Public Safety Commission

AGENDA

Wednesday, August 5, 2026
6:00 p.m.

This meeting includes in-person and virtual participation.
Albany Police Department
2600 Pacific Blvd SW, The Community Room
Or join the meeting here:
https://council.albanyoregon.gov/groups/saf/zoom

Please help us get Albany's work done.
Be respectful and refer to the rules of conduct posted by the main door to the Chambers and on the website.

1. Call to order

2. Roll call

3. Presentation of challenge coins by Fire Chief Chris LaBelle

4. Approval of June 3, 2026, minutes.

5. Public Comment

   Persons wanting to provide comments may: email written comments or register to speak by emailing rochelle.james@albanyoregon.gov prior to 12:00 pm on August 5, 2026, or appear in person to speak at the meeting.

6. Department reports
   a. Police- Marcia Harnden
   b. Fire- Chris LaBelle

7. Business from the members.
   a. Independent analysis from Commissioner Mark Stewart regarding the 2026 Oil/Energy Crisis (30 mins)

8. Next meeting date: Wednesday, October 7, 2026, at the Albany Fire Department, Station 11.

This meeting is accessible to the public via video connection. The location for in-person attendance is accessible to people with disabilities. If you have a disability that requires accommodation, please notify city staff at least 48 hours in advance of the meeting at: rochelle.james@albanyoregon.gov 541-917-7564

Testimony provided at the meeting is part of the public record. Meetings are recorded, capturing both in-person and virtual participation, and are posted on the city website.

MINUTES

June 3, 2026
6:00 p.m.
Albany Fire Department, Ralston Room
Approved: DRAFT

Call to Order

Chair Bessie Johnson called the meeting to order at

6:00 p.m. Roll Call

Members present: Cynthia Green; Bessie Johnson; Kevin Kreitman; Erik Rau; Sheree Speaks-Mahi, Nick Fowler; Katie Pleis

Members absent: Nick Fowler; Katie Pleis; Cynthia Green; Kevin Kreitman

Staff present: Police Captain Jerry Drum; Fire Chief Chris LaBelle; Julia Tremain Clerk III; Chuck Perino Emergency Manager

The February 4, and May 18, 2026 minutes were approved a presented.

Staff Updates:

Police Update – Captain Jerry Drum

Captain Drum started off with overdose data. They have had no overdose deaths year to date and have a steady decrease over the past years. This is largely to do with Narcan being more accessible and used by the public as well as police. A question got brought forward about why there is a difference in Narcan administrations as well as overdoses compared to last year. This is attributed to gaps in reporting. If Narcan is used privately it's not recorded. He goes on to state that heroin "has virtually disappeared out of the community" and that it's not coming in so they aren't seizing it.

There have been eleven total hires in 2025 with 8 of them being year to date, along with two pending hires. They also have vacancies that include a police officer, a clerk and three approved "over hire" positions to preplan for retirements.

For the crime snapshot Drum shared that it is remaining stable with an increase in property crimes, as well as shoplifting and domestic violence. Overnight camping has also increased. Response times are up largely due to higher volumes of people in the community making it harder to get through traffic. Abandoned vehicles are down due to CSOs patrolling more and getting them off the street. A request was presented to get more information on the approach to overnight camping. Captain Drum shared that it is always an education focus first, letting people know you cannot camp on public land within the city like down by the river, before it becomes a citation.

Fire Update – Chief Chris LaBelle

Total responses this year are already at 10,628 with a month still to go, potentially a little lower than FY 25 but they are getting into the busy time of year with 44 calls in one day this last month. Response times are still low, with an additional goal of tracking time spent on structure fires. Their average currently is one hour and six minutes, with one major outlier. There was a structure fire that required overnight supervision, causing a crew to be there for fourteen hours.

Life safety division numbers are still down. That department has three people when it should be about seven. There was an attempt to put in for a grant that would fund an additional deputy fire marshal, which was unsuccessful but will be reattempted.

Upcoming events is June 23 through July 6 you will be legally allowed to sell fireworks in the state of Oregon. This will require the DFM to review each grocery store and pop-up tent to make sure everyone has the proper permits and set up. This is in addition to the fireworks show at Timberlinn park. City of Millersburg, Albany, and Linn County will be involved with making sure the site is ready to go and is safe.

Community paramedic, Hillary Kosmicki, “continues to do an amazing job” with the care facilities. This month she did a demonstration with the lifting devices, and they have been averaging thirty calls a month. This means thirty less times they are calling 911, keeping resources available for emergencies in the community. With the implementation of these devices the residents also have less time to wait for emergency responders since help can be administered by in-house staff. The most common calls continue to be sick person, fall, and lift assist. Meaning this program is highly effective in cutting out a good portion of the most frequently called about emergency types.

The busiest time of day continues to be eight in the morning to eight at night, with a lot of calls between seven and eight in the morning being caused by inter-facility transfers. These are normally held until shift changes unless there is a true emergency and not just a higher level of care needed. This prevents crews that may have been on for 46 hours making an unnecessary three in the morning ride to Portland.

Regarding hiring there have been seven conditional positions for firefighter paramedic and all have accepted. Three of the line crew have left for other agencies, and one member is out of work for the next month so the city has allowed a three position over hire in this biennium. This will cause noticeable savings in overtime hours. A new training chief started on June 1. Dave Milburn comes with 28 years of fire service experience.

Safety camp is June 29 through July 2, for the 4th-6th grade children in our community. It starts at Oak Grove and will have members of the fire and police department making it a success.

Open burning ended June 1, which transitions us into fire season. An above normal fire season is expected, possibly similar to what we experienced in 2018, but the Fire Department is ready to send out resources as part of a task force if need be, being very conscious to take care of “home base” first and leave plenty of staffing in the community. A question was raised about the tall grass and weeds in the community, wondering if the city has anything in place for preventing potential fire hazards. Chief LaBelle confirmed there is a program between police and fire. The report initially comes to fire, and the owner of the property is given plenty of notice before being escalated to police. A follow up question was raised regarding tracking the upcoming “El Nino” event, Perino and LaBelle confirmed they do track weather trends and take those into account when making our emergency preparedness plans.

Emergency Manangement – Chuck Perino

Perino began by covering the general picture of his job duties. His role is large-scale type disasters including flooding, FEMA-declared disasters and public outreach. This includes coordinating with different groups from county, state and federal agencies. The largest task being developing plans and procedures, for example the COOP plan which is the Continuity of Operations Planning. This is what happens in the event the city loses the ability to use a building, or some level of leadership is unavailable.

A lesser known facit is being in a state required role to work with Linn County first. Working with Benton County is permitted, however State law requires contacting Linn County as first priority. Mitigation, or the lessening of disasters, is another large component of the position. Perino goes on to give an example of older homes in flood prone areas being placed on stilts to prevent damage in the event of a more than likely flood. This saves the city money in the long run by preventing costly cleanup and repairs.

Emergency alerting systems are managed by this position as well including Nixle, for road closure alerts or notice of police activity.   You must be subscribed to receive these alerts unlike Albany Alert which operates much like an Amber Alert. This system deals with large scale disasters and will send a message out to phones in the area with no need to subscribe. There has been a new system implemented as well called IPAWS (Integrated Public Alert and Warning System) that you will receive notices for even if you are from outside the area visiting, essentially an emergency broadcast system.

Business from the members –

Kevin Kriteman shared it would be beneficial to future meetings to have a representative from APD or AFD be a guest speaker to share more details on how different parts of the departments operate.

Mark Stewart requested an opportunity to discuss fuel prices and public safety. Kriteman requested he create a write up to present for consideration.

Next Meeting Date
The next regularly scheduled meeting is on Wednesday August 5, 2026, at the Albany Police Department.

Adjournment

Hearing no further business, Chair Johnson adjourned the meeting at 7:06 p.m.

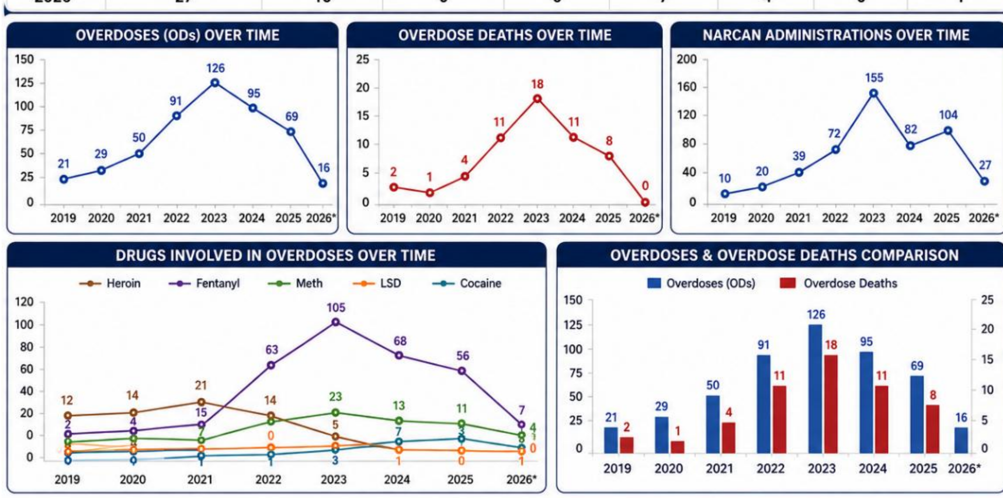
Respectfully submitted,	Reviewed by,
Julia Tremain Clerk III	Reviewer's Name Reviewer's Title

**Documents discussed at the meeting that are not in the agenda packet are archived in the record. The documents are available by emailing cityclerk@cityofalbany.net.*

PUBLIC SAFETY COMMISSION
DEPARTMENT REPORT
June 2026

ALBANY POLICE DEPARTMENT
OVERDOSE DATA 2019–2026*
**2026 data is year-to-date (through current point in 2026)*

YEAR	NARCAN ADMINISTRATIONS	OVERDOSES (ODs)	OVERDOSE DEATHS	HEROIN	FENTANYL	METH	LSD	COCAINE
2019	10	21	2	12	2	3	1	0
2020	20	29	1	14	4	6	2	1
2021	39	50	4	21	15	7	1	1
2022	72	91	11	14	63	18	0	1
2023	155	126	18	5	105	23	1	3
2024	82	95	11	0	68	13	1	7
2025	104	69	8	0	56	11	2	3
2026*	27	16	0	0	7	4	0	1



KEY FINDINGS

FENTANYL DRIVES OVERDOSES
- Fentanyl cases increased from 2 in 2019 to 105 in 2023 (5,000%+ increase).
- By 2023, fentanyl was involved in more than 4 out of every 5 overdoses.

