



AGENDA

REGULAR MEETING OF THE DOWNTOWN DEVELOPMENT AUTHORITY BOARD

Tuesday, June 17, 2025

6:30 PM

Village Hall – 21 East Church Street, Lake Orion, MI 48362

(248) 693-8391 ext. 102

1. Call to Order

2. Roll Call and Determination of Quorum

3. Approval of Minutes

A. Approval of DDA Regular Meeting Minutes of May 20, 2025

4. Approval of Agenda

5. Call to the Public

The DDA welcomes comments related to the work and spirit of the DDA on non-agenda items. Each person wishing to address the DDA Board shall be afforded an opportunity to do so. When recognized, give your name and address and direct your comments to the Chair. Comments on the agenda items may be allowed upon the calling of the item.

COMMENTS ARE LIMITED TO THREE (3) MINUTES, OR AS ALLOWED BY THE BOARD CHAIR.

6. Consent Agenda

All items on the Consent Agenda are approved by one vote.

A. Financial Reports

7. Financial Matters

A. Bill Approval

B. Lumber Yard Reconstruction - Change Orders

C. Lumber Yard – Continuing Demolition Cost

8. New and Old Business

- A.** Façade Grant Application – Lake Orion Bike & Adventure Co.
- B.** Additional Credit Card - Resolution
- C.** Paving Repair(s) - Tarr lot
- D.** Strategic Plan 2025-2030- - Final Draft
- E.** Schedule Annual Review(s) - Executive Staff
- F.** Adoption of Downtown Development Authority 2025-26 Budget
- G.** Village Budgetary Resolution – PA57 Administrative Fee
- H.** Village Budgetary Contract – Public Safety

9. Reports, Resolutions and Recommendations

- A.** Assistant Director’s Report
- B.** Executive Directors Report
- C.** Lumber Yard Progress Report

10. Board Comments and Training Feedback

11. Next Regular Meeting - July 15, 2025

12. Adjournment

In the spirit of compliance with the Americans with Disabilities Act, individuals with a disability should feel free to contact the Village, at least three (3) business days in advance of the meeting, if requesting accommodations. The Village of Lake Orion will provide foreign language or hearing impaired interpretation services for those individuals who contact the village to request such services at least seven (7) days prior to the meeting.

En el espíritu de la observancia de la Ley de Estadounidenses con Discapacidades, las personas con discapacidad debe sentirse libre para ponerse en contacto con el pueblo, por lo menos tres (3) días hábiles de antelación a la fecha de la reunión, si se solicitan alojamiento. El municipio de Lake Orion proporcionará idioma extranjero o personas con problemas de audición servicios de interpretación para las personas que se ponen en contacto con el pueblo de solicitar dichos servicios con no menos de siete (7) días antes de la reunión.



DDA SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC: Approval of DDA Regular Meeting Minutes of May 20, 2025

RECOMMENDED MOTION: To approve the Downtown Development Authority Board Regular Meeting Minutes of May 20, 2025.



MINUTES

REGULAR MEETING OF THE DOWNTOWN DEVELOPMENT AUTHORITY BOARD

Tuesday, May 20, 2025

6:30 PM

Village Hall – 21 East Church Street, Lake Orion, MI 48362

(248) 693-8391 ext. 102

1. Call to Order

The May 20, 2025 Downtown Development Authority Regular Meeting was called to order at 6:32 PM by Vice Chairperson Caruso.

2. Roll Call and Determination of Quorum

PRESENT

Vice Chairperson Sam Caruso
Secretary Hank Lorant
Board Member Sally Medina
Board Member Alaina Campbell
Board Member Chris Barnett – arrived at 6:35 PM
President Teresa Rutt

ABSENT

Chairperson Debbie Burgess
Treasurer Matt Shell
Board Member Lloyd Coe

STAFF PRESENT

Executive Director Matthew Gibb
Assistant Director Janet Bloom
Village Manager Darwin McClary
DPW Director Wes Sanchez
Deputy Clerk/Treasurer Lynsey Blough

3. Approval of Minutes

A. Approval of DDA Regular Meeting Minutes of April 15, 2025

MOTION made by Board Member Campbell, Seconded by Secretary Lorant, to approve the Downtown Development Authority Board Regular Meeting Minutes of April 15, 2025, as presented.

