985	105,246	135,863	176,937
From Fund Balance	(4,253)	16,262		0		12,083
BALANCE with EXPENDITURES	120,024	203,064	199,985	105,246	135,863	189,020

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

CONTINGENCY FUND - REVENUE

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
S.O. Tax A, B, C, F	0	0	0	0	0	0
Property Tax	0	0	0	0	0	0
Delinquent Tax & Interest	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0

COUNTY LODGING TAX - REVENUE

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Lodging Tax	99,092	107,543	95,000	123,079	174,798	155,000
Interest	0	0	0	0	0	0
TOTAL	99,092	107,543	95,000	123,079	174,798	155,000

EMERGENCY SERVICES FUND - REVENUE

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Sales Tax	781,500	785,741	630,000	605,168	890,000	800,000
General Fund Transfer In	119,972	119,972	119,972	0	119,972	43,200
TOTAL	901,472	905,713	749,972	605,168	1,009,972	843,200

CONSERVATION TRUST FUND - REVENUE

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Transfer In	924	772	740	371	742	740
S.O. Tax A, B, C, F	0	0	0	0	0	0
Delinquent Tax & Interest	0	0	0	0	0	0
TOTAL	924	772	740	371	742	740

TABOR AMENDMENT EMERGENCY FUND - REVENUE

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Transfer In	0	0	0	0	0	0
Interest	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0

NOXIOUS WEED FUND - REVENUE

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Transfer In from Road & Bridge	0	0	0	0	0	0
Other Revenues	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0

ANVIL MOUNTAIN WORKFORCE HOUSING REVENUE

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
Property Sale	134,739	138,221	150,000	0	0	90,000
Apartment Rent	0	0	99,000	74,972	99,963	105,000
TOTAL	134,739	138,221	249,000	74,972	99,963	195,000

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

ROAD & BRIDGE FUND REVENUE

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
P.I.L.T.	81,000	98,113	98,000	89,168	89,168	90,000
Forest Reserve	45,718	54,382	100,000	44,838	44,838	40,000
Highway Users Tax	427,974	322,125	332,781	269,236	332,781	377,776
Highway 110 Maintenance	0	0	0	0	0	0
Snow Removal	0	0	0	0	0	0
S.O. Tax A, B, C, F	1,254	1,177	1,150	1090	1,453	1,400
Refunds	0	4,623	4,500	0	3500	3,500
Sale of Assets	0	0	0	0	0	0
LOST 4-Wheelers	0	0	0	0	0	0
Magnesium Chloride (USF)	0	0	0	0	0	0
CORE Mountain Fee	0	0	6,000	0	7,000	7,000
OHV Grant	0	0	0	0	0	0
EPA COOP Agreement	0	0	0	0	0	0
Title II SRS	0	0	0	0	0	0
Miscellaneous	9,227	3,862	2,500	343	400	2,500
Sub-Total	565,174	484,282	544,931	404,676	479,140	522,176
Property Tax	11,630	11,675	11,859	11,494	11,859	13,724
Delinquent Tax and Interest	66	70	100	61.64	100	100
TOTAL	576,870	496,028	556,890	416,232	491,099	536,000

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

GENERAL FUND REVENUE

	2019	2020	Budget 2021	9/30/2021 Year to Date	Year End Est.	Budget 2022
P.I.L.T.	13,801	-	-	-	-	-
S.R.S.	-	-	-	-	-	-
Cigarette Tax	306	316	300	275	350	350
Town Contract - Sheriff	246,687	291,539	287,400	186,579	287,400	295,800
USFS Contract - Sheriff	4,000	4,620	4,600	-	4,600	4,600
BLM Contract - Sheriff	-	10,000	10,000	10,000	10,000	10,000
Social Services	22,663	27,947	24,000	36,366	48,488	48,488
S.O. Tax A, B, C, F	91,388	85,940	83,000	59,208	78,000	78,000
Sales Tax	159,604	182,408	185,000	187,083	239,573	240,000
Liquor/Marijuana Licenses	2,250	250	3,000	2,225	2,300	2,500
Building Permits / Fees	-	-	-	-	-	-
Land Use Fees	4,170	5,190	5,000	5,080	5,930	6,000
Subdivision Fees	-	-	-	-	-	-
Workforce Housing Fees	-	-	-	-	-	-
Sheriff's Fees/Fines	-	-	500	-	-	500
Clerk's Fees	38,518	52,189	42,000	48,252	55,000	50,000
Treasurer's Fees	79,336	82,624	81,000	76,548	81,000	90,000
Health Dept. Grants & Fees	109,065	320,669	260,000	189,920	260,000	320,000
Copies - Maps - etc.	-	-	200	-	-	200
Investment Income	19,101	9,773	10,000	733	977	1,000
Courthouse Rent	-	-	2,500	-	2,500	2,500
Hospital Building Rent	-	-	10,000	800	8,100	10,000
Advertise/Overbids	1,916	3,329	4,000	683	3,500	3,500
IGA with Town of Silverton	48,612	14,059	-	-	-	-
Road & Bridge Administration	-	-	-	-	-	-
Property Tax	858,934	866,332	875,109	855,836	875,109	1,022,767
Delinquent Tax + Interest	5,710	5,488	5,000	3,259	5,000	5,000
Preschool Rent	7,000	6,000	6,000	3,000	6,000	6,000
Fire Authority Reimbursement	4,843	5,926	6,000	6,974	6,974	-
Mineral Lease	37,100	56,718	37,000	1,375	1,375	2,500
Election Reimbursement	531	7,879	600	590	1,500	1,200
Alpine Ranger	7,000	-	-	-	-	-
Excise Tax	3,269	1,782	2,500	1,184	1,579	2,500
Veterans	7,350	7,350	7,350	13,328	13,328	7,350
Escrow Transfers In	520,043	-	29,500	-	20,000	10,000
Miscellaneous Revenue	23,128	74,899	15,000	22,949	24,000	15,000
Sub-Total	2,316,326	2,123,227	1,996,559	1,712,248	2,042,583	2,235,755
DOLA Grant - Workforce Housing	-	-	-	-	-	-
Emergency Management	7,000	18,350	14,000	7,500	14,000	14,000
Housing Solution CDBG	152,219	91,956	185,000	108,215	144,287	150,000
OHV Alpine Loop Grant	-	-	-	-	-	-
DOLA Courthouse	-	-	167,537	151,179	160,000	7,537
State Historic Grant Hospital Bldg.	193,275	-	-	-	-	-
DOLA Grant Hospital Bldg	130,632	-	-	-	-	-
EPA COOP Agreement	-	-	-	-	-	-
DOLA Apartments	88,352	-	-	-	-	-
DOH Apartments	304,430	-	-	-	-	-
CDPHE Communications Liaison	-	49,309	61,248	45,000	60,000	60,000
Underfunded Courthouse Grant	-	-	80,000	33,306	33,306	-
DOLA Fire Truck	-	-	-	265,373	256,373	-
SHF Courthouse	-	-	100,000	-	-	198,990
Ambulance Grant	-	201,000	-	-	-	-
Clerks Recording Grant	-	-	-	-	-	-
Clerks Electronic Technology Grants	-	-	-	-	-	-
REDI Grant MSI	-	-	32,953	-	32,953	-
REDI GRANT SJDA	-	-	85,000	17,000	35,855	49,145
Software Grant	-	34,618	-	-	-	-
CARES	-	-	-	-	-	-
Other Grants	39,410	276,350	25,000	87,514	87,514	25,000
Sub-Total	915,318	671,583	750,738	715,087	824,288	504,672
TOTAL	3,231,644	2,794,810	2,747,297	2,427,335	2,866,871	2,740,427

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

FUND REVENUE

	2019	2020	Budget 2021	9/30/2021		Preliminary Budget 2022
				Year to Date	Year End Est.	
General Operation	2,316,326	2,123,227	1,996,559	1,712,248	2,042,583	2,235,755
General Operation Grants	915,318	671,583	750,738	715,087	824,288	504,672
General Operation Total	3,231,644	2,794,810	2,747,297	2,427,335	2,866,871	2,740,427
Road & Bridge Operation	576,870	496,028	556,890	416,232	491,099	536,000
Contingency	0	0	0	0	0	0
County Lodging Tax	99,092	107,543	95,000	123,079	174,798	155,000
Conservation Trust	924	772	740	371	742	740
Emergency Services Fund	901,472	905,713	749,972	605,168	1,009,972	843,200
TABOR Emergency		0	0	0	0	0
Noxious Weed Management	0	0	0	0	0	0
Social Services	124,277	186,802	199,985	62,817	83,756	176,937
Anvil Mountain Workforce Housing	134,739	138,221	249,000	74,972	99,963	195,000
Escrow Accounts (Below)	228,993	369,098	213,700	1,220	213,760	208,542
TOTAL	5,298,010	4,998,986	4,812,584	3,711,193	4,940,960	4,855,846
				9/30/2021		
Escrow Accounts	2019	2020	Budget 2021	Year to Date	Year End Est.	Budget 2022
Ambulance	10161	10248	10000	22	10,000	10,000
Fire Department	34964	168214	20000	64	20,000	20,000
Sheriff's Vehicle	17053	10082	10000	7	10,000	10,000
Search and Rescue	0	5000	5000	0	5,000	5,000
Computer Equipment	32	50	20	5	6	5
Clerk's Technology Fund	527	588	500	592	700	500
Courthouse	20497	9208	5000	300	5,000	5,000
Assessor/Treasurer	45	70	25	6	7	5
Historical Archives	16	24	10	2	2	5
Workforce Housing	112	170	100	16	20	10
Land Use Fund	5203	3312	3000	28	3,000	3,000
Emergency Preparedness	52	81	30	7	10	5
County Barn	21337	112	21000	33	21,000	21,000
Secure Rural Schools	0	0	0	0	0	0
Road Equipment	88360	129556	129000	50	129,000	129,000
Gravel	20073	21519	0	10	12	10
LOST 4-Wheelers	25	38	15	3	3	2
Housing	0	0	0	0	0	0
CR 2 and 110 Asphalt Maintenance	10536	10826	10000	74	10,000	5,000
CDOT Contract (110A & B)	0	0	0	0	0	0
TOTAL	228,993	369,098	213,700	1,220	213,760	208,542

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

FIVE YEAR CAPITAL IMPROVEMENTS PLAN

Year	Department	Item	Estimated Cost
2022	Courthouse	Restoration	100,000
	Hospital	Maintenance	5,000
	Sheriff	Vehicle Replacement	35,000
	Road & Bridge	Traylor	20,000
			160,000
2023	Courthouse	Maintenance	5,000
	Hospital	Maintenance	5,000
	Road & Bridge	Motor Grader	434,000
			444,000
2024	Courthouse	Maintenance	10,000
	Hospital	Maintenance	10,000
	Sheriff	Vehicle Replacement	37,000
	Road & Bridge	Loader	200,000
			257,000
2026	Courthouse	Maintenance	10,000
	Hospital	Maintenance	10,000
	Road & Bridge	Dozer	350,000
			370,000

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

John Deere Financial	Year	Annual Payment	2ea. 772G Motor Graders
772G Motor Grader 47723	2018	41,511.73	
772G Motor Grader 47728	2019	41,511.73	
	2020	41,511.73	
	2021	41,511.73	
	2022	41,511.73	
		207,558.65	
Purchase Option Price		433,959.90	

Citizens State Bank of Ouray					
Anvil Mountain Apartments 3.75%	Year	Principal	Interest	Annual Payment	Balance
	2019	22,251.45	44,534.07	66,785.52	1,175,493.15
	2020	22,976.53	43,808.99	66,785.52	1,152,516.62
	2021	23,976.93	42,808.59	66,785.52	1,128,539.69
	2022	24,891.70	41,893.82	66,785.52	1,103,647.99
	2023	25,841.35	40,944.17	66,785.52	1,077,806.64
	2024	26,713.78	40,071.74	66,785.52	1,051,092.86
	2025	27,846.38	38,939.14	66,785.52	1,023,246.48
	2026	28,908.56	37,876.76	66,785.32	994,337.72
	2027	30,011.66	36,773.86	66,785.52	964,326.06
	2028	31,055.25	35,730.27	66,785.52	933,270.81
	2029	32,341.45	34,444.07	66,785.52	900,929.36
	2030	33,575.30	33,210.22	66,785.52	867,354.06
	2031	34,856.36	31,929.26	66,785.62	832,497.80
	2032	36,098.70	30,686.82	66,785.52	796,399.10
	2033	37,563.26	29,222.26	66,785.52	758,835.84
	2034	38,996.35	27,789.17	66,785.52	719,839.49
	2035	40,484.11	26,301.41	66,785.52	679,355.38
	2036	41,957.56	24,827.96	66,785.52	637,397.82
	2037	43,629.35	23,156.17	66,785.52	593,768.47
	2038	45,293.87	21,491.65	66,785.52	548,474.60
	2039	47,021.90	19,763.62	66,785.52	501,452.70
	2040	48,763.70	18,021.82	66,785.52	452,669.00
	2041	50,676.25	16,109.27	66,785.52	402,012.13
	2042	52,609.62	14,175.90	66,785.52	349,403.13
	2043	54,616.73	12,168.79	66,785.52	294,786.40
	2044	56,670.25	10,115.27	66,785.52	238,116.15
	2045	58,862.47	7,923.05	66,785.52	179,253.68
	2046	61,108.14	5,677.38	66,785.52	118,145.54
	2047	63,439.48	3,348.04	66,787.52	54,706.06
	2048	54,706.06	947.54	55,653.60	-
	Total	1,200,000.00	837,345.43	2,037,345.43	

Catepillar Financial	Year	Annual Payment
Caterpillar D6NXL		
Total Price \$ 288,468.00	2020	40,925.83
	2021	40,925.83
	2022	40,925.83
	2023	40,925.83
	2024	40,925.83
	2025	40,925.83
	Total	245,554.98
Final Lease Payment		132,845.83

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

DA Courthouse Remodel	Year	Principal	Interest	Annual Paymen	Balance
24259 2	2017	2,215.51	485.18	2,700.69	22,043.69
Interest 2.00%	2018	2,259.82	440.87	2,700.69	19,783.87
	2019	2,305.02	395.68	2,700.70	17,478.86
	2020	2,351.12	349.58	2,700.70	15,127.74
	2021	2,398.14	302.55	2,700.69	12,729.60
	2022	2,446.10	254.59	2,700.69	10,283.50
	2023	2,495.02	205.67	2,700.69	7,788.48
	2024	2,544.92	155.77	2,700.69	5,243.56
	2025	2,595.82	104.87	2,700.69	2,647.74
	2026	2,594.78	52.95	2,647.73	

Citizens State Bank of Ouray	Year	Principal	Interest	Annual Paymen	Balance
Fire Truck	2021	15,381.81	4,331.25	19,713.06	122,118.19
	2022	15,866.34	3,846.72	19,713.06	106,251.85
	2023	16,366.13	3,346.93	19,713.06	89,885.85
	2024	16,873.90	2,839.16	19,713.06	73,011.82
	2025	17,413.19	2,299.87	19,713.06	55,598.63
	2026	17,961.70	1,751.36	19,713.06	37,636.93
	2027	18,527.50	1,185.56	19,713.06	19,109.43
	2028	19,109.43	603.60	19,713.03	-
Total		137,500.00	20,204.45	157,704.45	

Citizens State Bank of Ouray	Year	Principal	Interest	Annual Paymen	Balance
Assessor Treasurer	2021	2,780.05	1,648.86	4,428.91	31,837.85
Computer Software	2022	2,916.61	1,512.30	4,428.91	28,921.24
	2023	3,055.15	1,373.76	4,428.91	25,866.09
	2024	3,200.27	1,228.64	4,428.91	22,665.82
	2025	3,349.33	1,079.58	4,428.91	19,316.49
	2026	3,511.38	917.53	4,428.91	15,805.11
	2027	3,678.17	750.74	4,428.91	12,126.94
	2028	3,852.88	576.03	4,428.91	8,274.06
	2029	4,034.82	394.09	4,428.91	4,239.24
	2030	4,239.24	201.36	4,440.60	-
Total		34,617.90	9,682.89	44,300.79	

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

LEASE - PURCHASE AGREEMENTS

Preschool	Year	Annual Paymen	Portion that is Ir Balance
\$80,000 @ 4%	2006	4,515.50	1,315.50
Region 9 Economic	2007	6,000.00	2,800.00
Development District	2008	6,197.59	2,997.59
	2009	6,067.46	2,867.46
	2010	5,903.39	2,703.39
	2011	5,877.41	2,677.41
	2012	5,768.05	2,532.67
	2013	5,270.46	2,345.95
	2014	5,270.46	2,224.04
	2015	5,340.67	2,279.15
	2016	5,105.93	2,014.53
	2017	5,057.85	1,857.85
	2018	4,898.07	1,698.07
	2019	3,200.00	1,120.00
	2020	3,200.00	1,120.00
		66,374.77	28,615.54
			42240.77

Citizens State Bank of Ouray	Year	Principal	Interest	Annual Paymen	Balance
Animas St. Shop Building	2013	12,000.00	8,620.27	20,620.27	168,000.00
	2014	12,000.00	7,980.00	19,980.00	156,000.00
	2015	12,000.00	7,410.00	19,410.00	144,000.00
	2016	12,000.00	6,858.74	18,858.74	132,000.00
	2017	12,000.00	6,270.00	18,270.00	120,000.00
	2018	12,000.00	5,700.00	17,700.00	108,000.00
	2019	12,000.00	5,130.00	17,130.00	96,000.00
	2020	12,000.00	4,572.49	16,572.49	84,000.00
	2021	12,000.00	3,990.00	15,990.00	72,000.00
	2022	12,000.00	3,420.00	15,420.00	60,000.00
	2023	12,000.00	2,850.00	14,850.00	48,000.00
	2024	12,000.00	2,286.25	14,286.25	36,000.00
	2025	12,000.00	1,710.00	13,710.00	24,000.00
	2026	12,000.00	1,140.00	13,140.00	12,000.00
	2027	12,000.00	570.00	12,570.00	-

Bank of the San Juans	Year	Principal	Interest	Annual Paymen	Balance
\$292,875.00 @ 3.75%	2014	14861.54	10844.78	25706.32	278013.46
Fire Authority Building	2015	15424.07	10282.24	25706.31	262589.39
	2016	16007.9	9698.42	25706.32	246581.49
	2017	16613.82	9092.49	25706.31	229967.67
	2018	17242.67	8463.64	25706.31	212725
	2019	17895.35	7810.97	25706.32	194829.65
	2020	18572.7	7133.61	25706.31	176256.95
	2021	19275.71	6430.61	25706.32	156981.24
	2022	20005.33	5700.99	25706.32	136975.91
	2023	20762.56	4943.76	25706.32	116213.35
	2024	21548.46	4157.86	25706.32	94664.89
	2025	22364.1	3342.22	25706.32	72300.79
	2026	23210.62	2495.7	25706.32	49090.17
	2027	24089.18	1617.14	25706.32	25000.99
	2028	25000.99	705.33	25706.32	0

Catepillar Financial	Year	Principal	Interest	Annual Paymen	Balance
Caterpillar D6T	2017	36,798.00	9,099.64	45,897.64	256,665.14
	2018	36,798.00	8,213.28	45,011.28	262,589.39
	2019	36,798.00	7,298.58	44,096.58	228,080.42
	2020	36,798.00	6,354.59	43,152.59	198,581.00
	2021	36,798.00	5,380.41	42,178.41	168,137.59
	Total	183,990.00	36,346.50	220,336.50	136,720.00

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

TABOR

On November 7, 1995 the voters of San Juan County authorized the retention of all revenues in excess of limits imposed by Article X, Section 20 of the Colorado Constitution (TABOR).

SAN JUAN COUNTY IS IN COMPLIANCE WITH THE TABOR AMENDMENT

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

COUNTY MILL LEVY COMPARISON

	<u>Assessed Valuation</u>	<u>Mill Levy</u>	<u>Revenue</u>
2016			
General Fund*	42,597,105.00	19.000	809,345.00
Road & Bridge	42,597,105.00	0.350	14,908.99
Social Services	42,597,105.00	0.291	12,395.76
Refunds/Abatements	42,597,105.00	0.053	2,257.65
TOTAL	42,597,105.00	19.694	838,907.39
2017			
General Fund	42,503,261.00	19.000	807,561.96
Road & Bridge	42,503,261.00	0.350	14,876.14
Social Services	42,503,261.00	0.291	12,368.45
Refunds/Abatements	42,503,261.00	0.247	10,498.31
TOTAL	42,503,261.00	19.888	845,304.85
2018			
General Fund	45,092,397.00	19.000	856,755.54
Road & Bridge	45,092,397.00	0.350	15,782.34
Social Services	45,092,397.00	0.291	13,121.89
Refunds/Abatements	45,092,397.00	0.078	3,517.21
TOTAL	45,092,397.00	19.719	889,176.98
2019			
General Fund	44,464,962.00	19.000	844,834.28
Road & Bridge	44,464,962.00	0.350	15,562.74
Social Services	44,464,962.00	0.291	12,939.30
Refunds/Abatements	44,464,962.00	0.196	8,715.13
TOTAL	44,464,962.00	19.837	882,051.45
2020			
General Fund	45,790,836.00	19.000	870,025.88
Road & Bridge	45,790,836.00	0.350	16,026.79
Social Services	45,790,836.00	0.291	13,325.13
Refunds/Abatements	45,790,836.00	0.088	4,029.59
TOTAL	45,790,836.00	19.729	903,407.40
2021			
General Fund	46,079,462.00	19.000	875,509.78
Road & Bridge	46,079,462.00	0.350	16,127.81
Social Services	46,079,462.00	0.291	13,409.12
Refunds/Abatements	46,079,462.00	0.011	506.87
TOTAL	46,079,462.00	19.652	905,553.59
2022			
General Fund	53,829,861.00	19.000	1,022,767.36
Road & Bridge	53,829,861.00	0.350	18,840.45
Social Services	53,829,861.00	0.291	15,664.49
Refunds/Abatements	53,829,861.00	0.062	3,337.45
TOTAL	53,829,861.00	19.703	1,060,609.751

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

MILL LEVIES

	Assessed Valuation	Mill Levy	Revenue
SAN JUAN COUNTY			
General Fund	53,829,861.00	19.000	1,022,767.36
Road & Bridge	53,829,861.00	0.350	18,840.45
Social Services	53,829,861.00	0.291	15,664.49
Temporary Reduction	53,829,861.00	0.000	0.00
Refunds/Abatements	53,829,861.00	0.062	3,337.45
TOTAL	53,829,861.00	19.703	1,060,609.75
SCHOOL DISTRICT			
General Fund	53,829,861.00	0.000	0.00
Hold Harmless	53,829,861.00	0.000	0.00
Abatement	53,829,861.00	0.000	0.00
Bond Redemption	53,829,861.00	0.0000	0.00
TOTAL	53,829,861.00	0.000	0.00
TOWN OF SILVERTON			
General Operating	29,237,242.00	0.000	0.00
Obligation Bonds	29,237,242.00	0.000	0.00
Refunds/Abatements	29,237,242.00	0.000	0.00
TOTAL	29,237,242.00	0.000	0.00
SOUTHWEST WATER			
General Operating	53,829,861.00	0.000	0.00
Temporary Reduction	53,829,861.00	0.000	0.00
Refunds/Abatements	53,829,861.00	0.000	0.00
TOTAL	53,829,861.00	0.000	0.00
HERMOSA CLIFF FIRE			
General Operating	0.00	0.000	0.00
Bond	0.00	0.000	0.00
Refunds/Abatements	0.00	0.000	0.00
TOTAL	0.00	0.000	0.00
DURANGO FIRE PROTECTION			
General Operating	9,143,676.00	0.000	0.00
Bond	0.00	0.000	0.00
Refunds/Abatements	0.00	0.000	0.00
TOTAL	9,143,676.00	0.000	0.00

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

SUMMARY OF ALL FUNDS

	Estimated Beginning Balance	Estimated Revenue	Estimated Expenditures	Estimated Ending Balance
Total General Operation	496,753	2,740,427	2,870,608	366,572
Road & Bridge Operation	307,116	536,000	598,000	245,116
Contingency	54,554	-	-	54,554
TABOR Emergency	30,000	-	-	30,000
Social Services	78,474	176,937	189,020	66,391
Conservation Trust	10,611	740	6,000	5,351
County Lodging Tax	300,384	155,000	150,000	305,384
Emergency Services	1,000,465	843,200	844,150	999,515
Noxious Weed Management	1,988	-	-	
Anvil Mountain Workforce Housing	249,000	195,000	105,000	339,000
Escrow Accounts (Below)	719,827	208,532	200,000	728,359
	3,249,171	4,855,836	4,962,778	3,140,241

ESCROW ACCOUNTS	Estimated Beginning Balance	Estimated Revenue	Estimated Expenditures	Estimated Ending Balance
Ambulance	72,325	10,000	0	82,325
Fire Department	65,723	20,000	0	85,723
Sheriff's Vehicle	33,513	10,000	35,000	8,513
Search and Rescue	10,000	5,000	0	15,000
Computer Equipment	4,099	5	0	4,104
Clerk's Computer Equipment	4,177	500	0	4,677
Courthouse	47,226	5,000	10,000	42,226
Assessor/Treasurer	3,169	5	0	3,174
Historical Archives	353	5	0	358
Workforce Housing	2,670	10	0	2,680
Land Use Fund	56,486	3,000	0	59,486
Emergency Preparedness	2,247	5	0	2,252
Secure Rural Schools	125,648	0	0	125,648
Gravel	144,544	0	0	144,544
County Barn	39,662	21,000	21,000	39,662
Road Equipment	23,205	129,000	129,000	23,205
LOST 4-Wheelers	3,903	2	0	3,905
CR 2 and 110 Asphalt Maintenance	80,877	5,000	5,000	80,877
TOTAL	719,827	208,532	200,000	728,359

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

EMERGENCY SERVICES FUND - EXPENDITURES
9/30/2021

	2019	2020	Budget 2021	Year to Date	Year End Est.	Budget 2022
Ambulance Assoc.	86,400	86,400	86,400	64,800	86,400	86400
Emergency Service Sales Tax	375,000	460,000	460,000	345,000	460,000	460000
Transfer to Escrow	10,000	10,000	10,000	0	10,000	10000
Ambulance Total	471,400	556,400	556,400	409,800	556,400	556,400
Fire Authority	35,082	33,572	37,572	28,179	37,572	37572
Fireman's Pension		45,000	30000	30,000	30,000	30000
Truck Payment			20000	0	20,000	20000
Building Lease Purchase	25,677	25,677	25678	12,839	25,678	25678
Building O and M	12,196	11,157	9500	8,666	11,500	12000
Insurance	5,926	6,974	5000	0	7,000	7500
Transfer to Escrow	20,000	20,000	20000	0	20,000	20000
Fire Total	98,881	142,380	147,750	79,684	151,750	152,750
Emergency Service Other*	27,500	51,249	56,000	15,000	56,000	100,000
Transfer to Escrow						15,000
Fire Station Mezzanine			25,000	93,386	93,386	-
Tax Refund			20000			20,000
TOTAL	597,781	750,029	805,150	597,869	857,536	844,150
Emergency Service Other*						

2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

PERSONNEL - COMMISSIONERS

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2022
Scott FETCHENHIER					
Salary	28,470	30,225	30,225	31,587	31,587
Social Security	2,178	2,312	2,312	2,416	2,416
Health Insurance	11,400	12,000	14,457	15,900	15,900
Retirement	854	907	907	948	948
sub-total	42,902	45,443	47,900	50,851	50,851
Ernie KUHLMAN					
Salary	28,470	30,225	30,225	31,587	31,587
Social Security	2,178	2,312	2,312	2,416	2,416
Health Insurance	3,000	3,000	3,000	3,000	3,000
Retirement	854	907	907	948	948
sub-total	34,502	36,444	36,444	37,951	37,951
Austin LASHLEY					
Salary	28,470	30,225	30,225	31,587	31,587
Social Security	2,178	2,312	2,312	2,416	2,416
Health Insurance	3,000	3,000	3,000	15,900	15,900
Retirement	854	907	907	948	948
sub-total	34,502	36,444	36,444	50,851	50,851
TOTAL	111,906	118,331	120,788	139,653	139,653

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

PERSONNEL - ADMINISTRATION

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2022
William TOOKEY					
Salary	73,695.46	77,154.86	77,154.86	77,154.86	77,154.86
Social Security	5,638	5,902	5,902	5,902	5,902
Health Insurance	11,400	12,000	14,457	15,900	15,900
Retirement	2,211	2,315	2,315	2,315	2,315
Unemployment	295	309	309	309	309
sub-total	93,239	97,680	100,137	101,580	101,580
Administrative Assistant Heather MACDOUGALL					
Salary*	0.00	11,160.00	12,400.00	12,400.00	12,400.00
Social Security	0	854	949	949	949
Health Insurance	0	4,080	4,915	5,406	5,406
Retirement	0	335	372	372	372
Unemployment	0	45	50	50	50
Sub-total	0	16,473	18,686	19,176	19,176
TOTAL	93,239	114,154	118,823	120,757	120,757
* = 620 hours @ 20.00					

PERSONNEL - VETERANS OFFICER

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2022
Tommy WIPF					
Salary	906	930	930	930	4,800
Social Security	69	71	71	71	367
Health Insurance	20	20	20	20	20
Retirement	3	3	3	3	144
TOTAL	998	1,025	1,024	1,024	5,331

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

PERSONNEL - EMERGENCY MANAGER

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2022
Jim DONOVAN					
Salary	29,245	45,053	45,053	36,400	36,400
Social Security	2,237	3,447	3,447	2,785	2,785
Health Insurance	0	12,000	14,457	11,130	7,950
Retirement	0	1,352	1,352	1,092	1,092
Unemployment	117	180	180	146	146
TOTAL	31,599	62,031	64,488	51,552	48,372

*=2080 Hours @ \$35.00

1040 Hours Emergency Manager 1040 Hours Public Health

Hours and Rate subject ot change depending on pandemic funding

PERSONNEL - COMMUNICATIONS LIAISON

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2022
Anthony EDWARDS					
Salary	0	36,972	36,972	40,669	44,269
Social Security	0	2,828	2,828	3,111	3,387
Health Insurance	0	0	0	0	0
Retirement	0	1,109	1,109	1,220	1,328
Unemployment	0	148	148	163	177
TOTAL	0	41,057	41,057	45,163	49,161

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

SAN JUAN COUNTY, COLORADO

PERSONNEL - SOCIAL SERVICES TECHNICIAN

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2021
Krissy Rhoades					
Salary	33,470	34,380	34,380	39,130	39,130
Social Security	2,560	2,630	2,630	2,993	2,993
Health Insurance	11,400	12,000	14,457	15,900	15,900
Retirement	1,004	1,031	1,031	1,174	1,174
Unemployment	134	138	138	157	157
TOTAL	48,568	50,179	52,636	59,354	59,354
1820 hrs. @ 21.50					

PERSONNEL - CORONER

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2022
Keri METZLER					
Salary	9,900	13663	13663	13663	13663
Social Security	757	1,045	1,045	1,045	1,045
Retirement	297	410	410	410	410
TOTAL	10,954	15,118	15,118	15,118	15,118

PERSONNEL - SURVEYOR

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2022
Kenny SCHAAF					
Salary	1,100	1518	1518	1518	1518

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

PERSONNEL - NURSE

	Budget 2018	Budget 2019	Budget 2020	Budget 2021
Becky JOYCE				
Salary	50,960.00	52,335.92	52,335.92	72,800.00
Social Security	3,898.44	4,003.70	4,003.70	5,569.20
Health Insurance	11,400.00	12,000.00	14,457.00	15,900.00
Retirement	1,528.80	1,570.08	1,570.08	2,184.00
Unemployment	203.84	209.34	209.34	291.20
Sub-total	67,991.08	70,119.04	72,576.04	96,744.40
40 hours/week				
Lois MACKENZIE				
Salary	15,600.00	16,024.00	16,024.00	18,720.00
Social Security	1,193.40	1,225.84	1,225.84	1,432.08
Health Insurance	-	-	-	-
Retirement	468.00	480.72	480.72	561.60
Unemployment	62.40	64.10	64.10	74.88
Sub-total	17,323.80	17,794.65	17,794.65	20,788.56
12 hours/week@ \$30.00				
Amie Bicocchi				
Salary	18,720.00	26,702.00	31,200.00	31,200.00
Social Security	1,432.08	2,042.70	2,386.80	2,386.80
Health Insurance	-	-	14,457.00	15,900.00
Retirement	561.60	801.06	936.00	936.00
Unemployment	74.88	106.81	124.80	124.80
Sub-total	20,788.56	29,652.57	49,104.60	50,547.60
30 Hours/week @ \$23.00				
Jim DONOVAN EPR Grant				
Salary	6,962.80	15,017.60	36,400.00	36,400.00
Social Security	532.65	-	2,784.60	2,784.60
Health Insurance	-	-	4,770.00	4,770.00
Retirement	208.88	450.53	1,092.00	1,092.00
Unemployment	27.85	60.07	145.60	145.60
Sub-total	7,732.19	15,528.20	45,192.20	45,192.20
1040 @ \$35.00				
Brandi				
Salary	5,520.00	-	36,400.00	50,960.00
Social Security	422.28	-	2,784.60	3,898.44
Health Insurance	-	-	-	15,900.00

