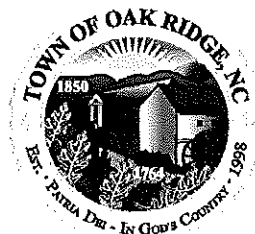


TOWN OF OAK RIDGE

VOLUNTEER APPLICATION FOR BOARD OR COMMISSION



Please return your completed application to the Town Clerk by hand to the Town Hall at 8315 Linville Road, by mail to P.O. Box 374 Oak Ridge, NC 27310, or by email to ssmith@oakridgenc.com. Please call Town Hall at (336) 644-7009 with any questions regarding board/committee service or your application.

Please note that Town of Oak Ridge Volunteer Applications are Public Record according to North Carolina law and can be shown to third parties without notice.

Please Print Clearly

- (1) Name: Phyllis CLODFELTER Date 7/18/22
10/28/21
- (2) Address: 6707 BROOKBARK ROAD, OAK RIDGE, N.C. 27310
- (3) Email Address: PCL0D41@yahoo.com
- (4) Phone Number(s): 336 643-4332 Cell 336 740-2211
- (5) Please indicate on which board you would like to serve by selecting from the following options. For more information, please visit www.oakridge.com and click Board & Committees.

- Board of Adjustment:
- Finance Committee:
- Historic Preservation Commission:
- Parks & Recreation Advisory Board:
- Planning & Zoning Board:
- Mountains-to-Sea Trail Committee:
- Special Events Committee:

(6) Where do you reside:

- Incorporated Oak Ridge: For 36 Years
- Oak Ridge ETJ: For _____ Years

(7) Are you currently serving on a Town of Oak Ridge board or committee? Yes No

If Yes, which one: _____

(8) Have you previously served on a Town board of committee? Yes No

If Yes, did you complete the term for which you were appointed? Yes No

If No, Please explain: _____

(9) Where are you currently employed? Retired

Current Position or Job Title: _____

Brief Description of Job Duties: _____

(10) Please list any volunteer, professional or civic activities in which you participate:

Church Activities; Bible Study; United Methodist
~~Committee~~ Womens Circle, visiting members
who are ill.

(11) Any additional information or comments relating to your ability or desire to serve on a Town of Oak Ridge board or committee (feel free to attach a resume for additional information):

Enjoyed serving on Parks & Rec Committee.
I now have the time to serve again

(12) How did you learn about this volunteer opportunity? Just applying in case of opening

(13) For purposes of reporting to the NC Department of the Secretary of State (as required by G.S. 143-157.1), are you: Female: or Male:

This application will stay on file for 6 months. If not appointed during this time frame, it will be discarded without notice.

For Internal Use Only

Date Received: 10/28/21 Residence: Incorporated X ETJ _____
Appointed by Council: Yes _____ No _____ Date: _____
Term of Office: _____ Years Expiration Date: _____
Seat #: _____ on _____ (Board, Committee, Commission)
Notes: _____

SAMUEL K. ANDERS, C.P.A., M.S.A., P.C.

INFO@SAMANDERSCPA.COM

8004 LINVILLE ROAD SUITE G
P.O. BOX 447
OAK RIDGE, NC 27310

1.800.467.8299

336.643.7577
336.993.3449
FAX 336.643.3606

To the Town Council
Town of Oak Ridge, North Carolina

We are pleased to confirm our understanding of the services we are to provide for Town of Oak Ridge for the year ended June 30, 2023.

We will prepare the financial statements of Town of Oak Ridge, which comprise the annual and monthly balance sheets - modified accrual basis and the related statements of revenue and expenses - modified accrual basis for the year ended June 30, 2023 and perform a compilation engagement with respect to those financial statements. Management has elected to omit substantially all of the disclosures ordinarily included in the financial statements prepared in accordance with the modified accrual basis of accounting. The supplementary information accompanying the compiled financial statements will be presented for additional analysis. The supplementary information will be compiled from information that is the representation of management. We will not audit or review the supplementary information. We will not express an opinion, a conclusion, or provide any assurance on such supplementary information.