- VOTING YEA:** Caruso, Lorant, Medina, Campbell, Rutt
- VOTING NAY:** None
- ABSENT:** Burgess, Shell, Coe, Barnett
- MOTION:** Carried

B. Approval of DDA Special Meeting Minutes of May 7, 2025

MOTION made by Board Member Campbell, Seconded by Secretary Lorant, to approve the Downtown Development Authority Board Regular Meeting Minutes of April 15, 2025, as presented.

- VOTING YEA:** Caruso, Lorant, Medina, Campbell, Rutt
- VOTING NAY:** None
- ABSENT:** Burgess, Shell, Coe, Barnett
- MOTION:** Carried

4. Approval of Agenda

MOTION made by Vice Chairperson Caruso, Seconded by Secretary Lorant, to approve the Downtown Development Authority Board Agenda of May 20, 2025, with the addition of 8H. Topographical Survey.

- VOTING YEA:** Caruso, Lorant, Medina, Campbell, Rutt
- VOTING NAY:** None
- ABSENT:** Burgess, Shell, Coe, Barnett
- MOTION:** Carried

5. Call to the Public

None.

6. Consent Agenda

All items on the Consent Agenda are approved by one vote.

MOTION made by President Rutt, Seconded by Secretary Lorant, to approve the May 20, 2025 Consent Agenda by one vote, as presented.

- VOTING YEA:** Caruso, Lorant, Medina, Campbell, Rutt
- VOTING NAY:** None
- ABSENT:** Burgess, Shell, Coe, Barnett
- MOTION:** Carried

A. Financial Reports

MOTION made by President Rutt, Seconded by Secretary Lorant, to receive and file the financial reports for April 2025.

VOTING YEA: Caruso, Lorant, Medina, Campbell, Rutt
VOTING NAY: None
ABSENT: Burgess, Shell, Coe, Barnett
MOTION: Carried

7. Financial Matters

A. Bill Approval

MOTION made by President Rutt, Seconded by Secretary Lorant, to approve disbursements in the amount of \$182,345.75 for April 2025.

VOTING YEA: Caruso, Lorant, Medina, Campbell, Rutt
VOTING NAY: None
ABSENT: Burgess, Shell, Coe, Barnett
MOTION: Carried

8. New and Old Business

A. Presentation - DPW General Services

DPW Director Sanchez gave a brief presentation on the services the Department of Public Works has historically provided to the DDA District and presented a 2025 Cost of Services Breakdown reflecting current year wage rates and equipment costs.

MOTION made by President Rutt, Seconded by Secretary Lorant, to receive and file the list of Services at No Cost to the DDA presented on May 20, 2025.

VOTING YEA: Caruso, Lorant, Medina, Campbell, Barnett, Rutt
VOTING NAY: None
ABSENT: Burgess, Shell, Coe
MOTION: Carried

Board Member Barnett requested clarification on the services DPW provides to the DDA and indicated he is satisfied as long as those services are completed. DPW Director Sanchez added that the DDA is not obligated to use DPW and may contract services externally if it becomes more cost-effective.

B. Updated Budget Recommendation – Village Contracts

President Rutt sought clarity on the final DPW contract version and snow plowing responsibilities. Executive Director Gibb confirmed the current draft reflects the Ad Hoc Committee decisions and said the DDA will reassess snow removal needs and property responsibilities.

MOTION made by Board Member Campbell, Seconded by Secretary Lorant, to approve the updated and recommended budget for fiscal year 2025-2026, subject to the execution of all necessary contractual agreements between the DDA and the Village, referring the

recommendation to the Village Manager for presentment to Village Council for their consideration in accord with the DDA Budget Policy.

- VOTING YEA:** Caruso, Lorant, Medina, Campbell, Barnett, Rutt
- VOTING NAY:** None
- ABSENT:** Burgess, Shell, Coe
- MOTION:** Carried

C. Lumber Yard - Change Order for Fence Repair

MOTION made by Board Member Barnett, Seconded by Board Member Campbell, to approve a contract for the removal and replacement of damaged fencing by Change Order with Mickey’s Construction at a cost not to exceed \$12,000 with funds from GL 248-726-980-001 PUBLIC SPACE GRANT - GENERAL

- VOTING YEA:** Caruso, Lorant, Medina, Campbell, Barnett, Rutt
- VOTING NAY:** None
- ABSENT:** Burgess, Shell, Coe
- MOTION:** Carried