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

Retirement	165.60	-	1,092.00	1,528.80
Unemployment	22.08	-	145.60	203.84
Sub-total	6,129.96	-	40,422.20	72,491.08
35 hours/week @ \$28.00				
Total	119,965.59	133,094.46	225,089.69	285,763.84

All Hours and Rates are subject to Pandemic Funding

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

SAN JUAN COUNTY, COLORADO

PERSONNEL - TREASURER

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2022
Deanna JARAMILLO					
Salary	43,800	60,449	60,449	60,449	60,449
Social Security	3,351	4,624	4,624	4,624	4,624
Health Insurance	11,400	12,000	14,457	15,900	15,900
Retirement	1,314	1,813	1,813	1,813	1,813
Sub-total	59,865	78,887	81,344	82,787	82,787
Heather MACDOUGALL					
Salary	6,600	7,200	8,000	8,000	8,000
Social Security	505	551	612	612	612
Health Insurance	0	2,640	3,181	3,498	3,498
Retirement	198	216	240	240	240
Unemployment	26	29	32	32	32
Sub-total	7,329	10,636	12,065	12,382	12,382
TOTAL	67,194	89,522	93,408	95,169	95,169
* = 400 hours @ 20.00					

PERSONNEL - ASSESSOR

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2022
Kim BUCK					
Salary	43,800	60,449	60,449	60,449	60,449
Social Security	3,351	4,624	4,624	4,624	4,624
Health Insurance	11,400	12,000	14,457	15,900	15,900
Retirement	1,314	1,813	1,813	1,813	1,813
Sub-total	59,865	78,887	81,344	82,787	82,787
Heather MACDOUGALL					
Salary*	13,200	14,400	16,000	16,000	16,000
Social Security	1,010	1,102	1,224	1,224	1,224
Health Insurance	0	5,280	6,361	6,996	6,996
Retirement	396	432	480	480	480
Unemployment	53	58	64	64	64
Sub-total	14,659	21,271	24,129	24,764	24,764
TOTAL	74,523	100,158	105,473	107,551	107,551
* = 800 hours @ 20.00					

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

SAN JUAN COUNTY, COLORADO

PERSONNEL - CLERK & RECORDER

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2022
Ladonna JARAMILLO					
Salary	43,800	60,449	60,449	60,449	60,449
Social Security	3,351	4,624	4,624	4,624	4,624
Health Insurance	11,400	12,000	14,457	15,900	15,900
Retirement	1,314	1,813	1,813	1,813	1,813
Sub-total	59,865	78,887	81,344	82,787	82,787
Evelyn ARCHULETA					
Salary*	17,160	17,680	22,750	26,000	26,000
Social Security	1,313	1,353	1,740	1,989	1,989
Health Insurance	0	0	0	0	0
Retirement	515	530	683	780	780
Unemployment	69	71	91	104	104
Sub-total	19,056	19,634	25,264	28,873	28,873
TOTAL	78,921	98,520	106,608	111,660	111,660
* = 1300 hours @ 20.00					

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

SAN JUAN COUNTY, COLORADO

PERSONNEL - SHERIFF

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2021
Sheriff - Bruce CONRAD					
Salary	49,100	67,764	67,764	67,764	67,764
Social Security	3,756	5,184	5,184	5,184	5,184
Health Insurance	11,400	12,000	14,457	15,900	15,900
Retirement	1,473	2,033	2,033	2,033	2,033
Sub-total	65,729	86,981	89,438	90,881	90,881
Undersheriff - Steve LOWRANCE					
Salary	60,858	62,501	62,501	62,501	62,501
Social Security	4,656	4,781	4,781	4,781	4,781
Health Insurance	11,400	12,000	14,457	15,900	15,900
Retirement	1,826	1,875	1,875	1,875	1,875
Unemployment	243	250	250	250	250
Sub-total	78,983	81,408	83,864	85,307	85,307
Deputy - Abigail ARMISTEAD					
Salary	53,251	53,096	45,442	53,096	53,096
Social Security	4,074	4,062	3,476	4,062	4,062
Health Insurance	11,400	12,000	10,843	15,900	15,900
Retirement	1,598	1,593	1,363	1,593	1,593
Unemployment	213	212	182	212	212
Sub-total	70,535	70,963	61,306	74,863	74,863
Deputy - Unknown					
Salary	25,358	53,096	40,898	53,096	53,096
Social Security	1,940	4,062	3,129	4,062	4,062
Health Insurance	5,000	12,000	8,433	15,900	15,900
Retirement	761	1,593	1,227	1,593	1,593
Unemployment	101	212	164	212	212
Sub-total	33,160	70,963	53,850	74,863	74,863
Reserves - John GULLION					
Salary	15,000	15,000	15,000	15,000	15,000
Social Security	1,148	1,148	1,148	1,148	1,148
Health Insurance	0	0	0	0	0
Retirement	0	0	0	0	0
Unemployment	60	60	60	60	60
Sub-total	16,208	16,208	16,208	16,208	16,208
Office Administrator**					
Salary	0	9,450	9,450	9,450	10,681
Social Security	0	723	723	723	817
Health Insurance	0	0	0	0	0
Retirement	0	284	284	284	320
Unemployment	0	38	38	38	43
Sub-total	0	10,494	10,494	10,494	11,861
Back Country Officer*					
Salary	12,459	28,756	20,000	24,499	24,499
Social Security	953	2,200	1,530	1,874	1,874
Health Insurance	0	0	0	0	0
Retirement	0	0	0	0	0
Unemployment	50	115	80	98	98
Sub-total	13,462	31,071	21,610	26,471	26,471

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

TOTAL	278,076	368,087	336,770	379,088	380,454
**= 960 hours @ 25.52					
*= 520 hours @ 20.54					

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

PERSONNEL - CUSTODIAN

	Budget 2018	Budget 2019	Budget 2020	Budget 2021
Becky RHOADES				
Salary	19030	19,547	19,547	20,000
Social Security	1,456	1,495	1,495	1,530
Unemployment	20	20	20	8
Retirement	3	3	3	600
TOTAL	20,509	21,065	21,065	22,138

1000 hours @ 20.00

PERSONNEL - SNOW SHOVELER

	Budget 2018	Budget 2019	Budget 2020	Budget 2020
Unknown				
Salary	8000	8000	8000	8000
Social Security	612	612	612	612
Unemployment	20	20	20	3
Retirement	3	3	3	240
TOTAL	8,635	8,635	8,635	8,855

400 hours @ 20.00

PERSONNEL - FURNACE/LAWN/SHOVELING

	Budget 2018	Budget 2019	Budget 2020	Budget 2021
Colin Trower				
Salary				26,000
Social Security				1,989
Unemployment				10
Retirement				780
TOTAL	0	0	0	28,779

1300 hours @ 20.00

**2022 PRELIMINARY BUDGET
SAN JUAN COUNTY, COLORADO**

SAN JUAN COUNTY, COLORADO

PERSONNEL - ROAD & BRIDGE

	Budget 2018	Budget 2019	Budget 2020	Budget 2021	Budget 2022
Louis GIRODO					
Salary	72,425.89	74,381.39	74,381.39	74,381	74,381.39
Social Security	5,541	5,690.18	5,690.18	5,690	5,690.18
Health Insurance	11,400	12,000.00	14,457.00	15,900	15,900.00
Retirement	2,173	2,231.44	2,231.44	2,231	2,231.44
Unemployment	290	297.53	297.53	298	297.53
Sub-total	91,829	94,600.53	97,057.53	98,501	98,500.53
David ANDREWS					
Salary	57,179.99	58,723.85	58,723.85	58,724	58,723.85
Social Security	4,374	4,492.37	4,492.37	4,492	4,492.37
Health Insurance	3,000	3,000.00	3,000.00	3,000	3,000.00
Retirement	1,715	1,761.72	1,761.72	1,762	1,761.72
Unemployment	229	234.90	234.90	235	234.90
Sub-total	66,498	68,213	68,213	68,213	68,212.84
Mike MAXFIELD					
Salary	54,638.19	56,113.42	56,113.42	56,113	56,113.42
Social Security	4,180	4,292.68	4,292.68	4,293	4,292.68
Health Insurance	11,400	12,000.00	14,457.00	15,900	15,900.00
Retirement	1,639	1,683.40	1,683.40	1,683	1,683.40
Unemployment	219	224.45	224.45	224	224.45
Sub-total	72,076	74,313.96	76,770.95	78,214	78,213.95
Unknown					
Salary	0.00	52,000.00	0.00	0	52,000.00
Social Security	0	3,978.00	0.00	0	3,978.00
Health Insurance	0	12,000.00	0.00	0	15,900.00
Retirement	0	1,560.00	0.00	0	1,560.00
Unemployment	0	208.00	0.00	0	208.00
Sub-total	0	69,746.00	0.00	0	73,646.00
OVERTIME PAY	5,000	5,000.00	5,000.00	5,000	5,000.00
TOTAL	235,403	311,873	247,041	249,927	323,573.32

2022 MEETING CALENDAR

SAN JUAN COUNTY BOARD OF COMMISSIONERS

January:	Wednesday	12 th	8:30 A.M.
	Wednesday	26 th	6:30 P.M.
February:	Wednesday	9 th	8:30 A.M.
	Wednesday	23 rd	6:30 P.M.
March:	Wednesday	9 th	8:30 A.M.
	Wednesday	23 rd	6:30 P.M.
April:	Wednesday	13 th	8:30 A.M.
	Wednesday	27 th	6:30 P.M.
May:	Wednesday	11 th	8:30 A.M.
	Wednesday	25 th	6:30 P.M.
June:	Wednesday	8 th	8:30 A.M.
	Wednesday	22 nd	6:30 P.M.
July:	Wednesday	13 th	8:30 A.M.
	Wednesday	27 th	6:30 P.M.
August:	Wednesday	10 th	8:30 A.M.
	Wednesday	24 th	6:30 P.M.
September:	Wednesday	14 th	8:30 A.M.
	Wednesday	28 th	6:30 P.M.
October:	Wednesday	12 th	8:30 A.M.
	Wednesday	26 th	6:30 P.M.
November:	Wednesday	9 th	8:30 A.M.
	Wednesday	23 rd	6:30 P.M.
December:	Thursday	15 th	8:30 A.M.

Meeting Place: Commissioners' Room – San Juan County Courthouse

2022 COUNTY HOLIDAYS

SAN JUAN COUNTY

* Friday, December 31 st	-	New Years' Day
Monday, January 17 th	-	Martin Luther King, Jr. Day
* Monday, February 21 st	-	Presidents' Day
Friday, April 15 th	-	Good Friday (1/2 Day)
* Monday, May 30 th	-	Memorial Day
Monday, June 20 th	-	Juneteenth
* Monday, July 4 th	-	Independence Day
* Monday, September 5 th	-	Labor Day
* Monday, October 10 th	-	Columbus/Indigenous Person Day
* Friday, November 11 th	-	Veterans Day
* Thursday, November 24 th	-	Thanksgiving
Friday, November 25 th	-	Pepto-Bismol Day
Friday, December 23 rd	-	Christmas Eve
* Monday, December 26 th	-	Christmas

* Indicates Paid Holiday

Fund Status Report

San Juan County

Report Selection Criteria:

Fiscal Year: 2021
 From Date: 9/1/2021
 Thru Date: 9/30/2021
 From Period: 9
 To Period: 9
 Option: Period
 Selected Fund Type: ALL
 Include Encumbrances? NO
 Include Pri Yr Liabilities? NO
 Printed in Alpha by Fund Name? NO

Selected Funds :

General Fund (01)	Beginning Balance	Receipts	Disbursements	Transfers	Ending Balance
010 - COUNTY GENERAL FUND	\$172,921.33	\$404,815.52	(\$461,483.77)	\$0.00	\$116,253.08
020 - COUNTY ROAD & BRIDGE	\$455,169.64	\$45,517.51	(\$29,452.41)	\$0.00	\$471,234.74
030 - CONTINGENT FUND	\$54,554.94	\$0.00	\$0.00	\$0.00	\$54,554.94
035 - AMENDMENT 1-EMERGENCY FUN	\$30,000.00	\$0.00	\$0.00	\$0.00	\$30,000.00
040 - SOCIAL SERVICE FUND	\$80,192.81	\$6,391.63	(\$16,137.51)	\$0.00	\$70,446.93
045 - AFFORDABLE HOUSING FUND	\$233,747.72	\$13,214.31	\$0.00	\$0.00	\$246,962.03
050 - CONSERVATION TRUST	\$10,290.12	\$181.01	\$0.00	\$0.00	\$10,471.13
051 - LODGING TAX FUND	\$303,416.24	\$248.50	\$0.00	\$0.00	\$303,664.74
052 - TOURISM BOARD FUND	\$7,635.12	\$0.08	\$0.00	\$0.00	\$7,635.20
055 - NOXIOUS WEED FUND	\$1,988.18	\$0.00	\$0.00	\$0.00	\$1,988.18
060 - TOWN OF SILVERTON	\$484.73	\$16,190.01	(\$15,955.07)	\$0.00	\$719.67
070 - DURANGO FIRE PROTECTION DIS	(\$2,382.83)	\$1,855.97	(\$1,855.97)	\$0.00	(\$2,382.83)
080 - SOUTHWEST WATER CONSERVAT	\$59.60	\$947.72	(\$947.72)	\$0.00	\$59.60
090 - ADVERTISING FEES	\$9,518.40	\$0.00	\$0.00	\$0.00	\$9,518.40
100 - REDEMPTION	\$312.30	\$7,353.27	(\$7,353.27)	\$0.00	\$312.30
110 - SCHOOL GENERAL	(\$8,203.11)	\$26,702.71	(\$26,702.71)	\$0.00	(\$8,203.11)
116 - SCHOOL BOND	\$0.00	\$5,122.90	(\$5,122.90)	\$0.00	\$0.00
200 - SPECIAL ASSESSMENTS	(\$38,169.09)	\$0.00	(\$30.00)	\$0.00	(\$38,199.09)
210 - 911 AUTHORITY	\$23,990.91	\$8,383.39	(\$1,214.89)	\$0.00	\$31,159.41
220 - TREASURER'S FEES	\$15,468.05	\$20.00	\$0.00	\$0.00	\$15,488.05
230 - ASSESSOR'S PENALTY	\$5,548.41	\$0.00	\$0.00	\$0.00	\$5,548.41
240 - TREASURER'S DEEDS/FORECLOS	\$11,249.96	\$0.00	(\$15.00)	\$0.00	\$11,234.96
250 - CLERK TECHNOLOGY FEES	\$4,000.40	\$69.00	\$0.00	\$0.00	\$4,069.40
260 - ADMIN FEE	\$2,698.42	\$0.00	\$0.00	\$0.00	\$2,698.42
270 - PEAK INVESTMENTS	\$35,207.53	(\$222.36)	\$0.00	\$0.00	\$34,985.17
280 - ABATEMENTS	(\$2,333.91)	\$0.00	\$0.00	\$0.00	(\$2,333.91)
300 - ESCROW-AMBULANCE	\$62,345.44	\$2.27	\$0.00	\$0.00	\$62,347.71

Fund Status Report

San Juan County

Report Selection Criteria:

Selected Fund Type: ALL
 Include Encumbrances? NO
 Include Pri Yr Liabilities? NO
 Printed in Alpha by Fund Name? NO

Fiscal Year: 2021

From Date: 9/1/2021

From Period: 9

Thru Date: 9/30/2021

To Period: 9

Option: Period

Selected Funds :

	Beginning Balance	Receipts	Disbursements	Transfers	Ending Balance
350 - ESCROW-COMPUTER EQUIP	\$4,096.72	\$0.46	\$0.00	\$0.00	\$4,097.18
360 - ASSESSOR/TREASURER ESCROW	\$3,167.26	\$0.64	\$0.00	\$0.00	\$3,167.90
400 - ESCROW-GRAVEL	\$144,541.54	\$1.02	\$0.00	\$0.00	\$144,542.56
410 - COUNTY BARN ESCROW	\$39,703.79	\$4.75	\$0.00	\$0.00	\$39,708.54
420 - ROAD EQUIP PURCHASE ESCROW	\$23,249.67	\$5.08	\$0.00	\$0.00	\$23,254.75
430 - LOST 4-WHEELERS ESCROW	\$3,903.18	\$0.34	\$0.00	\$0.00	\$3,903.52
440 - CDOT CONTRACT ESCROW	\$5,000.00	\$0.00	\$0.00	\$0.00	\$5,000.00
450 - COURTHOUSE ESCROW	\$66,111.19	\$20.55	\$0.00	\$0.00	\$66,131.74
460 - MSI ESCROW	\$70,399.22	\$10.32	\$0.00	\$0.00	\$70,409.54
470 - EMERGENCY PREPAREDNESS	\$2,243.64	\$0.73	\$0.00	\$0.00	\$2,244.37
500 - HISTORICAL ARCHIVES ESCROW	\$353.36	\$0.22	\$0.00	\$0.00	\$353.58
550 - ASPHALT ESCROW	\$70,944.12	\$7.56	\$0.00	\$0.00	\$70,951.68
570 - FOREST RESERVE ESCROW	\$125,648.18	\$0.00	\$0.00	\$0.00	\$125,648.18
590 - EMERGENCY SERVICES SALES TA	\$1,288,423.56	\$164,773.79	(\$45,000.00)	\$0.00	\$1,408,197.35
600 - FIRE TRUCK FUND	\$45,780.67	\$6.53	\$0.00	\$0.00	\$45,787.20
650 - LAND USE ESCROW	\$53,511.29	\$2.86	\$0.00	\$0.00	\$53,514.15
700 - WORKFORCE HOUSING ESCROW	\$2,663.78	\$1.58	\$0.00	\$0.00	\$2,665.36
750 - ESCROW-SHERIFF VEHICLE	\$23,600.39	\$0.75	\$0.00	\$0.00	\$23,601.14
800 - PUBLIC TRUSTEE	\$234.00	\$139.00	(\$309.00)	\$0.00	\$64.00
810 - SPECIFIC OWNERSHIP TAX	\$1,651.97	\$10,607.93	(\$1,651.98)	\$0.00	\$10,607.92
820 - TAX HOLDING FUND	\$133,559.82	\$18,437.39	(\$94,298.04)	\$0.00	\$57,699.17
900 - ADVANCED COLLECTIONS	\$5,915.12	\$0.00	\$0.00	\$0.00	\$5,915.12
950 - WEST SIDE SPECIAL IMP. DISTRIC	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
960 - HOSPITAL GRANT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
* Fund Type Total *	\$3,584,413.78	\$730,814.94	(\$707,530.24)	\$0.00	\$3,607,698.48
* Report Total *	\$3,584,413.78	\$730,814.94	(\$707,530.24)	\$0.00	\$3,607,698.48

San Juan County

Composition of Cash Balances and Investments

As Of: 9/30/2021

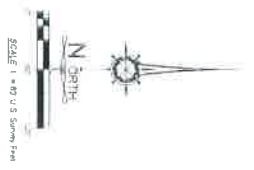
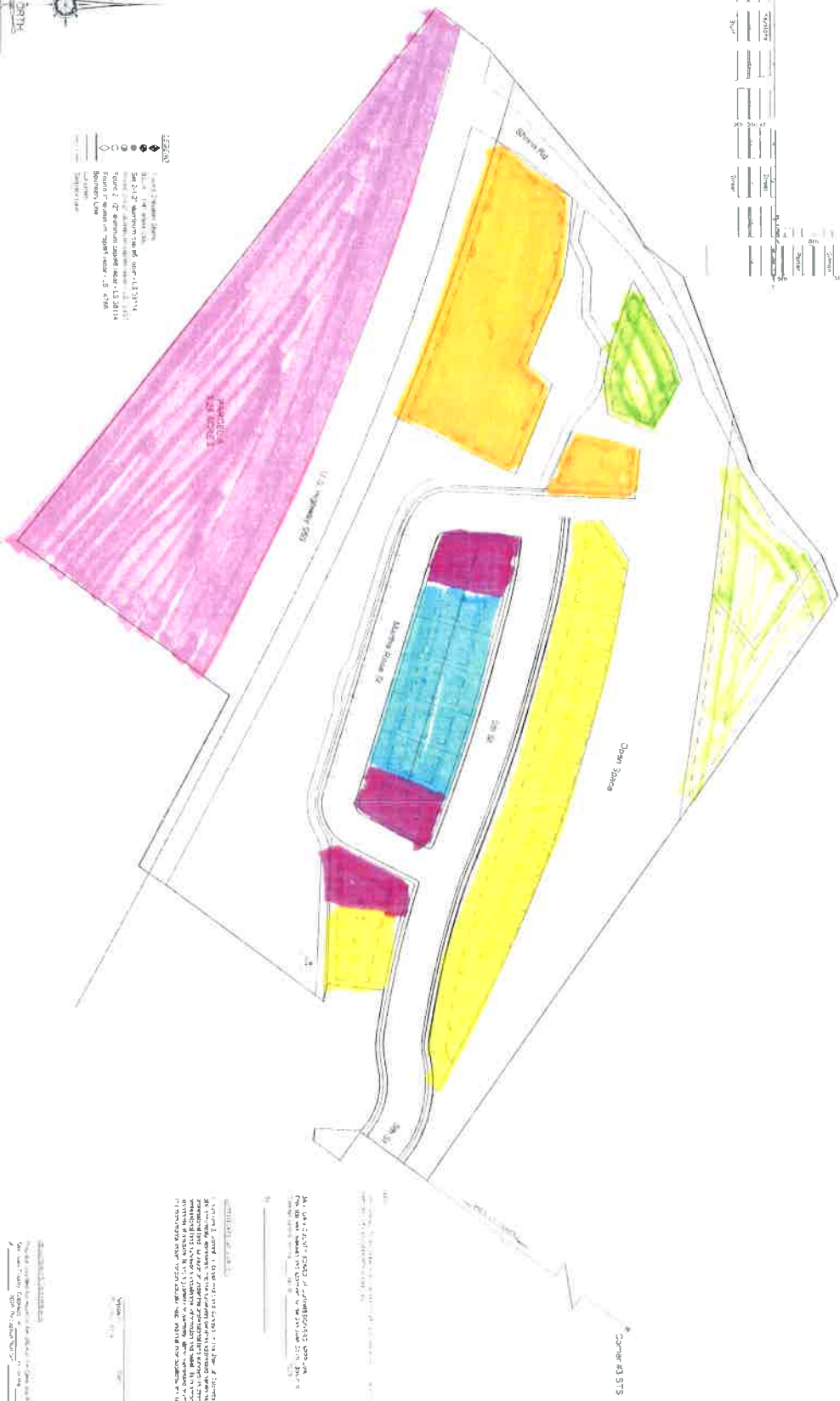
	Net Bank Balance	Investments	Cash on Hand/ In Transit	Total
<i>Cash and Cash Items</i>				
Cash on Hand	\$0.00	\$0.00	\$200.00	\$200.00
<i>Demand and Time Deposits</i>				
Citizens State Bank	\$1,290,571.64	\$0.00	\$0.00	\$1,290,571.64
<i>Investment Pool</i>				
Citizens State Bank	\$0.00	\$1,015,909.59	\$0.00	\$1,015,909.59
COLOTRUST	\$0.00	\$1,004,791.18	\$0.00	\$1,004,791.18
Sigma Financial Corporation	\$0.00	\$296,226.07	\$0.00	\$296,226.07
	<u>\$1,290,571.64</u>	<u>\$2,316,926.84</u>	<u>\$200.00</u>	<u>\$3,607,698.48</u>

VICINITY MAP

Section	1	2	3	4	5	6	7	8	9	10	11	12
Color	Light Blue	Light Green	Light Yellow	Light Purple	Light Orange	Light Cyan	Light Pink	Light Grey	Light Brown	Light Blue	Light Green	Light Yellow
Area	10000	10000	10000	10000	10000	10000	10000	10000	10000	10000	10000	10000
Perimeter	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000

Re-plot of Sheet 4, Anvil Mountain Subdivision Set Backs

Suspended Section 18, Township 41 North, Range 7 West of the New Mexico Meridian
San Juan County, Colorado



DATE OF READING

BY: [Name]

- 1. 1/4" = 40' 0.5 Survey Feet
- 2. 1/4" = 40' 0.5 Survey Feet
- 3. 1/4" = 40' 0.5 Survey Feet
- 4. 1/4" = 40' 0.5 Survey Feet
- 5. 1/4" = 40' 0.5 Survey Feet
- 6. 1/4" = 40' 0.5 Survey Feet
- 7. 1/4" = 40' 0.5 Survey Feet
- 8. 1/4" = 40' 0.5 Survey Feet
- 9. 1/4" = 40' 0.5 Survey Feet
- 10. 1/4" = 40' 0.5 Survey Feet
- 11. 1/4" = 40' 0.5 Survey Feet
- 12. 1/4" = 40' 0.5 Survey Feet

PROJECT NAME	RE-PLAT OF SHEET 4, ANVIL MOUNTAIN SUBDIVISION
CLIENT	ANVIL MOUNTAIN SUBDIVISION
DATE	10/15/2014
BY	[Name]
CHECKED BY	[Name]
SCALE	1" = 40' 0.5 Survey Feet
PROJECT LOCATION	SAN JUAN COUNTY, COLORADO
PROJECT NUMBER	10000
DATE OF READING	10/15/2014
BY	[Name]
CHECKED BY	[Name]
SCALE	1" = 40' 0.5 Survey Feet
PROJECT LOCATION	SAN JUAN COUNTY, COLORADO
PROJECT NUMBER	10000

SOUTHWEST LAND SURVEYING LLC

San Juan County

Apartment #	# of Bedrooms	Unit Type	Rent \$
A1 - 1st floor	2	Unrestricted	\$ 1,238.00
A2 - 1st floor	3	Unrestricted	\$ 1,552.00
A3 - 2nd floor	2	HDG 30%	\$ 480.00
A4 - 2nd floor	3	Affordable 60%	\$ 1,062.00
B1 - 1st floor	1	Affordable 60%	\$ 800.00
B2 - 1st floor	1	Affordable 60%	\$ 827.00
B3 - 1st floor	1	Unrestricted	\$ 960.00
B4 - 1st floor	1	HDG 50%	\$ 608.00
B5 - 2nd floor	2	Affordable 60%	\$ 958.00
B6 - 2nd floor	2	Affordable 60%	\$ 958.00
B7 - 3rd floor	2	Affordable 40%	\$ 563.00
B8 - 3rd floor	3	Unrestricted	\$ 1,552.00

1 Bedroom 500 sq. ft.
2 Bedroom 900 sq. ft.
3 Bedroom 1000 sq. ft.

2021 AREA MEDIAN INCOME

AMI-2021	1 Person	2 Person	3 Person	4 Person	5 Person	6 Person	7 Person	8 Person
120%	61,800	70,560	79,440	88,200	95,280	102,360	109,440	116,520
100%	51,500	58,800	66,200	73,500	79,400	85,300	91,200	97,100
80%	41,200	47,040	52,960	58,800	63,520	68,240	72,960	77,680
Mortgage Payment Affordable AMI								
Income	\$40,000	\$45,000	\$50,000	\$ 55,000	\$60,000	\$65,000	\$70,000	\$75,000
Monthly	\$967	\$1,088	\$1,208	\$1,329	\$1,450	\$1,571	\$1,692	\$1,813

SILVERTON/SAN JUAN COUNTY AFFORDABLE HOUSING ISSUES
SAN JUAN COUNTY REGIONAL PLANNING COMMISSION

10-19-2021

Which of the following strategies could be done to address affordable housing issues?

- Expediting development review for affordable housing developments aimed at households at or below 120% AMI
- Waiving/subsidizing/reducing local development review or fees, such as building permit fees, planning waivers, and water and sewer tap fees
- Requiring deed restrictions on certain properties
- Zoning for tiny homes
- Working regionally to address housing issues
- Using county-owned or public property to develop affordable housing
- Expediting development review for acquiring or repurposing underutilized commercial property that can be rezoned to include affordable housing units (including preserving existing affordable housing units)
- Having a density bonus program
- Promoting the use of sub-metering of water utility charges for affordable housing projects
- Having a dedicated funding source to subsidize infrastructure costs and associated fees related to publicly owned water, sanitary sewer, roadways, sidewalks and curbs infrastructure
- Granting duplexes, triplexes, or other appropriate multi-family housing options as a use by right in single-family residential zoning districts
- Classifying a proposed affordable housing development as a use by right when it meets the building density and design standards of a given zoning district
- Authorizing accessory dwelling units as a use by right on parcels in single family zoning districts (that meet the safety and infrastructure capacity considerations of the county)
- Allowing planned unit developments with integrated affordable housing units
- Allowing the development of small square footage residential unit sizes
- Reducing minimum parking requirements for new affordable housing developments
- Creating a land donation, land acquisition, or land banking program.
- Adopting an inclusionary zoning ordinance

Which of the following are affordable housing need/priority in the community?

- Workforce housing development
- Infrastructure – water, sewer, road development/horizontal development costs
- Behavioral health resources, including homelessness prevention resources, support for human services, child welfare, etc.

- Support for regional project coordination, public/private partnerships, non-profit developer support
- Capacity building, operations support, administrative support
- Land acquisition/banking
- Expanding modular home/tiny home development
- Rental assistance
- Improving quality of existing affordable housing units

What do you view as the largest barriers to having more affordable housing in the community?

- Funding/Designated Funding Source
- Land
- Infrastructure
- Staff Capacity
- Developers
- Contractors
- Building Materials
- Other:

What impacts, if any, has the community experienced as a result of affordable housing challenges?

- An increase in the homeless population
- Workforce challenges
- Increased traffic and commute times
- Slower economic growth
- Other:

How has COVID-19 impacted your county affordable housing plan or actions?

- Increased property values
- Increased costs for building supplies
- Shortage of building supplies

Potential partnerships for the collaboration on affordable housing projects?

- San Juan County
- Town of Silverton
- Southwest Colorado Council of Government
- Region 9
- Silverton School District
- Housing Authority
- Non-Profit Organizations
- Department of Local Affairs
- Colorado Department of Housing

- CHFA
- Developers
- Contractors
- Other:

What is the affordable housing target for homeownership?

- 30-50% AMI
- 50-70% AMI
- 70-90% AMI
- 90-110% AMI
- 110-130% AMI
- 130% + AMI

What is the affordable housing target for rental units?

- 30-50% AMI
- 50-70% AMI
- 70-90% AMI
- 90-110% AMI
- 110-130% AMI
- 130% + AMI

To what extent will "NIMBY-ism" hamper affordable housing progress?

What strategies can be implanted to overcome NIMBY-ism?

To what extent does land availability hamper affordable housing?

To what extent does the short-term rental industry hamper affordable housing?

Are the short-term rental regulations adequate?

To what extent does the inability to attract developers, contractors and subcontractors hamper affordable housing?

Will the master plan identify policies and/or locations for the development of affordable housing?

Will the development codes require compliance with the master plan?

Can a shovel-ready affordable housing project be designed if funding becomes available?

Other issues, concerns or strategies:

Workforce Housing: Strategies to Address Workforce Housing Needs (White Paper)

San Juan Development Association - June 2021

1. Definitions

Workforce Housing - housing affordable to households earning between 60 and 120 percent of area median income (AMI). Workforce housing targets middle-income workers which include professions such as police officers, firefighters, teachers, health care workers, retail clerks, and the like. Also known as attainable housing.

Attainable Housing – see definition of workforce housing

Affordable Housing – housing affordable to households earning below 80 percent of area median income (AMI)

2. Approach for Workforce Housing Strategies

Many communities are facing a shortage of housing and the problem is not new to Colorado's mountain towns. San Juan Development Association (SJDA) has researched and assembled a variety of strategies that other communities and local governments have used in the past to help tackle their housing needs. Research has been pulled from federal agencies, nationally recognized housing research groups, case studies of regional and rural programs, and interviews with Local City Leaders, Non-Profits, and Community Organizations.

Compiling the information, strategies can be grouped into four main approaches:

1. Policy & Management
2. Planning & Land Use
3. Dedicated Funding
4. Capacity Building

More details on each approach as well as examples will be outlined below.

3. Workforce Housing Strategies

Policy & Management

1. Create a comprehensive workforce housing policy

A policy begins with a housing needs assessment and feasibility study. The policy addresses the findings of the study and the outcomes. At the time of this report, SJDA is sponsoring a Silverton Housing Study in partnership with Housing Solutions of the Southwest, Southwest Colorado Council of Government, and Root Policy. The study will evaluate status of housing, assessment of needs, community capacity, and an employer survey to understand staffing challenges as it relates to employee housing. The preliminary study will be available in June.