HEROIN HAS DISAPPEARED
- Heroin overdoses fell from 21 in 2021 to 0 beginning in 2024.

OVERDOSE DEATHS ROSE, THEN DECLINED
- Deaths peaked at 18 in 2023.
- Since 2023, deaths have declined but remain higher than pre-fentanyl levels.

NARCAN USE EXPANDED DRAMATICALLY
- Narcan administrations increased more than 15-fold from 2019 to 2023.
- Likely contributed to preventing additional overdose deaths.

OVERALL OVERDOSES HAVE DECLINED
- Overdoses peaked at 126 in 2023.
- 45% decrease in 2025 compared to the peak.

VEHICLE & EQUIPMENT COSTS

Breakdown of Costs for One Patrol Vehicle

PORTABLE RADIO COSTS	$10,005
CAR RADIO	$9,460
PATROL VEHICLE	$44,783
UPFIT COSTS VEHICLE	$33,512
TOTAL VEHICLE COSTS	**$87,555**

ALBANY POLICE DEPARTMENT
CRIME SNAPSHOT
2026 YEAR-TO-DATE COMPARISON
Through April 2026

GROUP A CRIME SUMMARY (YTD)

	2025 YTD	2026 YTD	% CHANGE
Person Crimes	142	149	4.93%
Property Crimes	517	515	-0.39%
Society Crimes	261	234	-10.34%
Livability Crimes	195	92	-52.82%
TOTAL GROUP A CRIME	**1,115**	**1,090**	**-2.24%**

1 CRIME REMAINS GENERALLY STABLE

Overall Group A crime remains relatively flat compared to last year.

- **Person Crimes** 142 → 149 — 4.93%
- **Property Crimes** 517 → 515 — -0.39%
- **Society Crimes** 261 → 234 — -10.34%
- **Livability Crimes** 195 → 92 — -52.82%

THEME: Crime levels remain generally stable despite fluctuations within specific categories.

2 SHOPLIFTING & DOMESTIC VIOLENCE UP

Retail theft and domestic violence continue to be significant community concerns.

- **Shoplifting** 152 → 246 — 61.84%
- **Domestic Violence** 30 → 48 — 60.00%
- **Rape** 8 → 10 — 25.00%
- **Sex Crimes** 23 → 24 — 4.35%

THEME: Shoplifting and domestic violence continue to increase and are key areas of focus.

3 SIGNIFICANT REDUCTIONS IN PROPERTY CRIMES

Many traditional property crimes are down significantly.

- **Business Burglary** 20 → 3 — -85.00%
- **Vandalism** 62 → 20 — -67.74%
- **Credit Card Fraud** 11 → 6 — -45.45%
- **Other Fraud** 57 → 47 — -17.54%
- **Larceny - Other** 107 → 84 — -21.50%

THEME: Substantial reductions in burglary, vandalism, and other property crimes.

4 FEWER CALLS FOR SERVICE

Overall demand for police services is lower than last year.

- **Total Calls** 12,296 → 11,602 — -5.64%
- **Dispatched Calls** 6,078 → 5,944 — -2.20%
- **Self-Initiated Calls** 6,218 → 5,658 — -9.01%

THEME: Fewer calls for service and proactive activity compared to last year.

5 RESPONSE TIMES UNDER PRESSURE

Average response times have increased across all priority levels.

AVERAGE RESPONSE TIME (MINUTES)

	2025 YTD	2026 YTD	% CHANGE
Priority P & 1	5.36	5.69	6.05%
Priority 2 & 3	12.06	14.42	19.52%
Priority 4+	9.03	21.80	141.30%

THEME: Response times are increasing due to staffing challenges, vacancies, retirements, and call complexity.

6 LIVABILITY ISSUES SHOWING MIXED RESULTS

POSITIVE TREND
Abandoned Vehicles
186 → 77
-58.60%

CHALLENGE
Overnight/Prohibited Camping
4 → 11
175.00%

THEME: Significant improvement in abandoned vehicle complaints, while camping-related issues continue to grow.

ADDITIONAL TRENDS TO NOTE

- Drug Law violations down 9.76% YTD
- DUII offenses down 5.48% YTD
- Weapons Law violations down 17.46% YTD
- Business Robberies down 50.00% YTD
- Human Trafficking and Homicide remain at 0

DATA REFLECTS COMPARISON OF YEAR-TO-DATE (YTD) THROUGH APRIL 2026 VS. APRIL 2025.

Changes in small numbers can result in large percentage changes and must be viewed with caution.

5/27/2026 07:43

PUBLIC SAFETY COMMISSION
DEPARTMENT REPORT
June 3, 2026

Albany Fire Department Total Responses					
Month	FY 22	FY 23	FY 24	FY 25	FY 26
July	1,070	992	1,001	1,015	1,061
August	1,048	968	1,018	1,118	1,011
September	1,010	920	862	998	921
October	958	972	957	1064	1,047
November	941	970	891	938	929
December	945	1158	970	997	1009
January	911	1007	1118	999	952
February	829	914	816	957	885
March	853	880	936	903	947
April	864	905	922	875	863
May	896	891	996	1013	1003
June	936	924	973	990	
Total	11,291	11,495	11,459	11,859	10,628

Fire & Life Safety Evaluations					
Month	FY 22	FY 23	FY 24	FY 25	FY 26
July	142	79	67	79	89
August	98	97	51	91	84
September	88	60	98	70	37
October	69	54	82	98	58
November	85	31	70	143	41
December	95	83	86	70	45
January	172	72	52	65	69
February	132	72	52	57	59
March	110	102	76	78	50
April	92	54	77	48	40
May	73	57	81	38	
June	175	75	72	69	
Total	1,083	836	864	906	572

Average Response Times City of Albany Calls Only 911 Call Received to Arrival Time					
	FY 22	FY 23	FY 24	FY 25	FY 26
Emergent Responses	7:10	7:18	7:06	7:25	7:01
Structure Fires	6:18	6:09	6:35	6:27	6:19
Reported Structure Fires	111	127	109	125	83
Average Scene Time Structure Fires					01:06:09

Community Paramedic Activity					
Month	FY 22	FY 23	FY 24	FY 25	FY 26
July	40	47	28	51	36
August	50	29	45	26	22
September	45	26	24	17	32
October	46	38	40	34	31
November	13	40	53	19	22
December	14	23	39	27	39
January	30	58	56	55	46
February	21	19	45	36	74
March	14	54	21	32	22
April	33	33	22	50	41
May	29	64	58	54	
June	44	46	20	58	
Total	306	477	373	459	365

Top 25 Responses	Count
SICK PERSON	1587
FALL	975
LIFT ASSIST	833
BREATHING PROBLEMS	706
TRANSFER	595
UNCONSCIOUS FAINTING	558
CHEST PAIN	543
MVC INJURY	508
FIRE ALARM ACTIVATION	440
UNKNOWN MEDICAL PROBLEM	425
SEIZURE	306
HEMORRHAGE BLEED	266
STROKE CVA TIA	239
ABDOMINAL PAIN OR PROBLEMS	194
OD INGESTION POISONING	186
EMERGENCY TRANSFER	181
PSYCHIATRIC SUICIDE ATTEMPT	173
TRAUMA INJURY	169
HEART PROBLEMS AICD	162
DIABETIC PROBLEM	159
CARDIAC OR RESPIRATORY ARREST	134
FIRE MOVEUP ONLY	131
SMALL MISC FIRE	116
ASSAULT RAPE VIOLENT TRAUMA	100
BACK PAIN	97

	# of Concurrent
1	3920
2	3702
3	1995
4	756
5	189
6	53
7	8
8	2
9	
10	1

Row	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Grand Total
00	43	30	37	26	42	39	41	258
01	39	34	28	53	27	39	43	263
02	29	25	28	32	32	24	40	210
03	35	26	28	29	29	29	29	205
04	27	25	28	20	25	32	25	182
05	28	32	29	30	28	42	29	218
06	46	34	43	39	33	42	33	270
07	52	52	62	69	55	67	61	418
08	52	61	80	69	76	74	57	469
09	78	71	77	56	81	84	66	513
10	88	89	91	103	66	77	81	595
11	78	93	101	92	89	87	79	619
12	78	74	106	75	79	96	73	581
13	89	88	95	81	92	91	77	613
14	84	94	87	72	71	77	82	567
15	70	74	92	108	87	79	85	595
16	86	101	91	85	90	91	90	634
17	67	76	81	86	87	96	98	591
18	78	62	89	104	67	99	70	569
19	79	75	74	73	79	104	84	568
20	69	86	77	73	73	91	72	541
21	55	80	87	63	67	84	63	499
22	48	52	69	36	49	58	41	353
23	45	37	48	33	32	57	43	295
Grand Total	**1443**	**1471**	**1628**	**1507**	**1456**	**1659**	**1462**	**10626**

PowerPoint Presentation on

2026 Oil/Energy Crisis

Researched

by

Public Safety Commissioner

Mark Stewart

For review at the

August 5, 2026

Public Safety Commission meeting

2026 Oil/Energy Crisis

Independent Analysis for __Albany_____ as of June 2026

The Big Questions:

-Is there or is there not a crisis?