Our Responsibilities

The objective of our engagement is to—

- 1) prepare financial statements in accordance with the modified accrual basis of accounting based on information provided by you and
- 2) apply accounting and financial reporting expertise to assist you in the presentation of financial statements without undertaking to obtain or provide any assurance that there are no material modifications that should be made to the financial statements in order for them to be in accordance with the modified accrual basis of accounting.
- 3) Samuel K. Anders, CPA, MSA will serve as the finance officer for the Town of Oak Ridge, North Carolina. In this capacity he will prepare, and file reports required for the Town to comply with various regulatory agencies of the State of North Carolina.
- 4) We will prepare your semi-monthly payroll, payroll tax payments, quarterly payroll reports, year-end payroll reports and W-2s. We will also calculate and process your employer and employee retirement contributions.
- 5) We will provide bookkeeping services which include reviewing bills and preparing checks for payment of bills. We will track sales tax paid and prepare periodic requests for refund of sales taxes paid.

We will conduct our compilation engagement in accordance with the Statements on Standards for Accounting and Review Services (SSARS) promulgated by the Accounting and Review Services Committee of the AICPA and comply with applicable professional standards, including the AICPA's *Code of Professional Conduct*, and its ethical principles of integrity, objectivity, professional competence, and due care, when performing the bookkeeping services, preparing the financial statements, and performing the compilation engagement.

We are not required to, and will not, verify the accuracy or completeness of the information you will provide to us for the engagement or otherwise gather evidence for the purpose of expressing an opinion or a conclusion. Accordingly, we will not express an opinion or a conclusion nor provide any assurance on the financial statements.

Our engagement cannot be relied upon to identify or disclose any financial statement misstatements, including those caused by fraud or error, or to identify or disclose any wrongdoing within the entity or noncompliance with laws and regulations.

We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities.

Your Responsibilities

The engagement to be performed is conducted on the basis that you acknowledge and understand that our role is to prepare financial statements in accordance with modified accrual basis of accounting and assist you in the presentation of the financial statements in accordance with the modified accrual basis of accounting. You have the following overall responsibilities that are fundamental to our undertaking the engagement in accordance with SSARS:

- 1) The selection of modified accrual basis as the financial reporting framework to be applied in the preparation of the financial statements.
- 2) The preparation and fair presentation of financial statements in accordance with the modified accrual basis of accounting and the inclusion of all informative disclosures that are appropriate for the modified accrual basis of accounting. This includes-
 - A description of the modified accrual basis of accounting, including a summary of significant accounting policies, and how the basis of accounting differs from accounting principles generally accepted in the United States of America, the effects of which need not be quantified.
 - The preparation and fair presentation of financial statements in accordance with the modified accrual basis of accounting and the inclusion of a description of the modified accrual basis of accounting.
- 3) The design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of the financial statements that are free from material misstatement, whether due to fraud or error.
- 4) The prevention and detection of fraud.
- 5) To ensure that the Town complies with the laws and regulations applicable to its activities.
- 6) The accuracy and completeness of the records, documents, explanations, and other information, including significant judgments, you provide to us for the engagement.
- 7) To provide us with—
 - access to all information of which you are aware is relevant to the preparation and fair presentation of the financial statements, such as records, documentation, and other matters.
 - additional information that we may request from you for the purpose of the compilation engagement.
 - unrestricted access to persons within the Town of whom we determine it necessary to make inquiries.
- 8) It is our understanding that you will post copies of our compiled financial statements on the Internet. Pursuant to this you agree that the copies posted will be provided to you by us in an electronic format that will be published online in their entirety including the compilation opinion letter. It is further understood that these electronic copies will be watermarked for security and will not be altered in any way. Should modification be necessary for any reason for both current and prior periods you will contact us for written approval prior to taking any action.

You are also responsible for all management decisions and responsibilities and for designating an individual with suitable skills, knowledge, and experience to oversee our bookkeeping services and the preparation of your financial statements. You are responsible for evaluating the adequacy and results of the services performed and accepting responsibility for such services.

Our Report

As part of our engagement, we will issue a report that will state that we did not audit or review the financial statements and that, accordingly, we do not express an opinion, a conclusion, nor provide any assurance on them. There may be circumstances in which the report differs from the expected form and content. If, for any reason, we are unable to complete the compilation of your financial statements, we will not issue a report on such statements as a result of this engagement. We are not independent with respect to the Town of Oak Ridge. We will disclose that we are not independent in our compilation report.

Our report will disclose that the financial statements are prepared in accordance with the modified accrual basis of accounting, which is a basis of accounting other than accounting principles generally accepted in the United States of America.