After formulating the housing study, and once a solid assessment of needs is understood, there are different approaches to policy and management that local governments can enact to incentivize and support workforce housing development. A list of policies with examples are below:

- Inclusionary zoning – planning ordinances that require a given share of new construction to be affordable by people with low to moderate incomes
- Upzoning – introducing rezoning laws that allow multifamily units to be built in what use to be single-family-only zoning areas to create more accessible and ample housing options through building of duplexes, triplexes, and garden apartments
- Density bonuses – a zoning tool that permits developers to build additional floor area, in exchange for amenities and affordable housing needed by the community. Amenities can be community centers, libraries, parks, childcare centers, affordable housing, and more. Certain zones allow for extra density, up to a specified maximum floor space ratio, in exchange for cash contributions towards amenities and affordable housing. Financial contributions are determined by the density bonus contribution rate set out under the schedule of the zoning bylaw
- Housing preservation – policies aimed at maintaining existing workforce housing units by utilizing programs that support long-term ownership, maintenance upkeep through code enforcement, and notice and right-of-refusal laws
- Single Permitting Process – allows ease of permitting for developers who are interested in building workforce housing by having a guided, single application
- Fast Track Permitting – prioritizes workforce housing projects by automatically bringing their permitting to front of the line
- New Build Requirement Reductions – reducing requirements within zoning laws when developing workforce housing, an example is reduction in parking requirements per unit

2. Create a Workforce Housing Delivery System with Performance Checks

The housing delivery system ensures the effective coordination and integration of the workforce housing policy into planning and management activities. Examples could be community-based, public-private partnerships, or subset of the local government. This system role would be to work on the operation and implementation of the policy.

Supporting the delivery system with performance checks provides accountability in the management and implementation. Examples of performance measurement checks are below:

- Number of Supported Affordable Housing Units Created per Year: The number of affordable houses created with support from the local government tracks efforts to maintain the affordability of living in an area.
- Amount of Housing Relief Distributed: The dollar amount of housing relief provided by the municipality is also an effective illustration of municipal involvement for promoting affordable living.

- Number of Residents Assisted in Housing Relief Programs: Looking at the number of actual recipients of housing relief can provide insight into the number of residents impacted by housing relief programs.
- Percentage of Residents Satisfied with Affordable Housing: Evaluating the overall satisfaction of affordable housing helps gauge performance in providing high-quality, affordable housing to residents.
- Housing Opportunity Index Percentage: This measure requires observing the number of new and existing homes which were affordable to families earning the area median income and dividing that by the total number of homes using income and sales prices.
- Percentage of Households That Pay 30% or More of Income on Housing: The 30% of income toward rent looks at the percentage of municipal households who pay at or above HUD's standard for burdensome housing cost in relation to total household income.
- Number of HUD Eligible First-Time Homebuyers: The number of HUD eligible first-time home buyers ensures adequate, safe, and affordable housing options for residents at or below 80% of area median income (based on data from the Consolidated Annual Performance and Evaluation Report by HUD).
- Total Attendance at Neighborhood Meetings: This measure helps disclose the level of community engagement in the municipality.
- Resident Satisfaction with Neighborhood Meetings: Resident satisfaction with neighborhood meetings, taken from a satisfaction survey, can aid in determining if residents find neighborhood meetings informative.

3. Integrate the Workforce Housing Policy & Delivery System into Master Planning

Integrating the Workforce Housing Policy and Delivery System into the Master Plan ensures commitment and support to long term housing goals.

Planning & Land Use

1. Create land use and zoning codes to incentivize developers and owners

Land use and zoning codes should encourage and enable workforce housing development opportunities. Examples of such are below:

- Infrastructure Investment – new or updated infrastructure to undeveloped areas will encourage developers to consider property since hook ups are readily available
- Waiver of building permits and/or water and sewer fees – lowers initial investment of developers and allow them to reach their ROI faster
- Density relief – increasing allowance of number of dwelling units to qualify as one principal building
- Expansion of multi-family residential districts – increases developable areas for multi-unit dwellings
- Tax Incentives (Opportunity Zone) - Prior capital gains proceeds reinvested through Qualified Opportunity Funds in Qualified Opportunity Zones are eligible for tax deferral and potentially also for permanent tax exclusion, depending on the length

of the investment. In addition, a permanent exclusion of future appreciation is possible if the opportunity fund is owned for more than 10 years

- Tax Abatements - Freezing real estate tax assessments, lower tax rates on repurposed buildings, limit Real Estate Tax Assessments for Rent- and Resale-Restricted Properties, and/or limit the Rate by which Real Estate Tax Liability can increase
- Cash Incentives -incentivizing community members to support workforce housing availability through deed restriction, covenants, or development.

2. Encourage diversification of Workforce Housing Planning and Land Use Programs

Planning objectives and program activities should address the production of workforce housing and preservation through a variety of different ways. Such examples are:

- Ground leases - separates the ownership of land from the ownership of the improvements on the land, such as an office building or a shopping center. The landowner leases the land to the developer of the improvements, who pays rent for use of the land. Typically ground leases are long term and include set rent escalations, foreclosure rights should the lessee default, and a reversionary right, which means improvements on the property revert to the landowner at the end of the lease term.
- Community Land Trusts - a nonprofit organization that holds land on behalf of a place-based community, while serving as the long-term steward for affordable housing, community gardens, civic buildings, commercial spaces, and other community assets on behalf of a community. CLTs balance the needs of individuals who want security of tenure in occupying and using land and housing, with the needs of the surrounding community, striving to secure a variety of social purposes such as maintaining the affordability of local housing, preventing the displacement of vulnerable residents, and promoting economic and racial inclusion. Versions of CLT differ all over, but majority have land owned by the CLT who oversees the management and use, while residents own the house or unit they live in under deed restrictions.
- Community Development Corporations - a non-profit organization incorporated to provide programs, offer services, and engage in other activities that promote and support community development. CDCs usually serve a geographic location such as a neighborhood or a town. They often focus on serving lower-income residents or struggling neighborhoods. CDCs play a critical role in building community wealth for several key reasons: They anchor capital in communities by developing residential and commercial property, ranging from affordable housing to shopping centers and even businesses; At least one-third of a CDC's board is typically composed of community residents, allowing for the possibility of direct, grass-roots participation in decision-making; CDCs' work to enhance community conditions oftentimes involves neighborhood organizing, a process critical for empowering residents and gaining political power.

3. Ensure no "Net Loss" of Existing Rental Housing Supply

Policy provisions should be added to ensure that all future development will not result in a “net loss” of existing workforce rental housing. Examples of provisions are below:

- Deed restrictions – specifically to workforce housing, these are programs to give local workers and families the ability to rent and attain homeownership in a community. Deed restrictions help to safeguard the long-term value to the community of the initial investment in affordable homeownership by limiting any subsequent sales of the home to income-eligible borrowers at an affordable price. The resale restrictions are attached to the property’s deed, and may be enforced for several decades or more, depending on state law. Buyers of deed-restricted properties are typically allowed to retain some but not all of the benefits of home price appreciation, thereby preserving ongoing affordability for the next buyer, in keeping with the terms of the restriction.
- Covenants – rules governing the use of property
- Rental code enforcement – ensures that properties do not become uninhabitable for housing
- Rehabilitation tools – programs or funding that helps owners pay for repairs or updates required to maintain rental properties, most used for emergency repairs or units that service low-income renters
- Renter termination notice - policies that require owners of rental properties to give residents advance notice of any intention to sell the property or convert it to condominiums. The notice period gives residents a chance to plan how they will address the change in ownership which often can lead to higher rents and so allows renters time to search for new housing
- Right-of-refusal laws – allows residents (or another qualifying entity) to match a legitimate offer to purchase the property that leads to a transfer of ownership either to the residents or to another entity willing to preserve the property as workforce housing over the long-term.

Dedicated Funding

1. Create dedicated funding sources

Public/private dedicated funding sources should be created in support of workforce housing projects and program activities. Examples of funding sources are:

- Housing trust fund (HTF)– established sources of funding for affordable housing construction and other related purposes created by governments to ensure a steady stream of funding rather than rely on regular budget processes. HTFs are ideally funded through dedicated revenues like real estate transfer taxes or document recording fees. Examples of sources of funding for local housing trust funds include: General Funds, Capital improvement project funds, tax increment financing funds, impact fees, hotel occupancy taxes, settlement funds, public benefit funds, government general obligation bond revenues, condominium conversion fees, real estate transfer taxes, sales taxes, property taxes, including dedicated levies, housing excise taxes, inclusionary zoning in-lieu fees, disposal waste fees, state funding allocations, sales of surplus plan, developer proffers, permit fees.

- Bond issues – debt securities, a variation of municipal revenue bonds, issued by state or local governments to raise money for affordable housing development projects that provide the government with cheap financing and the lender, especially those in the upper tax brackets, with tax advantages. In addition to repaying the bond principal, the state or locality must pay interest on the money it borrows. Mortgages provided through housing bonds are restricted to first-time homebuyers who earn no more than the area median income. Furthermore, the price of a home purchased with a housing bond mortgage is limited to 90% of the average area purchase price. Housing bonds typically have low interest rates and can be issued as either a fixed or variable-rate demand obligation (VRDO).
- Tax increment financing (TIF) funds - a public financing method that is used as a subsidy for redevelopment, infrastructure, and other community-improvement projects. The original intent of a TIF program is to stimulate private investment in a blighted area that has been designated to be in need of economic revitalization. Through the use of TIF, municipalities typically divert future property tax revenue increases from a defined district toward an economic development project or public improvement project in the community. TIF subsidies are not appropriated directly from a city's budget, but the city incurs loss through foregone tax revenue. TIF creates funding for public or private projects by borrowing against the future increase in these property-tax revenues.
- Certification of Participation (COP) - a type of financing where an investor purchases a share of the lease revenues of a program rather than the bond being secured by those revenues. Certificates of participation are secured by lease revenues. A certificate of participation (COP) can also be referred to as a participation certificate. The key takeaways are that COPs allows investors to participate in a pro-rata share of a lease-financing agreement; As opposed to bond participation, COPs pay investors via lease revenues as opposed to bond interest; COPs are a commonly found in municipal financing as an alternative to muni bonds. A lease-financing agreement is used by a municipality or local government to acquire real property. Under the agreement, the local government makes regular payments over the annually renewable contract for the acquisition and use of the property. A lease-financing contract is typically made available in the form of a certificate of participation.

2. Leverage funds with Federal, State, and Local Public Funds

Coordination should be made to create locally designed workforce housing programs that effectively leverage local financing with federal and state housing grants like below:

- Federal & CO DOLA Division of Housing
 - Home Investment Partnership Program - HOME dollars provide competitive funding to local government, non-profit and private developers. The purpose of the HOME Program is to address a wide range of activities that build, buy, and/or rehabilitate affordable housing for rent or ownership or provide direct rental assistance to low-income people
 - National Housing Trust Fund - The HTF is a new affordable housing production program administered by the U.S. Department of Housing and Urban

development and capitalized through Fannie Mae and Freddie Mac. The program increases and preserves the supply of decent, safe, and sanitary affordable housing for extremely low-income households, those earning at or below 30% of the area median income (AMI).

- Housing Development Grant Funds - The HDGF program is a competitive grant that provides funds for acquisition, rehabilitation, and new construction. The Fund was created by the Colorado state treasury and consists of monies allocated to the Colorado Affordable Housing Construction Grants Fund by the General Assembly. HDG funds improve, preserve, or expand the supply of affordable housing, finance foreclosure prevention activities in Colorado and acquisition of housing and economic data necessary to advise the State Housing Board on local housing conditions.
- Housing Development Loan Fund - The HDLF program was created to meet federal matching funds requirements. This fund makes loans for development, redevelopment, or rehabilitation of low- or moderate-income housing. Loans provided through HDLF require collateral.
- Colorado Housing Investment Fund - The CHIF was created with \$36 million from the Attorney General's custodial funds to address Colorado's need for affordable rental housing.
- Revolving Loan Programs - We currently fund local agencies around the state to operate RLFs for Single-Family Owner-Occupied Rehabilitation (Rehab), Down Payment Assistance (DPA), and similar homeownership assistance programs.
- Bills moving through the Colorado General Assembly (~\$65M)
 - HB21-1271 - Concerning the establishment of programs offering state assistance to local governments to promote the development of innovative affordable housing strategies in a manner that is compatible with best local land use practices, and, in connection therewith, making an appropriation. Includes a local government affordable housing development incentive grant program and a local government planning grant program.
 - HB21-242 - allows the division of housing within the department of local affairs to use the housing development grant fund for rental assistance, tenancy support service programs, and awarding grants and loans for the rental, acquisition, or renovation of underutilized hotels, underutilized motels, and other underutilized properties to provide non congregate sheltering or affordable housing for people experiencing homelessness.

3. Focus funding on purchase, rehabilitation, and rental activities

Local governments should focus housing funds away from deep subsidy, first time homebuyer programs to targeted purchases, rehabilitation and investor-owner, rental rehabilitation programs. Successful funding programs include neighborhood revitalization efforts, public infrastructure investments, code enforcements, land acquisitions, and building acquisitions.

Capacity Building

Capacity Building is the process to increase the knowledge, skills, and effectiveness of a project staff to implement activities that contribute to objectives by ensuring that partners and stakeholders have the skills and information needed to fulfill their roles.

1. Support Public-Private Housing Partnerships

The workforce housing delivery system should be operationalized through new and existing public-private housing partnerships which should serve as intermediates between local governments and communities. These include:

- Construction companies
- Building supply companies
- Private equity development groups

2. Support Employer Assisted Housing Programs

Communities can leverage employer's support for workforce housing to create institutional capacity building for long term workforce rental housing developments.

- Enlisting employers to build a constituency for workforce homes by encouraging business owners to assume leadership roles in efforts to increase availability and raise public support
- Adopting employer-assisted housing strategies for public works including housing benefit programs to new applicants
- Providing incentives for employer investment by offering matching funds for employer contributions to cover employees down payments, closing cost assistance, or renter security deposits and/or providing tax credits to employers who contribute cash, property, or securities to workforce housing projects
- Providing organizational support to interested employers to navigate employee housing programs

3. Support Alternative Building Designs & Materials

Local governments should support alternative building designs and materials including "green" building methods and localized suppliers that could reduce the costs of workforce housing development.

4. Conclusion

Workforce housing is a complex problem which requires a multifaceted solution that is continually evaluated and revised to meet the needs of the community. The four strategic approaches, Policy and Management, Planning and Land Use, Dedicated Funding, and Capacity Building, are not siloed but rather interdependent. Communities that can continually evaluate their resident's needs and support through a localized combination of the strategies have the most success in planning, developing, and using long-term workforce housing.

**San Juan Development Association
Economic Diversification & Resiliency Coordinator Report
September 1st – 30th, 2021**

This report covers activities and project updates done by the SJDA Economic Coordinator during the time above.

Participated Meetings

- Community Builders
 - Project Management Team Weekly update meetings
- Region 9 High Alpine Taskforce Kick-off meeting
- SJDA Board Meeting - 9/10
- SJDA budget presentation to joint SJC & ToS Meeting
- Regional connections
 - Heather Otter- Region 9, monthly check-ins
 - Miriam – SWCCOG, bi-monthly check-ins
 - CHFA – Max Mattisson and Chris Lopez on regional housing discussion
 - Andrew Trump – OEDIT Business Development check in
 - Dr Sam Dosumu – Pueblo Community College Dean

Activities

- Assisted 3 inquiries from small business owners
- Updating Prospectus with Region 9 (Heather) – planning on printing copies in November

Projects

- Grants
 - Received:
 - CHFA SHIP-TA Grant (~\$20K)– Second Round – assistance for pre-development in Anvil
 - DOLA’s Main Street Open for Business Grant - \$612,849.30
 - 5% of total grant is for SJDA’s operation budget in overseeing grant (\$29,183)
 - EDCC Scholarship Application for upcoming EDCC Conference (\$275)
 - Submitted:
 - EDO Recovery Grant (\$25k) – operational funding for EDOs negatively affected by COVID
 - CHFA direct effects grant (\$47,300) – operational and development funding for build out in Anvil
- Fiber
 - Fiber/broadband discussion with community leads (ToS, SJC, & School)
 - Discussion with Clearnetworx on proposed fiber build out in ToS
- Workforce Housing
 - CHFA discussion on SHIP-TA and constuction financing

- Discussion with 9318 Contracting on gap funding for build out of 8 remaining attainable lots
- Two meetings with DOH (Andrew Atchley) on pursuing DOH grant application for build out of 8 remaining attainable lots
- Discussion with SWCCOG on their grant application for regional housing approach for economic development. SJDA will support with program operation for SJC if received
- Attended presentation at ToS Trustee meeting on sustainable developer in Durango
- Met with Weatherization Program Coordinator (Marcy Child)
- SJDA Sustainability
 - Planning membership drive for October
 - Working with Creative Cracker Jack for membership brochures and advertisements
 - Obtaining information on AmeriCorps VISTA Program

SAN JUAN COUNTY ROAD DEPARTMENT

Monthly Road Maintenance Report

SEPTEMBER 2021

**County road #110 Gladstone, grading, road repair, rock removal.
Clean up mudslide debris in culverts.**

1-772G grader, 8 hours.

2-772 grader, 2 hours.

936 loader, 4 hours.

Int. dump truck, 2 hours.

Pickups, 8 hours.

50 tons gravel hauled.

**County road # Eureka, grading, road repairs, pull ditch and spread
some gravel. 105 tons gravel hauled.**

1-772G grader, 7 hours.

2-772G grader, 21 hours.

936 loader, 2 hours.

Int. dump truck, 6 hours.

Pickup trucks, 4 hours.

**County road #3 Stony Pass, road work and road tractor off the pass
and Haul to CR-14.**

D6N tractor, 15 hours.

Pickup trucks, 3 hours.

Peterbilt truck, 2 hours.

**County road #33 Kendall Mt. grade and pull ditch up to the Idaho
slide.**

1-772G grader, 2 hours.

County road #23 Maggie Gulch, graded and removed large road out of the switchback on first section of road. Some rock removal.

1-772G grader, 2 hours.

County #25 Eureka Gulch, grade and pull slough, repair and fill over rocky areas up to the EPA closure! Removed road closed signs and barricade there was no reason to keep road closed 9/23/21.

1-772G grader, 6 hours.

Pickup truck, 1 hour.

County road #12 Clear Lake, Worked with the Forest Service and a tree cutting crew to clear the road of downed and dangerous tree falls and snags. Some road repairs and worked on upper part of road above the Burbank Mine. Unplugged a couple of culverts. Rear window knocked out of tractor by a tree snag.

D6T tractor, 16 hours.

Pickups, 3 hours.

Peterbilt truck, 2 hours to haul tractor.

County road #7 South Mineral, grade and repair before road reopened!

1-772G grader, 2 hours.

2-772G grader, 2 hours.

936 loader, 2 hours.

Equipment Maintenance and Repairs, 50 hours. 2000 hour warranty service on #1-grader, Engine and exhaust tune-up, Change all oils and filters in engine, fuel, transmission, hydraulics, FWD, circle motors done by Honnen Equipment Service, \$3,000. Repair on D6T tractor under carriage two section of rock guards and broken bolts removed!

Louie Girodo used 60 hours comp-time in September

Dave Andrews rolled the 2012 Chevy Pickup in South Mineral probably totaled it out. The Cab was caved- in and the bed was damaged was able to drive back to town. Might be able to repaired only had 67,000 miles on it. Probably would be cheaper to get a new one off State Bid? Or see what the insurance wants to do. Dave was not injured or given a ticket. He was blinded by the sun and rolled off the road!

County road #7 South Mineral Creek, Culvert Replacement Project for the Forest Service. Remove old rotted out and damaged culverts and replace them with new 15" plastic culvert. Contract called for 24" diameter culvert but 15" had to be used due to the shallow depth and cover over the top of culvert. Hired Rusty Melcher/Alpine Outdoor Living to excavate culverts and ditch on the intakes and outlets of new culverts etc. Project started on 9/7/21 and completed on 9/8/21. Remove old culverts and haul to transfer station. Load and haul 85 tons of gravel for bedding and cover. Plastic culvert has almost doubled in price this year!

Komatsu excavator, 14 hours x \$140.00 per hour \$1,960.00.

County 936E 3yd. loader, 1 hours, \$100.00. = \$1,000.00.

County, Int. 9400 Dump truck, 6 hours, \$85.00 = \$520.00.

Labor, two men 12 hours, shoveling, handling culverts, loading old culverts and new culverts etc. \$35.00 hour, \$420.00.

7 sections of 15"x 20'-140 ' at \$25.00 per ft. = \$3,453.00.

Gravel 85 tons x \$16.00 per= \$1,360.00.

Chevy Pickup, 2 hours, \$80.00.

Total for CR-7 Culvert Project, \$9,003.00.

County Road #14 Culvert Replacement Project on Brown's Gulch near the Brooklyn Mine. Remove and replace old rotted out steel culvert and replace with 48"x 40' plastic smooth culvert. Excavate and replace with D6N tractor and 936E loader, Haul new culvert to site and haul old culvert to be disposed scrap iron bin. Project started and finished on 10/4/21.

48"x 40' plastic culvert at \$152.00 per ft.= \$6,068.80.

D6N tractor, 7 hours x \$120 per hr. \$840.00.

936E loader, 5 hours x \$100 per hr. = \$500.00.

Int. 9400 dump truck, 4 hours at \$85 per hr. = \$340.00.

Labor, two men 3 hours, \$35.00 per hr. = \$105.00.

Chevy Pickup truck, 2 hours, \$40 per hr. \$80.00.

Total for Cr-14 project, \$7,934.00.

Total for both projects \$16,946.80.

WE may have to make some adjustments to to meet the Forst Service Contract totals.

County Sales Tax

	2016	2017	2018	2019	2020	2021 % Change	5yr. Average	
January	5,959.36	6,799.02	4,970.71	7,799.87	6,854.79	16,723.50	143.97%	8,629.58
February	14,491.56	15,080.08	13,859.09	12,885.86	22,860.78	19,987.28	-12.57%	16,934.62
March	8,627.43	10,000.08	11,861.72	11,246.33	14,595.18	16,402.87	12.39%	12,821.24
April	9,804.86	11,323.27	10,399.61	8,857.05	15,280.29	15,820.09	3.53%	12,336.06
May	13,024.22	13,990.92	16,321.32	19,708.91	12,778.47	24,773.54	93.87%	17,514.63
June	5,819.62	7,552.19	4,601.13	5,827.74	9,946.40	17,549.36	76.44%	9,095.36
July	22,946.78	7,682.30	5,985.49	6,206.92	17,737.22	13,668.65	-22.94%	10,256.12
August	11,781.46	13,949.50	6,568.03	13,486.95	10,921.79	32,028.49	193.25%	15,390.95
September	15,042.34	21,634.93	9,579.78	22,429.05	21,745.79	30,048.75	38.18%	21,087.66
October	12,955.34	16,769.39	11,057.45	13,774.16	18,726.14	29,953.36	59.95%	18,056.10
November	13,548.66	-4,182.80	11,187.78	15,070.58	17,785.19		18.01%	9,822.54
December	6,497.13	4,750.60	5,273.24	7,547.72	17,476.46		-5.00%	5,888.17
Total	140,498.76	125,349.48	111,665.35	144,841.14	186,708.50	216,955.89	28.91%	128,151.67

Year to Date 120,452.98 124,781.68 95,204.33 122,222.84 151,446.85 216,955.89 43.26%

Emergency Services Sales Tax

	2016	2017	2018	2019	2020	2021	% Change	5-Year Ave.
January	5,343.03	5,622.78	5,693.58	22,652.17	22,081.29	35,673.96	61.56%	18,344.76
February	9,368.55	10,692.95	9,500.78	20,193.73	38,888.47	40,698.37	4.65%	23,994.86
March	7,022.72	7,037.70	8,924.66	28,148.22	30,899.33	39,142.28	26.68%	22,830.44
April	8,989.30	8,265.99	22,040.87	52,719.27	32,992.58	39,017.29	18.26%	31,007.20
May	11,187.66	11,429.96	23,915.42	32,415.46	28,328.62	53,200.16	87.80%	29,857.92
June	7,002.03	6,362.70	13,364.73	17,201.80	20,323.77	38,209.24	88.00%	19,092.45
July	16,350.76	12,960.82	36,977.68	35,279.36	29,408.23	54,965.11	86.90%	33,918.24
August	28,294.88	29,968.07	54,297.30	74,723.11	62,795.11	139,369.81	121.94%	72,230.68
September	42,058.55	45,477.85	100,795.88	126,269.99	120,650.92	164,773.79	36.57%	111,593.69
October	31,447.71	33,384.56	82,850.46	103,635.85	108,852.60	139,222.51	27.90%	93,589.20
November	33,410.55	39,818.53	88,859.04	101,380.60	107,416.93		5.95%	59,078.46
December	21,352.56	14,380.35	34,697.06	45,399.97	63,130.77		-5.00%	25,661.42
Total	221,828.31	225,402.27	481,917.46	660,019.53	665,768.62	744,272.52	0.87%	194,457.80

Year to Date 167,065.19 171,203.39 358,361.36 513,238.96 495,220.92 744,272.52 50.29%

Lodging Tax

	2016	2017	2018	2019	2020	2021 % Change	5 yr. Average
January	1,083.78	35.05	126.80	885.93	3,729.44	543.94	-85.41%
February	7,581.19	10,406.98	8,318.23	10,816.00	14,088.47	20,282.97	43.97%
March	1,544.89	786.00	3,097.25	145.07	454.00	660.00	45.37%
April	195.49	1,543.39	2,002.98	33.00	-	1,489.56	0.00%
May	7,263.06	13,776.57	11,375.54	17,612.98	14,069.00	30,651.70	117.87%
June	4,849.00	1,094.30	1,356.34	952.07	300.40	1,007.32	235.33%
July	1,394.08	309.00	2,702.84	170.21	573.00	11,854.90	1968.92%
August	9,590.21	10,799.07	11,477.00	14,372.43	13,978.56	57,659.81	312.49%
September	1,354.94	5,661.40	7,956.78	2,738.12	139.00	248.50	78.78%
October	3,733.58	2,632.10	666.79	2,848.73	780.48	1,346.59	72.53%
November	39,304.00	38,017.00	43,574.04	47,263.00	58,396.70		23.56%
December	1,011.00	2,839.96	2,029.95	1,790.37	1,918.52		-5.00%
Total	78,905.22	87,900.82	94,684.54	99,627.91	108,427.57	125,745.29	8.83%

Year to Date 38,590.22 47,043.86 49,080.55 50,574.54 48,112.35 125,745.29

103,277.23

Town Sales Tax

	2016	2017	2018	2019	2020	2021	% Change	5-Year Ave.
January	15,412.76	15,692.10	17,803.62	17,777.51	28,417.92	40,358.55	42.02%	24,009.91
February	22,982.62	27,691.72	24,144.03	26,379.98	39,259.76	45,122.36	14.93%	32,519.57
March	19,463.45	18,150.71	23,836.90	33,717.73	34,763.49	46,228.85	32.98%	31,339.54
April	26,152.34	21,740.67	24,868.07	75,356.86	37,422.14	46,611.62	24.56%	41,199.87
May	31,726.42	31,728.94	21,945.84	32,071.64	24,839.85	60,352.89	142.97%	34,187.83
June	22,188.51	17,898.60	17,527.63	21,650.46	22,518.84	43,589.40	93.57%	24,636.99
July	42,456.28	44,161.00	53,182.66	50,243.72	29,239.56	74,281.24	154.04%	50,221.64
August	101,398.06	105,922.79	80,166.62	105,875.94	90,106.11	190,977.70	111.95%	114,609.83
September	153,191.88	160,276.49	151,431.83	179,274.96	170,982.30	233,606.46	36.63%	179,114.41
October	112,835.51	116,768.86	121,288.07	151,774.01	155,155.28	192,817.13	24.27%	147,560.67
November	120,093.55	163,456.93	130,755.88	146,395.83	153,802.89		5.06%	134,981.62
December	78,913.11	52,770.79	50,151.94	64,974.75	83,368.79		-5.00%	58,196.60
TOTAL	746,814.49	776,259.60	717,103.10	905,493.39	869,876.93	973,946.20	-3.93%	670,005.77
Year to Date	547,807.83	560,031.88	536,195.28	694,122.81	632,705.25	973,946.20	53.93%	

County Sales Tax (month collected)

	2016	2017	2018	2019			2020			2021		
				Local	Remote	Total	Local	Remote	Total	Local	Remote	Total
January	8,627.43	10,000.08	11,861.72	11,205.30	41.21	11,246.51	10,788.33	3,806.85	14,595.18	12,774.47	3,628.40	16,402.87
February	9,804.86	11,323.27	10,399.61	8,772.61	84.44	8,857.05	10,870.13	4,410.17	15,280.30	12,943.71	2,876.38	15,820.09
March	13,024.22	13,990.92	16,321.32	19,310.39	398.52	19,708.91	9,542.34	3,236.13	12,778.47	20,077.43	4,696.12	24,773.55
April	5,819.62	7,552.19	4,601.13	5,675.84	151.91	5,827.75	6,642.00	3,304.40	9,946.40	12,099.99	5,449.37	17,549.36
May	22,946.78	7,682.30	5,985.49	5,876.94	325.95	6,202.89	14,961.72	2,775.50	17,737.22	7,456.19	6,212.46	13,668.65
June	11,781.46	13,949.50	6,568.03	12,825.21	661.74	13,486.95	8,411.36	2,510.43	10,921.79	24,129.22	7,899.27	32,028.49
July	15,042.34	21,634.93	9,579.78	21,568.05	861.00	22,429.05	17,395.28	4,350.51	21,745.79	21,822.70	8,226.05	30,048.75
August	12,955.34	16,769.39	11,057.45	12,723.74	1,050.42	13,774.16	14,702.81	4,023.33	18,726.14	23,443.66	6,509.70	29,953.36
September	13,548.66	-4,182.80	11,187.78	14,041.68	1,028.90	15,070.58	13,563.83	4,221.36	17,785.19			
October	6,497.13	4,750.60	5,273.24	6,721.34	825.95	7,547.29	13,816.59	3,659.87	17,476.46			
November	6,799.02	4,970.71	7,799.87	5,930.45	924.35	6,854.80	13,790.50	2,933.00	16,723.50			
December	15,080.08	13,859.09	12,885.86	13,632.71	9,228.08	22,860.79	15,682.24	4,317.03	19,999.27			
Total	141,926.95	122,300.18	113,521.28	138,284.26	15,582.47	153,866.73	150,167.13	43,548.58	193,715.71	134,747.37	45,497.75	180,245.12

Emergency Services Sales Tax (month collected)

	2016	2017	2018	2019			2020			2021		
				Local	Remote	Total	Local	Remote	Total	Local	Remote	Total
January	7,022.72	7,037.70	8,924.66	27,980.65	167.86	28,148.51	26,847.59	4,051.74	30,899.33	32,447.80	6,735.19	39,182.99
February	8,989.30	8,265.99	22,040.87	21,749.81	30,969.48	52,719.29	26,943.46	6,049.12	32,992.58	33,038.78	6,019.09	39,057.87
March	11,187.66	11,429.96	23,915.42	31,606.19	809.27	32,415.46	18,988.97	4,560.71	23,549.68	43,877.86	9,322.30	53,200.16
April	7,002.03	6,362.70	58,262.95	16,573.10	628.71	17,201.81	14,879.87	5,443.90	20,323.77	30,509.93	7,699.31	38,209.24
May	16,350.76	12,960.82	36,977.68	33,423.78	1,892.28	35,316.06	24,551.07	4,857.16	29,408.23	45,019.35	9,945.76	54,965.11
June	28,294.88	29,968.07	54,297.30	72,152.85	2,570.26	74,723.11	56,773.64	6,471.47	63,245.11	125,792.28	13,577.53	139,369.81
July	42,058.55	45,477.85	100,795.88	123,864.51	2,405.48	126,269.99	110,539.66	10,111.26	120,650.92	149,173.26	15,600.53	164,773.79
August	31,447.71	33,384.56	82,850.46	101,317.76	3,702.92	105,020.68	98,545.37	10,307.22	108,852.59	125,932.27	13,290.24	139,222.51
September	33,410.55	39,818.53	88,859.04	99,005.06	2,075.54	101,080.60	98,173.46	9,243.47	107,416.93			
October	21,352.56	14,380.35	34,697.06	43,619.35	1,780.63	45,399.98	55,526.63	7,604.14	63,130.77			
November	5,622.78	5,693.58	22,652.17	19,732.41	2,348.89	22,081.30	30,125.87	5,585.20	35,711.07			
December	10,692.95	9,500.78	30,306.85	30,176.30	8,712.17	38,888.47	33,466.13	7,274.58	40,740.71			
Total	223,432.46	224,280.90	564,580.34	621,201.77	58,063.49	679,265.26	595,361.72	81,559.97	676,921.69	585,791.53	82,189.95	667,981.48

Town Sales Tax (month collected)

	2016	2017	2018	2019			2020			2021		
				Local	Remote	Total	Local	Remote	Total	Local	Remote	Total
January	19,463.45	18,150.71	23,836.90	33,491.06	226.94	33,718.00	32,098.08	2,665.41	34,763.49	39,091.44	7,137.41	46,228.85
February	26,152.34	21,740.67	24,868.07	25,970.59	49,386.28	75,356.87	32,169.42	5,252.72	37,422.14	39,866.84	6,744.78	46,611.62
March	31,726.42	31,728.94	21,945.84	31,177.43	894.21	32,071.64	20,790.69	4,049.16	24,839.85	50,131.71	10,221.18	60,352.89
April	22,188.51	17,898.60	17,527.63	20,798.07	852.39	21,650.46	17,127.14	5,391.71	22,518.85	36,719.07	6,870.33	43,589.40
May	42,456.28	44,161.00	53,182.66	47,514.29	2,696.78	50,211.07	24,256.22	4,983.35	29,239.57	64,579.46	9,701.78	74,281.24
June	101,398.06	105,922.79	80,166.62	102,431.94	3,444.00	105,875.94	82,279.01	7,827.11	90,106.12	177,151.51	13,826.19	190,977.70
July	153,191.88	160,276.49	151,431.83	176,293.44	2,981.52	179,274.96	159,181.07	11,801.24	170,982.31	216,870.04	16,736.42	233,606.46
August	112,835.51	116,768.86	121,288.07	149,121.51	2,652.50	151,774.01	142,713.83	12,441.45	155,155.28	178,061.07	14,756.06	192,817.13
September	120,093.55	163,456.93	130,755.88	144,109.26	2,286.57	146,395.83	143,258.72	10,544.18	153,802.90			-
October	78,913.11	52,770.79	50,151.94	62,956.32	2,018.43	64,974.75	74,881.79	8,487.00	83,368.79			-
November	15,692.10	17,803.62	17,777.51	25,590.15	2,827.77	28,417.92	34,363.94	5,994.61	40,358.55			-
December	27,691.72	24,144.03	26,379.98	34,571.00	4,688.76	39,259.76	37,811.41	7,310.95	45,122.36			-
TOTAL	751,802.93	774,823.44	719,312.94	854,025.06	74,956.15	928,981.21	800,931.32	86,748.89	887,680.21	802,471.14	85,994.15	888,465.29



Willy Tookey <admin@sanjuancolorado.us>

Technical Update vol. 25 no. 43 - Are you Prepared for Winter Driving?