-If there is a crisis, how does that impact us here in ___Albany___?

-If this is a global issue, what can ___Albany____ do about it?

This is going to take a long time to get through and explain. There is an overwhelming amount of information here. This is a complex issue, and there are a great many things that need to be demonstrated/explained first before it will even be possible to start addressing these questions. But even if you don’t get absolutely everything in this presentation, that’s ok. Please stick with me, you will still have a much better understanding of our collectively shared situation by the end.

The Basics:

In order to determine whether the ongoing oil disruption as a result of the closure of the Strait of Hormuz is actually a crisis, it is important to understand how oil works.

-"Ok, but don't we pay people already to understand this stuff?"

Short answer- yes. However, there isn't a consensus among the experts right now and we're looking at basically 2 different lines of thinking as far as whether or not this is a crisis, and the extent of this crisis if there is one.

Essentially….

“Everything is going to be ok. USA produces enough oil to insulate ourselves. The rest of the world will have it rough, but we’re going to be just fine- no disruptions and we definitely won’t run out of gas. The war will be over soon and so too shall we return to normal. And, the markets agree.”- IEA, News Outlets, Commentators, the Markets/Exchanges

VS

“This is not hyperbole- we may be looking at a complete collapse of the entire global economy. This could be ‘end of days’ levels of bad.”- also IEA, News Outlets, Commentators, Oil CEO’s

First, Consider Iran

-Right now, as of 17 June 2026, the USA has been so utterly defeated in this war that we are, allegedly, moving forward with an agreement with Iran where:

-They get 300B$ in reparations. That's several times the reparations paid by the Weimar Republic during WW1. That's an entire year's worth of their GDP.

-Billions in sanctions relief

-Complete control over the Strait of Hormuz

-25B$ up front before anything is even signed

-And they're still, by the wording in the agreement, allowed to purchase nuclear weapons.

Iran Cont.

-On Februrary 27-28th, the USA assassinated the Ayatollah, and several members of his family.

-The Ayatollah’s son is now in charge of the IRGC, making him the supreme authority there.

-In that attack, his father (the previous supreme leader), wife, his child, his brother in law, and one of his nieces or nephews were killed. And, he himself was there and maimed.

-He watched his whole world die in a surprise attack during an active negotiation with the United States.

-He was reportedly more of a hard liner than his father was. In other words, he was even more of an extremist….. before we killed his family.

Iran Cont.

-Just keep all of that in mind as you consider whether or not we’re in a crisis.

-Genuinely, what are the chances that he’s going to settle for anything less than the complete annihilation of the United States?

-Iran has a complete choke hold on the entire global economy through the Strait of Hormuz. And now they know that. All they have to do is…. nothing.

-And, Iran can see all of the statistical oil inventory data that you’re about to see.

Whatever “deal” we do or do not reach with Iran, just remember all of the above.

You only get to say “The sky is falling” in public once before no one ever takes you seriously again.

-So which is it? Are we in a crisis or not?

Because of the potential stakes of this issue, and considering historic precedent, it has become necessary for local leadership nationwide to become familiar with oil as a general subject in order to determine for our own selves how we believe we should act.

However, I believe that so far, ______ will be the first municipality to even consider this issue in any official capacity. Which begs the obvious question then….

If no one else is concerned with this, why should we be?

-This is what we’re here right now to find out.

The Stakes:

-Police, Fire, and EMS vehicles need fuel to operate and motor oil for maintenance. If there is a nationwide shortage of either, operations across all emergency services are impacted. *Nationwide* includes us here in our own home town.

-In general, civilians need fuel to leave their house to work and produce goods or services.

-Logistics need fuel to move those goods.

The Stakes Continued:

-The goods produced and moved by logistics need to be affordable once they arrive at their final destinations. This includes materials that are further manufactured into consumer goods.

If the goods aren't affordable, and/or if the cost of logistics to move those goods isn't justifiable, production slows or even shuts down across our entire economy (Demand Destruction- more on that later). Unemployment, homelessness, and public unrest goes up. -1970's recession

And if this impacts our food supply, how many meals do you imagine people will miss before they're lighting fires in the streets? The populace in Kenya is already rioting as their nation has been among those hit hardest by the oil disruption *so far*. -Rueters

-And consider: There can still be food on the shelves, but if it becomes too expensive to buy it, that's functionally the same as the shelf being completely empty.

So, what do we actually know so far?

-This brings us back to The Basics. To even begin to answer this question, you're going to have to have a basic understanding of how oil works, and some history.

Extraction

End user Consumption

The Cycle

The Oil Market

Refining/Manufacturing

1970's oil crisis

SPR:
Strategic
Petroleum
Reserve

Cushing Storage

The Cycle

-This is a very basic overview and the depth of nuance here warrants possibly years of study at the collegiate level followed by several more years of experience in the field. But we can still get a basic look that helps shine a light on several topics.

-In short, when it comes to oil → It’s all one big circle that we’ve depended on for at least the last 50 years to have the way of life that we have.

Consumers create a demand for oil and then…

-We extract that oil

-Then the oil goes onto its own market

-Refiners and Manufacturers buy the oil and turn it into useful things

-Consumers use the end products:

Cars, Trucks, Planes, Trains, Generators, Medicine, Plastics, Gloves, Paint, Heating Oil, Ink, Computers, Phones, Even Food……

Nearly everything you can think of either has a derivative of oil in it or was made possible because of oil. If we had the time, I would challenge everyone to find even 1 object in this room that hasn't been touched by oil.

Extraction

Extraction

-Historically, extraction has very closely paced consumption/demand

-There are primarily 2 types of oil that we extract from the planet

Heavy/sour (Brent)

Light/sweet (WTI- West Texas Intermediate)

Light Oil vs Heavy Oil

-Light Oil: We here in the USA primarily extract Light(WTI) from our own ground. It's cheaper to refine, but it doesn't have as much sulfur content in it and though we can get Deisel out of it, we often have to mix it with Heavy oil because of the way our refineries are built. What is most important to understand here is, USA refining capacity is NOT geared towards refining of Light oil. We export the vast majority that we produce to other countries for them to refine. When you hear the phrase "*USA is a net-exporter of oil*"- this is why.

-Conversely, we import vast amounts of Heavy oil for our own refining and production.

"Well, why aren't we set up to refine our own oil? That doesn't make sense."

Actually…Heavy Oil made America #1 in the world

-Heavy oil is significantly more expensive to refine. However, what *we* are able to get out of it has been so profitable, that nearly our entire refining industry has been geared to refine Heavy oil from Canada, Venezuela, Mexico, and the Middle East (8% of our Heavy oil is/was imported from there)-EIA.

-We bought all that Heavy oil at a significant discount because no one else was/is setup to spend the extra money that it would cost to refine it.

-This allowed the USA to become dominant across the entire global economy because everyone wants those end products that *we* were producing from that Heavy oil. And again, it has been very, very profitable.

Extraction, Transportation, and Hormuz

-It’s important to note that the 8% of Heavy Oil we were getting out of the strait took on average, 60 days, to reach the USA coast.

-The strait of Hormuz was mined

-The Pentagon has already said it would take 6 months to clear the mines

-It is completely unrealistic to assume shipping traffic will return to normal quickly if/when the strait is declared open again

-Put yourself on an oil tanker, would you want to sail into a minefield while hauling flammable cargo? What if you were the owner of that ship?

Hormuz and Logistics

-Oil infrastructure has been hit with missiles across the entire Gulf Cooperation Council (GCC). That means oil terminals along the strait have been damaged, refineries in countries surrounding Iran and within Iran have been damaged, and it could take years before production in the Middle East returnes to pre-war levels.

-Even if we get all the ships currently trapped out, new ships coming in need terminals to doc with to load more oil. Those terminals have been damaged and there is no definitive report on exactly when everything will be online again. New ships also need insurance, and insurers aren't thrilled about insuring a ship sailing into a minefield/warzone.

-Even if the war ends today, 6/18/2026, it will take months, at a minimum, before the 20% loss to the oil supply is returned. And then another 60 days after that for it to arrive here.

The Oil Market (where the actual crisis lies)

-The Oil Market is significantly more nuanced than what I'm about to explain, but for the sake of brevity it's ok to think about it like this:

-No matter where you are in the world, when you extract oil, it all goes onto the same market.

Extractors are going to sell the oil they extract to the highest bidder. When it comes to the basic concept of "Supply and Demand", oil is a perfect product to demonstrate that concept.

Supply and Demand

-IF there is Demand for oil, producers will extract it to fill that demand. It doesn’t matter where in the world that demand comes from. However, there must also be a practical guarantee that that demand will last.

-IF there is an over abundance of Supply, meaning, Supply>Demand, that lowers the price of oil and Extractors don’t make as much money. After all, it costs money to extract oil in the first place, so, that <u>oil has to sell at a price that covers and justifies that cost.</u>

-In a nutshell, this is why any disruption to the oil supply, at all, is a big deal. Extractors have not built nor will they ever build an excess of production. Because to have done so would inevitably drive down the sale price of oil- putting them out of business. The sole exception to this rule is OPEC(more on that later).