You agree to include our accountant's compilation report in any document containing financial statements that indicates that we have performed a compilation engagement on such financial statements and, prior to inclusion of the report, to ask our permission to do so.

Other Relevant Information

Samuel K. Anders, CPA, MSA is the engagement manager and is responsible for supervising the engagement and signing the report or authorizing another individual to sign it.

Our fees for these services will be billed at a discounted hourly rate of \$110.00. You will also be billed for out-of-pocket costs such as report production, word processing, postage, travel, etc. This fee estimate is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the work performed. If significant additional time is necessary, we will discuss it with you and arrive at a new fee estimate before we incur the additional cost. Our invoices for these fees will be rendered each month as work progresses and are payable upon presentation.

You agree to hold us harmless and to release, indemnify, and defend us from any liability or costs, including attorney's fees, resulting from management's knowing misrepresentations to us.

We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you acknowledge and agree with the terms of our engagement as described in this letter, please sign the enclosed copy, and return it to us.

Sincerely,



Samuel K. Anders, CPA, MSA, PC

Acknowledged:
Town of Oak Ridge

Date

MEMORANDUM

TO: Town Council

FROM: Bill Bruce

DATE: July 29, 2022

RE: Town Park Entrance Master Plan

In Council packets is a proposal from Hill Studio to prepare the Oak Ridge Town Park Entrance Master Plan and construction drawings. The plan will include landscaping and sidewalks at the corner of Linville Road and Lisa Drive, as well as possible additional parking, a patio and other hardscape elements, and universal accessibility associated with the Farmhouse Community Center project. The proposal includes preparation of construction drawings sufficient to bid the project.

The Farmhouse Community Center subcommittee reviewed two proposals for this project and supports staff's recommendation to approve the enclosed proposal from Hill Studio.

Note: the proposal references an application for soil evaluation, which has been subsequently handled by staff and will be removed from the proposed contract.

Requested Action: Approve proposal from Hill Studio for Town Park Entrance Master Plan and construction drawings for \$25,010.





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April 28, 2022
Revised June 9, 2022
Revised July 15, 2022

Mr. Bill Bruce, AICP Town Manager
Town of Oak Ridge, NC
8315 Linville Road
P.O. Box 374
Oak Ridge, NC 27310
c/o staylor@oakridgenc.com

RE: Oak Ridge Park Entrance Master Plan and Construction Drawings
Hill Studio Proj. No.: 2104.02

Community Planning

Dear Mr. Bruce:

This letter will serve as an amendment to the agreement between the Town of Oak Ridge (Owner) and Hill Studio (Landscape Architect) for the scope of services shown below. The work proposed is for Hill Studio and its subconsultants to assist the Town of Oak Ridge by developing design documents ready for for the site of the Oak Ridge Park Community House, at 8300 Linville Road.

Landscape Architecture

UNDERSTANDING OF PROJECT

The Owner desires to build out approximately 1500 sf of an existing residence located at 8300 Linville Road, into a Community House at the Corner of the Town Park (Base Contract with Hill Studio). With building documents ready to be bid, we now need to prepare the site component of the work. The Consultant is to provide Professional Design Services for the renovation of the landscape and site of building, and ancillary outdoor activities (sidewalk connections, patio, parking, and universal access).

Architecture

Preservation

The specific sizes, character and changes to the facility will be confirmed and refined in the Schematic Design Phase of the work.

The Project Delivery Method will be Design / Bid / Build.

BASIC SCOPE OF SERVICES

The Owner will continue to work with consultant on design of the landscape. The Consultant's role will be to provide professional design services to assist the Owner in the Programming/Schematic Design and Construction Documents Phases required to complete the work. This agreement provides for services to complete construction documents. Future services (when authorized) may include bidding and

120 W Campbell Avenue
Roanoke, Virginia 24011

tel: 540-342-5263

fax: 540-345-5625

WWW.HILLSTUDIO.COM



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construction observation as a part of future task orders. The Consultant will provide the following design services by Task.