1 message

County Technical Services, Inc. <communications@ctsi.org>
Reply-To: "County Technical Services, Inc." <communications@ctsi.org>
To: sanjuancounty@frontier.net

Tue, Oct 26, 2021 at 2:02 PM

**Technical Update**

10/26/21

Technical Update vol. 25 no. 43 - Are
you Prepared for Winter Driving?

Winter storms and weather have begun moving across Colorado in recent weeks, bringing high winds, snow, and hazardous travel conditions to roads across Colorado. Winter weather can be hazardous, and driving and road conditions can change quickly. A couple of years ago, a man and his dog in Oregon spent five days trapped in his car when it went off the road in a snow storm. He survived by turning his car on occasionally for warmth and by eating Taco Bell sauce packets and drinking melted snow. Relying on having enough gas, a love of fast food, and a tendency not to clean out your vehicle is not a good survival strategy.

The Colorado Department of Transportation recommends people traveling in cold weather stock their vehicles with a winter weather survival kit that includes the following.

- Flares/reflectors to signal for help and warn other motorists
- Sturdy scraper/snow brush/snow shovel to clear snow
- Battery- or crank-powered radio to listen to emergency broadcasts
- Flashlight with extra batteries or crank-powered flashlight
- Survival blanket or sleeping bag
- Chemical hand warmers
- Extra set of clothes, including coat, hat, mittens, boots, etc.

- Gallon jug of water and nonperishable food
- First aid kit and essential medications
- Tire chains and tow strap
- Non-clumping kitty litter/sand for traction
- Jumper cables
- Extra cloth or paper towels for cleanup if necessary
- Deck of cards or board games for entertainment

If You Are Stranded in Your Vehicle

If you find yourself stranded in your vehicle during a snowstorm, immediately check that the tailpipe is clear of snow. A blocked tailpipe can lead to a deadly buildup of carbon monoxide in the passenger compartment. According to U.S. Airforce Staff Sergeant Charles Dornford, who teaches cold weather survival strategies to Department of Defense personnel in Arctic Alaska, taking the following steps if you become stranded in winter weather could save your life.

- Keep the vehicle's tailpipe clear.
- Stay in your car unless you see a building nearby.
- Turn the car off to conserve gas, and only turn it back on occasionally to stay warm.
- Check the tailpipe every time you turn the heater on.
- Do exercises in the car, such as flutter kicks, to stay warm.
- Stay hydrated. Melt snow if necessary. The more hydrated you are, the warmer you will stay.
- Keep your seat belt on. Even if you are pulled over, another vehicle may still hit yours.
- Turn on your hazard lights or use roadside flares to alert other drivers or rescuers of your location.

What This Means for Counties

If possible, avoid driving in bad weather; however, if you must be out, ensure that you are prepared in case winter weather means spending a night in your vehicle. Keep an emergency winter survival kit in your vehicle and know the steps to take if stranded. For more information, contact CTSI at (303) 861 0507.

A PDF of this Technical Update is available [here](#).

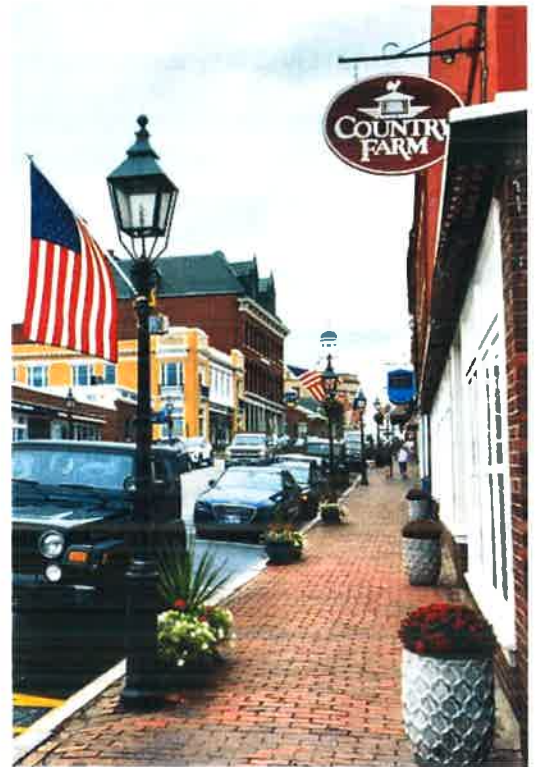
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AARP Rural Livability Workshop Report

How and why small towns and remote communities are working to become more livable for older adults and people of all ages





AARP is the nation's largest nonprofit, nonpartisan organization dedicated to empowering Americans 50 and older to choose how they live as they age. With nearly 38 million members — plus offices in every state, the District of Columbia, Puerto Rico and the U.S. Virgin Islands — AARP strengthens communities and advocates for what matters most to families with a focus on health security, financial stability and personal fulfillment. The AARP Livable Communities initiative works nationwide to support the efforts of neighborhoods, towns, cities, counties and rural areas to be livable for people of all ages. The initiative's programs include the AARP Network of Age-Friendly States and Communities, the AARP Community Challenge "quick-action" grant program and educational publications, including this one and others available at [AARP.org/LivableLibrary](https://www.aarp.org/LivableLibrary).

Websites: [AARP.org](https://www.aarp.org) and [AARP.org/Livable](https://www.aarp.org/Livable)

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Twitter: [@AARPLivable](https://twitter.com/AARPLivable)

Free Newsletter: [AARP.org/LivableSubscribe](https://www.aarp.org/LivableSubscribe)

AARP Rural Livability Workshop Report

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Visit [AARP.org/LivableLibrary](https://www.aarp.org/LivableLibrary) to download or order this free guide or other publications. Learn more about rural communities at [AARP.org/RuralLivability](https://www.aarp.org/RuralLivability).

AARP Rural Livability Workshop Report

How and why small towns and remote communities are working to become more livable for older adults and people of all ages

THE WORKSHOP

In June 2019, AARP convened its first-ever national gathering about rural livability — as it relates to people of all ages and, especially, to older adults.

Held in Portland, Maine, the three-day event was attended by AARP staff, volunteers, community partners and livability practitioners representing a range of specialties and locations. (See the list of participating organizations on page 53.)

This report is based on presentations, discussions and activities from the workshop — the videos and materials from which can be found at AARP.org/RuralLivability. The topics covered in this report surfaced while the event was being planned, and were reaffirmed during it as being of greatest interest and opportunity.

The “Local Voices,” “Expert Insights,” “Field-Tested Strategies,” “News Clip” and “Snapshot” items that appear in this publication come from the workshop, related events, media sources and AARP’s work in communities throughout the nation.

The *AARP Rural Livability Workshop Report* is by no means complete regarding the many issues and interests that impact rural communities. But the observations, data and examples contained within these pages can serve to inform community influencers — local, state and national officials; policymakers; service providers; nonprofits; citizen activists; and others — about the needs, benefits, challenges and solutions found in rural places. ■

THE REPORT

- Introduction 2
- What Is a Rural Community? 4
- Rural America Stats and Facts 6
- Community Connections 8
- Outdoor Spaces and Public Places 14
- Housing 20
- Transportation 26
- Healthy Living, the Economy and High-Speed Internet 32
- Extreme Weather and Disasters 42
- Closing Thoughts 48
- Learn More 49
- Endnotes 51
- AARP Network of Age-Friendly States and Communities 53
- The Workshop Roster 53



▲ Wood Island Lighthouse, Saco Bay, Maine

MUCH ADO ABOUT MAINE

With a median age of 44.9 years old, Maine has the oldest population in the nation.¹ It is also the most rural state: 61.3 percent of its citizens live in rural areas.² Many of the examples in this report are from Maine due to these realities and also because the AARP Rural Livability Workshop took place there. Another reason: Maine is the state with the most rural localities in the AARP Network of Age-Friendly States and Communities. Learn more about the network on page 53.

Introduction

America's demographic future is showing up first in rural areas, where older residents form a greater proportion of the population than in urban areas

One-quarter of all Americans age 65 or older live in small towns and rural communities. That percentage is growing, since the rural population is aging at a faster rate than the nation's population as a whole.¹

According to the AARP Home and Community Preferences Survey, adults in rural areas are more likely than those living in cities and suburbs to say they want to reside in their community and/or current home for as long as possible.²

The realities of aging are playing out in rural communities: In reporting that the number of people age 85 or older will more than triple in the United States by 2050 — from 5.8 million in 2010 to 19 million — the Housing Assistance Council, a rural housing advocacy organization, declares, “This change will have profound implications in rural regions which already have a larger share of seniors and a smaller share of social services than suburban and urban communities.”³

As the importance of community livability for people of all ages becomes more evident, it's critical for elected officials, local leaders, businesses and nonprofits to understand the issues, challenges and opportunities facing rural communities.

Aging in the home where a person lived comfortably for years can be difficult when distance or a lack of transportation is a barrier to needed services. Distance also isolates people who no longer drive and contributes to feelings of loneliness.

Three in five homes in rural areas and small towns were built prior to 1980.⁴ Many lack adequate insulation and age-friendly features such as grab bars and single-floor living. Due to the age and condition of the structures, modifications are often needed but are delayed due to cost and the difficulty of performing the work.

People are leaving rural communities at a faster rate than they are moving to them: Although some rural communities, particularly those in the Western United States, have had slight gains in population over the past 20 years, the majority, especially in Midwestern counties that are economically dependent

on farming, have experienced population declines.

One reason is the growth of industrial agriculture (and decline of smaller, independent farms) and the mechanization of farming (which means fewer farm workers are needed). Another is that the death rate in rural areas of the Northeast and Midwest is greater than the birth rate.⁵

Since 2000, nearly a million people nationwide have left their rural hometowns to move to a larger community (see the related image from Maine on the opposite page), while only 600,000 people have moved to rural counties.⁶ Many of those leaving are young people in pursuit of higher education and careers. The decrease in the working age population in rural areas is leading to labor shortages, sinking home values, reduced tax bases and, consequently, a decline in or loss of municipal services.

Yet despite the overall trend of population decline, some rural counties are attracting new residents, leading to rural places that are increasingly diverse, multicultural and multilingual. In amenity-rich communities that have experienced growth (such as those in parts of California, Colorado and Montana), the influx of relatively well-off new residents is leading to an increase in housing prices,⁷ which both benefits and challenges long-time residents.

Small towns and rural places can be laboratories for change: While most small communities also have small operating budgets that can't accommodate big projects, there are often other resources to tap, such as a deep well of civic involvement among residents.

Because there are typically fewer bureaucratic hurdles, weaving age-friendly considerations into broader local objectives is possible. There may also be more opportunities for innovation and efficient decision-making. Communities that have a strong sense of independence and resourcefulness can be better able to mobilize and tackle new challenges.

As a participant at the AARP Rural Livability Workshop observed, “There's a greater sense of permission in rural areas to try things.” Another said, “Innovation really does exist in small towns and rural communities. Planning doesn't have to take years. We can just do it!” ■



LOCAL VOICES

Why small towns and rural communities are great places to live:

- “My neighbors aren’t on top of me, but we’re still very much a community.”
- “Main Street and the town center are real places, not just the name of a shopping center.”
- “We never sit in traffic.”
- “I don’t have to lock my door.”
- “I’m surrounded by nature — trees, flowers, wildlife, fresh air, bright stars at night.”
- “Neighbors are available to help when help is needed and wanted. However, neighbors also know to stay out when help isn’t wanted. We respect the right to privacy here.”
- “If someone comes on hard times, the community helps. It may be a neighbor giving a ride to someone who can’t drive or mowing the grass for a person who can no longer do it themselves. When something really bad happens, like a home fire or large medical bills, we raise funds. We may throw a bean supper or put a donation jar out. There are lots of ways we help each other.”
- “In a rural community, you feel needed. We depend on volunteers to run our town, keep the library open and do a host of other important things.”
- “My cats can go outside. My dog doesn’t need a leash. My chickens can free-range.”
- “Hills and hiking trails are my fitness center.”

Advice from local leaders and advocates in small towns and rural communities:

- “It’s a mistake to assume that a town is dying just because it has fewer residents than in the past. That diminishes all of the positive things going on every day and leads communities to invest energy and resources into attracting new businesses or residents rather than paying attention to the people who are already there.”
- “Pursuing livability work doesn’t mean a community isn’t currently livable.”
- “Outsiders wanting to help a community need to work with residents. People won’t respond if there isn’t a trusted local link.”
- “We need to frame livability differently in rural areas. It’s often seen as strictly an urban concern.”
- “People take pride in the place they live, so we need to work with that. You won’t get anywhere starting with the assumption that something is wrong or missing in their town.”
- “Go in with questions rather than answers, and be prepared to listen.”



EXPERT INSIGHT

“Some of the most talented and resourceful people I know live in rural communities and in communities that are underserved or forgotten. We often have what we need to make places great. We just need the invitation and the knowledge and spark to do it.”

— **Andrew Howard**, placemaking specialist and co-founder, Team Better Block*

* See page 50 to learn about several of the organizations that appear in this report.



BOOMERANG

[boo-muh-rang] noun

An individual, who either grew up in Maine or spent some time here, but left the state for whatever reason — only to return to Live + Work in Maine.

Make the move back:
LiveWorkMaine.com/boomerang

▲ Signage at the airport in Portland, Maine

What Is a Rural Community?

The answer varies, depending on who — or what — is being asked



▲ With nearly 900 farms, more than 70 percent of the land in Champaign County, Ohio, is used to grow crops.

What's perceived as being a rural or remote community can differ greatly by region. People living in the remote Mountain West might not consider the small towns of coastal Maine to be particularly rural. Life in the rural Midwest isn't like life in the rural South or most anywhere in rural or frontier Alaska.

So what qualifies a community as rural?

The **U.S. Department of Agriculture** attempts to answer in an article titled "What is Rural?"¹

"The existence of multiple rural definitions reflects the reality that rural and urban are multidimensional concepts. Sometimes population density is the defining concern, in other cases it is geographic isolation. Small population size typically characterizes a rural place, but how small is rural? Population thresholds used to differentiate rural and urban communities range from 2,500 up to 50,000, depending on the definition."

The definition used by the **U.S. Office of Management and Budget** is based on counties. "Metropolitan" regions include a core county with at least one densely populated urban area of 50,000 or more people, plus surrounding counties where at least 25 percent of residents work in the core county. "Micropolitan" regions include a core county with at least one urban area that has a population of 10,000 to 49,000. All other areas are classified as "noncore." (Some but not all noncore areas are rural.)²

The **U.S. Census Bureau** defines rural as "all population, housing, and territory not included within an urbanized area or urban cluster. As a result, the rural portion of the United States encompasses a wide variety of settlements, from

densely settled small towns and 'large-lot' housing subdivisions on the fringes of urban areas, to more sparsely populated and remote areas."³

(In fact, most rural communities are clustered in the vicinity of urban areas, which has historically been the case "as rural populations resided on farms producing food and other goods for nearby urban centers or resided in small market and mill towns serving the needs of both surrounding rural populations as well as residents of nearby cities.")⁴

Additional definitions come out of other federal and state offices, the variations often based on the work being done or why the question is being asked. One way to achieve some location specific clarity is to use the **Am I Rural?** tool. Provided by the Rural Health Information Hub, the interactive web page can be accessed at RuralHealthInfo.org/am-i-rural. ■



▲ Since many rural areas no longer have a local post office, the presence of one is essentially a confirmation that a community exists. Located in the Florida Everglades, the nation's smallest post office (Ochopee 34141) serves about 300 residents.

THE AMERICAN FRONTIER

Yes, it still exists!

According to the **National Center for Frontier Communities**,

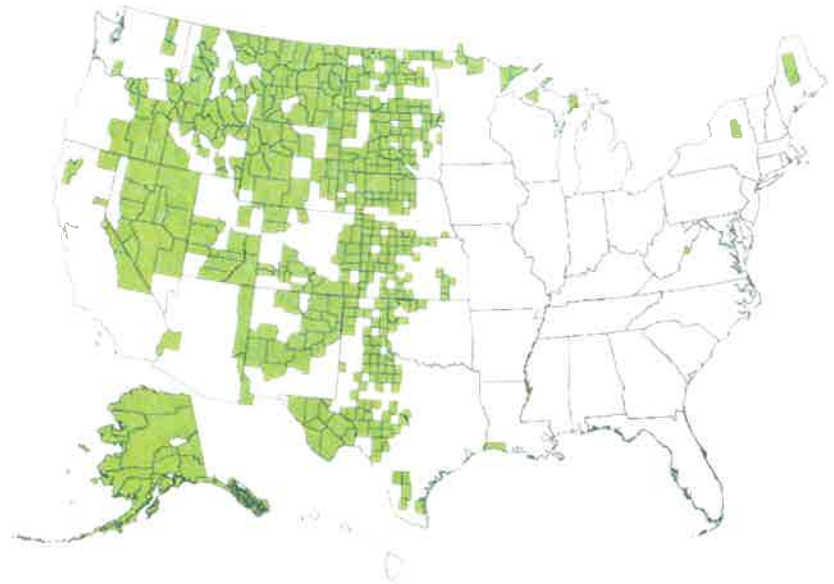
“Frontier America consists of sparsely populated areas that are geographically isolated from population centers and services.

“Frontier, like rural, suburban, or urban, is a term intended to categorize a portion of the population continuum. Frontier refers to the most remote end of that continuum (in some states the wilderness designation is considered most remote).”¹

“Unfortunately, there is not a single universally-accepted definition of frontier,” notes the **Rural Health Information Hub**. “Definitions of frontier used for state and federal programs vary, depending on the purpose of the project being researched or funded.

“While frontier is often defined as counties having a population density of six or fewer people per square mile, this simple definition does not take into account other important factors that may isolate a community.

“Therefore, preferred definitions are more complex and address isolation by considering distance in miles and travel time in minutes to services.”² ■



▲ **Frontier counties (marked in green) are often defined as having a population density of fewer than six people per square mile.**

The **National Rural Health Association** identifies several factors to consider in classifying an area as frontier.³ The following conditions, explains the association, “may cause significant problems in access to health services, create poor economic opportunities and other conditions causing health and social disparities.”

- population density
- distance from a population center or specific service
- travel time to reach a population center or service
- functional association with other places
- service or market area
- availability of paved roads
- travel inhibiting weather
- seasonal changes in access to services



EXPERT INSIGHT

“Rural is typically defined ... as ‘non-metropolitan’ or ‘non-urban.’ This doesn’t tell us much. Perhaps due to this lack of precision and our nation’s agrarian roots, people still commonly equate rural with agriculture, fields of corn, cows and hardscrabble farmers. This is not only inaccurate; it is wide of the mark. From vibrant college towns to communities gone bust from the flight of paper mills or coal mines, from hopping cultural tourism locales to centers of furniture, machinery and textile manufacturing, rural America is anything but simply farmland, and it is anything but uniform.”

— **The Aspen Institute Community Strategies Group**, “Rural Development Hubs: Strengthening America’s Rural Innovation Infrastructure” (November 2019)

Rural America Stats and Facts

People and places:

- 97 percent of the nation's landmass is rural, but only 19.3 percent of the population (nearly 60 million people) lives there
- 64.4 percent of rural residents live east of the Mississippi River
- Only 10 percent of people in the West live in rural areas
- 46.7 percent of people living in rural areas reside in the South

The most rural states by population by region:

- Northeast: Maine and Vermont (with 61.6 and 61.3 percent of the population living in rural areas)
- South: West Virginia (50.9 percent)
- West: Montana (43.6 percent)
- Midwest: South Dakota (42.9 percent)

As of the 2010 Census, there were 3,143 counties in the United States and a total population of 308.7 million:

- 704 *completely rural* counties accounted for 5.4 million people
- 1,185 *mostly rural* counties accounted for 36.8 million people
- 1,254 *mostly urban* counties accounted for 266.6 million people

Poverty in rural America:

- Of the nation's 353 "persistently poor" counties, 301 — or 85.3 percent — are in nonmetro or rural areas.
- The most severe poverty is found in historically poor areas of the Southeast, including the Mississippi Delta and Appalachia, as well as on Native American lands.
- The 2019 poverty threshold was \$13,300 for an individual living alone under age 65 and \$12,261 for a single head of household 65 or older.
- 16.4 percent of rural residents live at or below the poverty line. Of those individuals, 32.0 percent are Black/African-American, 31.0 percent are American Indian/Alaska Native, 24.5 percent are Hispanic and 14.2 percent are White.
- Among the rural poor, 10.1 percent are age 65 or older.

POPULATION AGE 65+ AND 'LEVEL OF RURALITY'

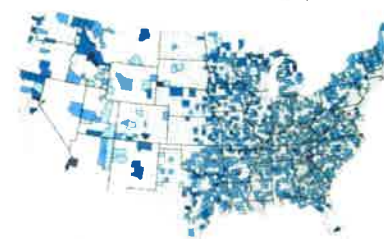
Mostly urban counties

- Population is less than 50.0 percent rural
- Median county percent 65 years or older is 15.1 percent



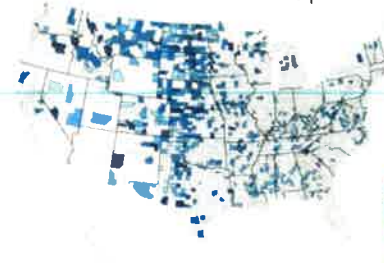
Mostly rural counties

- Population is 50.0 to 99.9 percent rural
- Median county percent 65 years or older is 17.8 percent



Completely rural counties

- Population is 100 percent rural
- Median county percent 65 years or older is 20.2 percent



Percent

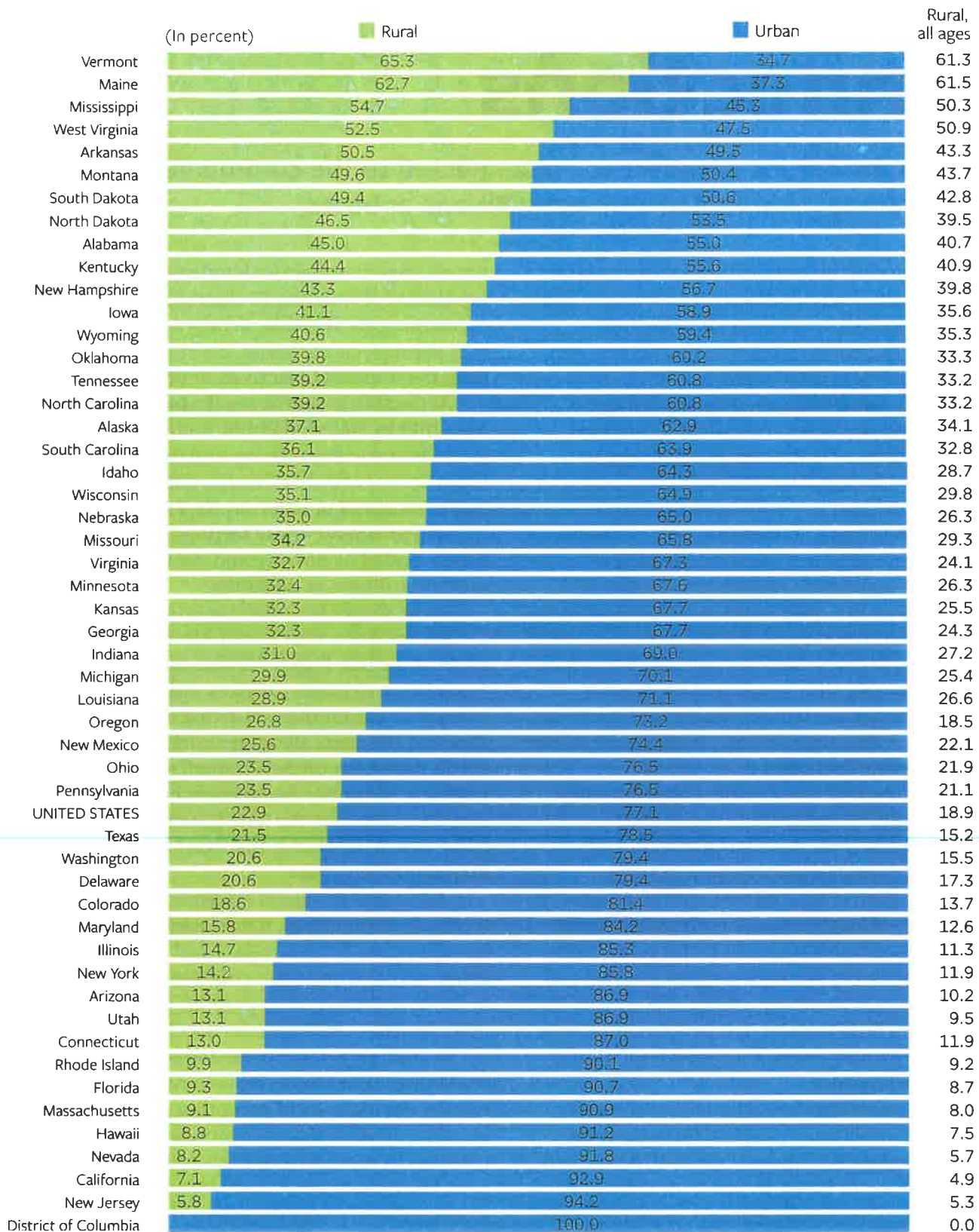
- 25.0 or greater
- 20.0 to 24.9
- 15.0 to 19.9
- Less than 15.0

RURAL COMMUNITIES AND RACE

"Whites make up nearly 80 percent of the rural population, compared with 58 percent of the urban population. Hispanics are the fastest growing segment of the rural population but make up just 9 percent of the rural population, compared with 20 percent in urban areas. Blacks constitute 8 percent of the rural population, while American Indians are the only minority group with a higher rural than urban share (2 percent versus 0.5 percent). Relatively few Asians and Pacific Islanders (included in the "Other" category) are rural residents, with these groups accounting for only 1 and 0.1 percent of the rural population, respectively. The rest of the "Other" category (accounting for 1.8 percent of the rural population) are residents reporting multiple races.

— U.S. Department of Agriculture, Economic Research Service, "Rural America At A Glance" (2018)

Population Age 65 or Older in Rural and Urban Areas, 2002 – 2016



SOURCES: *Rural America Stats and Facts* (see page 51) | **Population Age 65+ and 'Level of Rurality':** U.S. Census Bureau. Smith, A.S. and Trevelyan, E (September 2019) *The Older Population in Rural America* Page 17. Retrieved from: <https://www.census.gov/content/dam/Census/library/publications/2019/acs/acs-41.pdf>. | **Rural Communities and Race:** U.S. Department of Agriculture, Economic Research Service (November 2018) *Economic Information Bulletin 2000*. Retrieved from: <https://www.ers.usda.gov/publications/pub-details/pubid-90555> | **Population Age 65 or Older in Rural and Urban Areas, 2002-2016:** U.S. Census Bureau. Smith, A.S. and Trevelyan, E (September 2019). *The Older Population in Rural America* Page 5. Retrieved from: <https://www.census.gov/content/dam/Census/library/publications/2019/acs/acs-41.pdf>

Community Connections

It's important for local leaders to be connected to the community and for community members to connect with one another

The topics in this publication focus on place-based service and infrastructure needs. They apply to people of all ages and include suitable housing, safe streets, community services and the proximity of retail areas.

Of course, those features alone don't make a place a community. A key ingredient — perhaps *the* key ingredient — is the ability and desire of residents to be involved in the community and with one another.

Local government, businesses, organizations and individuals all play a role in cultivating an age-friendly community, one where younger and older people can live, play, work or volunteer. When towns are small and remote, having opportunities to interact with fellow residents is especially important.

But connecting with neighbors, being with family and friends, and simply seeing and speaking to other people on a regular basis is becoming more difficult in many rural places.

A lack of jobs and other income opportunities lead many working-age adults to leave their hometown. Aside from the transportation and internet-access challenges common in rural communities (and discussed later in these pages), the shuttering of local businesses and Main Street shops due to economic stagnation and competition from retail malls, big box stores, chain eateries and online shopping mean there are fewer places to actually go. It's little wonder that people who live in rural areas have a higher risk for social isolation than their urban peers.

Most adults want to be independent and self-sufficient. However, even people who value their autonomy need social connections. AARP research reveals that three in 10 adults age 45 or older in rural areas lack companionship, feel left out and consider themselves to be too isolated.¹

Loneliness has serious health consequences. A 2015 study by Brigham Young University found that social isolation, living alone and loneliness each

have a negative effect on longevity that is the equivalent of smoking 15 cigarettes a day or consuming six alcoholic drinks a day. (In fact, the lack of social connections, the study found, is worse than the impact of inactivity or obesity).²

According to survey results published in May 2019 by National Public Radio, the Robert Wood Johnson Foundation and the Harvard T.H. Chan School of Public Health, one in five rural residents age 18 or older say they always or often feel isolated or lonely.³ Those feelings are often compounded by poverty and, for many frail older residents, illness or disability.

Some simple but effective interventions do exist.

For instance, the Carrier Alert program, a joint effort of the U.S. Postal Service and the National Association of Letter Carriers, enlists mail carriers to keep an eye on the well-being of older and disabled residents along their delivery routes.

In Burnham-on-Sea, a small town in southwest England, the police department created "chat benches." Signs on the benches read, "*The 'Happy to Chat' Bench: Sit Here if You Don't Mind Someone Stopping to Say Hello.*"⁴

Although the opioid epidemic is present in all types of communities, it has wreaked particular havoc in already underresourced rural households. When adults with minor children become addicted or die by overdose, their parents, grandparents or other relatives often become the children's caregivers.

In 2017, 28 percent of custodial grandparents in the United States were living in rural areas.⁵ Even though the majority of parenting grandparents live in urban centers, the concentration of grandfamilies is higher in rural America, where 6.5 percent of grandparents are responsible for one or more grandchildren under the age of 18, compared with 4.2 percent of grandparents in urban areas.⁶

Complex family dynamics, coupled with a lack of services (e.g., support groups, back-up care options, transportation), mean that most parenting

▶ Nestled in the mountains of Southern Vermont, Grafton describes itself as “a vibrant community, still holding the traditional Town Meeting with participation from a wonderfully diverse population of 600 people.”



▼ The all-volunteer Davidsonville Area Civic Association was founded by residents in 1974 to counter business and government efforts to develop the largely agricultural, unincorporated region in Anne Arundel County, Maryland. Nearly 50 years later, several of the founding members still serve on the group’s board.



◀▲ When distances are great, interactions with neighbors can amount to little more than waving at one another from a passing car. Volunteering is a way people can connect or stay connected with the community they live in. Volunteer-led AARP chapters enable residents to participate in good works, meet new people and — like chapter members from Prentiss, Mississippi (left), and Bessemer-West Jefferson County, Alabama (above) — enjoy good food .

grandparents don’t get the support they need. As a result, these adults are at a higher risk for social isolation, depression and poor physical health than their noncustodial grandparenting peers.⁷

Changed attitudes about age and aging are needed. Age in and of itself doesn’t define an individual’s role and responsibilities. After all, many

people age 65-plus are still in the workforce. Many are primary caregivers for small children or adult loved ones.

In a livable community, local leaders recognize the realities of its residents, provide supports and encourage people to participate in the full range of local activities, regardless of their age. ■

FIELD-TESTED STRATEGIES: Community Connections

EXPERIENCE MATTERS

AGE to age, an initiative of the Northland Foundation, fosters intergenerational connections in northeastern **Minnesota**, where it operates in seven rural counties and three tribal nations.