Supply and Demand cont.

-The Strait of Hormuz is/was the gateway for roughly 20% of the world's oil supply.

That supply was effectively cut off with the start of hostilities with Iran. 20% effectively just wiped out overnight.

-Through some extreme logistical wizardry, roughly 8% of that has been bypassed over new land routes that avoid having to use the Strait of Hormuz.-EIA

It is important to note that this is a bandaid and not a solution. We may have, in essence, recovered ~8% of the supply, but it still cannot be delivered efficiently. That's why we weren't sending that supply over land to begin with.

Supply: Disruption

-The last disruption we have a good historical reference for happened in the 1970’s.

That was a **7%** total disruption. And it led to fuel rationing in the USA and a decade long recession from the 70’s into the early 80’s.

Yes, we have built out production capacity over the last 50 years. But please note that the disruption we’re seeing today, barring logistical stopgaps, is nearly 3x in size.

Supply: Once you start pumping oil you can’t stop

-When an Extraction company drills a new oil well, that well runs as long as possible, because it has to.

-If an oil well is shut down after it has been drilled, the underground pressure necessary to help get the oil out of the ground in the first place is reduced/lost. And we can’t get it back. I don’t have enough engineering knowledge to explain further than that, but this is the gist of it.

-This means that once you turn the rig back on, it’s still going to pump oil, but now at a greatly reduced rate. If the well/rig doesn’t produce enough oil to justify the cost of installing and running it, it’s bad news for the extraction company.

Supply: Then the oil must have somewhere to go…

-Storage for anything is expensive to build and maintain, and Oil is particularly expensive to store and maintain.

-So, if we’re not consuming the oil we’re producing fast enough, oil wells/rigs may need to be shut down. After all, there’s nowhere for that oil to go if the

“Extract $\longrightarrow$ Refine”

process backs up…

And if the price isn’t right, we’re not going to be consuming the oil fast enough to balance the entire process.

Supply: Storage

-2 Main things to consider:

United States Strategic Petroleum Reserve

Cushing, Oklahoma Oil Storage

Supply: SPR

-In response to the 1970’s oil crisis the USA created a strategic reserve in 1975 in order to weather any future potential disruptions to the oil supply.

-Above ground storage is expensive, so, we stored hundreds of millions of barrels of oil in underground salt caverns.

-If the cavern inventory is drawn down too far, they start to collapse. This is not because the caverns themselves are empty, rather it is because of the water we pump into the caverns as we draw the oil out. That water then dissolves the salt caverns, which promotes collapse. It also makes extraction increasingly more difficult as eventually any oil that we pull out will have water and salt in it that has to be removed before refining.

-The official Functional Tank Bottom is around 44M barrels

-What that means: The oil near the bottom isn’t practically useful anyway. It’s tainted with sediment and would require special extraction equipment to even pull it back out of the reserve. And, at that level the caverns face severe, permanent, damage.

Supply: SPR

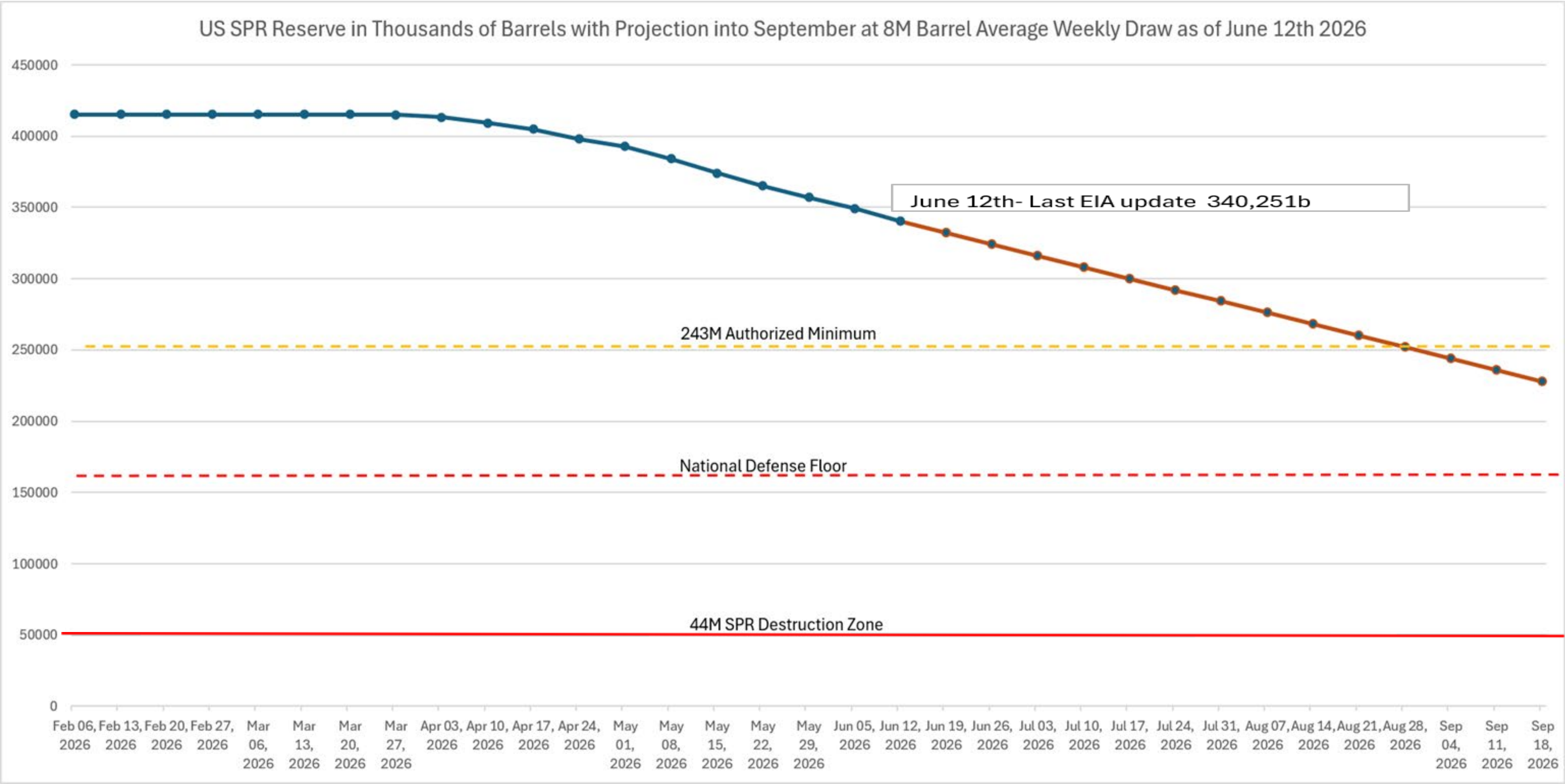
-There is a hard minimum of 150M barrels that is reserved for National Defense.

-The current standard minimum for National Defense is 243M barrels and requires Presidential approval to draw beyond that point.

-The inventory level in February, before the assassination of the Ayatollah of Iran and other members of his family, was 415M barrels.

-As of June 12th, the inventory is at 340M and is dropping at a rough average of 8M barrels per week.

-At the current rate of draw down, we should expect to hit the 243M minimum by September at the latest.


US SPR Reserve in Thousands of Barrels with Projection into September at 8M Barrel Average Weekly Draw as of June 12th 2026
450000
400000
350000
300000
250000
200000
150000
100000
50000
0
June 12th- Last EIA update 340,251b
243M Authorized Minimum
National Defense Floor
44M SPR Destruction Zone
Feb 06, 2026
Feb 13, 2026
Feb 20, 2026
Feb 27, 2026
Mar 06, 2026
Mar 13, 2026
Mar 20, 2026
Mar 27, 2026
Apr 03, 2026
Apr 10, 2026
Apr 17, 2026
Apr 24, 2026
May 01, 2026
May 08, 2026
May 15, 2026
May 22, 2026
May 29, 2026
Jun 05, 2026
Jun 12, 2026
Jun 19, 2026
Jun 26, 2026
Jul 03, 2026
Jul 10, 2026
Jul 17, 2026
Jul 24, 2026
Jul 31, 2026
Aug 07, 2026
Aug 14, 2026
Aug 21, 2026
Aug 28, 2026
Sep 04, 2026
Sep 11, 2026
Sep 18, 2026

SPR Notes:

-The SPR should be considered functionally empty at 243M. It would be unthinkably irresponsible for any administration to draw the reserve beyond this point barring a full scale world-wide military conflict.

-Beyond 240M, the salt caverns become severely damaged according to the DOE.

-Also, all of the oil that is being taken out of the reserve now, must be put back. That inventory is going to come from the global market just like it would for any other buyer of oil.

-The USA is not the only nation drawing down its SPR right now.

-Everyone else will have to re-fill their SPRs the same as us.

SPR Point of No Return

-Remember, it will take at least 60 days for a tanker to leave the GCC and arrive in the USA

-If the SPR runs out at the beginning of September, 60 days out puts a pretty hard point of no return at around the July 4th weekend.

-That’s just an estimate. It could be sooner. Realistically, the point of no return was likely February 28th.

-Again, even if traffic starts moving through the strait today, we still won’t have the full 20% of the oil supply back for several months.