D. Lumber Yard - Contract for Additional Tree and Brush Removal

MOTION made by Board Member Campbell, Seconded by President Rutt, to approve a contract for the removal and grinding of trees and brush at the Lumber Yard with Timber Beast Tree Service at a cost not to exceed \$4,250.00 with funds from GL 301-901-950-000 DEMOLITION AND LAND IMPROVEMENT

- VOTING YEA:** Caruso, Lorant, Medina, Campbell, Barnett, Rutt
- VOTING NAY:** None
- ABSENT:** Burgess, Shell, Coe
- MOTION:** Carried

E. Redevelopment Liquor License - 34 S Broadway

MOTION made by Board Member Barnett, Seconded by Secretary Lorant, to forward recommendation to the Village Council to approve a redevelopment liquor license for Sage Brush Cigar Bar of Lake Orion, LLC.

- VOTING YEA:** Caruso, Lorant, Medina, Campbell, Barnett, Rutt
- VOTING NAY:** None
- ABSENT:** Burgess, Shell, Coe
- MOTION:** Carried

F. Michigan Downtown Association 2025 Spring Conference

Board Member Barnett supported attending events for networking and staying informed, and suggested the board revisit the policy to make staff participation easier.

MOTION made by Board Member Barnett, Seconded by President Rutt, to approve for Janet Bloom attending the Michigan Downtown Association Conference in Traverse City for the registration cost, mileage, and approved reimbursable expenses.

VOTING YEA: Caruso, Lorant, Medina, Campbell, Barnett, Rutt

VOTING NAY: None

ABSENT: Burgess, Shell, Coe

MOTION: Carried

G. Issue Media Group (Metromode/SecondWave) Media Package

President Rutt, Board Member Campbell, Vice Chairperson Caruso, Executive Director Gibb, and Assistant Director Bloom discussed and clarified the annual cost of the program.

MOTION made by Vice Chairperson Caruso, Seconded by President Rutt, to grab the final package with the proposed contract be brought back at the next meeting.

VOTING YEA: Caruso, Lorant, Medina, Campbell, Barnett, Rutt

VOTING NAY: None

ABSENT: Burgess, Shell, Coe

MOTION: Carried

H. Topographical Survey

MOTION made by President Rutt, Seconded by Secretary Lorant, to accept and approve the proposal from PEA Group dated May 15, 2025 for Topographical Survey work for the Lumber Yard at Paint Creek at a cost not to exceed \$14,500, with proceed from GL 301-901-950-000 Demolition and Land Improvement.

VOTING YEA: Caruso, Lorant, Medina, Campbell, Barnett, Rutt

VOTING NAY: None

ABSENT: Burgess, Shell, Coe

MOTION: Carried

9. Reports, Resolutions and Recommendations

A. Lumber Yard Progress Report

Vice Chairperson Caruso exited the meeting at 7:26 PM.

Executive Director Gibb provided an update on the Lumber Yard and noted that the information will be posted on the DDA website.

Vice Chairperson Caruso returned at 7:28 PM.

MOTION made by Secretary Lorant, Seconded by Board Member Barnett, to receive and file the Progress Report dated May 20, 2025.

VOTING YEA: Caruso, Lorant, Medina, Campbell, Barnett, Rutt

VOTING NAY: None

ABSENT: Burgess, Shell, Coe

MOTION: Carried

B. Assistant Director’s Report

Assistant Director Bloom provided updates on Downtown events, social media stats, and a grant submission. She also thanked Sunrise Rotary for offering to help with flags.

MOTION made by President Rutt, Seconded by Board Member Campbell, to receive and file the Assistant Director’s Report

VOTING YEA: Caruso, Lorant, Medina, Campbell, Barnett, Rutt

VOTING NAY: None

ABSENT: Burgess, Shell, Coe

MOTION: Carried

10. Call to the Public

Luca Mezzalira inquired about the tree removal at the Lumber Yard and expressed interest in installing a food forest there. He explained that a food forest is a self-sustaining ecosystem composed of edible and medicinal plants, offering both aesthetic and community benefits. He asked about the Council's interest and potential opportunities for such a project in the area.

11. Board Comments and Training Feedback

No comment from Board Member Barnett.