Although the region makes up 25 percent of the state's landmass and is home to 327,000 people, there are "a lot of lakes and trees between all those people," Lynn Haglin, the foundation's vice president, explains.

When Northland assessed community needs, the top one was the need for greater civic engagement. The second — a surprise, Haglin said — concerned the area's children. As one resident put it, "We want children in our community to know we care about them, we recognize them, and we really hope that when they have gone off to college and figured out what they want to do in life, that they will make their way back to the community if possible."

Each AGE to age program differs in the work it takes on, but each provides a multigenerational approach to community building through social and community engagement. Reading Pals matches older people with elementary school students. Other projects pair teens with older people to create public art or to plant and care for community gardens, which then support local food pantries.

Within the tribal nations in Minnesota, AGE to age programs have focused on Native American culture and traditions, such as blanket making, rice harvesting, beading and learning to speak Ojibwe.

A bonus for many participants is the development of supportive relationships that continue beyond the project work.

"There are many lonely children these days — two parents are working or maybe it's a single-parent household," said Haglin. "We have a lot of poverty in our area. Some kids may be surrounded by children in school, but they don't belong to a group or have connections. The older adults are providing that for the kids, especially for young people who do not participate in sports. There's very little in small, rural communities for youth who have other interests."

For the older adults, participating in AGE to age means fewer days spent alone and, many say, a renewed sense of purpose. ■



EXPERT INSIGHT

"Connecting kids with an older adult is a way to give them the support of a mentor and a chance to feel like a valued member of the community."

— **Lynn Haglin, vice president, Northland Foundation, and director, KIDS PLUS, a project that includes the intergenerational initiative AGE to age**



SNAPSHOT



Olathe, Kansas, is a mid-sized city (population 137,000) but its Operation Lifeline program can easily be replicated by communities of any size — or just among neighbors.

Since 1979, the Olathe Police Department has arranged for volunteers (some shown above) to make daily telephone calls to older people who live alone. If there's no answer, a police officer is dispatched to ensure that all is well.

The program is free and "truly does save lives," Mayor Mike Copeland told AARP in 2018. "We've assisted people who have fallen during the night and were discovered when they couldn't answer the volunteer's call."

Even when the person does pick up the phone, there have been times, said Copeland, when a caller sensed something just wasn't right. In those cases, the volunteers reached out to family members who were able to help.

PRESERVING THE PAST

After a long-time resident of **Old Orchard Beach, Maine**, donated several dozen old photographs of the town to the Harmon Museum, the local age-friendly initiative, OOB Community Friendly Connection, wanted to include the images in an exhibition.

However, as is true of many communities and even individual households, no one was familiar with the faces in the newly recovered photos or the stories behind the images.

The failed attempts to identify older residents who might be familiar with the pictured people and places inspired the age-friendly team, along with local educators Joanne Dowd and Casey Rossignol, to launch a historical research project. The work would be led by local sixth-graders.

The students divided themselves into photographers, interviewers and hospitality hosts. Longtime residents were invited to the school to share their recollections about earlier days in Old Orchard Beach.

The researchers' methods were very simple — the camera crew placed iPads on music stands and the interviewers asked questions — but the results were not. “The kids blew us away!” said Rossignol. The students were surprised as well.

“I felt more in tune with my community after meeting people who had lived in my town their entire life,” said a student named Izzy. “I became more interested in the history of my town, and I’m not one for history.”

Chloe, a classmate, was similarly moved.

“I interviewed a lady name Velma Williams,” explained Chloe. “She had an interracial relationship with Emerson Cummings, a town council member and math teacher in the high school. When they were dating, people would stare at them. And she would stare back. She told me she really loved him. When some people came to play music on the pier, Emerson and his mom, Rose, gave them a place to stay and would feed them because black musicians weren’t allowed to stay in the hotels.”

By encouraging people of very different ages to sit together, talk and listen, the community’s past became part of its present and future. ■

Find another Old Orchard Beach article on page 38.



NEWS CLIP

“Older adults residing in small towns and rural communities may be especially vulnerable to the dangers of isolated living, but these individuals and their communities, with modest levels of support, can be mobilized to take action against this threat to well-being in later life.”

— **Lenard W. Kaye, director,**
University of Maine Center on Aging,
Bangor Daily News, April 25, 2017



LOCAL VOICES

- **“In some communities, it can be hard to bring neighbors together and to create opportunities for the generations to meet and work collaboratively.”**
- **“If you live in a small town that is very widespread, with not many people, and you have a lot of older people who don’t use the internet and your phone system is not always reliable, it’s hard to get people to know where they are and where you are and how to ask for help or how to join together in any kind of social engagement.”**
- **“Compared to living in a city or a suburb, there aren’t a lot of supports and services in rural areas for new parents. And there’s really *nothing* for the people who are raising their grandchildren or great-grandchildren.”**
- **“When I was a new mom, I lived in a small town where older women ran a program that provided local mothers with two hours of free child care at a church nursery school. The older-lady volunteers got to cuddle and care for babies and toddlers and the mothers got a short but needed break. Helpful, intergenerational programs like that can be created in all kinds of communities.”**

FIELD-TESTED STRATEGIES: Community Connections

ACTING OUT

Although Broadway shines the brightest spotlight, theatrical productions are staged throughout the country. In fact, in many towns, a high school musical or a concert by the town choir is a big social event.

In a growing number of communities, theater is also being used to educate audiences about local issues and societal concerns, including those specific to the lives of older adults.

The Stagebridge theater company regularly travels to schools and community centers in nearby rural towns and regions from its homebase in **Oakland, California**. Founded in 1978, the company seeks to “enrich the lives of older adults and their communities through the performing arts.”

The productions address a variety of aging-related realities, including depression, downsizing and caregiving. Many of the scripts are original and tailored to the audience. (*Was There Light Before TV?*, for instance, is performed for schoolchildren.) Discussions with the audience follow each show.

A secret to the success of this type of theater is its flexibility. Some performers read their lines while others rely on improvisation. Some of the troupes include actors who have dementia or use assistive devices to move around.

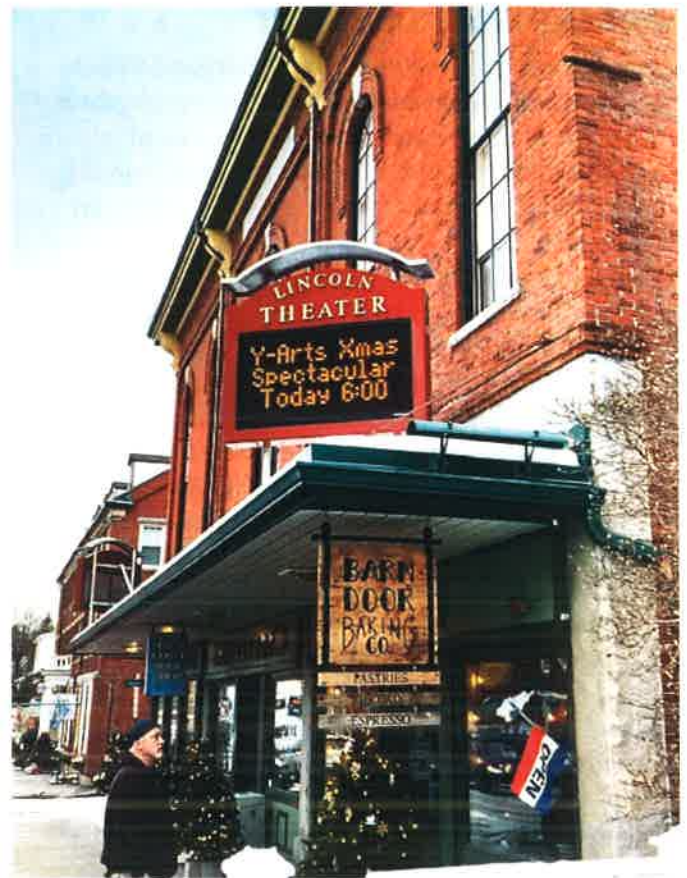
What the productions have in common is that they present older people as active, engaged, vital contributors to the community.

In **Somerset County, Maine**, the Resiliency in Action Interactive Improvisational Theater (an affiliate of the Marti Stevens Interactive Improvisational Theater) pulls residents of all ages into tough, often emotional conversations — on purpose.

In the Somerset productions, acting troupes of two to four people perform short dramatizations, of usually less than five minutes, that abruptly end when the characters reach a moment of crisis.

A moderator then turns to the audience and invites them to ask questions and make suggestions to the still-in-character actors, all of whom are volunteers and many of whom work in public health, education or community advocacy.

Interactive improvisational theater is a way of strategizing solutions to everyday problems. It delves into elder abuse, grandparents' raising grandchildren, hunger, bullying, and school shootings, among other realities. The scenarios inspire discussions about how the community can be more supportive,



▲ Something is always happening at the historic Lincoln Theater (circa 1875) in Damariscotta, Maine. The venue presents plays, hosts lectures, screens feature films and broadcasts live performances from stages throughout the world.

especially of the most vulnerable. The performances help people see themselves in others.

In fact, the scenarios are often so realistic that audience members cry, get angry and, at times, argue with the characters. At the end of the gatherings, the actors step out of their roles and introduce themselves to ensure that audiences understand they aren't really, for instance, a fraudster trying to swindle an elderly neighbor.

Employers, organizations and governments seek out the troupes for trainings, interventions and group-learning activities.

As described on the Marti Stevens website, the method provides “learning without lectures, blackboards, experts, flip charts, pencils, or workbooks. It encourages cooperation, critical thinking, respect for others, and taking healthy risks to express oneself in front of peers.” ■

HEAVY LIFTING

Recruiting teenagers for service projects can be tough. Due to school, homework, sports and jobs, young people have limited free time. In rural areas, which often have a disproportionately small youth population — one served by regional rather than local schools — many young people spend a lot of time simply commuting to and from school.

To ensure that young residents are involved in its livability efforts, the age-friendly committee in **Cumberland, Maine**, includes a high school student on its leadership council.

Teen involvement is also a priority for the town's semiannual Big Project Day, when residents help older neighbors with household projects they can't handle by themselves. Examples include gardening, repair work, and the installation or storage of window air-conditioning units.

"Relationships now exist as a result of these projects between seniors and our younger folks," said Teri Maloney-Kelly, the event's coordinator. "There are families that didn't realize they had a neighbor around the corner who needed help until they did a project like this." ■



▲ A young volunteer shovels snow off a carport roof as part of Aging in Place Cumberland's efforts to keep the community's older residents safe.

TAKEAWAYS

- Big city solutions — such as a chat bench, acting troupes of older people or a daily check-in call — can, with a little creativity, be replicated in small towns and villages.
- People of all ages and life stages who want to be involved in the community often lack a means of doing so. Empowering them requires tearing down barriers, such as a lack of transportation, and developing programs that fit the community and build connections.
- When seeking volunteers, develop a task (or "ask") that is tailored to potential candidates' interests, needs and availability.
- Activities that build on what people enjoy or need can engage residents who aren't involved in other aspects of community life.
- When addressed in nonconfrontational or non-embarrassing ways, difficult conversations about community issues — such as senior hunger, elder abuse or the impact of drug addiction on families — can take place and lead to solutions.
- It may take a little imagination to bring people of different ages together in a community, but it can be done when they share a common interest and when members of each age group can feel they're making a meaningful contribution. Working together in a community garden or recording the stories of older people are two activities that bring groups together on the basis of a common interest and give residents of all ages a sense of purpose.
- Young people care about their communities. When they're more involved in making decisions about projects designed to improve livability, they'll be more engaged in the projects and more interested in volunteering.
- The best way to find an effective program for a community is to seek the input of its residents.

Outdoor Spaces and Public Places

Just because someone has a yard or acres upon acres of land doesn't mean they have no need for parks and community gathering spots

Local parks and public spaces can help build a sense of place and social belonging, and this is true whether the community is suburban, urban or rural. However, the ways parks and public spaces are designed, maintained, programmed and funded don't always meet the needs of the people the places were meant to serve.

A rural community's identity, tax base and municipal priorities are affected when the population grows or shrinks or when the community experiences changes in its economic base. As a result, the local government's ability to fund basic services — such as education, infrastructure and public safety — is put to the test. Pinched for funds, there might not be room in the budget for investing in parks and other vital public places.

The disappearance of Main Street businesses and the increase of empty storefronts reduce foot traffic to once-thriving downtowns. With fewer visitors and a decline in the tax base, it may not be feasible for a small city or town to invest in the amenities and activities that can enhance its center.

The consequences of such declines undermine the health of both people and places.

As the National Main Street Center declares: "Downtowns are the heart of our communities" and "a community is only as strong as its core."

Time outdoors, either in one's own yard or a public place, helps people be more active; reduces obesity; and improves blood pressure, bone density and cardiorespiratory fitness.¹ Access to natural areas help people manage feelings of stress, anger and aggression; lessens social isolation; and improves coping abilities and cognitive function.²

For children, time spent in quality outdoor spaces can enhance creativity and problem-solving, reduce hyperactivity, and improve focus and behavior.³

Green spaces and trees play a vital role in overall ecosystem health by absorbing stormwater runoff and pollutants. Great parks and public spaces also

build community pride, enhance local economies, increase civic engagement and bring people together — for fairs and festivals, flea markets, cookouts, family reunions and other events and activities.

Small local parks are as important as large, regional, state or national parks.

In fact, the Trust for Public Land believes that all Americans should have a park or green space within a 10-minute walk of their home.⁴ While access to natural places takes on a different meaning in urban as opposed to rural settings, the point is that all people should be able to easily access a safe, outdoor, natural space.

And people really do need places *to go to*.

As sociologist Ray Oldenburg writes in *The Great Place*, in addition to home and work, people need "a third place," which he defines as a destination where a person can "relax in public ... encounter familiar faces and make new acquaintances."

Andrew Howard, co-founder of the placemaking and urban design firm Team Better Block, observes that, "the typical place in need of our team's help are old Main Streets, places that used to be active but are now essentially dead. We always ask, 'What did this place used to be like?' Then we work to make it like that again. Our goal is to reclaim cities and communities for the public good, one block at a time."

Such places and spaces need to be engaging, safe and accessible — the latter meaning that in addition to being navigable for people with disabilities, the larger population needs to be able to get to the location. And once they're there, programming (e.g., exercise classes, ranger-led hikes, special events) is essential to keep them coming back.

An often overlooked outcome is that spaces and places need to be suitable for users of vastly different ages and life stages. As livability expert Gil Penalosa, founder of 8 80 Cities, explains in what has become his mantra: "If everything we do in our public spaces is great for an 8-year-old and an 80-year-old, then it will be great for people of all ages." ■



▲ Located near Denali National Park, Talkeetna, Alaska, is a very remote, very small (population 875), very welcoming community with an active Main Street that's listed on the register of National Historic Places.

▼ A waterfront park and Little Free Library box is a popular spot in Eastport, Maine, the easternmost community in the United States.



◀ Combining funds from an AARP Community Challenge grant (see page 49) with the talents of local artists and volunteers, the Black Belt Treasures Cultural Arts Center created mosaic benches for Camden, Alabama's historic downtown. "We hope that as people shop, walk and do business in town, they'll stop and rest and learn a little bit more about our community, our history, our culture," said a center director.



◀ The Tolani Lake community in the Navajo Nation is located in a barren, sparsely populated region of northeastern Arizona. The closest shopping is an hour away. Schools and medical services are even farther.

FIELD-TESTED STRATEGIES: Outdoor Spaces and Public Places

REINVENTION AND REPAIR

Outdoor public places needn't close due to the cold. In 2015, community leaders in **Anchorage, Alaska**, voted to turn a former greenhouse property that was in disrepair into a much-needed 12-acre recreation area and green space in the city's east end.

The Muldoon Town Square Park is usable year-round, with a playground, picnic shelter and running track. In the winter, the track becomes an ice skating rink. A small or rural community in a cold climate can replicate and even improve upon the idea.

In a similarly cold and snowy community hundreds of miles to the southeast, the senior center on the **Blackfoot Reservation in Montana** is well-run and well-used, but has very limited outdoor space.

Located across from boarded-up houses, the center was connected to a park that had no trees or shade or protection from the wind and snow. Discarded pets turned semiwild dogs roamed freely.

When the community's elders were asked about their concerns and wishes for the senior center and park, their top priorities were safety, shelter from the wind, and a place to gather and socialize. The tribe



▲ A curvy ice skating track in Anchorage, Alaska.

used grant funding to install a secure wooden fence with decorative iron gates around the center and outdoor space. Young people put down sod and built planters according to specifications provided by the elders, who can now garden without having to stoop over or sit on the ground. ■

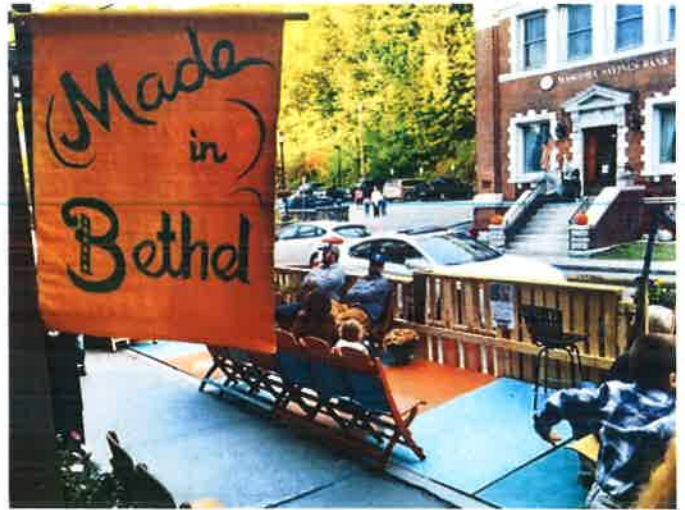
BUILD IT AND THEY WILL COME

With help from AARP and the placemaking firm Team Better Block, a push for better walkability and a livelier downtown is helping transform and reinvigorate **Bethel, Vermont**.

After Tropical Storm Irene battered the town in 2013, residents organized ad hoc efforts to fix the place up. It began with a fall festival, during which the Bethel Revitalization Initiative encouraged people to imagine what they wanted for the town.

That brainstorming led to an ambitious, free “pop-up” college (dubbed Bethel University) in which residents taught lessons based on their own skills and interests. The program “helped create a sense of pride and possibility for the first time in years,” said a local leader. The new energy led Bethel to look at more ambitious changes, so the town hosted the state's first “better block” project.

During an October weekend, a downtown block on Main Street received a makeover featuring street plants, crosswalk enhancements and a protected lane for cyclists and wheelchair users. Pop-up shops (some of which became permanent) opened in several of the long-vacant storefronts. ■



◀▲ By turning two Main Street parking spots into a temporary parklet, the downtown location (shown from the sidewalk and sky) became a popular place for people — and a taco booth — rather than cars.

HAVE A SEAT

A common sight in all types of communities are bus and transit stops where people are standing and waiting. They're standing because the only place to sit is on the ground.

In **Jackson Hole, Wyoming**, several young families, older adults and people with disabilities were living near a bus stop that consisted of a sign and nothing else but weeds and trash.

After a bench financed by an AARP Community Challenge grant (see page 49) was installed, neighbors added landscaping. One volunteered to water the plants, another said he'd remove snow from the bench in the winter. The bus stop was transformed by a small infrastructure investment and lots of public support.

To encourage pedestrian traffic in its small business district, **Port Orford, Oregon**, installed

four benches with attached planters.

The seats gave the business district a boost and provided a needed place for shoppers to rest, people watch, talk to friends and enjoy the town. The benches were constructed by a crew from the nearby correctional facility. High school students made plaques to recognize the inmates for their work and AARP for helping to fund the building supplies.

A few well-placed benches can make any destination a lot easier for people to visit.

When residents of **Bangor, Maine**, told a local livability committee that seating was needed outside the Cross Center, a large event venue, the advocates asked the manager to install benches in key locations. "Sure," he replied. "We have benches in storage out back."

With little effort and no cost to the advocates, the benches were supplied and installed. ■



SNAPSHOT



In addition to being functional, seating can be an attraction, such as in the Napa Valley town of **Yountville, California**, where a plaza in front of the community center is sometimes set up like a living room, with furniture arranged to facilitate conversation. The space also has two pianos at which anyone can sit and tickle the ivories.



NEWS CLIP

"As the nation's first cross-country multiuse trail, the Great American Rail-Trail will connect people of all ages and abilities with America's diverse landscapes and communities. Nearly 50 million people living within 50 miles of its route will be able to call this iconic American infrastructure their own as the trail delivers new access to the outdoors and new opportunities for physical activity and recreation. Hundreds of communities along the route will experience new opportunities for business development and tourism. ... Whether bridging gaps within and between communities; creating safe walking and biking access to jobs, transit, shopping and green space; or serving as recreation for cyclists, runners and casual daily explorers, this will be America's trail."⁵

— **Rails-to-Trails Conservancy**, announcing the preferred route for a 3,700-mile walk/bike trail that will stretch between Washington state and Washington, D.C.

Visit RailsToTrails.org to see the route and learn how much of it is already open for use.

FIELD-TESTED STRATEGIES: Outdoor Spaces and Public Places



LOCAL VOICES

- “When people hear talk of parks, they often think of national parks or state parks. What we’re lacking are small, local parks and local public places where we can spend a bit of time without having to plan for an outing that will take an entire day.”
- “I wish we had a downtown, center of town. A place to go and maybe bump into people you know. We have strip malls and big box stores.”
- “Being an older person stuck alone at home can be sad and lonely. But the places we have for seniors to gather are also sad and lonely.”
- “Cities have their hazards and dangers, but so do rural areas. Boredom and nothing to do or place to go can lead to people using illegal drugs or drinking to excess just to pass the time.”
- “We have a great library in this town. There are classes for people to learn to use their cell phones and iPads, book groups, and many activities. Since I had my stroke and have to use a walker, though, I can’t get inside. There is no parking near the ramp, and I can’t do stairs.”
- “Our local grocery store has reserved special parking for people with disabilities and for seniors, new moms, and pregnant ladies. I just love seeing those signs, because it means we are all welcome.”
- “The town got some grant money and invested in a wheelchair accessible trail that goes through some woods and to the lake. Eagle Scouts designed and built beautiful benches with scenes from our town history. Everyone goes there now.”

PARKING FOR PEOPLE

The revitalization of downtown **Kuna, Idaho**, has been an ongoing process involving businesses fixing up storefronts and sidewalks being repaired. Street lights, benches and plantings were spruced up. Streets were repaved.

Improvements were happening — except in one key area: the Bernie Fisher parking lot, adjacent to a walk-bike trail, the Kuna Senior Center, and the business district.

Blighted, oversized, largely vacant parking lots are not hard to find in communities throughout the United States. The Kuna lot fortunately had great potential as a pedestrian-friendly public plaza.

To spark the community’s imagination and hoped-for change, the city and Idaho Smart Growth hosted a Park for a Day event so residents could experience the parking lot as a pedestrian plaza. There was live music, a food vendor and sketches of how the expanse of asphalt could be transformed.

Attendee suggestions tended toward using the space for short-term, recurring events, such as an Oktoberfest or themed dance nights. ■



▲▼ An often-empty parking lot in downtown Kuna, Idaho, could be repurposed as an ice-skating rink.



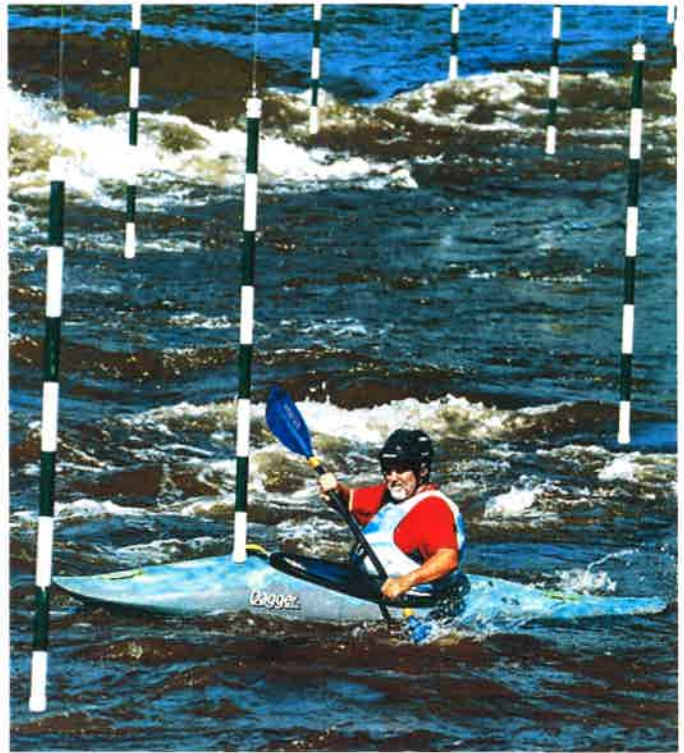
GET WET! HAVE FUN! TAKE A HIKE!

Charles City, Iowa, was struggling due to vacant storefronts and plant closings. The population was shrinking. Flooding had destroyed an entire neighborhood.

But the removal of a dangerous dam along the Cedar River enabled the city to transform a section of the waterway into the state's first whitewater park. The effort excited local young people and brought needed tourism dollars to town.

In **Fort Lincoln, North Dakota**, the Fort Abraham Lincoln State Park has to contend with both harsh weather and limited staffing. Among the park's doable and successful event offerings are a competitive fitness hike, a nighttime "glow" hike and a multiday Halloween-themed Haunted Fort event. Visitors who participate in 12 of the park's monthly hikes earn a free one-year park pass.

In **Carlsbad, New Mexico**, the support of local gas and oil companies, businesses and individual donors enabled the creation of Friendship Park, a "playground for everyone" that includes equipment suitable for people with special needs. ■



▲ The development of a whitewater park helped change the fortunes of Charles City, Iowa.



EXPERT INSIGHT

"It's easy to say we can't build friendly environments for physical activity in rural settings because it costs too much, and we're afraid of change in rural communities, and we don't have the resources, and we may not even have the technical know-how, and we are suffering population decline.

"In fact, rural communities and small towns may be uniquely advantaged to build fully accessible environments where it's convenient and inviting and safe to get out and move under your own power. Rural communities that build inclusive environments that invite everyone to get outside and move have a higher quality of life, and the local economic energy is better."

— **Mark Fenton**, transportation, planning and public health consultant and adjunct associate professor, Tufts University

TAKEAWAYS

- When a local park or the downtown area offers fun, worthwhile activities, it encourages residents to engage in outdoor recreation and boosts both the local economy and the community in general.
- A property lot or small piece of land may not look like much, but it can be turned into an inviting park or other public space, even if only for a special event.
- Pop-up events are a great way to gauge public support for long-term change. Ask businesses, the local government or the community at large to supply or help create the materials and elements needed to make an event happen.
- Whether in urban or rural areas, hiking trails and park spaces can have a positive impact on real estate values, business activity and community identity.

Housing

Rural regions have an acute need for housing that is affordable as well as accessible for residents of many ages and abilities

The housing stock in rural America is “older than that of the nation as a whole, heightening the need for, and the cost of, repairs, maintenance, and accessibility retrofits,” states a report by the U.S. Department of Housing and Urban Development, which also notes that in 2013, 63 percent of rural homes were built before 1980.¹

In many rural communities, much of the housing stock dates back to the early 20th and even the 19th centuries. Unless a renovation has occurred, many of these homes lack a first-floor bedroom or toilet. Few older homes are wheelchair accessible.

The majority of homes in rural areas are single-family residences, which are often far too large for empty nesters and require a level of maintenance that is costly, physically demanding and time-consuming.

According to AARP research about rural home ownership, nearly two out of five properties need major modifications to accommodate residents who want to age in place.²

Modifications come with a significant price tag, but making the needed changes is often preferable, safer and more cost effective and realistic than staying in an inaccessible home or downsizing to a newer, more accessible residence.

About 80 percent of older adults in rural communities own their homes,³ and among those residents nearly all own their homes free and clear.⁴

“But the structure isn’t appropriate, the size is not appropriate,” declared David Lipsetz, CEO of the Housing Assistance Council, at the AARP Rural Livability Workshop. “There is a small percentage of rental to move to. There’s an enormous need for affordable, right-sized housing.”

Another barrier to uprooting for more suitable housing is that the equity accumulated by older rural homeowners tends to be less than that of older homeowners in urban areas. This is because rural homes are generally less expensive. For instance, in 2017, the national median price of a rural single-family home was \$159,300 compared with \$207,800 for urban communities.⁵

But as in any neighborhood, housing values in

rural areas can be a boom or a bust.

Stagnant or declining values are devastating for people planning to relocate who had counted on their home as an asset. In some areas of the rural Midwest, housing prices have stagnated at 1990 levels. From 2000 to 2016, rural regions in Ohio, Indiana and Michigan saw a decrease in housing values of up to 7 percent.⁶ Such values generally benefit home buyers rather than owners.

Although increasing and very high housing prices and shortages are common in booming cities, the same situations exist in many rural places.

This often happens in picturesque areas that attract tourists and well-to-do retirees.⁷ For instance, in Montana, Wyoming, North Dakota and South Dakota, rural home prices increased by 40 to 78 percent from 2000 to 2016.⁸ High-income buyers compete with one another for available properties, which raises asking prices and boosts the housing market to levels that many current or returning residents can’t afford.

Rapidly increasing property values make life tough for existing homeowners as well. They often find themselves asset rich but cash poor due to steep increases in real estate taxes and other costs. If they sell their home, they might not find an affordable and suitable house or apartment elsewhere in the area.

Colorado is a place where soaring housing prices, compounded by high utility costs, are creating problems for both young and older residents, neither of whom can afford to live where they already have a life.

Among the other challenges: Many communities in rural America struggle with endemic, multigenerational poverty. To make ends meet, residents of various ages are often forced to move in with others, leading to overcrowding.

The nation’s opioid epidemic has added both community and household hardships. When adults with young children become addicted or die, their parents often become the children’s guardians. An empty nest becomes full again.

The lack of housing that’s safe and affordable, and size and place appropriate, impacts people of all ages and life stages. ■



▲ Oregon's Willamette Valley is stunning. But living far from services and neighbors can be isolating.



▲ Old homes, such as this rural Maryland farmhouse built in 1850, often have a lot of stairs and are expensive to maintain.



▲▼ Among the benefits of life in a rural downtown (such as Harrodsburg, Kentucky) are walkability and (in Nelsonville, Ohio) front row seats at the parade.





MISSING MIDDLE HOUSING

Across the United States, there’s a mismatch between the housing stock and what the market wants and needs. This is partly due to changing demographics, such as the rapidly aging population and shrinking household sizes.

A practical solution is something called “missing middle housing.”

These types of residences (see the illustration, above) are described as missing because very few have been built since the early 1940s due to zoning constraints, financing difficulties and the shift to automobile-centric patterns of development.

Where the structures do exist, they easily go unnoticed because — and this is a good thing — they blend right in. Original missing middle homes are located in walkable urban areas as well as in historic small towns and Main Street districts.

As a housing type, missing middle homes are close to amenities, mix well with other building types, never exceed the scale of a house (height,

width, depth) and can be purchased or rented. Many of the properties are designed as live-work units.

While new missing middle housing projects are becoming more common in large cities, they’re also located in smaller communities, including **Papillion, Nebraska**, and **South Jordan, Utah**.

“Missing middle housing types are a great way to deliver affordable housing choices by design since they’re of a scale that most communities would support,” explains Daniel Parolek, founder of Opticos Design and the architect who coined the term “missing middle.”

The concept can also broaden housing discussions, including with people or groups that bristle at words like “density” or “multifamily.” Conversations can develop around a question such as “Where will downsizing empty nesters live when they need to be in a less car-dependent home, but want to remain in or near their community?”

One answer is missing middle housing. ■

LOCAL VOICES

- “We have people who’ve lived in a home their family has owned for generations, and when it comes time to turn over the keys, it’s very difficult. Once people are in the smaller places, they are usually happier. But the transition of leaving their house, of getting rid of their possessions and downsizing, is emotional and physically difficult and even dangerous when they’re older and they try to make repairs or do the packing and moving themselves.”
- “Aging in place isn’t a viable option for people who can’t afford to maintain or retrofit a home. Finding affordable, comfortable, high-quality housing is especially challenging in rural areas.”
- “We think of roommate housing as being only for college students or young people. But there’s no reason why older people shouldn’t be sharing a large home. Doing so provides everyone involved with companionship, help when needed and a more affordable way to live.”

FIND AND SEEK

Rural residents sometimes have problems accessing emergency services. Conversely, first responders can experience problems finding and reaching rural residents.

Common reasons for the latter include a home being difficult to find due to hidden or missing house numbers, the home being inaccessible because a driveway is too narrow or is covered with snow or overgrown with vegetation, or the road to the home is poorly maintained.

To address the first issue, the Georgetown for All Ages Committee in **Georgetown, Maine**, helped create, distribute and install large, reflective house numbers that can be clearly seen from the road at each of the town's 500 homes. The service was free.