30 July 2026 SPR quick note*

Amos Hochstein, who was the Assistant Secretary of State for Energy under the Obama administration, and who later was a senior adviser on energy to the Biden administration, stated during the Global Energy Forum last month that:

“[sic] I don’t know anyone who believes that you can actually draw down the SPR below 300M”

He went on to explain that going below 300 would cause immediate damage and hinder any further extraction operations.

So, although we have an official policy setting our current release levels, it may be inadequate. Mr. Hochstein oversaw the previous draw down during Covid and the start of the Ukraine war that took the SPR down to its previous record low of 347M. That level caused over 100M$ worth of damage to the caverns.

As of the creation of this slide, we now have roughly 1 ½ weeks before we hit 300M.

Supply: Russia

-The USA SPR reached a near historic low at the beginning of the Russian war with Ukraine. We were still dealing with demand destruction from Covid and the sudden conflict in Ukraine caused severe trouble in the oil markets.

-Russia produces about 10-12% of the global oil supply.

-As of May-June 20206, Ukraine has started directly striking Russian oil production.

-Remember, it doesn’t matter where the oil comes from, it all goes towards the same global market….. A market that already has a 20% hole in it.

-The historic SPR low set at the beginning of the Russia/Ukraine war is evidence that the conflict there has had and will have an impact on us here in the USA.

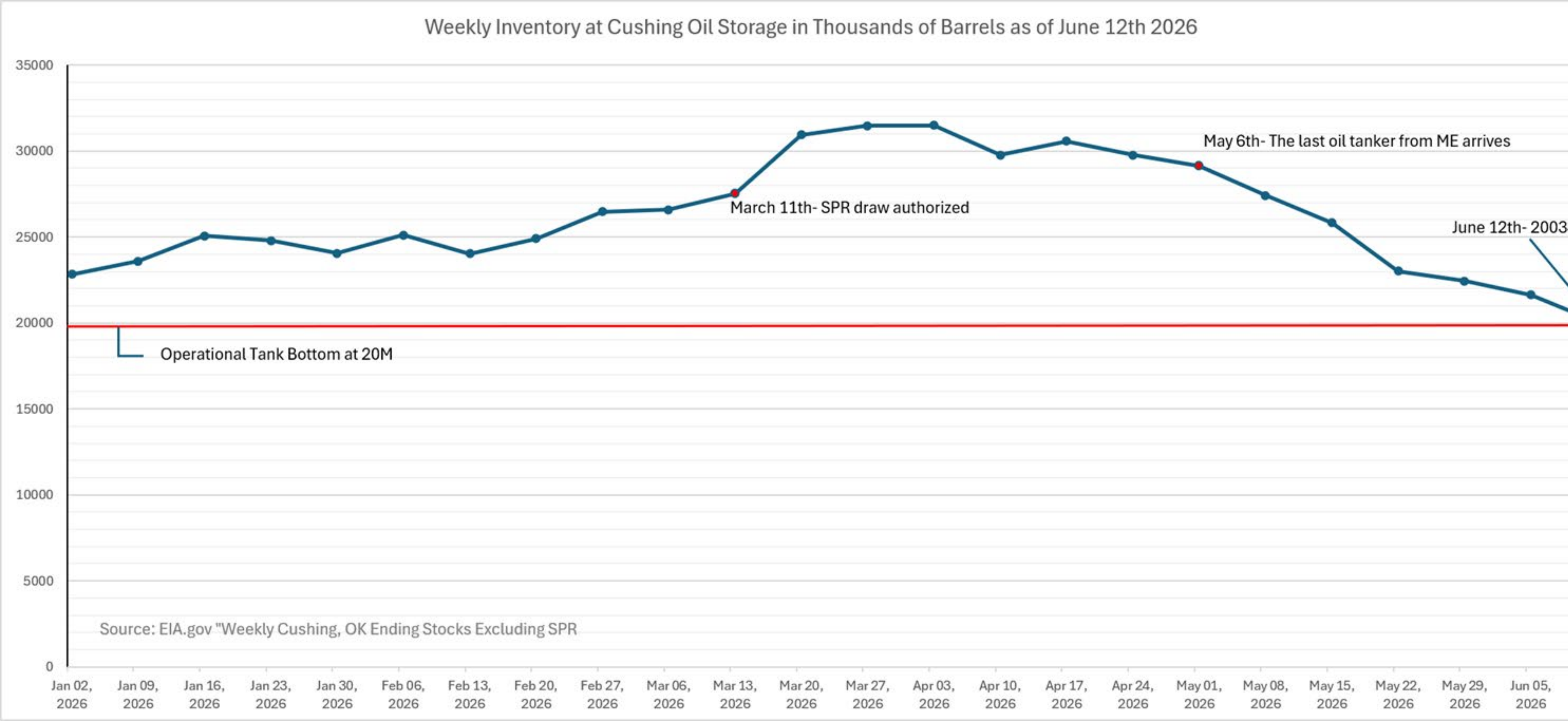
Supply: Cushing Storage Depot

-Cushing serves as the **largest** above ground oil storage depot in the USA.

-The majority of our pipelines run through there and it provides a central hub for distribution of oil(WTI) to coastal refineries and shipping depots.

-Where the SPR is owned by the US government, Cushing is owned by private entities.

-This is oil that, if it isn’t exported, it goes directly into production of petrochemical products (namely fuel and lubricants) in whatever limited production capacity we have.


Weekly Inventory at Cushing Oil Storage in Thousands of Barrels as of June 12th 2026
35000
30000
25000
20000
15000
10000
5000
0
May 6th- The last oil tanker from ME arrives
March 11th- SPR draw authorized
June 12th- 2003
Operational Tank Bottom at 20M
Source: EIA.gov "Weekly Cushing, OK Ending Stocks Excluding SPR
Jan 02, 2026
Jan 09, 2026
Jan 16, 2026
Jan 23, 2026
Jan 30, 2026
Feb 06, 2026
Feb 13, 2026
Feb 20, 2026
Feb 27, 2026
Mar 06, 2026
Mar 13, 2026
Mar 20, 2026
Mar 27, 2026
Apr 03, 2026
Apr 10, 2026
Apr 17, 2026
Apr 24, 2026
May 01, 2026
May 08, 2026
May 15, 2026
May 22, 2026
May 29, 2026
Jun 05, 2026

Supply: Cushing and a Note on Storage

-As of the creation of this slide, 17 June 2026, it is extremely likely that Cushing is functionally empty.

-Remember, it’s important that once we start extracting oil– it must have somewhere to go.

-For the moment, we have a surplus of storage space that’s growing at an alarming rate.

-This might be a good thing later when “Demand Destruction” finally hits.

-However, if the economy goes into a recession or depression and oil consumption is drastically reduced, that storage capacity will fill back up fairly quickly.

-Once it’s full, the real damage to oil production starts because we’ll have to shut down extraction sites. This is a long lasting problem that unfolds slowly at first, but then snowballs very quickly.

Supply: *“America could be energy independent if we wanted to be, we just have to pump more oil.”*

-This is a sentence that has been uttered in public and the media ad nauseum for decades. It is a strongly held sentiment by many voters. And it has been a consistent source of frustration with our government whenever gas prices start to get high.

After all, why won’t the Federal Government just let us make enough oil so that we don’t have to rely on other countries, especially the Middle East? We should be able to make gas cheaper, right?

-If you’ve followed along so far, you already know most of the answer to that question. Extraction companies can’t operate if the price of oil falls too far down. And it would cost billions of dollars to build new refineries capable of refining our own oil anyway. And even then, we’d still be short on Diesel fuel.

Supply cont.

-Because new refineries cost in the Billions of dollars, investors are absolutely not going to make that kind of investment unless they can be absolutely sure that that investment is going to pay off. Oil companies pay some of the smartest people on the planet a considerable amount of money to calculate exactly how much oil they should produce in order to sell it at the highest price possible. The Federal Government actually has very little to do with any of it in the end. If the oil companies themselves can’t justify it, they won’t do it.

-You don’t have to be an oil engineer to get this because even having a basic understanding of supply and demand allows you to understand why we have the system that we have.

Supply and OPEC (Organization of the Petroleum Exporting Countries- AKA Middle Eastern Oil)

-Apart from the basics of Supply and Demand, American oil production has been largely kept in check by OPEC.

-Our forte from the very beginning has been refining. But OPEC has been specialized in extraction. It’s right there in the name. And they have considerable cash reserves to weather market fluctuations. They also sit on considerable stocks of easy-access oil underneath their countries, and have extremely poor workers rights/protections. It was expensive and possibly inhumane, but they were the first to position themselves with potential excess production capacity. So, if any other nation were to attempt to build up their own production in order to compete with them, all they had to do was quickly dump more oil onto the market, driving the oil price down and stifling their competitors. This is a large factor behind what has been the USA’s own very gradual increase in production over time. This is why OPEC is referred to as a “Cartel”. Because of them, USA producers have had to execute a very careful balancing act over decades in order to slowly grow production to both meet demand and avoid prompting retaliation from OPEC.

Supply: Our own advantages

-Yes, we produce a considerable amount of petroleum products here in the USA.

-And yes, those products are sold to the highest bidders.

Where we have an advantage is the physical distance it takes to move those products outside of the USA. The farther we have to ship oil and gas, the more expensive that is for the buyer, the same as Home Depot doesn't pay shipping for you when you order lumber.

-Because production is local, we don't have to pay as much in shipping costs for our own oil products. Therefor, we have an advantage in buying power when it comes to buying our own products.

If the USA truly is insulated from this crisis, then this is solely why. We are assuming that poorer countries can't afford to outbid us for our own oil and gas.

History and Supply and Demand Destruction

-Again, in the 1970's the world nearly ground to a halt over a 7% disruption to the oil supply. But how did we recover from that?