TASK 1 – SCHEMATIC DESIGN

1. Code Search – Perform code search regarding parking, landscaping, canopy requirements, easements, etc. We believe 5 parking spaces will be required.
2. Meet with the Owner and the Engineer and review the site, desired conditions, and discuss sewer and stormwater conditions.
3. After meeting with the Owner, develop a program stating the types, and location of spaces desired on the site.
4. Develop the design complying with design requirements, including design guidelines of the Historic District.
5. Provide initial design sketches to illustrate the program in coordination with the Owner's design program.
6. Provide Schematic Drawings of the Design.
7. Provide a Preliminary Probable Cost of Construction.
8. Engineer will provide statement of feasibility on sewer and stormwater.
9. Present the Schematic Plans to the Owner.

TASK 2 – SURVEY

1. Includes survey of approximately 2 acres of boundary around the House. Survey will include boundary information, topographic contours at 2' interval, known utilities, pavements, and easements.

TASK 3 – WORKING DRAWINGS

The Consultant will assemble an engineering team and develop Construction Drawings suitable for the Owner to bid the project.

1. Provide changes to the design based on Owner's review and the construction cost estimate.
2. Provide base drawings to subcontracted engineers. Coordinate engineer's work.
3. Provide Construction Documents and specifications that can be used to qualify for bidding, and a building permit.
4. Provide 75% Construction Document Drawings and Specifications for Owner review.
5. Incorporate the Owner's comments.
6. Provide 100% Construction Documents and Specifications, with an updated Probable Cost of Construction.
7. Drawings may include but not limited to Legend and Abbreviations, Landscape and Hardscape Plans, Elevations, Enlarged Plans, and Details



TASK 4 – QUALITY CONTROL

1. Utilize North Carolina Registered Landscape Architect STACH pllc for quality control review of final bid set drawings.

TASK 5 – CIVIL ENGINEERING AND PERMIT APPLICATIONS

1. Complete and submit applications for Guilford County Environmental Health soil evaluations for septic system(s).
2. Complete and submit application for NCDOT Commercial Driveway Permit.
3. Civil Engineer to attend and participate in (as needed) of Planning Board and Town Council Public Hearings for Site Plan approval processes.
4. Deliverables include Civil and Utility plans, specifications and details.

Subconsultants

The following services will be subcontracted by the Consultant. The Consultant will coordinate the work of the services noted below for inclusion on the Construction Documents Set.

1. Glenn Stach, RLA, of STACH pllc is providing Landscape Architectural Services.
2. Survey, Civil and Utility Engineering: Bill Greco, Land Solution, Inc.

Additional Services

Upon request of the Owner, additional services will be negotiated in advance of the work being performed. Any and all additional services require advanced written approval by the Owner. For clarity, services currently not scoped, include:

- Municipal review or application fees
- Any revisions to the plans due to unsuitable soil conditions
- Any revisions to the plans due to owner desired changes
- Any services provided relating to septic system layouts, mapping, and supply line design
- Any geotechnical consulting or testing fees
- Construction or Project Management

TERMS OF AGREEMENT

Owner Responsibilities

Work to expedite and secure community meetings and approvals so as not to delay the design process.



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The Owner will compensate Hill Studio for the above services for fees determined as shown:

TASK 1 – SCHEMATIC DESIGN	\$4,040.00
TASK 2 – SURVEY	\$4,000.00
TASK 3 – WORKING DRAWINGS	\$5,045.00
TASK 4 – QUALITY CONTROL	\$5,000.00
TASK 5 – CIVIL ENG. AND PERMIT APPLICATIONS	\$6,925.00

Total Fee for Basic Scope of Services **\$25,010.00**

Other Terms

This amendment represents the entire agreement amendment between the Owner and Consultant. This amendment may be amended by written instrument signed by both parties to this agreement.

Unless superseded herein, of the terms and conditions of the original contract shall be binding on the Consultant and the Owner, and their respective heirs, legal and personal representatives, successors, and assigns.

Upon execution of this agreement amendment, the Consultant is authorized to proceed with the described professional services.

In witness whereof, each party to this agreement has caused it to be executed on the date indicated below.

Entire Agreement

The above represents the entire agreement to the amendment between the Owner and Hill Studio. This agreement may only be amended by written instrument signed by both parties to this contract. Please indicate your understanding of, and agreement with, the above by signing both copies and returning one to Hill Studio for our files.

Respectfully Submitted:
HILL STUDIO

Greg Webster, RLA, LEED AP
Date: July 15, 2022

Approved
Town of Oak Ridge