In **Davidsonville, Maryland**, the Boy Scouts raised funds for their troop by creating and selling, for \$5 each, reflective house-number signs (pictured). In **Phippsburg, Maine**, the town asks residents to ensure that their driveways are wide enough and that trees are kept trimmed so fire trucks will have full access to all homes. ■



▲ Reflective house-numbers help both residents and first responders.

BOARDING SCHOOL

Gowanda, New York, needed affordable housing for its older residents. An old school building stood vacant until it was converted into 32 apartments for low-income adults age 62 or older. The building also contains a medical office, an adult daycare facility, a food pantry and counseling services.

The town of **Hallowell, Maine** (population 2,400), is home to more older adults than school-age children.⁹ In 2016, after years on the market, the Maine Industrial School for Girls, a 19th century institution for “wayward” young women, was converted into Stevens Commons, a 55-acre mixed-use campus with affordable rental apartments for people 55 or older.

Forgiveable loans from the Community Development Block Grant program and the nonprofit Community Housing of Maine funded the housing for older residents. ■



EXPERT INSIGHT

“Some native elders are living in the home they’ve lived in for decades. A lot of those homes are intergenerational, and they’re crowded because they have kids and grandkids in the home. That can deteriorate the homes. A lot of our tribal housing programs’ main job is maintaining housing stock. But the tribes are also in a unique position. Because of the housing shortage, every time they build a new unit, it’s something they can really consider and tailor to the particular individuals they’re trying to serve.”

— **Tony Walters**, Executive Director
National American Indian Housing Council



NEWS CLIP

“Many homes here [in Ogallala, Nebraska] were built for a far different time, before mechanization, when you needed big families to work the farms. Most are outdated. The few that are on the market ... often need thousands of dollars’ worth of upgrades. Most people can’t — or aren’t willing to — pay that.”

— “Rural America Faces a Crisis in ‘Adequate Housing,’” *Weekend Edition*,
National Public Radio, August 11, 2018

FIELD-TESTED STRATEGIES: Housing

COMFORTABLY HOME

To help older residents maintain their homes, nonprofits in many communities organize volunteers who assist with simple chores, weatherization and routine maintenance.

In rural **Putnam County, Ohio**, for example, a local men's organization partners with the national nonprofit Habitat for Humanity to replace roofs, repair siding, install stair railings and grab bars, and even add plumbing to equip homes with running water.

The Honey Do Crew does the same for low-income adults in **Kanawha County, West Virginia**.

In **Trappe, Maryland**, AARP Foundation partnered with Habitat for Humanity to host workshops that provide home maintenance tips and teach older homeowners how to perform simple repairs.

In many places, state and local housing authorities are also helping to make homes safer and more comfortable for older residents. In 2017, **Maine's** state housing authority launched a repair program to assist older people who want to remain in their homes but can't afford the needed repairs and modifications. Participants receive an in-home assessment to identify low-cost, high-impact changes that can make their home safer.

The renovations are paid for by the state and are performed by a housing agency employee who is also a certified aging-in-place specialist. The most common modifications: installing bathroom grab bars, adding insulation, and making it easier and safer to enter and exit the home.

During the program's first two years, the average cost of materials per home was \$1,578. In that same timeframe, the program reduced the rate of in-home falls by 79 percent and decreased the number of hospital visits, including trips to the emergency room, by 61 percent.¹⁰ ■



▲ Home repair volunteers in West Virginia.



▲ A volunteer driver for the VegiCare program.

IT TAKES A VILLAGE

The Village to Village Network is a national umbrella organization that supports nonprofit, community-based, volunteer- and neighbor-run aging-in-place arrangements called Villages.

Where the programs exist, residents typically pay dues to their local Village, which then connects them with services, activities, and support from volunteers and vetted vendors.

The first Village was established by neighbors in Boston's Beacon Hill. In rural areas, a Village program might serve several small towns.

CommunityCare of Lyme, the Village affiliate in **Lyme, New Hampshire**, doesn't charge membership fees and its services are available to all residents, regardless of age.

The organization's mission is to "build on Lyme's heritage as a warm, welcoming and service-oriented community by building partnerships, embracing new ideas and designing systems that improve our individual and collective sense of well-being."

A men's group, called Those Guys, provides transportation services and performs minor household tasks and seasonal chores.

Farmers donate vegetables to the VegiCare program, which distributes produce to households in need. The SouperCare program delivers homemade soup to people who are ill, going through a life transition (such as a new baby or the death of a family member) or have a disability that makes it difficult to prepare their own meals. ■

SENIOR-SAFE SMOKE ALARMS

Fire prevention and detection is especially important in rural areas, where most residents get water from private wells on their property. Fire hydrants — which exist only where there’s a piped, municipal water supply — are rarely available.

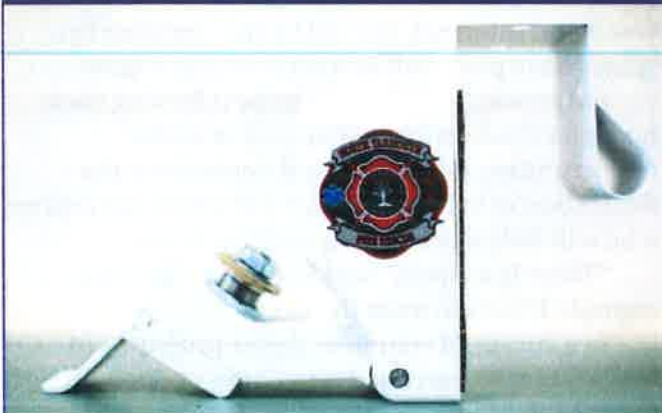
Firefighters either transport water to the site in tanker trucks or extract it from nearby lakes, ponds or swimming pools. Since most rural areas depend on volunteer firefighters, the response time may be slower, too, despite the level of devotion. (See page 44 for more about firefighting.)

As part of the Senior Safe Program in **Casper, Wyoming**, Rotary volunteers and Casper College fire science students work with the fire department to install smoke detectors, carbon monoxide alarms, night-lights and LED bulbs, which last longer, shine brighter and use less electricity than traditional incandescent bulbs.

Thanks to funding from local organizations, including AARP Wyoming, there is no cost to homeowners. Between 2014 and 2019, 60 volunteers installed more than 2,000 smoke detectors and carbon monoxide alarms in 300 homes. ■



SNAPSHOT



The Fire Rescue squad in **North Yarmouth, Maine**, installed key safes on or near the entry doors of homes with older residents who live alone. The town’s first responders are the only people who can open the lockbox that contains the key. A tracking system records when each box is opened and by whom.

ROOMS AND MORE FOR RENT

Since the **Mount Washington Valley** in **New Hampshire** attracts tourists year-round, real estate prices are high. By matching older homeowners who have an extra bedroom with home seekers, the HomeShare MWV program enables older residents to generate income from rent and not live alone.

To expand housing options statewide, the New Hampshire legislature legalized the creation of accessory dwelling units (or ADUs), which are secondary residences attached to a single-family home or built on the same property lot. ■

TAKEAWAYS

- Many older residents want to remain in their small town or rural community, but a lack of aging-suitable and “right-sized” housing options limit their ability to do so.
- Solutions needn’t always be implemented by government officials. Neighbors, even distant ones, can check on one another.
- Neighbors can also provide services to one another (e.g., raking leaves, plowing snow), meet for meals, share equipment, offer rides and do errands together.
- Local governments can convert unused schools or other town-owned buildings into smaller, more centrally located housing for older people who need to downsize or for younger residents seeking a starter home.
- Rural communities need to “find” or create their missing middle housing — and introduce the concept of cohousing and home-sharing as residential options.
- Accessory dwelling units can help address housing shortages, enable family members to live near one another and allow homeowners to earn rental income. (See page 49 for how to learn more.)
- The presence of housing choices that are affordable and appropriate for individuals and families at different life stages enables people of all ages to thrive in a community.

Transportation

It can be difficult if not impossible for nondrivers in rural areas to get where they need or want to go

“**E**very rural place has a transportation issue and may not even know it,” declared John Robert Smith, chair of Transportation for America and a former mayor of **Meridian, Mississippi** (see more on page 30), at the AARP Rural Livability Workshop.

“Transportation affects the creation of jobs and whether people stay in the community,” said Smith. “It affects whether young people can take classes at the community college. Whether Grandma can get to her critical oncology appointment. Whether workers can get home from the third shift at the plant.”

In survey after survey, transportation is a top concern for people who want to age in place. According to AARP research, nine out of 10 adults in rural areas drive to get around in their community.¹

Why? In most rural places, living without a car can mean living an isolated, dependent and disempowered life. There are solutions — and numerous challenges for implementing them.

Transportation funding at every level of government is tightening.

Barriers, bureaucracies and an inability to coordinate between local, regional, state and federal jurisdictions leads to a disconnected transportation network with mixed priorities and vast limitations.

There is further dysfunction among the different types of providers: public, private, organization-based and volunteer-operated.

To manage through the cost-cutting and chaos, and then better coordinate services, the Age-Friendly Berkshires team in **Massachusetts** invited all transportation providers in the region to meet and collaborate. A direct result was *The Berkshire County Transportation Guide*, which is updated biannually.

The Transportation Management Association advocates for funding and programs to help people connect to the “last mile (or seven miles in the most rural areas)” between public transportation and their home. In 2019, the association partnered with the Massachusetts Registry of Motor Vehicles, AARP Massachusetts and Dementia Friendly

Massachusetts to offer AARP Smart Driver classes and CarFit workshops. (See page 49 for information about the AARP Driver Safety program.)

Some seemingly small barriers to making transportation more accessible are still significant.

For instance, many houses of worship have a vehicle that sits idle in a mostly empty parking lot for much of the week, used only on certain days to shuttle nondriving worshippers.

While the same vehicle could take people to the grocery store and medical appointments, providing that kind of service involves spending more on fuel and insurance — and requires a driver. Sometimes, finding a driver is the most difficult part.

During the AARP Rural Livability Workshop, representatives from **Grayson County, Virginia**, and **Holly Springs, Mississippi**, confirmed that even though each community had a vehicle ready to provide its older residents with rides to medical appointments, neither could find a qualified driver.

Without public transportation options, people who aren’t able to drive must depend on friends, neighbors, family members or volunteers. Some rural, all-volunteer driver programs are relatively small and informal, limited to one community; others have paid staff and serve a large region.

Either way, whether someone is leaving their home for medical care, shopping or social opportunities, getting around depends on the dedication of volunteers, many of whom are retirees who will only drive during daylight hours.

“There is a stress,” said Smith, “on finding enough drivers to meet the need.”

In a survey of volunteer driver programs in **Minnesota**, 68 percent did not have enough drivers, forcing the groups to turn down requests.² Nationwide, the number of volunteer drivers in a community drops significantly when seasonal residents relocate for a few months each year.

Another problem is the lack of information about existing services. While larger municipalities often have apps or websites detailing transit options, routes and schedules, many smaller communities rely on volunteers and social service groups to both



▲ Like many of the nation’s fast-moving, multilane commercial roadways, traveling in a vehicle is a must for shopping along or crossing Route 491 in Gallup, New Mexico.

disseminate transportation information and provide the needed services.

The nonprofit organization Feonix: Mobility Rising is an AARP partner that’s working to fill those information and service gaps for “vulnerable and underserved” communities in, among other states, **South Carolina, Texas and Michigan.**

And then there’s the demographic reality that one in five drivers in the United States is age 65 or older.³ Due to health issues or simply normal aging, many older adults choose to limit their driving or turn in their car keys entirely.

According to the AAA, people typically outlive their driving years by seven to 10 years.⁴

It’s important for rural communities — actually, *all* communities — to help residents plan for a future when they might not drive. It’s also important for communities to provide transportation options for people of all ages.

Although walking typically can’t serve as the sole form of transportation for nondrivers, and bicycling may not be viable for everyone, both should be included on the transportation menu.

In fact, according to a Rails-to-Trails Conservancy report,⁵ people in towns with a population under 50,000 walk nearly as much as people in urban and suburban centers, thanks to streets with little traffic and businesses within easy walking distance.

Being able to walk, bike or safely “roll” to one’s destinations keeps people connected to their community and is good for the local economy.

Rural communities are becoming healthier and more socially connected by implementing traffic calming solutions and making creative, low-budget improvements to — among other street-level features — sidewalks, crosswalks, recreational trails, lighting and bicycle lanes. ■

COMPLETING THE STREETS

A “Complete Street” is a roadway that is safe and useful for pedestrians, cyclists, drivers and passengers.

The approach, explains the National Complete Streets Coalition, “integrates people and place in the planning, design, construction, operation, and maintenance of our transportation networks.” Doing so “helps to ensure streets are safe for people of all ages and abilities, balance the needs of different modes, and support local land uses, economies, cultures, and natural environments.”

In **Brookings, South Dakota**, the emphasis of downtown development is on creating walkable neighborhoods. Planters, benches, safe pedestrian crossings and public art make the area attractive. Businesses that are accessible to all ages and abilities encourage everyone to shop and spend time there.

In **Ennis, Montana**, the town government worked with local partners, including the Montana Center for Independent Living, to design the first sidewalks for its Main Street. The sidewalks are now fully accessible — for wheelchair users, people pushing baby strollers, everyone. Children can even safely walk to school and to local parks.

Residents of **Manzanita, Oregon**, want to keep the small-town vibe and live in harmony with the surrounding natural environment. The oceanside community is a popular vacation destination and retirement location. To encourage people to walk and bike, the town committed to making all of its streets at least 20 feet wide so they can be shared safely by drivers, bicyclists and pedestrians. ■



SNAPSHOT

After a community survey, **North Yarmouth, Maine**, realized there was widespread concern about traffic speeds in its village center.

In response, the town and the Living Well in North Yarmouth committee created the “Kite in Your Sight? Please Slow Down” campaign, in

which 40 colorful kites were placed in spots known for speeding.

The project’s theme built upon the success of the annual North Yarmouth Kite Festival. In the street safety effort, plastic kites from a local discount store serve as visual “don’t speed” reminders.

To educate drivers, an overhead banner stretching across the entrance to town declared, “Welcome to the Village Center. Kite in Your Sight? Please Slow Down. Our Community Thanks You.”

The effort was a hit with kite-spotting children, their parents and local safety officials.



EXPERT INSIGHT

“Before automobiles were common, my great-grandfather would catch a ride into town with the mailman. People used to know their neighbors and barter things all the time. Not so much anymore. Many times, if you’re in a community where you haven’t had transportation options for a long time, you just give up on once-routine parts of life. You don’t even think about going to have coffee with your friends on Tuesday or going to the VFW on Friday night anymore, because it’s been years since you’ve been able to do so.”

— **Valerie Lefler**, Nebraska-native and founder of Feonix: Mobility Rising

CATCHING A RYDE

Residents of all ages in a seven-county region of south-central **Nebraska** can contact RYDE Transit (Reach Your Destination Easily) for a low-cost door-to-door ride.

John Fagot, the mayor of **Lexington, Nebraska**, is a regular rider. He doesn't drive due to vision loss.

"But RYDE Transit takes me wherever I want to go," he said, "City Hall, home, work. Life would be difficult for many people in the county without it. People depend on it. They could not keep their jobs. They could not do their daily errands."

About half of all RYDE Transit riders are over age 50, but many children take RYDE Transit to after-school activities. Passengers are asked to book their rides 24 hours in advance if possible, while return trips are more flexible.

"When you're at the doctor, you don't know if it will be 10 minutes or two hours," RYDE Transit director Charles McGraw points out.

RYDE Transit, which is one of more than 60 public transit providers in Nebraska, is run by the Community Action Partnership of Mid-Nebraska, which also manages the region's Head Start programs, numerous senior centers, WIC programs and food banks. Funding comes from local municipalities and counties as well as the state and federal governments, foundation grants, local United Ways, and individual donors. ■

NEIGHBORS DRIVING NEIGHBORS



▲ In Mount Vernon, Maine, a twice monthly, two-car shopping excursion starts with socializing over coffee and a quick bit to eat.

Neighbors Driving Neighbors is a grassroots nonprofit serving five rural communities in central **Maine** — specifically **Vienna, Fayette, Mount Vernon, Belgrade** and **Rome**.

The drivers describe themselves as "volunteers providing rides for those who don't drive so they can more easily stay in their homes."

The destinations need to be within 35 miles ("or so") from the passenger's home.

In a three-year period, 44 drivers provided more than 2,000 free rides to 100 neighbors to help with medical appointments, errands and social activities.⁶

The grant- and donation-funded service grew out of a community forum in which residents identified transportation as a problem in need of a local solution. The organization is run by a part-time manager and a volunteer board. The clientele are older residents and people with a disability.

"I feel better not burdening family," one passenger explained.

The drivers say the work is rewarding because they can help someone directly and meet new people. In at least one case, the time spent volunteering was actually relaxing.

"The driver was so sweet," a rider reported. "My appointment was long but she said it was okay because she took a nap in her car." ■



NEWS CLIP

"The nation's rural population is declining while greater percentages of people living in far-flung places are relying on mass transit. That's because these places are home to populations that are aging, and increasingly low-income. This translates into growing numbers of people who can't or shouldn't drive, or that can't afford a car or its gas and upkeep."

— "It Makes Rural Living Possible: Rural Transit Districts Help Many Get Around," *The Southern Illinoisan*, February 14, 2019, citing research by the American Public Transportation Association

FIELD-TESTED STRATEGIES: Transportation



◀ Greyhound buses and Amtrak's Crescent Line (between New York City and New Orleans, Louisiana) stop at Union Station in Meridian, Mississippi.

LOCAL VOICES

- “In rural areas it’s often like a village system, where family and neighbors provide rides when needed. But now the people who were the primary ride givers are getting old themselves.”
- “Many rural areas do have public transit buses or vans, but many older residents have never, or hardly ever, used them. Our transit agency now brings vehicles to community events so older people can see what it’s like to board and ride.”
- “In some places, transit vans en route to a city or large town will pass through a small town or rural area without stopping. That’s a wasted resource and missed transportation opportunity.”
- “Communities need a ‘one-stop shop’ for coordinating all rides in a region.”
- “People are often more willing to scrape together the money to pay for a ride than to ask someone for the favor of a ride.”
- “There’s a myth that rural communities aren’t walkable. Many do have walkable downtown areas. When I go to my wife’s hometown in North Dakota, we park the car and walk the entire the time we’re there.”
- “Some rural communities have a distinct town center. For those that do, downtown walkability is key. For areas without a central downtown, it’s still important to be able to take walks for recreation and health.”

IF YOU BUILD IT THEY WILL COME

Established at the crossroads of two railway lines, **Meridian, Mississippi**, was a thriving city throughout the late 1800s.

During his 16 years as mayor, John Robert Smith recognized the potential of his hometown to again serve as both a destination and transportation hub.

The restoration of Union Station in the late 1990s made the facility one of the best multimodal transportation centers in the country and helped revitalize the city’s downtown.

In addition to housing Amtrak and other transit providers, the upgraded building was designed with meeting rooms and event spaces for community activities as well as weddings and other celebrations.

Smith’s advocacy for the restoration of the Grand Opera House of Mississippi — and the development of an arts district and arts education centers — made Meridian and its walkable downtown a place people want to visit and live in.

According to the Great American Stations Project, “Meridian’s tremendous success story has provided ample inspiration for other small cities.” ■

CATCHING A FLIGHT FOR CARE

In some parts of rural America, specialty medical services — including for organ transplants, ongoing burn treatments and even cancer — can be hundreds of miles away.

People in need of distant care are often helped by pilots who volunteer with “public benefit flying” organizations. (The nonprofits that provide such services include the Angel Flight programs, each of which covers a specific state or region.)

Using their own small planes and covering all costs, the pilots transport patients to distant medical facilities. They also assist with disaster response, animal rescue efforts and family reunifications.

Visit AirCareAlliance.org to learn which organizations serve what areas. ■



SLOW DOWN FOR PEDESTRIANS

The downtown area of **Wayne, Maine**, appears suddenly when a driver travels along Route 133, a busy state highway with fast-moving traffic

Because of curves in the roadway and a hill, pedestrians crossing Main Street often aren't seen by drivers until the last moment.

"Logging trucks and other large trucks race through town, barely slowing down as they do," Stan Davis, a member of the community's aging-at-home committee, told AARP in 2017.

An AARP Community Challenge grant helped the town acquire two "Reduce Speed" beacons that were installed at either end of the downtown. The town also purchased portable pedestrian-crossing signs.

"They'll help keep everyone safe as they cross the road to the post office, the library, the restaurant, the school, the dam where people swim and the farmers market," Davis added. ■

◀ **Wayne, Maine's town manager (far left) and aging-at-home coordinator stand with a flashing traffic sign that alerts motorists to *slow down!***

TAKEAWAYS

- Contrary to common assumptions, walkability is an important part of small-town life.
- It can be difficult if not impossible for nondrivers in rural areas to get where they need or want to go. Rural transit services and choices can be improved through better coordination and communication and through expansion, including ride-sharing and, yes, safe ways to walk and bike.
- While ride-sourcing and -sharing services, such as Uber, Lyft, Via and GoGoGrandparent, are easy to find in urban and even suburban areas, they are often not available in rural places.
- Autonomous vehicles (aka: self-driving cars) could be a solution for getting nondrivers around the vast distances of rural regions, but they're part of a future not yet on the docket. In fact, most experts believe rural areas will be the last to see the technology.
- Look at all the organizations in a community — from faith-based groups to businesses to regional transportation authorities — as potential sources of transportation solutions and services.
- There's a real need to improve "last mile" mobility, such as the trip to and from the bus stop.
- Most older Americans grew up walking and bicycling. Many would do more of each today if provided safe routes for doing so.
- Public transit waiting areas need to be safe and provide both seating and protection from bad weather.
- Volunteer drivers are the heart and soul of volunteer transportation programs. Successful recruitment strategies include scheduling flexibility and stressing the community benefit.
- To retain volunteers, it's important to find creative ways to thank them, keep them busy (but not too busy) and provide ongoing training that benefits them personally and maximizes their effectiveness.
- Transportation options are a lifeline for rural communities. As John Robert Smith, the chair of Transportation for America, warns, "Without transportation choices, we face the continued depopulation of small town and rural America."

Healthy Living, the Economy and High-Speed Internet

Essential needs include nearby medical care, reliable internet access and innovative thinking about work and economic development

Many of life's modern conveniences aren't readily found in some small towns or rural areas. That can include access to medical care, high-speed internet service, reliable and safe drinking water, reasonably priced healthy food, and other services and products that urban and suburban communities generally take for granted.

For instance, the availability of potable water depends on the presence and quality of a drilled well — and the absence of natural and man-made pollutants. A 2018 report in the *New Republic* found that half of the 5,000 drinking water systems in the United States that received health violations in 2015 served 500 or fewer residents.¹

Even when the water is safe to drink, if there's an electrical blackout due to a storm, high winds or even high use, a home that doesn't have a gas- or solar-powered backup generator may be left without power, heat, cooling, or telephone and internet service. Residents can also be left without running water and a working septic system since most private wells and sewage septic system pumps run on electricity.

Although food is grown in rural areas, it is increasingly difficult for rural residents to find fresh meat, fruit and vegetables in their local stores.

For one in five rural communities, a supermarket or fresh food options are more than 10 miles away.² The U.S. Department of Agriculture classifies such communities as "food deserts."³

In many areas, the proliferation of dollar stores, which sell discounted household goods and packaged foods, undermines local grocers that haven't already shut their doors due to the influence of mega-supermarkets such as those within Walmart or warehouse stores.⁴ The on-demand grocery delivery services (Instacart, Peapod, Shipt, AmazonFresh) that feed many urban and suburban residents are costly options and usually not available in low-population areas.

Local solutions to the scarcity of fresh food

include informal volunteer transportation services, community gardens and food pantries. A church in rural **Conetoe, North Carolina**, for example, started the Conetoe Family Life Center, a 21-acre community garden and bee farm. Half of the produce is donated to low-income families.

In **Newport, Vermont**, a remote community with high unemployment where one in four residents are age 65 or older, the Fresh Start Community Farm coordinates multiple garden sites (one on the lawn of a local business) and chooses plantings based on what will grow best in each location. Some of the sites include safe places for children to play while parents are working in the garden.

A community grant from AARP Vermont was used to add raised planting beds so people can garden without getting down on the ground. The gardens are harvested weekly during the three-month growing season and volunteers receive a share based on the number of hours they work.

"While younger people do the manual labor, like digging and weeding, older people grow the seeds in their homes over the winter and instruct the kids on how to care for the plants," Patricia Sears, a former AARP Vermont volunteer state president, explained in 2015. "A pride has developed in the neighborhood, and the people are taking care of one another."

In **Lenox, Iowa**, a store owner provided the healthy food solution. Ramsey's Market sells groceries and runs both a Mexican restaurant (called Tiger Taco) and a hardware store. The market features weekly low-cost "Fresh Deals" that include meat, fruit and vegetables. To meet the needs of residents who can't get to the store, Ramsey's makes free deliveries for orders over \$50 and charges \$2 to deliver smaller orders.

Great distances and a lack of medical providers, particularly for specialty services, can make it difficult for rural residents of any age to access health care, even if they have insurance or can afford to pay out of pocket. Only 10 percent of the



▲ In many rural or remote communities, it can be hard to find an open store or restaurant during the “off-season.” Seasonal closings are common in areas that attract tourists (such as Boothbay Harbor, Maine, pictured) but also occur in less destinational places, with “winter schedules” beginning as early as September.

nation’s physicians practice in rural communities.⁵ For many people, an emergency room is the medical provider of first and only resort.

That’s assuming they live in an area that still has a hospital. More than 100 rural hospitals closed during the 2010s,⁶ and many of the nation’s 2,000 rural hospitals are struggling to survive due to factors including unpaid patient debt. Patients are likewise struggling due to their unpayable medical bills.

According to a 2019 article in the *Washington Post*, the Poplar Bluff Regional Medical Center — a for-profit hospital serving **Butler County, Missouri**, and other rural counties — has filed thousands of lawsuits against its patients with balances due. More than 35 percent of the people in Butler have unpaid medical debt on their credit report. Some of the defendants derisively refer to their court appearances as the “follow-up appointment.”⁷

Even when care is nearby, it can be inaccessible due to a lack of transportation. That’s partly why the regional hospital in **Paris, Texas**, helps fund a shuttle service — cheekily named the Paris Metro.

With the rise of the internet, a rural renaissance

was widely predicted. People would be able to live and work anywhere, and millions would move into idyllic smaller communities where, with the push of a button, the world would be at their fingertips.

Overlooked in that vision were the physical barriers to connectivity (mountains, oceans, distance), the cost of developing or updating the necessary infrastructure, and the influence and interests of various corporations, stakeholders and special interests.

For-profit internet providers want to invest in areas flush with potential customers. Sparsely populated rural regions don’t provide the desired bang for the buck. Yet in more than 20 states it’s actually illegal for a municipality or community to develop its own internet network.⁸

Fixed (i.e., installed) and mobile high-speed internet access (also known as broadband) are now the norm in densely populated areas, but the services aren’t available in all rural communities. In fact, as of 2019, 98 percent of urban areas nationwide had some sort of high-speed internet access compared with 69 percent of rural households.⁹ *Continued* ▶

Even where the service does exist, the cost, coupled with those of computers and smartphones, can be too much for a cash-strapped household. Yet, in many ways, high-speed internet is now an essential utility, like electricity or water.

In some situations, reliable high-speed internet is a matter of life and death. That was the case in 2016, when a **Sioux Falls, South Dakota**, emergency medicine physician with the telehealth network Avera eCARE guided a physician's assistant, located 700 miles away in rural Montana, through the treatment of a child badly injured in an ATV crash.¹⁰

When telehealth services are an option, patients can participate in routine and follow-up medical appointments from home.

Another reality is that due to a lack of career opportunities and modern services, young people are leaving rural regions. Depending on the community, such migrations are debilitating or at least a matter of concern. While older residents in many places are more than capable of performing the jobs that need doing, as the population ages it may become more difficult to find essential services in rural areas.

High-speed internet access can be the key to a small town's ability to survive and its residents to thrive. For instance, knowing that more than 50 percent of its residents are age 50 or older,¹¹ remote **Eastport, Maine**, made securing high-speed internet a priority so it could attract younger residents who are able to work for distant employers.

While the topics addressed in the previous chapters are each vital to rural livability, economic opportunity, available health services, and high-speed internet access are necessary for a chance at success and a comfortable standard of living. ■



SNAPSHOT



Millinocket, Maine, once supplied some of the largest newspapers on the East Coast, including *The New York Times*. The Great Northern Paper Company's mill operated 24 hours a day, seven days a week, providing jobs and good incomes for residents, many of whom had immigrated from Europe and Canada. The community's fortunes changed in 2008, when the mill closed its doors after a series of corporate acquisitions and ultimately a bankruptcy. As the nearest town to the northern terminus of the Appalachian Trail, Millinocket is still frequented by hikers and others who love the outdoors. To provide the local economy with an off-season, pre-winter-blues boost, the town hosts an annual marathon — *in December*. The marathoners and their supporters shop, socialize, eat and drink. Nearly 2,000 runners braved the cold (25°F but sunny) in 2019.



EXPERT INSIGHT

“At its essence, smart growth is about shaping the quality of the place, and then that place shapes the lives of the people who live there. Our 21st century economy is no longer based on tools and spools. Only 10 percent of our economy is manufacturing today. It is about the knowledge economy. Large businesses, industry and tech firms are moving into downtowns. Why? They are chasing the workforce they can't get to move to the more distant office or research park. Businesses are moving to downtowns, where walk scores, transit and bike scores are better because that's where the workforce wants to be. And that doesn't mean living in big metropolitan areas.”

— **John Robert Smith**, chairman, Transportation for America, and former mayor, Meridian, Mississippi

Healthy Living

FIELD-TESTED STRATEGIES

STREET SMARTS

An available and powerful resource in or near many small towns and rural places are the students and researchers at educational institutions.

Jermaine Mitchell, an assistant professor of exercise and nutrition science at the University of Montevallo in **Montevallo, Alabama**, has his students create wellness programs specific to the needs and interests of local older adults. (So if a person or group enjoys square dancing, the fitness activities might feature music and dance steps.)

The students also use the *AARP Walk Audit Tool Kit* (see page 49) to assess the walkability of Montevallo neighborhoods. Sidewalks have been fixed and crosswalks added due to their work.

Says Mitchell: “Service learning projects form partnerships of faculty, students and communities to put knowledge and skills to work on today’s most critical problems.” ■



▲ University students in Montevallo, Alabama, met with local leaders about improving street safety.



NEWS CLIP

“Rural clinics and hospitals are closing across the nation. When they close, it’s hard for younger families and older residents to stay in town — and harder to attract new businesses, or attract replacements for the doctors, nurses and other health-care workers who may be retiring from their practices or just leaving town.”

— **Deborah Fallows**, “The Surprising Rural Health-Care Legacy of the ‘60s,” *TheAtlantic.com*, September 4, 2019

HELPING HANDS

The Healthy U program at the **University of Wyoming in Laramie** provides a free six-week, 40-hour training to people with chronic health conditions, such as diabetes, high blood pressure, arthritis, pain and depression.

Participants learn how to best manage their illness. They then take what they’ve learned into rural communities as volunteer “peer leaders” who support others with chronic conditions. Similar programs exist in rural parts of **California, Colorado, Kentucky, Mississippi, South Dakota and Vermont**.

A study by the National Council on Aging found that chronic-disease self-management programs save money, increase medication compliance and reduce emergency room visits.¹² Participants report leading more active lives, experiencing less depression and having fewer sick days. ■



EXPERT INSIGHT

“Because nurses are uniquely woven into the fabric of the community — in schools, workplaces, homes, prisons, hospitals, assisted living facilities, and other community spaces — they are positioned to be a more powerful part of improving health and health equity.”

— **Center to Champion Nursing in America**, an initiative of **AARP, AARP Foundation and the Robert Wood Johnson Foundation**

COMMUNITY NURSING



◀ Suzie Zimmer, a community nurse in Washington state's Chelan Valley provides preventive care, medication management and other supports to frail and vulnerable adults so they can live independently and reside in their homes for as long as possible.

Community nurses are a trusted and primary source of care where medical services and supports can be hours away. These licensed clinicians live in the areas they serve. They deliver care and supports in local settings, including within houses of worship, community centers and patient homes.

Some community nurses are paid. Many volunteer their expertise and are affiliated with faith-based organizations. (In Christian churches, these providers may be referred to as “parish nurses.” Those working within the Jewish faith are known as “congregational nurses.” In Muslim communities, they're called “crescent nurses.”)

In **Lyme, New Hampshire** (also noted on page 24), a pair of parish nurses offer drop-in office hours and make house calls.

In **Hope, Alaska**, a nurse serves about 200 people, providing care and case management services to people who have complex medical conditions, developmental disabilities or mental health diagnoses.

Established in 2017, the Chelan Valley Community Nurse Program in **Chelan, Washington**, provides assessments, education and prevention services and acts as an essential link between uninsured residents and health care systems. Funding from grants and donations enable the services to be offered for free.