Demand Destruction

-When the price of something is too high, demand for that thing is destroyed. But Demand Destruction is more than people turning away because something became too expensive to buy.

Demand Destruction

-When the Demand for something goes down, so too must the supply. A producer can’t produce something if there’s no one to buy it.

-When the 7% disruption hit in the 70’s, oil prices spiked immediately. And they stayed high, prompting Demand Destruction.

-This led to a decade long recession because suppliers across the entire economy cut back. Demand Destruction is contagious if it starts at the very foundation of everything (Oil).

Demand Destruction Unfolding in the 70’s

-Inflation skyrocketed

- Prices for everything rose

-People stopped spending money

-Production pulled back

-This meant jobs were lost

-Ending with the whole economy going into a recession :(

Demand Destruction: Sounds bad, right?

-The harsh reality is, the way Demand Destruction played out in the 1970's is what saved us all in the end.

-The disruption hit

-The price of oil spiked and **the price was allowed to remain high**

-**Then the whole world reacted as though the price of oil spiked, as though there was a disruption**

-Producers reacted immediately. Consumption of oil was subsequently reduced—taking pressure off of the oil supply that had a 7% hole in it. The shock to the economy as a result was more gradual.

Demand Destruction: A Survival Mechanism

-Sure, we went into a recession, but we came out of it eventually.

-This was only possible because leaders worldwide acted as though there was a problem/crisis.

-Recovery was made possible by taking steps to address the problem–immediately.

But Where’s the Demand Destruction Now?

-There is limited Demand Destruction now from poorer countries being forced to cut back and higher gas prices prompting some people to not take summer trips

-But otherwise, the price of oil has been kept low (through extreme market manipulation), so the biggest consumers (USA in particular) are still consuming at full speed.

We’re consuming like normal while there’s still a 20% disruption to the oil supply.

There’s a nearly 3x larger disruption to the oil supply, and we’re not cutting back on consumption.

NO ONE IS ACTING LIKE THERE IS A CRISIS! And that’s a problem…

Full Speed into a Solid Wall

-Had the price of oil not been manipulated to drive the price down, the USA could have been acting like there's a crisis.

-We could have curtailed our consumption (which would probably have meant an immediate recession…again) and we could have potentially coasted on our reserves without completely collapsing our economy.

Instead, we're consuming like there's not a 20% hole in the oil supply. Storage inventories are plummeting as a result.

When that storage is gone, what then? We can print money, we can't print oil.

Instead of a gradual contraction in the economy and production, we're facing a scenario where we run out of oil suddenly, bringing everything else to an abrupt and screeching halt.

Operating Minimum Inventories

-Refineries(in particular) and production lines, are difficult to start up and shut down. It’s both expensive and time consuming.

-So, Operating Minimum Inventories are kept on hand so that, once production starts, it can run continuously.

-Those inventories depend on a smooth, constant stream of supplies.

Remember, Empty Doesn't Occur at Zero

-We can extract oil as fast as our noble oil industry can extract it.

But if that doesn't keep us above "Operating Minimums"...

-Refineries shut down

-And everything down stream shuts down with them

So where does all this so far leave us?

Supply: Competing for our own products

-Is it true that no one can out-bid us for our oil and gas? Does our home-advantage save us?

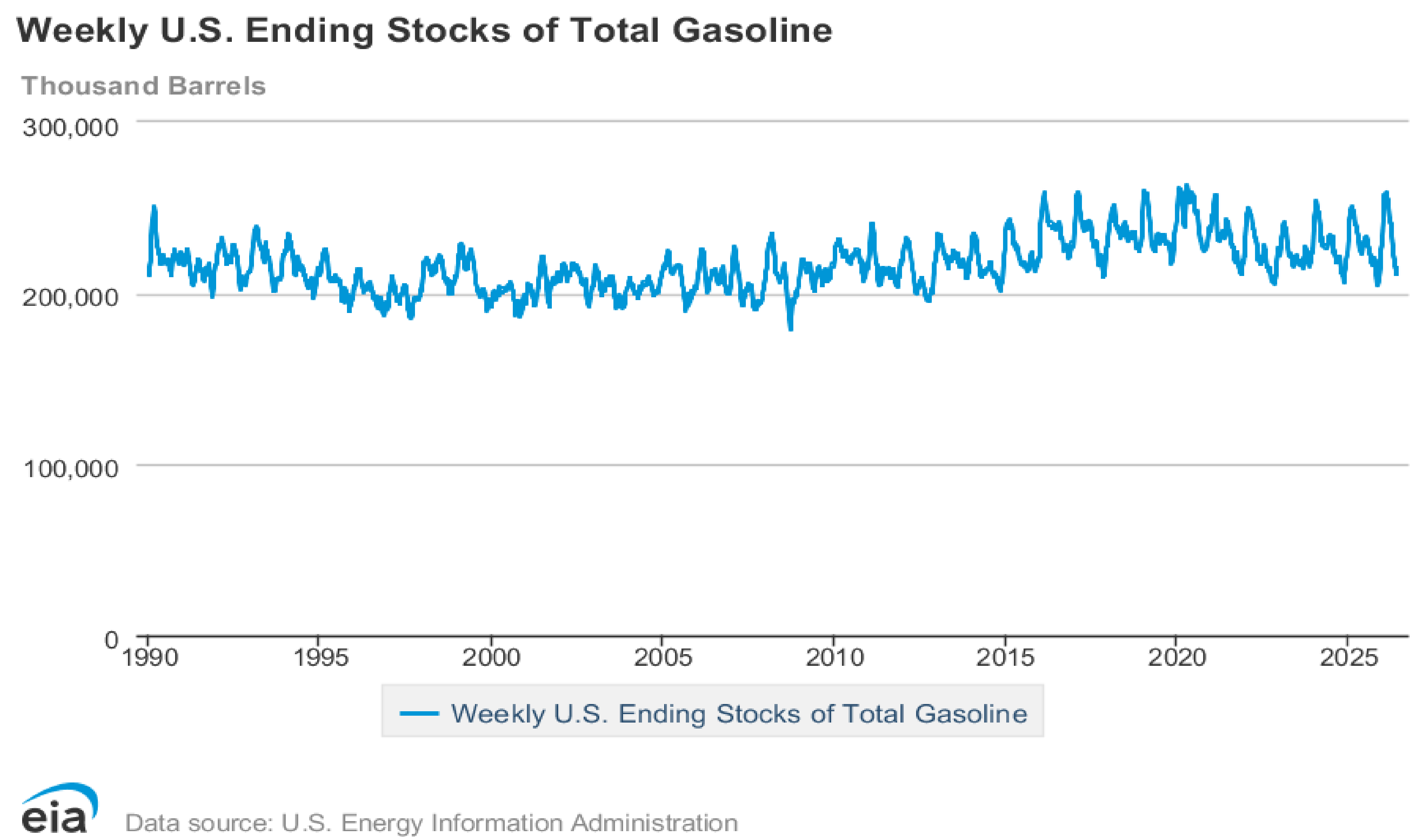
Well, gasoline stocks are falling in the USA right now as a combined result of increased summer usage, and refineries shifting production to Jet fuel that is being sold to Europe. -EIA

Why Europe? Because they are in full crisis mode trying to keep their airlines operational and are paying us a hefty premium.

It's worth noting that we've set a record this year for the largest drop in gasoline inventory over time.-Forbes

-That said, gasoline inventories do have a historical "Jawbone" up and down that coincides with seasonal usage as refineries switch back and forth between gasoline for summer and heating oil for winter.

-However, all of our production at the current level that we're maintaining is dependent on our Strategic Petroleum Reserve and private storage. It is theorized that if we enact export restrictions once the SPR is gone, we should be able to avoid shortages here at home. However, we don't have up to date historical empiric data to know for sure. This is our first time experiencing this situation with our increased production capacity. But again, that will require that we actually restrict exports(more on that later).



Weekly U.S. Ending Stocks of Total Gasoline
Thousand Barrels
300,000
200,000
100,000
0
1990
1995
2000
2005
2010
2015
2020
2025
Weekly U.S. Ending Stocks of Total Gasoline
eia
Data source: U.S. Energy Information Administration

Our Own Supply

-**Right now, while we are actively exporting oil, our reserves are going down.**

-Will we have enough to keep us afloat if we restrict exports? Again, we don't know for sure, we've never been here before.

-Our oil industry makes A LOT of money from exports. That money will be severely stunted if we enact export controls. So the golden question is:

If we enact export controls, will our oil producers stay operational enough to keep us adequately stocked?

Our Own Supply Cont.

It’s worth noting that we did previously have export controls all the way up until 2015. On the one hand, that’s good news, historically. On the other hand, oil producers have had over a decade now to become acclimated to the dramatically increased profits from exports. How they might react to a sudden, dramatic, reduction in profits when their ability to export to the highest bidder is cut off- is anyone’s guess. Historically, oil companies have laid off employees whenever the price of oil has fallen far enough or even during disasters like the BP oil spill in the Gulf of Mexico.

-We can govern the ability to export oil, but in the end the companies that run the whole process are still private, for **profit**, entities. Emphasis on “for-profit”.

Supply: Competing with China

China has reduced its oil imports to an 8 year low in response to the Iran conflict. -oilprice.com, NY Times

China, over the last several years, has consistently been the largest buyer of oil. -NY times

When looking at the available supply of oil in the world right now, it is important to note that the biggest buyer has stepped aside…. for the moment. As far as the rest of the world is concerned, China is saving the rest of the global financial system by stepping aside and lowering their oil imports. Because in doing so, that has taken a significant amount of pressure off of the oil markets. On the other hand, it's also helped keep prices down during a time when we universally, and badly, need the opposite to be happening.