As part of the Guilford Cares program in **Guilford, Vermont**, volunteer community nurses do house calls to help residents manage chronic illnesses. Other supports include a friendly-visitor program, medical equipment loans, a food pantry, and transportation services for medical appointments. ■

LOCAL VOICES

- “People who have spent a lifetime living in rural areas want the life and are aware of the trade-offs. Their attachment to the community where they have lived can keep them here even when needed medical services, home care and caregiver supports aren't available.”
- “One of the challenges in rural retirement destinations — the kinds of places where people want to vacation and fantasize about living — is that people move there when they're healthy and active and able to enjoy all the community has to offer. But they don't plan for what life will be like when they're no longer able to drive, or they develop a chronic illness, or need help to live independently in their homes.”
- “Our little town is lucky. We have one old-fashioned general medicine physician. The problem is that he is 78 years old.”
- “When they closed the local nursing home and then shut down the hospital, it took the heart out of our community. If there's an emergency, it's a two- or three-hour wait for an ambulance now, and if someone needs to be in a nursing home, the nearest is more than two hours away.”
- “Opioid deaths are 45 percent higher in rural areas than in the cities. That has a huge impact on our communities — for children born to addicted moms, businesses that can't find the workers they need, and for older people helping raise the children. Even if someone wants to beat their addiction, there isn't any treatment within a reasonable commute.”

The Economy

FIELD-TESTED STRATEGIES

THE CAR IS NO LONGER KING

“Traditional Main Streets are back,” declared John Robert Smith, during his presentation at the 2019 AARP Rural Livability Workshop.

The former mayor of **Meridian, Mississippi**, and current chair of Transportation for America, was telling a story about **Conway, Arkansas**, which he says attracted three tech firms that chose the small city over a suburban office park because each felt that “Conway has a cool downtown.” As a result, the businesses could attract the workers they needed.

Part of why **North Dakota** has a statewide Main Streets program is that it sees the redevelopment of its small towns into places with vibrant downtowns as a way to keep and lure young adults and families as residents.

“Vibrant community centers are a fundamental element of workforce development. North Dakota’s Main Street initiative provides community leaders with direct access to tools and resources to capitalize on their community’s strengths and make sound planning decisions,” reads the Main Street ND page at *ND.gov*. “These efforts help create vibrant communities that attract and retain the 21st century workforce North Dakota needs to compete and succeed in a global economy.”

Smith said he found that younger generations “move to where they want to be, then they find a job. They find a place that’s vibrant and attractive”



▲ Conway, Arkansas, is a member of Main Street America, a revitalization and preservation-based economic development program of the National Main Street Center.

According to Smith, “47 percent want to live in large metropolitan areas. Only 12 percent want to be in the suburban cul-de-sac neighborhoods they may have grown up in, 40 percent want to live in small towns and rural places — provided they have high-speed internet access and a downtown with a little pop that’s authentic. These economic and demographic shifts have big implications.” ■



NEWS CLIP

“McGregor [Minnesota] once had a bustling downtown, full of stores, bars and restaurants. People shopped and socialized there, running into each other and stopping by each other’s homes. ... But that started to change a couple of decades ago ... when the local economy began to decline. Stores like Walmart and Costco arrived, pushing out local businesses. Minnesota’s timber industry, a big source of employment, began to struggle. And family farms did, too, as the farms became less profitable and young people moved away looking for other careers. ... Today, downtown McGregor is eerily quiet, with only a handful of businesses, such as a car repair shop, a bowling alley, a health center, a church and a funeral home.”

— “Bringing Together Young and Old to Ease the Isolation of Rural Life,”
All Things Considered, National Public Radio, August 7, 2019

SHORT-TERM SOLUTIONS CAN LEAD TO LONG-TERM CHANGE



▲ A pop-up demonstration project in Old Orchard Beach, Maine, inspired positive change.

Washington Street in **Old Orchard Beach, Maine**, had seen better days. As part of its age-friendly communities work, AARP Maine invited the urban design and placemaking firm Team Better Block to the oceanfront town. The goal: help the community see the neighborhood's potential.

In July 2019, the consultants and local volunteers stenciled lobster and shell shapes onto sidewalks and crosswalks. They added planters, outdoor seating and took over two vacant storefronts to open a pair of temporary pop-up eateries: Specially For You, a bakery, and The Local Eatery, a burgers and hot dogs spot.

More than 250 residents showed up for the free meats and sweets. The local Salvation Army band provided live music.

Although the shops were gone within hours of their grand openings, seeds had been sown, and the buildings' owners subsequently reopened The Local Eatery. The bakery didn't follow suit, but the space is now home to a community-focused police station. When it's open, free coffee and doughnuts are available to anyone who drops by.

"Making what was a small investment of time and volunteer energy is paying off beyond what we could have imagined," said Louise Reid, the assistant town manager (who retired in 2019 at age 82). "The neighborhood is excited about the new businesses and, for the first time in decades, hopeful about what the future can bring." ■

LOCAL VOICES

- "For too long, the measure of success for a young person raised in a rural area is that they leave the community for college and launch a well-paid career in the city. The young people who stay behind are unfairly seen as failures."
- "We need to value all paths a young person can take in building a life. If everyone is pushed to go to college, and if work that involves physical labor or noncollege skills is held in low esteem, who will build our houses, drill our wells, maintain our power grid, fix our cars, open and run local businesses, and work on our ranches, farms and fishing boats? All of these jobs are essential to the survival of every community."
- "Our community has 1,018 residents, is very rural, and our main problem is our K-6 school has only 43 students. How do we attract young people to move to our community when we don't have broadband, roads and industry — and property is expensive?"
- "We have to dispel the myth that rural towns are only good places to visit and to live in old age. Our communities need to become more attractive places for young people to live, work and do business."
- "The issue is infrastructure. If we had broadband in our community, young people who work from home or who want to start small businesses of their own would stay. These days, you can't start a business or telecommute without internet. But that takes investment by the town. In my town there's no interest in spending money. Economic development is key, but it won't suddenly appear. We have to work at it."

High-Speed Internet

FIELD-TESTED STRATEGIES

LIBRARIES ARE HOT SPOTS

Today's public libraries are destinations for books, of course, but also for activities, equipment (see the photo of skis, below) and — perhaps most importantly in many rural communities — high-speed internet access.

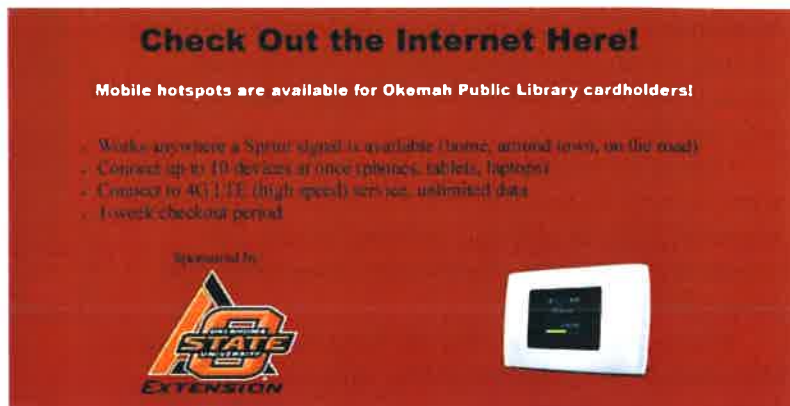
But since many rural libraries have limited hours and depend on volunteers as staff, the doors are often locked when people need an internet connection. As a result, it's not uncommon to see the parking lots of closed libraries filled with cars, inside which are adults who need the internet to search for work or parents with students who need the internet to do homework. (The dining areas and parking lots of fast-food eateries often serve a similar purpose.)

To address the lack of home-based internet, school districts in **Athens, Georgia**, and **Winterset, Iowa**, reached out to local businesses with free Wi-Fi and asked them to display decals that let students know the location is a safe and welcoming place for them to do their homework.

In **Coachella Valley, California**, school buses equipped with internet routers are parked overnight in residential areas that don't have connectivity. The bus-based routers enable students to complete their assignments.

In 2017, **Oklahoma State University** launched the Rural Library Hotspot Lending Program in the towns of **Elgin, Perkins, Seminole** and **Haskell** — the latter of which has a population of 1,900, half of whom had no home access to the internet.¹³ During the one-year pilot, the program provided up to seven mobile hot spot devices to each town's library, to be lent just like a book for one week at a time.

The American Library Association has information about setting up hotspot lending programs. (Use the keyword "hotspot" to search ALA.org.) ■



▲ Libraries in Oklahoma and elsewhere are lending mobile hotspots (shown above and held by a librarian, below) to patrons who otherwise won't have Wi-Fi access. ▼



▲ Public libraries are customizing their offerings to meet community needs. Skis, snowshoes, mountain bikes, canoes and kayaks are among the holdings of the "Katahdin Gear Library" within the Millinocket Memorial Library in Maine. Most equipment can be checked out by residents for one week.



EXPERT INSIGHT

"Entrepreneurship and innovation thrive in rural towns where people are connected. Access in these communities to reliable high-speed internet is crucial to that success."

— **Krista Burdick**, community engagement officer, LOR Foundation

See page 50 to learn more about LOR.

FIELD-TESTED STRATEGIES: High-Speed Internet

COMMUNITY-CREATED INTERNET

“In the mid-2000s, several towns in east-central Vermont determined that robust broadband telecommunications services were a necessary part of their continued sustainability,” explains the history page on the website of ECFiber, the local internet provider.

“Local broadband committees reached out to wireless service providers, but wireless proved to be unsatisfactory in our hilly wooded terrain.” In response, two dozen small towns joined forces to create ECFiber.

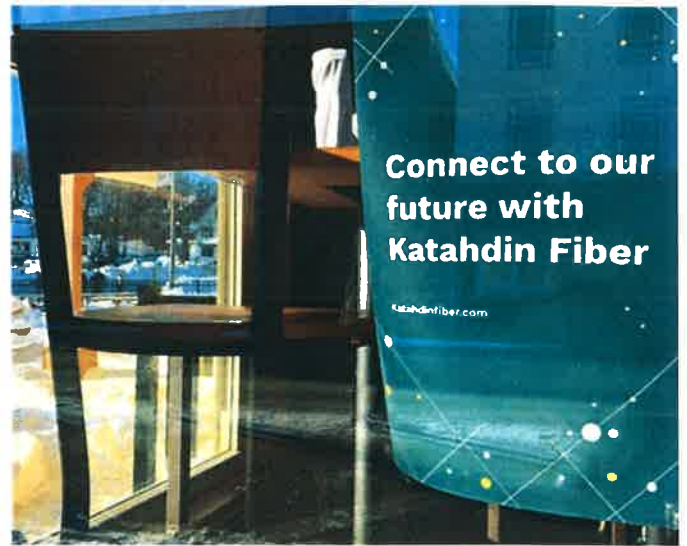
When residents of rural **St. Francis, Kansas**, felt the burden of the digital divide, they reached out to Eagle Communications, which brought high-speed internet to the town. Every home and business now has access to St. Francis’ fiber network. After more than five decades of losing population, the town is seeing new businesses open shop and home construction is on the rise.

Internet access in **Grayson County, Virginia**, was so lacking that residents described their connectivity as “advanced dial-up.”

In March 2019, the state’s governor signed legislation that will bring high-speed internet to the rural county. The delegate who advocated for the service declared, “We’re way past the point where broadband is a simple luxury. It’s as much a necessity these days as electricity.”

A community-created internet carrier could help Project MILES in **Larimer County, Wyoming**. MILES is an acronym for *Mobility, Inclusiveness, Locations, Everywhere, Simple*.

The idea is that people should be able to find appropriate transportation services with one click



▲ A poster in a shop window promotes a community-based effort to provide the Mount Katahdin region of northern Maine with “lightning-fast, responsive, stable, and affordable fiber internet connections for every home and business — at no cost to the community and without using taxpayer dollars.”

or one call. The larger goal is to use data and local resources to build “systemic solutions” rather than short-term programs. As noted after the project’s test pilot, however, solutions can’t be delivered by smart software alone.

“All software services with real time driver information transfer will require internet and/or satellite service,” states the pilot summary. “A One Click/One Call service will need to have processes in place to address the needs of riders who reside in and drivers traveling to rural areas with limited connectivity.” ■



◀ The cluster of colored squiggles represent ECFiber’s present and planned coverage area. The “nonprofit fiber-to-the-premises network” connected its first customers in 2011 and promotes itself as providing “Wicked fast internet for rural Vermont.” As of mid-2019, the network was serving 3,500 customers, who paid \$66 a month for basic internet (25 megabits per second) or \$149 for high-speed (700 mbps) service.



LOCAL VOICES

- “Many people in rural areas haven’t been exposed to high-speed internet, so they don’t understand its value. Lots of folks think it’s only for watching movies or playing games.”
- “Much of the newer farm equipment — including tractors — use GPS technology and require internet access.”
- “There are a lot of drawbacks with slow internet speeds. Decent-size companies will not move into a community without broadband. We have lost out because we don’t have it.”
- “People think rural communities don’t want ‘new-fangled’ technology and that they’re averse to change. That could not be farther from the truth. Children in rural areas need broadband to do their homework, same as city kids. The catch is that the rural kids can’t take their tablets or computer to public Wi-Fi. If they don’t have it at home, they don’t have it. Rural older folks want to be healthy, same as city folk. Telemedicine can be a huge help, but only if they have broadband. In the city, telemedicine can make life more convenient, but in rural areas, it might be the only option within 200 miles if a person needs, say, speech therapy.”



NEWS CLIP

“Many Illinois farmers are handicapped by the lack of high-speed internet in the rural areas where they perform their livelihood. This compromises an advantage long held, as the state is in the center of the breadbasket of the world, which supplies food for the masses.”

— “Rural Internet Access a Must for Farmers,”
Daily Journal, Kankakee, Illinois,
September 11, 2019

TAKEAWAYS

- Even a one-day pop-up demonstration event can inspire residents to imagine what permanent change can look like in their community.
- Rural communities that have high-speed internet can support telemedicine services, robotics-related work, collaborative care models and other innovative medical solutions.
- Telemedicine can save lives, especially in remote regions and towns without direct access to emergency or specialty medical care.
- Community and faith-based nurses provide much-needed help managing chronic illnesses and disability in rural communities. They are a critical link between residents and the health care system.
- Reliable, affordable high-speed internet service can help older adults avoid isolation and remain independent as they age by enabling them to use services such as online banking and shopping.
- Public libraries play an important role in small towns and rural communities. They are places where people can gather and find needed information. For many, the library is their only access to fast and reliable internet service.
- Without access to high-speed internet service, communities suffer, losing out on opportunities for local businesses to prosper and people to learn, find jobs and stay healthy.
- High-speed internet is critical for attracting businesses and enabling people to live locally if they telework or want to start a business.
- Both young adults and older adults want to settle in vibrant towns that ensure basic connectivity to jobs and information via the internet.
- When local utilities or for-profit corporations are unable or unwilling to expand high-speed internet service, it may be possible for a community or small cooperative to develop its own nonprofit network by financing, installing and maintaining a cell tower or other infrastructure and operations.

Extreme Weather and Disasters

Changing weather norms and weather-related events often have tragic consequences in remote and rural places

Intense weather patterns and disasters such as droughts, extreme temperatures, floods, wildfires, blizzards and mud slides, among other hazards, can be especially dangerous in rural communities, where distance, inadequate communication, a lack of emergency equipment and a fragile utility grid are common. Each event can prevent residents from being reached during a crisis or can require evacuation, permanent relocation, or extensive repairs and rebuilding.

Disasters are often hardest on older residents. Since there is a higher concentration of older adults in small towns and rural areas than in other parts of the nation, disaster planning and responses need to include a special focus on older people.

There are a number of reasons for the greater vulnerability. Some older residents are isolated, with few if any friends or relatives to check on them. People with chronic illnesses, such as hypertension or diabetes, have a harder time bouncing back after a disaster. Reduced mobility can make it difficult to get out of the house. Stockpiling medication and food is often impossible for people who struggle to afford those items in the first place.

The fear of the unknown, concerns about leaving pets or being far from familiar medical providers, a lack of transportation options (see page 26) and previous successes sheltering in place are among the reasons why people resist leaving their homes, even when an evacuation order is in place.

The vulnerability of older residents extends beyond the emergency itself. Researchers have found that older people experience an elevated risk of death in the year that *follows* a natural disaster.¹

Interestingly and ironically, the rugged independence (“We can take of ourselves, thank you”) that is valued by many

residents of small towns and rural communities can lead to uncoordinated and inadequate responses to an emergency. In some cases, emergency personnel aren’t even aware of where vulnerable residents live.

An attendee at the AARP Rural Livability Workshop shared that an effort to make sure every home in her community had large, readable house numbers (see an example on page 23) was met with resistance. Some residents, protective of their privacy, said they didn’t want to be so easily found.

No government, organization, community, household or individual can fully prepare for every crisis or catastrophe, be it climate- or weather-related, a result of human error or treachery, or a natural disaster.

However, governments, organizations, communities and individuals can prepare and plan for the likely emergencies — nor’easters in Maine, tornadoes in the Midwest, blizzards in the Rockies, hurricanes in the Caribbean, earthquakes or wildfires in California. ■



▲ September 2017 marked the first time in recorded history that two hurricanes — first Irma, then Maria — struck the same area within two weeks. After weathering both storms, AARP Virgin Islands staff helped distribute relief supplies.



▲ Hurricane damage in remote Ramrod Key, Florida



▲ A tornado funnel near McCook, Nebraska



▲ A wildfire near North Bonneville, Washington



▲ A frozen landscape along a Montana highway



▲ Flooding in Healdsburg, California



▲ Drought conditions in Squaw Valley, California

FIELD-TESTED STRATEGIES: Extreme Weather and Disasters

MAKING RADIO WAVES

The need for a community radio station came to Fran Kaliher in 2012, on the day a flash flood overwhelmed **Two Harbors, Minnesota**.

“Every way I tried to drive into town was impassable,” she recalled about her small community (population 3,700). “That’s when I thought, ‘We need to have a radio station so people could find out what’s happening.’”

Kaliher shared her idea with folks around town, including Leo Babeu, who had worked in radio when he was younger. Their creation, KTWH, has a broadcast radius of up to 10 miles.

Four dozen volunteers and two part-time workers operate the station out of a crowded three-room studio behind a Vietnamese restaurant.

The on-air schedule ranges from Linda Lee’s polka show to *The Flip Side*, on which both sides of hit 45-rpm records are played.

Since KTWH streams over the internet, snowbirds wintering down south can follow their grandkids’ games — and stay informed about the Two Harbors weather forecasts and any worrisome consequences. ■

SIGN UP FOR SERVICE — AND SHARING

In many places, emergency responders serve an entire county or region rather than a specific town or village. As a result, they often don’t know where individuals who need special assistance reside. Some communities have created questionnaires that residents or their caregivers can complete in advance to alert first responders to a person’s medical condition or disability.

That’s the case in **Sagadahoc County, Maine**, where residents with special needs can instruct first responders about how to access their home and find their “File of Life” listing the names of medical providers, medications being used, emergency contacts and even pet care instructions.

Questionnaires are also used to seek community help. One used in **Phippsburg, Maine**, asks, “Do you own and are you willing to loan equipment — such as snowmobiles, boats, ATVs, generators, etc. — that we may use in an emergency situation?”

Among the most pressing emergency needs in rural areas, however, involve the recruiting, training and retention of first responders — and ensuring that enough are nearby when a call comes in.



▲ **Two Harbors Community Radio** is a listener-supported station with a mission to “build community ... through intergenerational grassroots participation” and “an open forum for all voices to be heard in an atmosphere of respectful inquiry into our shared social issues and respective cultural expressions and beliefs.”



▲ **Members of the multigenerational Larimore Volunteer Fire Department** in Larimore, North Dakota.

“If they’re young enough, they’re working out-of-town,” Dale Trosen, of the **North Dakota Firefighter’s Association**, told the *Grand Forks Herald* in 2017. At the time, 96 percent of the state’s fire departments were staffed by volunteers. Another challenge, he explained, is the engulfing nature of today’s fires: “Thirty years ago, you could get to a fire and make a difference. We had more time,” he said. “There’s so much plastic now, which burns a lot faster.” ■



▲ After Hurricane Maria passed, AARP Puerto Rico staff and volunteers delivered more than 7,000 bags of groceries to older people living alone in 26 towns. Similar outreach efforts were launched in early 2020 after a series of magnitude 5 or greater earthquakes struck the island.

CREATE LEADERS

In 2017, Hurricane Maria devastated the U.S. territory of **Puerto Rico**, leaving large parts of the island isolated unto itself, disconnected from running water, electricity, medical care and usable roadways.

For many, survival required relying on neighbors because assistance would be a long time coming.

“When your government is bankrupt, you have to invest in the people. That means integration, social participation and empowerment,” José Acarón, director of AARP Puerto Rico, told an audience at the AARP Rural Livability Workshop. “If any change was going to happen after Maria, it was going to be house by house, street by street and community by community.”

To ignite that change, the AARP office restructured its existing Community Leadership Academy program to focus on three areas of livability: Community Supports and Health Services, Civic Participation and Employment, and Social Participation.

After attending the five-day training program, local volunteers are encouraged to take what they learned back to their home community to mobilize residents and create positive change from within. ■



EXPERT INSIGHT

“When life as you know it literally changes overnight, what do you have? Some people have their family right beside them. Others have only their neighbors. That’s when the word ‘community’ takes on a different and perhaps its truest meaning.

“One of the biggest lessons learned from Hurricane Maria was that the more widespread and disconnected communities are — such as in rural areas or sprawling, unwalkable suburbs — the more susceptible people are to the hazards that come with disasters. When modern infrastructure and services collapse, the luxury of space and privacy transforms into isolation and vulnerability.

“Having survived this life-changing event, I understand firsthand the necessity of building more resilient and integrated communities. Doing so promotes solidarity and security for all residents in times of an unstoppable disaster — and, perhaps more importantly, during every day of our lives.”

— José Acarón, state director,
AARP Puerto Rico



NEWS CLIP

“Rural communities are some of the most politically disenfranchised when it comes to climate policy, and [the 2018] National Climate Change Report showed they’re also among the most at risk when it comes to the effect of climate change. This could mean stronger storms, more intense droughts and earlier freezes.”

— KCUR 89.3 Radio/Harvest Public Media,
Kansas City, Missouri, June 17, 2019

A GOLDEN SOLUTION FOR SLIPPERY SIDEWALKS

“The day or two after the snowstorm, I couldn’t get to the pharmacy. I couldn’t get to the post office. I mean, that didn’t seem like an extreme thing to ask,” said Pearl Swenson, a resident of **Bucksport, Maine**, in remarks before the town council. “Those [snow] banks come up, and my legs don’t work like they used to,” she added.

In many communities, sidewalk care and snow shoveling is the responsibility of the home or business adjacent to the sidewalk. In downtown Bucksport, where many storefronts are empty, the sidewalks are a town duty.

The council and town manager responded to Swenson’s concerns with both short- and longer-term solutions. A part-time worker was hired and assigned to shovel downtown sidewalks. The town also shaved down the concrete edges of several sidewalks, “making it easier for pedestrians to shuffle onto them when a slick layer of ice renders normal footsteps difficult,” noted the local paper, the *Ellsworth American*.

Several Bucksport businesses do shovel the sidewalks outside their doors, partly because it’s good for business and partly because they could win the annual Ella B. Rayner Golden Shovel Award, named after a longtime Bucksport resident who was an advocate for pedestrian safety.

“It’s a lively competition that the various shoveling groups and businesses take very seriously,” observes Lori Parham, AARP Maine state director.



▲ In Bucksport, Maine, a golden shovel is given to the business that does the best job of keeping its sidewalks free of snow. BookStacks owner Andy Lacher is a repeat winner.

The full-size, gold-painted snow shovel is presented to a business that does a particularly good job of keeping its sidewalks clear. The winner’s name is written on the shovel in a black permanent marker.

Much like Miss America’s tiara, the golden shovel is handed down to the following year’s champion — when there is one. Due to a lack of snow in 2016, the competition wasn’t held. When winter came roaring back the following year, the shovel was in play again. ■



SNAPSHOT

Designing parks and other spaces so they can dry out and bounce back after flooding is one way a community can protect itself from likely hazards. For instance, when the Napa River floods, this park and trail area in **Napa, California**, is closed off by levees and solid gates, thus shielding the adjacent business district from the water and fast-moving logs propelled by the rapids. The bench is bolted to the cement so it remains in place even when submerged.





LOCAL VOICES

- **“It’s hard to get residents to engage in disaster planning when a disaster isn’t looming.”**
- **“The small, rural areas that are devastated by hurricanes or other disasters don’t receive the resources or attention provided to larger communities.”**
- **“Many older and vulnerable residents will not or cannot evacuate without significant help. If no one is able to provide direct assistance — ranging from packing up their essentials, securing their home, and transporting them to a shelter or other safe place — most older people have no choice but to stay.”**
- **“Fears about access to medical care and medicines are a big part of why people don’t evacuate when told to.”**
- **“We’re losing neighbors. We’re losing farms because some just can’t afford to pick up the pieces after a disaster.”**
- **“When the floodwaters recede, it’s often out of sight, out of mind. Things look dry, they look normal, but what’s left behind is devastation. Recovery takes a lot longer than people ever expect.”**
- **“When distant homes are scattered throughout a large area, first responders often don’t know where exactly people live.”**
- **“It’s hard to recruit first responders. The work is dangerous. It’s unpaid. The older residents are aging out of being able to do the physical aspects of the work and younger people need to focus on finding or keeping a paid job and on caring for their children. They can’t drop everything and run to put out a fire.”**

TAKEAWAYS

- Communities where neighbors know and can look after one another are more resilient and better able to protect themselves in times of disaster — and they can recover more efficiently in the aftermath.
- Even simple solutions, such as posting visible house numbers, are important, effective ways of preparing for a personal emergency or a large-scale disaster.
- High-speed internet and local communications platforms (such as a community radio station, local news website or social media feed) are needed to keep people informed about weather emergencies and other important alerts.
- Emergency preparations need to be done long before a disaster occurs.
- It’s critical for first responders to be able to quickly determine who needs help, where they are located and what they need.
- Many older adults have already lived through weather-related or similar emergencies and can tap into those experiences to help themselves and others.
- Rural communities can benefit from employing a team of community nurses and social workers who will identify and reach out to those most in need of help when a disaster strikes, thus calling on other residents, first responders and care providers only if absolutely necessary.
- Since all-volunteer emergency response teams are increasingly difficult to staff, local or regional governments may need to establish a greater number of full-time, salaried first responder positions and teams.

Closing Thoughts

Demographic changes make it imperative that local leaders approach community planning and design differently than how it has been done in the past.

The communities that thrive and survive are those where children can grow up safely and supported, and where residents want to remain and grow old.

There are many reasons why people value living in rural towns and communities — these include easy access to natural places, neighbors who help when help is needed, and the premium placed on privacy and independence. The majority of rural residents want to remain in their communities as they age, despite the potential difficulties.

Some of the overall takeaways and insights gathered during the AARP Rural Livability Workshop and from this report:

- Rural communities are tight-knit and pride themselves on coming together to tackle challenging problems.
- The distances to services and stores — even to neighbors — can amplify the challenges of aging in rural places.
- With fewer layers of bureaucracy, small towns and rural areas are the kinds of places where change is possible. The decision-making process can be more efficient than in larger communities or cities. In fact, small communities can be the perfect laboratory for testing new ideas.
- Small and temporary changes often lead to big improvements.
- Like all communities, rural communities that celebrate all generations see an increase in civic participation.
- Larger livability initiatives — such as building workforce housing, addressing food insecurity or enhancing transportation services — often benefit from a regional rather than purely local approach.
- Developing safe, accessible, welcoming public spaces encourages residents to connect with their neighbors and be physically active. An added bonus: communities with these places can attract tourist dollars.
- Since more and more people of all ages are living alone, housing solutions need to include nontraditional models, such as cohousing, shared housing and accessory dwelling units.
- High-speed internet is an essential service. The lack of high-speed internet access makes it hard if not impossible to attract young adults to a community, and it limits opportunities for entrepreneurs, for telemedicine, online banking and distance learning.
- Small downtowns are valuable assets, provided they are walkable, feature needed shops and services, provide places to gather and, ideally, reflect the community's location, history and culture.



▲ A domestic turkey pays a house call at a Maryland farm.



EXPERT INSIGHT

“If we want to change our communities for the future, it can’t be a vision that ends with us. The vision needs to be at a point 30, 40 years out. A point in time that I care about and will not occupy.”

— John Robert Smith, former mayor of Meridian, Mississippi, chairman of Transportation for America, during a presentation at the 2019 AARP Rural Livability Workshop

Learn More

 A selection of programs, publications, organizations, agencies and websites

AARP PROGRAMS AND RESOURCES

AARP Livable Communities

The AARP Livable Communities initiative develops resources for local leaders, policymakers, municipal staff, placemaking professionals, citizen activists and more. AARP staff and volunteers working at the national-, state- and local-level provide direct support in hundreds of communities. The website [AARP.org/Livable](https://www.aarp.org/Livable) features free publications, a subject-based articles archive, links to reports from AARP Research and the AARP Public Policy Institute, and information about the AARP Network of Age-Friendly States and Communities (also see page 53).

AARP Livable Communities e-Newsletter

Created for community influencers, this free, weekly, award-winning newsletter is an easy way to stay informed about livability efforts and ideas: [AARP.org/LivableSubscribe](https://www.aarp.org/LivableSubscribe)

AARP Community Challenge

This annual small-grants program provides funds to nonprofits and local governments for “quick-action” community improvement projects: [AARP.org/CommunityChallenge](https://www.aarp.org/CommunityChallenge)

AARP Livability Index

The index calculates a score for communities throughout the United States based on the services and amenities that impact people’s lives the most. Searches can be customized by location and livability domains: [AARP.org/LivabilityIndex](https://www.aarp.org/LivabilityIndex)

AARP States and Local Chapters

AARP is present in communities nationwide, working from offices in every state, the District of Columbia, Puerto Rico and the Virgin Islands, as well as hundreds of volunteer-run chapters: [AARP.org/States](https://www.aarp.org/States) and [AARP.org/Chapters](https://www.aarp.org/Chapters)

AARP Home and Community Preferences Survey

This recurring survey by AARP Research asks adults age 18 or older what they want and need in the places they live: [AARP.org/RuralLivability](https://www.aarp.org/RuralLivability) and [AARP.org/LivableSurvey2018](https://www.aarp.org/LivableSurvey2018)

AARP Driver Safety

Among the program’s online and local offerings is the AARP Smart Driver program, a refresher course for people age 50 or older. Drivers in many states qualify for an auto insurance discount upon completing the course: [AARP.org/DriverSafety](https://www.aarp.org/DriverSafety)

AARP Foundation

With a focus on alleviating poverty among older adults, AARP Foundation supports economic opportunities and social connectedness efforts that can prevent and reduce senior poverty: [AARP.org/Foundation](https://www.aarp.org/Foundation)

Center to Champion Nursing in America

An initiative of AARP, AARP Foundation and the Robert Wood Johnson Foundation, the center works to ensure community access to highly skilled nurses: [AARP.org/Nursing](https://www.aarp.org/Nursing)

AARP PUBLICATIONS

Each of the following titles is free and available in print or by download via the URLs below or [AARP.org/LivableLibrary](https://www.aarp.org/LivableLibrary).

AARP Roadmap to Livability

This six-part collection contains subject-specific strategies for launching or advancing community-based livability efforts: [AARP.org/LivabilityRoadmap](https://www.aarp.org/LivabilityRoadmap)

- *Book 1: AARP Roadmap to Livability*
- *Book 2: Community Listening Session Tool Kit*
- *Book 3: Housing Workbook*
- *Book 4: Transportation Workbook*
- *Book 5: Health Services and Community Supports Workbook*
- *Book 6: Economic Development Workbook*

AARP HomeFit Guide and

Here to Stay: Home Upkeep for All

Some of the nation’s oldest and least aging-friendly housing is located in rural areas. These AARP publications provide information about making a home safer for people of every age: [AARP.org/HomeFit](https://www.aarp.org/HomeFit) and [HereToStay.AARPFoundation.org](https://www.aarp.org/HereToStay)

The ABCs of ADUs and Accessory Dwelling Units

Accessory dwellings are secondary residences attached to a single-family home or built on the same property lot. ADUs can help address housing shortages, enable family members to live near one another and provide homeowners with a way to earn rental income: [AARP.org/ADU](https://www.aarp.org/ADU)

Making Room: Housing for a Changing America

Filled with ideas, solutions, photographs, infographics and floor plans from a National Building Museum exhibition of the same name, *Making Room* is a rallying cry for a wider menu of housing options: [AARP.org/MakingRoom](https://www.aarp.org/MakingRoom)

Engaging the Community to Create Community

This guide by AARP and Cities of Service provides examples of collaborations between public officials and residents to identify needs and solutions: [AARP.org/LivableLibrary](https://www.aarp.org/LivableLibrary)

Creating Parks and Public Spaces for People of All Ages

Developed by AARP, 880 Cities and The Trust for Public Land, this guide can help communities develop safe, healthy outdoor places for people of all ages and abilities. Rural examples are included: [AARP.org/LivableParks](https://www.aarp.org/LivableParks)

The Pop-Up Placemaking Tool Kit

Produced by AARP and Team Better Block, the tool kit is a practical guide to demonstrating and building support for needed community features: [AARP.org/Livable-PopUp](https://www.aarp.org/Livable-PopUp)

AARP Walk Audit Tool Kit and Leader Guide

Walk audits enable community members to document street safety problems for sharing with local officials as a way to advocate for change: [AARP.org/WalkAudit](https://www.aarp.org/WalkAudit)

Where We Live

A collection of inspiring ideas and solutions from America’s local leaders: [AARP.org/WhereWeLive](https://www.aarp.org/WhereWeLive)

Continued ►

ORGANIZATIONS

Citizens' Institute on Rural Design empowers rural residents to capitalize on local and regional assets in order to guide the civic development and future design of their own communities: Rural-Design.org

880 Cities brings people together to enhance mobility and public spaces with the goal of creating vibrant, healthy and equitable communities: 880Cities.org

Feonix: Mobility Rising creates mobility solutions, systems and programs to increase the transportation options for people in underserved communities: FeonixMobilityRising.org

Housing Assistance Council assists in the development of housing and homeownership for working low-income rural families and farmworkers, with a focus on high-need groups and regions, including Indian country, the Mississippi Delta, the Southwest border colonias and Appalachia: RuralHome.org

LOR Foundation partners with rural communities in Idaho, Montana, Wyoming, Colorado and New Mexico to accelerate ideas and elevate the rural voice: LORFoundation.org

Main Street America, a program of the National Main Street Center, works to revitalize older and historic commercial districts to build thriving neighborhoods and economies: MainStreet.org

National American Indian Housing Council advocates on behalf of Native housing entities and efforts to provide culturally relevant, quality affordable housing for Native people: NAIHC.net

National Center for Frontier Communities serves as a voice for people and programs in frontier communities and raises awareness of frontier issues among policymakers, agencies and the public: FrontierUS.org

Opticos Design is an architectural and planning firm that champions "missing middle housing" choices so people can live in affordable, sustainable, walkable places: OpticosDesign.com

Rural Health Information Hub is a clearinghouse for data and resources about rural health: RuralHealthInfo.org

Rural Institute Inclusive Communities focuses on improving life for rural Americans with disabilities: RuralInstitute.umt.edu

Smart Growth America and several of its programs (including the **National Complete Streets Coalition** and **Transportation for America**) provide supports and resources for rural places: SmartGrowthAmerica.org

Strong Towns advocates for community- and sustainability-focused development that improves the resiliency and financial strength of cities, towns and neighborhoods: StrongTowns.org

The Trust for Public Land works to save land for people to enjoy, from neighborhood parks to national parks: TPL.org

Team Better Block is a planning and placemaking firm that works with local leaders and community members to create useful public spaces: TeamBetterBlock.com

Village to Village Network is an umbrella-organization for locally created aging-in-community programs: VTVNetwork.org

GOVERNMENT AGENCIES

In addition to the services and information that's available from state, regional and local governments, the federal government departments and agencies listed below are among those with programs and resources that can be helpful to local leaders and residents of rural communities: USA.gov

- **U.S. Department of Agriculture**
- **U.S. Department of Housing and Urban Development**
- **U.S. Department of Transportation**
- **U.S. Environmental Protection Agency**
- **Federal Emergency Management Agency**

RURAL REPORTS

Creating an Age-Advantaged Community: A Tool Kit for Building Intergenerational Communities that Recognize, Engage and Support All Ages

Many rural communities are adopting livability practices, in part to attract young families. This Generations United tool kit provides successful examples. Available via GU.org

e-Connectivity @ USDA: Broadband Resources for Rural America

This report helps navigate the agencies within the USDA to find the programs, grants, loans and supports that can help expand rural internet service. Available via RD.USDA.gov

Emergency Preparedness and Recovery: A Tool Kit for Rural Communities

Produced by the Texas Chapter of the American Planning Association, the tool kit addresses the need for partnerships between emergency management personnel, local government and service organizations. Available via RuralCenter.org

Exploring Strategies to Improve Health and Equity in Rural Communities

A look at how the strengths and assets of rural areas can be leveraged to address community needs. Available via NORC.org

Rural Development Hubs: Strengthening America's Rural Innovation Infrastructure

Hubs build on community assets to improve public health, economic development and community engagement. Available via AspenInstitute.org

Rural Risk Communication Tool Kit

The Georgia Department of Community Health's Southeast Health District provides advice for connecting with rural communities about weather disasters and other emergency events. Available via RuralRCKit.org

Smart Growth in Small Towns and Rural Communities

An examination of strategies that can help rural communities achieve growth and development goals while maintaining a rural character. Available via EPA.gov

Tips for Designing Transit Services and Infrastructure That Promote Livability

Produced by the National Rural Transit Assistance Program, the guide explains how rural communities can enhance transit and make roads safer for cyclists, motorists and pedestrians. Available via NationalRTAP.org

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EXTREME WEATHER AND DISASTERS

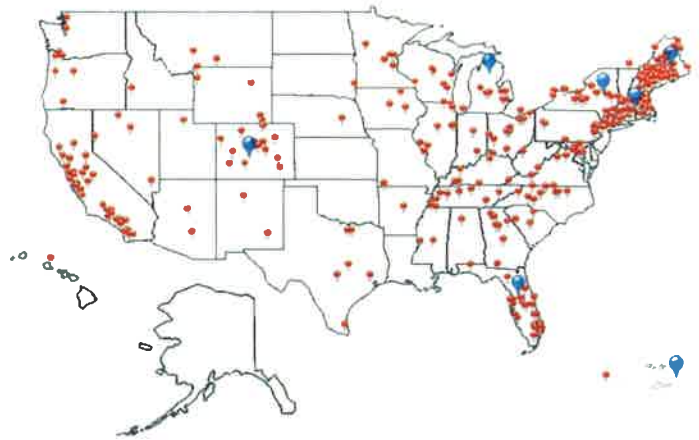
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AARP Network of Age-Friendly States and Communities

The **AARP Network of Age-Friendly States and Communities** — a program of the AARP Livable Communities initiative — encourages local leaders to implement the types of changes that make places more livable for people of all ages, especially older adults.

Several of the communities that appear in this publication belong to the network. Among them: **Grayson County, Virginia; Winnemucca, Nevada;** and numerous small, rural and remote towns in **Maine**.

The work that happens within the network is hands-on and locally determined and directed. While membership does not mean the community is currently “age-friendly,” or that AARP is endorsing it as a place to live, membership *does* mean that a community’s elected leadership has made the commitment to actively work toward making their town, city, county or state a great place to live for people of all ages.



▲ This map represents the network’s membership at the start of 2020. The red pins indicate the city, town and county members. Blue pins mark the member states or territories. Learn more about the network and check out the ever-growing member list by visiting [AARP.org/AgeFriendly](https://www.aarp.org/AgeFriendly).

The Workshop Roster

In addition to AARP staff and volunteers from throughout the nation, representatives of the following organizations participated in the AARP Rural Livability Workshop. (If a state isn’t indicated, the organization has a national presence.)

- 8 SC Cities
- Age-Friendly Coastal Communities (ME)
- Age-Friendly Biddeford (ME)
- Age-Friendly Georgetown (ME)
- Age-Friendly Jackman (ME)
- Age-Friendly Raymond (ME)
- Age-Friendly Readfield (ME)
- Age-Friendly Saco (ME)
- Age-Friendly Sullivan (ME)
- Age-Friendly Surry (ME)
- Aging 2.0 (ME)
- Aging Well in Waldo County (ME)
- Alaska Housing Finance Corporation
- Arcoostook Agency on Aging (ME)
- Auburn Recreation Department (ME)
- Augusta Age-Friendly Committee (ME)
- Berkshire Interfaith Organizing (MA)
- Berkshire Regional Planning Commission (MA)
- Bethel Area Age-Friendly Community Initiative (ME)
- Bicycle/Pedestrian Committee (ME)
- Big Project Days (ME)
- Boise State University (ID)
- Bucksport Bay Healthy Communities Coalition (ME)
- Build Maine
- Carlsbad Chamber of Commerce (NM)
- Cary Medical Center (ME)
- Charles City Area Chamber of Commerce (IA)
- Citizens Health Action Team (ME)
- City and County of Honolulu (HI)
- City of Auburn Recreation and Sport Facilities (ME)
- City of Bath (ME)
- City of Cuba City (WI)
- City of Danforth (ME)
- City of Hallowell (ME)
- City of Saco (ME)
- Community Friendly Connection (ME)
- Cumberland Aging in Place (ME)
- Eastern Area Agency on Aging (ME)
- Elicit Aging in Place Committee (ME)
- Federal Emergency Management Agency
- Fort Abraham Lincoln State Park (ND)
- Fourth Economy Consulting (ME)
- Freeport Community Services (ME)
- Friends in Action (ME)
- Gibson Center for Senior Service (NH)
- Government of the U.S. Virgin Islands
- Grayson County S.A.C. (VA)
- Hallowell All Age-Friendly Committee (ME)
- Healthy Island Project (ME)
- Healthy Peninsula (ME)
- Housing Assistance Council
- Indiana Electric Cooperatives
- International Council on Active Aging
- Island Connections (ME)
- ITNAmerica
- Living Communities Foundation (ME)
- Living Well in North Yarmouth Committee (ME)
- LOR Foundation
- Maine Center on Aging
- Maine Community Foundation
- Maine Council on Aging
- Maine Department of Health and Human Services
- Maine Development Foundation
- Maine Office of Elder and Disability Services
- MaineHousing
- MCH, Inc. (Maine)
- Mercy Care for the Adirondacks (NY)
- Millinocket Regional Hospital/Thrive Penobscot (ME)
- Montana State Government
- National American Indian Housing Council
- North Dakota Department of Commerce
- Northern Hilltowns Consortium of Councils on Aging (MA)
- Northland Foundation (MN)
- Oak Hill Assistive Technology (CT)
- Office of U.S. Senator Angus King (ME)
- Oklahoma State University
- Old Orchard Beach Community Friendly Connection (ME)
- Opticos Design
- Palermo Community Center (ME)
- Partnership for Age-Friendly Communities, Larimer County (CO)
- Portland Office of Elder Affairs (ME)
- Senior Services, Forsyth County (NC)
- Somerset County Public Health (ME)
- South Dakota Community Foundation
- Southern New Hampshire Planning Commission
- Strong Towns
- Team Better Block (OK)
- The Trust for Public Land
- Town of Bowdoinham (ME)
- Town of Bucksport (ME)
- Town of Fryeburg (ME)
- Town of Kennebunk Committee on Aging (ME)
- Town of Madison (ME)
- Town of Ogunquit (ME)
- Town of Scarborough Community Services (ME)
- Trafton Senior Center/Sanford-Springvale YMCA (ME)
- Transportation for America
- Trinity Green, LLC (ME)
- Tufts University (MA)
- University of Alaska Fairbanks School of Natural Resources
- University of Maine Center on Aging
- University of Montevallo (AL)
- University of Nebraska
- University of New England (ME)
- University of North Carolina Wilmington
- University of South Florida
- U.S. Department of Agriculture
- Vitruvian Planning (ID)
- Wayne Aging at Home (ME)
- West Virginia Municipal League
- Westbrook Housing (ME)
- Windham Human Services Advisory Committee (ME)
- Yarmouth Aging in Place (ME)

AARP Rural Livability Workshop Report

How and why small towns and remote communities are working to become more livable for older adults and people of all ages



▲ Lake Winnepesaukee, Meredith, New Hampshire



▲ The road to Casper, Wyoming



▲ A home and orchard in Chesnee, South Carolina



▲ A hayfield in Huntsville, Utah

America's demographic future is showing up first in rural areas, where older residents form a greater proportion of the population than in urban or suburban areas.

One-quarter of all Americans age 65 or older live in small towns and rural communities. That percentage is growing, since the rural population is aging at a faster rate than the nation's population as a whole.

According to the AARP Home and Community Preferences Survey, adults in rural areas are more likely than those in cities and suburbs to say they want to reside in their community and/or current home for as long as possible.

In June 2019, AARP convened its first-ever national gathering about rural livability — as it relates to people of all ages and, especially, to older adults. Held in Portland, Maine, the event was attended by AARP staff, volunteers, community partners and livability practitioners representing a range of specialties and locations.

This report is based on presentations and conversations from that event, as well as related meetings, media sources and AARP's work in communities throughout the nation.

While the *AARP Rural Livability Workshop Report* is by no means an exhaustive examination of the many issues that impact rural communities, the data, observations and examples contained within these pages can serve to inform community influencers — local, state and national officials; policymakers; service providers; advocacy organizations; citizen activists; and others — about the needs, benefits, challenges and solutions found in rural places.

To learn when AARP releases new livability publications, sign up for the free, weekly **AARP Livable Communities e-Newsletter:** [AARP.org/LivableSubscribe](https://www.aarp.org/LivableSubscribe).

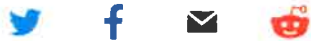


HOUSING

“Glorified homelessness”: Even tiny Silverton is experiencing the housing crisis that’s crushing mountain workers

Colorado’s housing shortage is exacerbated in remote Silverton, where there are no suburbs to commute from and little space to expand.

Shannon Najmabadi 5:00 AM MDT on Oct 20, 2021



Temporary housing encampments can be seen on the outskirts of Silverton Colo., Friday October 1, 2021.
(William Woody, Special to The Colorado Sun)



SILVERTON — Julian Roberts is lighting a campfire on the outskirts of Silverton, wind whipping smoke toward the painted school bus where he lives with his fiancée.

He's been camping out for weeks in the picturesque town of 600, nestled in a caldera among southwest Colorado's highest peaks.

It was a choice at first. It was beautiful to wake up near a creek in the town where he grew up, before going to work at a deli and cleaning motel rooms.

Roberts was hoping to find a more permanent residence once Silverton's peak tourism season ended around October, as cold weather starts to set in. But on an afternoon in late September, with the temperature close to 50 degrees and set to drop overnight, Roberts says he'd had little luck finding a rental he can afford on the \$700 he makes a week.

"We're at the point where people are having to pay \$1,600 or \$2,200 for the same space that was half (that) a year ago," he says.

TODAY'S UNDERWRITER

There's little affordable housing in the high-altitude town of Silverton.

Roughly half the houses in town sat vacant during part of the year in 2019, and places that are available are increasingly expensive, according to a



recent assessment. Many homes are older and poorly insulated, costing hundreds of dollars a month to heat on top of rent.

Local officials are developing an attainable housing project, but for now workers have been pushed toward RVs, cars and other more desperate living situations, as a housing crunch that began years ago snowballed when urban dwellers moved to more remote locations during the pandemic.

DeAnne Gallegos, executive director of the Silverton Chamber of Commerce, is candid about how some residents are living.

“It’s glorified homelessness, let’s be honest,” she said.

A housing crisis is playing out in the state’s resort communities and across southwest Colorado, but is exacerbated here by the remoteness of the once-booming mining town — the only municipality in Colorado’s least populated county. The one highway into Silverton cuts through treacherous — but stunning — mountain passes, and can be blocked by snow in the winter. There are no suburbs to commute from. Little land to annex.

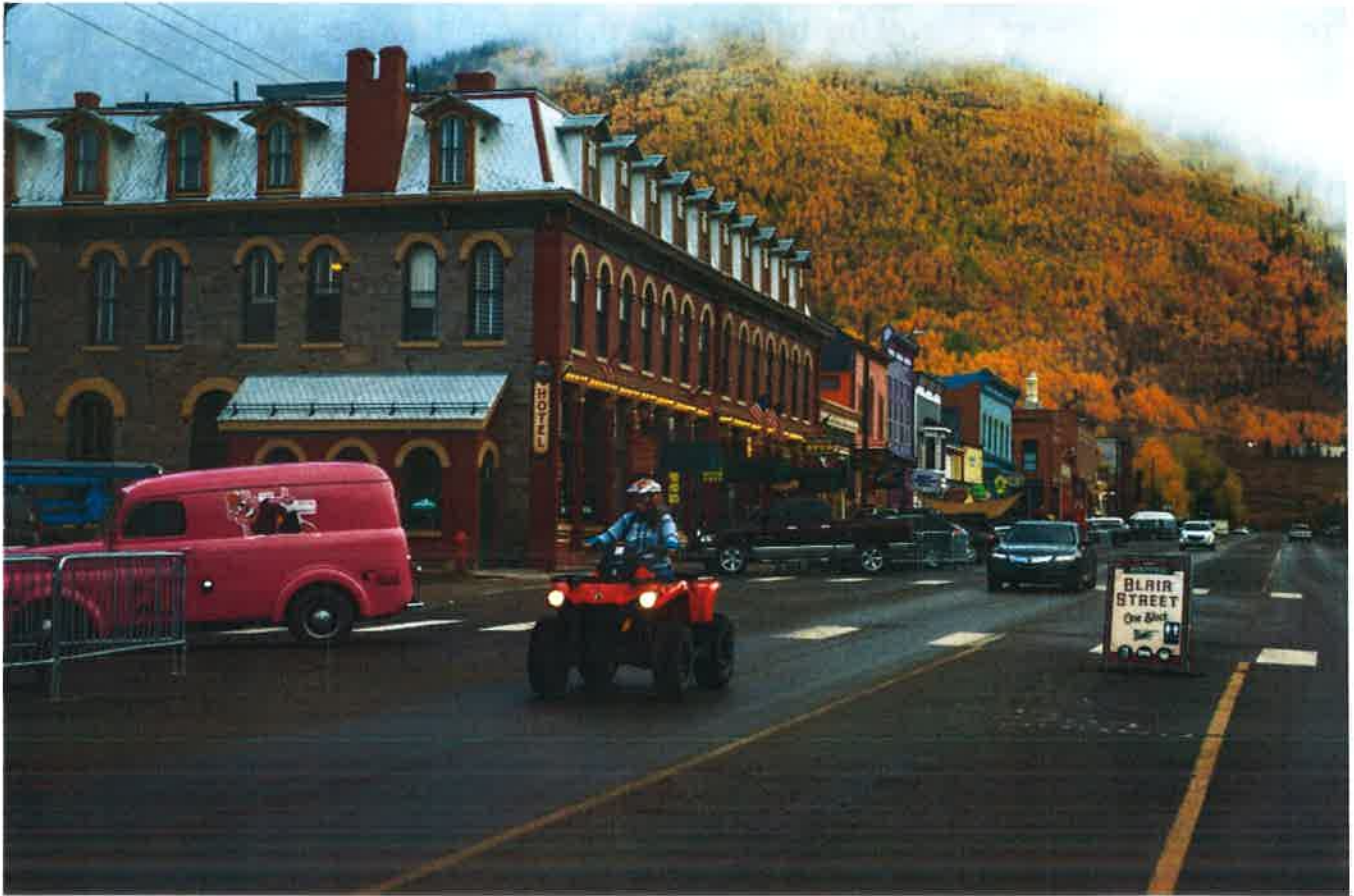
Recommended

“It’s scary”: The housing shortage has reached a crisis point in southwest Colorado

“We’re completely landlocked, and we do not have bedroom communities, like Telluride has Norwood and Rico and Ridgway,” Gallegos said. “Real estate is skyrocketing and things are selling faster than they can be built.”

The median value of homes sold increased nearly 60% between 2018 and 2021, reaching \$385,000 in San Juan County, where Silverton is the county seat. The number of homes priced at less than \$250,000 declined by half in those years while short-term rental listings increased nearly 160%, according to the assessment.





Traffic moves along Greene Street in downtown Silverton Colo. Friday October 1, 2021. (William Woody, Special to The Colorado Sun)

The scarcity of housing has contributed to a labor shortage in the town, where workers often hold multiple jobs — running from a hotel to a brewery, or acting as server, cashier and bartender at once. It’s a frustrating position for Silverton, which Gallegos said has been seeing packed hotels, high sales tax revenue and an economic boom from the tourist activities it turned to after mining operations stopped in the 1990s.

“It’s like: Where’s the ceiling? Where’s the breaking point? How much are we leaving on the table?” Gallegos said.

At the Grand Imperial Hotel, a regal and historic presence in Silverton’s downtown, owner Jim Harper helps out with laundry, answers phones and cleans toilets — partly out of necessity and partly because he believes the hotel is a family that runs best when everyone is cross-trained and can pitch in. He has converted an old storage area downstairs into employee



housing, and recently “cannibalized” two guest rooms for workers to rent for \$400 a month.

TODAY'S UNDERWRITER

He's down to about 13 employees from 21 employees, and housekeepers average 15 to 25 hours of overtime a pay period, he said.

“Silverton is in grave need, desperate need of affordable housing,” said Harper, who is also a town trustee. “To buy (a home) it is right around \$450,000 — there's nothing affordable about that.”

It's a similar story at Natalia's 1912, the largest restaurant in town, where owner Bill Walko is down to seven employees instead of 18. He comes to the kitchen on historic Blair Street each day at 4:30 a.m. to start cooking — typically working through 12 recipes for the restaurant's buffet line — and then will help set each table and run food out to diners.

“Sixteen to 18 hours a day, seven days a week,” said Walko, 65. “Hard for an old man.”

The restaurant now serves dinner only three nights a week. Line cooks have taken on dishwashing duties. Other workers act as “servers slash bartender slash hostess slash cashier,” and cycle through the adjoining coffee shop, Walko said. “Everybody has been cross-trained to do every imaginable, so that we have maximum ability to cope.”





Traffic moves under a Welcome to Silverton sign along Greene Street near downtown Silverton Colo. Friday October 1, 2021. (William Woody, Special to The Colorado Sun)

Two-thirds of employees' earnings come from overtime now, Walko said. He believes he could fill his 11 open positions if only there was housing.

“There simply is nothing available,” he said.

Adding to the crisis is the town's seasonal economy, where many businesses make nearly all their income in the six months between when snow melts and starts falling again.

Silverton establishments have long leaned on temporary workers to contend with the heavy tourist flow from May to October, but housing that workforce — many of them students and visitors from other states and countries — is a challenge.

Two years ago, Walko began signing year-long leases so his workers had housing for the six months a year the restaurant is open. At \$1,550 a month, it was expensive — but necessary, he said.



The coronavirus threw an unexpected wrench in his ability to hire because the pandemic kept European workers from getting needed visas. Now, though, housing is keeping workers away.



The Colorado Sun



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Walko said prospective employees have declined offers to work at the restaurant, where the dining room can become packed in minutes when the narrow gauge train from Durango pulls into the nearby Silverton station. Saloon-style writing in the restaurant's window declares: "Large groups welcome."

Silverton's two mountain resorts have employees that live in the town year-round, officials said. Silverton Mountain has helped its crew find housing in the winter, when there are only a few places available, said Jen Brill, co-owner of the Silverton Mountain ski area. Brill rents an employee house to workers "at a reasonable rate," and staff members who have houses sometimes rent rooms to colleagues, she said.

TODAY'S UNDERWRITER

Local officials say they are building about a dozen affordable homes and are contemplating zoning changes and other ways to bring more housing online.

William Tookey, administrator for San Juan County, said the new Anvil Mountain development won't be enough to meet the town's needs. The



homes — on a cleaned up smelter site — sit alongside 12 income-restricted apartments and a handful of lots that will be sold to residents at market rates. There's already a waiting list.

Local officials face difficulties buying land and extending water, sewer and other infrastructure to developments that creep up along the hillsides around Silverton. There's a short building season in the region, which typically gets 380 inches of snow each winter. It's costly to get building supplies across the high mountain passes — without guardrails — that connect Silverton to the outside world.

Recommended

Housing in small Colorado towns is “damn near a crisis.” But the solution isn't as easy as just building more.

“We're an extremely small community. We have very limited resources, very limited capacity,” said Tookey, a lifelong resident of the county.

He doesn't think housing alone will address the labor shortage.

“It's two separate issues. Obviously they're connected. If people don't have a place to live, obviously they're not going to stick around to work,” he said.

Jordan Bierma, a town trustee and local teacher, is among the residents who will move into the town's attainable housing development.



The inside of Natalia's Restaurant sits ready for customers on Blair Street in downtown Silverton Colo. Friday October 1, 2021. (William Woody, Special to The Colorado Sun)



Silverton resident Julian Roberts stands for a picture along Blair Street in downtown Silverton Colo. Friday October 1, 2021. (William Woody, Special to The Colorado Sun)

His family of three currently rents a former boarding house on a block filled with short-term vacation rentals that visitors rotate through.

Standing near where his new home will be built, Bierma said he's eager to be in a subdivision with more families and permanent residents, a requirement to qualify for the houses, some of which also have a cap on how much their value can appreciate.

TODAY'S UNDERWRITER

It's one of the few houses in town that Bierma and his wife can afford. Bierma earns a little over \$40,000 a year, close to the town's median income, working at Silverton's public school, where he teaches high school humanities, geometry and art, leads the agriculture elective, directs the school greenhouse, and coaches the soccer, climbing and skateboarding teams. His wife is a photographer and also works for the school.

Some of Bierma's students are living in nontraditional homes and campers, partly due to the housing market or the seasonality of their parents' jobs, he said.

"Winters are rough and you need a house to live in. Some of those kids may or may not be here in a month," he said. "It's just a really, really rough situation to be in."

Roberts and his fiancée are camping less than a mile away from the Anvil housing development.

They moved there over the summer — into a small bus belonging to Roberts' mother, who tricked it out with a composting toilet and a solar panel that can charge electronics. The couple eats in a small trailer they own and — until the stove broke — cooked out under a canopy tent ere between the two vehicles.



When it gets cold inside the lightly insulated bus, they dress their 11-month-old puppy, Uncle Buck, in a sweater.

TODAY'S UNDERWRITER

Roberts, 29, a theater major who dropped out of college, met his fiancée at Standing Rock, and remembers growing up in Silverton going to community potlucks, playing with his dog in the woods and squishing pennies on the railroad tracks.

“I would love to stay and give a similar childhood to my own children,” he said.

Roberts' fiancée manages a shop in town. Roberts typically works at the Canyon View Motel 9 a.m. to 3 p.m. — later if there's maintenance work to be done or hot tubs that need cleaning. On the weekends, he works at a deli from 6 a.m. until around noon, takes a 15 to 30 minute break, then returns to the motel to clean rooms, he said. He's running for the school board.

In October, Roberts was able to move into the Canyon View. The details haven't been worked out, but he doesn't think the owner, who he's known his whole life, will charge for the lodging.

Clark Anderson, executive director of Community Builders, a nonprofit helping Silverton develop a master plan, said the town and other parts of Colorado have a workforce housing market competing directly with that for high-end luxury homes. Prices overall have shot up in part due to short-term rentals, like through VRBO. Developers tend to cater to the affluent because they have investors or are trying to make a profit, he said.



A housing development sits under construction off Reese Street, located on the southern end of the town of Silverton Colo. Friday October 1, 2021. (William Woody, Special to The Colorado Sun)



A mixture of houses and businesses can be seen in downtown Silverton Colo. from U.S Hwy 550 south of town Friday October 1, 2021. (William Woody. Special to The Colorado Sun)

“You don’t find that many developers that are going to say, ‘You know, I know that houses are selling for \$1 million here but I want to really focus on building \$400,000 homes,’” Anderson said.

The trend has been building for years, as communities across the West have failed to keep pace with housing demand, after overbuilding in the past.

Harper, whose family owns the Grand Imperial Hotel and the Durango & Silverton Narrow Gauge Railroad, understands why there’s so much demand for housing.

“We live and work in a postcard and we’re blessed — those select few of us that get to live here,” he said.

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Shannon Najmabadi

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The Associated Press 7 minutes ago

HEALTH

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Mark Jaffe 4:21 AM MDT



CRIME AND COURTS

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Jennifer Brown 4:15 AM MDT



ENVIRONMENT

Stingy car electrification plan by Black Hills Energy drives Pueblo inequity, advocates say

Southern Colorado utility's first required Transportation Electrification Plan offers far fewer public benefits than Xcel's in a place that needs it much more, the groups say.

Michael Booth 4:08 AM MDT



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How social media is impacting our public lands, for better and worse



Trails may not be ready for increase in visitors chasing that perfect photo

By Nicholas A. Johnson Herald Staff Writer

Friday, Oct 15, 2021 5:00



A group of friends from across the United States makes their way down Horse Gulch Trail on Thursday. Group members said they found the trail using a trail app during their visit to Durango. (Jerry McBride/Durango Herald)



Trails in the San Juan National Forest that were once word-of-mouth destinations between locals and hikers are now shared worldwide thanks to social media.

After seeing photos of sites like the crystal blue pools of Ice Lakes and the winding white waters and falls of Cascade Creek, it is no wonder outdoor enthusiasts want to capture and share their own moments on social media platforms.

“We’re not saying don’t post about it, but it does have an effect where it invites more use that the sites might not be ready for,” said Jonathan Erickson, recreation manager for the San Juan National Forest. “I don’t think anybody really knows what to do about that.”

an area, be mindful of what's portrayed in posted images, volunteer at the places they enjoy, and educate others online instead of shaming



A group of hikers make their way up Animas Mountain Trail on Thursday in Durango. Social media can lead to overuse of some trails and outdoor destinations, but it can also be used to educate backcountry users about how to be good stewards of the land. (Jerry McBride/Durango Herald)



"On quiet days you might not see anybody there," Erickson said.

From 2010 on, social media posts about Blue Pool snowballed and Erickson said by 2013 the district was reporting 150 to 215 vehicles per day.

"The destination wasn't developed or engineered to handle that kind of use," Erickson said. "We wanted to show that there was a drive just through social media posting that resulted in this new kind of use condition that was developing at the site."



Cindy Dunbar, front, Shawna Off, center, and Linda Bunk all from Durango, hike down Animas Mountain Trail on Thursday in Durango. Group members, who are regular hikers, said they have noticed fewer people on the trails this year than last year, but also noted that trailhead parking remains a problem. (Jerry McBride/Durango Herald)



increase in traffic during 2020. Erickson said, but has seemed to level out in 2021.

"Leave No Trace did a really nice job advocating for best practices for anyone who's going to go out and spend time on public lands," Erickson said. "They've struck a nice balance in helping people post their content, but also recommend practices to help moderate the attention that tagging or geo-tagging can cause."

Ice Lakes Trailhead does not have the proper facilities to accommodate the large number of people who have been visiting it in San Juan County.

"There's no bathrooms, or parking controls, or barriers. Nothing to accommodate the amount of use that site is currently getting," Erickson said.

Erickson likened the increase in traffic at Ice Lakes to a previous job he had working with the Forest Service in Oregon, where his office did a study on visitors to Blue Pool at Tamolitch Falls in the Willamette National Forest.

In the study, Erickson said he and his colleagues traced back social media posts about Blue Pool to 2010 when the site saw about six to 12 cars a day.

Erickson said no studies have been done to develop the same sort of social media timeline in the San Juan National Forest on Ice Lakes, but he believes social media results are similar.

In areas that experience sudden increases in recreation, Erickson said the Forest Service identifies small things that can be done to immediately help deal with larger crowds.

"The way that we respond to it is that we try to do all the low-hanging fruit first," Erickson said. "Try to get in some parking controls, emphasize some staffing there."

Columbine Ranger District has begun investing in an environmental analysis for Ice Lakes to determine what priority projects need to be completed to alleviate the impacts of increased traffic.

"I think it's wonderful that the Columbine Ranger District is trying to address this," Erickson said. "They really want to take their time and deliver a quality product though, because it's not just about parking."

The Hermosa Creek Special Management Area saw a large

“A lot of what the Department of the Interior research shows is that there is really a wide spectrum of tolerances out there before an individual may report a decline in the quality of their recreation experience.” Erickson said.

Some people associate a larger number of interactions with a sense of safety, while others choose to recreate on public lands specifically for solitude.

“Back at Yosemite, the Park Service did a survey on recreation quality experience. ... What they found was that the population of people accessing a highly developed recreation site had a tolerance of about 40 encounters before they had their experience severely impaired.” Erickson said. “On days where we have hundreds of visitors up at Ice Lakes, we’re clearly exceeding that threshold the Park Service identified. ... If we’re way beyond 40 encounters, I think we’re well justified in trying to figure out how to respond.”

Erickson said responding to high foot traffic must be thoughtful when considering how to be inclusive to diverse groups of people.

“Different people experience our public landscapes in different ways,” Erickson said. “The job gets tricky trying to create an environment with high-quality recreation that also feels safe and inviting to anybody that wants to come visit.”

Noticeable impacts include trails being widened, new user trails and trail braiding. Trail braiding occurs when multiple trail alignments start to form through repeated use.

The Forest Service has the National Visitor Use Monitoring Program that aims to produce estimates of the volume of recreation visitation to national forests and grasslands. NVUM also records information about visitations, including activity participation, demographics, visit duration, measures of satisfaction and how much money visitors spend.

NVUM statistics show a significant spike in trips to public lands in 2020 that coincides with the COVID-19 pandemic. The number of recorded visitors to public lands in 2020 was up by 18 million from 2019, with a total of 168 million. NVUM began recording visitor data in 2005. Visitations numbers stayed between 140 million and 150 million until the spike in 2020. Numbers for 2021 have not yet been reported.

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How social media is impacting our public lands, for better and worse