Supply: USA vs China

By contributing to lowering the price of oil worldwide, China has placed themselves both politically and strategically in a position of leverage over everyone.

-Remember, as things stand now, oil inventories are still continuing to fall.

How China is able to curtail their own imports is likely due to their own large SPR. **If you were China right now, when would you open up your imports again?**

-Remember, no one outside of the poorest countries are really curtailing their oil consumption right now because oil prices are still relatively low.

Supply: USA vs China

-The USA can certainly outbid *poorer* countries for its own oil.

-But China is the 2nd richest country in the world.

So, the million dollar question then is: can the USA outbid China for its own oil if the world supply hits critical levels and China steps back onto the market? As far as I can tell, we don't actually know.

-Again, if we enact Export Controls, it might not matter. But export controls cut into potential profits for oil companies. And, doing so may throw us into another world war because the rest of the global economy is depending on our production right now. So, would we actually enact export controls? Maybe. However….

Supply: Market Manipulation by the USA

-Since the start of the war, per CNN, Trump has claimed that[sic] “There’s a deal with Iran for the end of the war”- **38 times** (Update* this slide was originally created in June but as of 30 July 2026 we’re now up to 40.)

-Every time Trump claims “victory” or “peace”, the price of oil falls on the futures markets. And Treasury Secretary Scott Bessent might be shorting the futures market with American Tax dollars. Though this isn’t fully confirmed, it is a likely explanation.

-In any case, the lower futures price has kept the physical price lower than it could have been.

-Many of those “peace” claims have coincided with the opening and closing of the markets over the weekends. And there *is* crystal clear evidence that insiders within the administration have been profiting immensely from shorting the oil markets, with profits on trades totaling into the billions now.

Supply: The Trump Weekly Cycle

Monday- “We’re going to bomb them back into the stone age”

Tuesday/Wed- “I’ve decided to give Iran a chance”

Thursday/Friday- Strikes are carried out on both sides

Friday night- “We’re going to wipe out Iran with thunder and fury the likes of which no one has ever seen”

Saturday/Sunday- “Good news everyone Iran has agreed to peace, we won”

Sunday night- “Peace is imminent”

Monday- Iran says “there was never a deal”, and the cycle repeats.

Supply: The Trump Cycle

Trump has repeated that pattern, nearly verbatim, every week for the last 3 months. And in that time, market traders have placed massive bets on the market and won hundreds of millions of dollars with uncanny perfect timing.

A simple search of “suspicious timing, oil futures shorts” brings up several sources showing a very clear pattern of insider trading happening right now, right in front of us.

Supply: I'll say the quiet part out loud

Trump, and those around him, are profiting directly off of the current oil market crisis. This is a level of brazen corruption we've never seen before. It's happening in broad daylight, right in front of us. They're not even trying to hide it.

So this is where a very important question comes in-

"If it comes down to it, would Trump really actually enact export controls on oil?" Because in the end, it will come down to him to make that happen.

Supply: Trump and Export Controls

Well, let's look at several things that seem unrelated, but they all tie in together at the end.

-After the first Trump administration where there is a full report on Trump colluding with Russia that's so damaging that it's almost completely redacted…

-After the stolen top secret documents case that was luckily handled by Trump's hand picked Judge, Aileen Canon, where anyone with eyes can see Trump endangered US National Security…

-After Trump's utter and complete failure to address Covid-19 and the resulting over 1 Million deaths in the USA alone (Which placed the USA among the highest casualty rate per capita globally), and now we have a resurgence of anti-vaccine activists- and measles.

-After the complete desecration of the constitution (particularly the 4th amendment) through Trump's militarization and deployment of ICE, launching outright sieges on multiple US cities in strictly Blue states, resulting in multiple civilian casualties and deaths.

Supply: Trump and Export Controls cont.

-After receiving bribes both from foreign countries (400M$ plane from Qatar just to name 1, 2B$ to his son Kushner from Saudi Arabia to name another) and bribes from the largest companies (This one was so blatant it made an entire episode of South Park)

-After having to fire so many senior Military officials before he could even start this war with Iran

-And then after starting this war with Iran, without any actual cause (Our own top counter terrorism official reported as much in March before resigning- Joe Kent)

-After attempting to make a 1.7 B$ slush fund for J6 rioters, and permanently exempting his entire family from IRS audits

-After thousands of Tweets with less decorum than a 12 year old on a sugar high, some even celebrating the deaths of both US citizens and US officials, and the rest outright demonizing an entire half of the political spectrum in this country.

Supply: Trump and Export Controls cont.

-After hosting a UFC event on the taxpayer dime on the White House front lawn, complete with a brawl between objectively trashy members of the crowd on OUR nationally sacred ground, where also one of the fighters called, unprompted, the previous First Lady, Michelle Obama, a man on that national stage

-After all the sweeping Tarrifs

-After the SCOTUS unwinding those Tarrifs

-And finally, after even more Tarrifs after that……

The quiet part out loud

“Drill baby, drill”- DJT

Do you believe Donald J Trump would enact **export** controls on US oil?

If so, why would you believe that?

Even then, after everything you’ve seen in the last 10 years, how much are you willing to bet on it?

To be or Not to be, 2 Questions are Why We’re Here

Barring everything so far,

-Is it rational to take no action at all to address a possible scenario where we run out of fuel locally?

Considering everything so far,

-Is it still rational to take no action at all to address a possible scenario where we run out of fuel locally?

Are you equally confident to say “yes” for both of these questions? They’re the same question save for 1 word. But this is vitally important and the point of this entire presentation- Are you **equally** confident to say “yes” for **both** of these questions?

And I get it, why is no one else concerned?

-No other municipalities are taking steps to address this issue.

-No one at any level of government is acting like there’s a problem, much less a crisis.

You’ve seen the same data everyone else can see. Inventories **are** dropping and it objectively looks like we’re going to hit empty soon/eventually.

-Where’s the concern? Where are the adults? Why is no one acting like there’s a problem?

I don’t know. But after what you just saw, *do you* still feel like there isn’t a problem? That’s what’s important here. Because it’s up to us to do something about it.

Why is no one else concerned? Cont.

There is a tragic vacuum of leadership in this country. No one has enough spine to disturb the status quo. And how dare anyone threaten a stock market that’s gone above 50000 (Dow) with negative facts.

There is an utter void of leadership at the top. The people running our Federal Government are bereft of anything even remotely resembling the capability to lead. For starters, demonizing half the country is not leadership. And the stock market is not God. And there’s more on that in an addendum to these slides at the end.

Coming to terms with this right now is the first step to not being blindly led into disaster by greedy fools, monsters, or possibly even traitors.

We may be the first to address this. Ok, that’s super unfortunate. But that’s not our fault. If no one else will step up to lead, then it finally falls on us to do so, and hopefully we can set an example for others.

Ok, what can we do?

I’m glad you asked…

-Every town has a fuel reserve built into their local gas stations to potentially keep emergency services in operation, they just don’t know it yet.

-First, we can figure out our exact fuel needs. Then, we can come together with the local gas stations to establish an emergency reserve. If the reserve is spread across enough gas stations, a single tanker truck can go to each station and pull out each station’s portion of the reserve to deliver it to our own fuel farm.

-Let’s explain the stakes to the gas station owners. Open the dialogue. We can come to an agreement. They’re in this boat with the rest of us.

-Alternatively, we can determine a switch case where “If ____ happens, we will assume control of either a portion or all of the local private inventory”, and sort through the fallout afterwards.

What can we do? Cont.

-These are unprecedented times. That's going to call for outside-the-box thinking. We're going to have to get creative. And there's not enough time to be nice about it.

-The rule of law was not designed with potential societal collapse in mind. There is no regulation for this kind of scenario.

-It might be messy. Just come to terms with that now. The dust will settle eventually, and we can sort out potential legal transgressions or hurt feelings when we're not in a crisis.

-There is no "I can't ____ because the rules say so" if the entire global economy suddenly comes to a complete standstill. And decorum is for when things are functioning normally. **Decorum during a crisis- can be a stone cold killer.** We're typically taught the opposite of that statement. But we're wrong.

What can we do? Cont.

-Leadership is going to require being direct. And it’s going to require the community. Don’t get lost in decorum when dealing with the community because you only get to lose the people during a crisis once. <u>Do not confuse decorum with order.</u> Because those in power now, including the City Council, exercise their authority at our, the public’s, discrestion. And after the countless dispicable events that have transpired over the last 19 months, anyone operating in a governing capacity needs to be aware just how tenuous their position really is right now.

-The public has been tortured with price gouging and shot dead in the street to thunderous applause by the perpetrators acting on behalf of the Federal government with ZERO accountability, and yet citizents in some cities are being arrested for clapping during public comment at City Council meetings. That will only be tolerated for so long… And that’s not a threat, that’s a lesson learned over and over and over again throughout human history.

-If something feels like it goes against decorum, but is factually/objectively correct, that’s a self-imposed issue. It’s not the community’s issue. That might be a tough lesson to learn for some. Stick with it. We’ll get through this.

-Being direct is going to mean we’re going to have to tell the public to prepare themselves for some very difficult times in the near future. Most people are severely uninformed and have no idea what’s happening. So if our accustomed way of life comes to an abrupt pause, most people might not react well. A common reaction to a bad surprise- is panic.

What can we do? Cont.

-If we can at least get the possibility of tough times into the minds of everyone, then when or if those times arrive, they won’t be surprised.

-Informing the public should also consist of constructive and helpful information. If we were to produce and release something like a pamphlet, warning of potentially tough times ahead, the natural concern for us might be causing a panic ourselves.

-We can avoid that by being careful in our presentation. That will include making an attempt to inspire confidence.

What can we do? Inspiration

Inspiration comes in many forms.

-Promoting an idea of community- “You’re not alone, we’re all in this together”

-We’re tribal creatures. Lean into that. Foster a sense of collectivism. We have a university campus nearby, ask a psychology teacher for help with messaging.

-Fostering a sense of community will require bringing the community together. That means getting out there, talking to people, getting them involved. Ask for help.

-Tap local organizations like the Legion, VFW, Chamber of Commerce (I know one member in particular who’s a communal wizard), Rotary, Masons, etc. Get everyone onboard working together, NOW, and contributing towards

What can we do? Inspiration Cont.

-You know what else inspires people? Knowledge. Problems are easier to face when you have an idea on how to approach them.

-We may be facing mass food insecurity. So, let’s educate the community on some basic gardening skills.

-Oregon is filled with “preppers”, so let’s put out the call. Have them come in and volunteer to teach their survival skills to others and/or add material to an informational pamphlet.

-If our way of life as we know it came to a pause, how could we weather it? Let’s get the people who know the answer to that in the same room as the people making decisions.

What can we do? It’s time to get Electric.

-It’s time to diversify our emergency vehicle fleets with electric vehicles. And honestly, we’re currently showing up very late to this particular party.

This obviously won’t happen overnight. But we need to begin the process by ensuring that we have at least 1 electric vehicle across Fire/EMS/APD, and we need to do so ASAP.

Even if I’m 100% wrong about all of this, the fact remains that we have, objectively, come very close to going over a very uncomfortable edge. And it’s a particular edge that might not have a way back. That threat alone justifies action.

I’ve already spoken with multiple dealerships in town and so far. Albany CDJR and Albany Toyota are willing to work with the city to help fulfill its needs. And Albany CDJR stands ready to hold their electric vehicle inventory for City use in the event of a fast moving crisis. That said, Electric Vehicle inventories are extremely low across the board. And the current oil and gas situation, our current regulatory policies, and our embargo on Chinese EV’s, is contributing to a severely restricted supply of electric vehicles. So our time to move slowly around this has long since passed.

Last Slide

I’m just 1 person. And I just gave you 6+ slides worth of options to address this crisis. Surely, we can do even more/better with more minds involved in this.

It’s time to come together as a community, and in a way we’re neither used to nor conditioned to. But as I have already demonstrated by simply going out and having conversations within the community, all it takes is just that- having a conversation. From there we can start to build upon whatever our needs may be.

I am not a particularly intelligent person. If I can come up with 6 slides worth of possibility by myself, I refuse to believe that we can’t come together as a community to figure this thing out.

And if it turns out there’s somehow no crisis in the end, our efforts wont have been a complete loss. Again, that we’ve even come as far along as we have with the current Oil situation should be a wake up call for all of us at the very least.

Addendum 30 July 2026

The situation has escalated since I last worked on these slides .

-We caught a momentary breather with an MOU that bought us some time, however that's over and done.

-Bab al Mandeb is now effectively cut off. That means a whole 30% of the global oil supply is impacted.

-The pipelines in Saudi Arabia that were bypassing oil from Hormuz over to BAM have been blown up on both ends of the pipeline. So, even if the waterways were open, there's significantly reduced oil coming out of the largest oil producing country in the Middle East.

-Refining capacity, particularly in Russia, has been devastated. This has somewhat taken the demand off of the oil supply, however, it doesn't remotely cover the 30% of the entire supply that came from the GCC being effectively cut off.

As of 29 July 2026, EIA is reporting that our total oil inventory fell 11M barrels over the last week. 4M came from the SPR which now sits at 307.7 M barrels and the rest came from commercial inventory. As stated in an earlier slide, we have 1 ½ weeks before we hit 300M in the SPR, which may turn out to be the actual floor. Also, Cushing is now down around 18M, which is 2M below minimal operating inventory levels.

Escalation Cont.

-We narrowly dodged a hurricane over the last 8 weeks that would have sat right on top of our own entire gulf oil production capacity. Refineries along the gulf shut in production for a matter of hours in case the storm intensified. Thankfully, and luckily, and in spite of the record warm water temps in the gulf of Mexico right now, the storm dissipated. I cannot adequatly stress the level of good fortune and luck at play here.

-Speaking of Albany CDJR, after talking with them I was informed that they had to send their service personnel over to Auto Zone to buy out their oil. They did this because <u>their own bulk carrier cancelled their oil delivery order</u> for the first time in at least the last 20 years that the manager I spoke to has worked in the industry.

When this body last met in June, I said that the cracks would start to show in July. This is one of those cracks I was talking about.

I also said that, by September, no one in this country would be unaware that there's a crisis. Honestly, even I didn't believe Bab el Mandeb would really, actually, come into play here. It was pretty unthinkable. But is has. And as a result we are in the worst possible-case scenario right now, and September might be very well be on the conservative side of my estimations. So, barring any other extreme swings of good fortune, we're right on track to run out of feed stock for our refineries by September *at the latest.* When that happens, America will shut down.

Escalation Cont.

At this point, I would strongly advise anyone with any amount of influence within the Oregon State Government to urge the Governor to declare a state of emergency.

We already do that pre-emptivly for things like fire-season so that resources can be made readily available.

This is an emergency. We are in an emergency right now. And our Federal government is continuing to do nothing to address it, and in fact it is wholly inflaming the entire situation with its every action.

We already watched this administration fumble the distribution of paper face masks during a pandemic that we had months to prepare for. And then, we couldn't even manage a cohesive message on vaccination or lockdowns. The USA had the highest fatality rate per capita in the entire world from Covid as a result, and it wasn't even close. We had to bring in refrigeration trucks to handle the number of dead bodies because the morgues couldn't keep up. I personally sat imobile for 8 months waiting for a hospital bed to open up so I could get a gallstone surgically removed. Thankfully I didn't end up septic. But what I saw inside the hospital when I finally did get surgery, much later into the pandemic, was nothing short of horrific. Our medical system has *still* not fully recovered to this day. And that was **before** DOGE and the gutting of our civil work force.

Escalation Cont.

There will be no “whole of government response” when the coming shortages start in earnest. And if we fail to act because of an assumption that upper levels of government, who again couldn’t distribute face masks under what will objectively be significantly less pressure- if we do nothing because we believe that they will successfully manage a sudden emergency rationing of oil and fuel, our community is going to suffer right along with the rest of this country. The writing is still written in blood on the wall from Covid.

So, if you tell me that our own emergency services won’t run out of fuel, after Covid, after the publicly available oil inventory data, and after the last 19 months of this administration- I don’t believe you. At all.

We’re in the midst of the worst oil disruption in history, and by worst I mean it’s not even close this time to the previous record, yet the City of Albany can’t bring the resources together to produce a report on what our own fuel needs are. Frankly, we’ve reached the point of disgrace. So, why then, should any member of the public believe that Albany’s emergency services will be spared when the supply runs out for the entire country? And not simply run out, but run out all at once from coast to coast.

We couldn’t even hold the special PSC meeting that was **unanimously voted upon by this commission** in June to address this issue. And as of the creation of this slide, 30 July 2026, we don’t even have a confirmed quorum for the August 5th meeting. And the City Council cancelled its own work session on the 10th after having gone on a month long break.

Escalation Cont.

We are falling straight off a cliff and no one is at the wheel.

And we are emergently running out of time to do better.

As little as we are demonstrating the capacity to manifest on our City-level when the subject matter doesn’t happen to concern *Flock Cameras*, our higher levels of government are demonstrating an even greater lacking. There’s a current parasitic outbreak across 45 states right now affecting produce, and we can’t even manage a simple product recall anymore. Measles is making a comeback. Screw worm is back on our side of the southern border. Oregon was just denied federal funds to fight our current forest fires because we’re not officially pro-Trump per our voter rolls. And I haven’t even scratched the surface. Tariffs against Canada are back after SCOTUS ruled against the last set of tariffs which saw ZERO of that money sent back to the public that it was taken from. ICE is shooting even more citizens dead in the streets over a violation of the law that’s in the same realm of legal severity as speeding tickets. We’d be here all night going over another 100+ slides if I were to even try to truly dig down into the true magnitude of the current Federal failings.

Escalation Cont.

<u>No one</u> is coming to save us or even help us. And we had better start acting like it while we've still got a city to live in. No one alive has seen anything like this current crisis. It can't even be compared to the 1970's anymore. This is the single greatest crisis of the modern era. And no one is lifting a finger to address it.

When I say no one is at the wheel, I mean our entire societal framework is being torn down by a rogue Federal Government and we don't even have regular City Council meetings on the agenda because of either cancellations or simply not scheduling them. And it's somehow too much to ask that the PSC meet up more than bi-monthly.

We've been at a point where an eternity has seemingly passed by every single month for the last 19 months. And for the last 19 months we have flatly refused to rise to the occasion. And now we're only a few months out from an election that has the potential to devolve into a full-blown civil war. Minnesota just had 30 town's water systems hacked. And we can't even begin to talk about any of that because this Oil crisis absolutely must come first. But again, we just wont show up.

Is this really the best that Albany can do? Are we really going to try to skid by on a bare minimum to maintain a status quo that hasn't truly existed since January of 2025? Because if that's so, I wouldn't give us a penny for our chances with this oncoming oil disaster. And I wish everyone the best of luck.