Board Member Medina shared that it’s been busy for her and also thanked Assistant Director Bloom for all that she’s doing for the DDA too.

Secretary Lorant noted the Art of Flower event was a success despite the weather, with strong attendance and a well-executed new safety setup. He acknowledged the police presence may have been heavy but understandable for their first time. He also expressed excitement about the size and potential of the Lumber Yard property.

Board Member Campbell praised the success of Clean Up Day, giving special thanks to Ron Price and his family from the Horseshoe Club for their hard work. She shared positive feedback from new residents who praised the vibrancy and charm of downtown, highlighting the collective efforts of the DDA, Village staff, DPW, and Police. She also offered well wishes to Chairperson Burgess, and expressing continued support.

President Rutt praised the community’s growth, noting strong real estate interest and excitement about the Lumber Yard project’s potential. She supported the idea of a food forest, inspired by her children’s experiences at Dow Gardens. She also highlighted the need to address invasive species like Japanese Knotweed, suggesting fall grants for remediation. Finally, she commended the Art of Flower event, recognizing Chief Amundson and the Arts Center for their efforts, and humorously noted the tradition of rain during the festival.

Vice Chairperson Caruso reflected on the significant progress downtown Lake Orion has made over the past 10-15 years, noting that the DDA’s vision is coming to life. He praised the hard work of the Board, the Village, and families in revitalizing the area, which has become a popular destination. He expressed excitement about the ongoing developments and the future growth of Lake Orion. He also shared well wishes for Chairperson Burgess’ continued recovery.

12. Next Regular Meeting - June 17, 2025

13. Adjournment

MOTION made by Secretary Lorant, Seconded by Board Member Campbell, to adjourn the May 20, 2025 Downtown Development Authority Board Regular Meeting.

VOTING YEA: Caruso, Lorant, Medina, Campbell, Barnett, Rutt

VOTING NAY: None

ABSENT: Burgess, Shell, Coe

MOTION: Carried

The May 20, 2025 Downtown Development Authority Board Regular meeting adjourned at 8:06PM.

Debbie Burgess
Chairperson

Lynsey Blough
Deputy Clerk/Treasurer

Sonja Stout
Village Clerk/Treasurer

Date Approved: as presented on June 17, 2025.



DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Financial Reports

See attached Reports:

248 Fund Balance Sheet (General DDA Fund)

301 Fund Balance Sheet (DDA Bond 2023 Fund)

404 Fund Balance Sheet (Property Acquisition Fund)

Revenue and Expenditure Report

The following items will be the same on the balance sheet and the revenue and expenditure report for each fund (248, 301, or 404)

- Beginning Fund Balance
- Net of Revenues & Expenditures
- Appropriation of Fund Balance
- Ending Fund Balance

RECOMMENDED MOTION: Receive and File the financial reports for May 2025.

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 05/31/2025

% Fiscal Year Completed: 91.78

*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

Section 6, Item A.

GL Number	Description	24-25 Amended Budget	YTD Balance 05/31/2025	Activity For 05/31/2025	Available Balance 05/31/2025	% Bdgt Used
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND						
Account Category: Revenues						
Department: 000 REVENUE						
248-000-402-000	Current Real Property Taxes	987,129.00	962,796.76	0.00	24,332.24	97.54
248-000-402-100	Property Tax - Twp DDA Capture	0.00	0.00	0.00	0.00	0.00
248-000-405-000	Property Tax - Personal	0.00	0.00	0.00	0.00	0.00
248-000-412-000	Property Tax - DPPT P/Y & C/Y	0.00	3,154.02	0.00	(3,154.02)	100.00
248-000-441-000	Local Community Stabilization Share	15,000.00	14,033.68	0.00	966.32	93.56
248-000-445-000	Penalties & Interest on Taxes	2,000.00	0.00	0.00	2,000.00	0.00
248-000-539-000	State Grants	43,500.00	500.00	500.00	43,000.00	1.15
248-000-540-000	COUNTY/FEDERAL PROGRAM GRANTS PUBLIC	595,823.00	446,867.25	0.00	148,955.75	75.00
248-000-582-000	Intergovernment - Police	0.00	0.00	0.00	0.00	0.00
248-000-664-000	Interest Earned	2,500.00	12,911.06	9.26	(10,411.06)	516.44
248-000-671-999	Appropriation from Fund Balanc	0.00	0.00	0.00	0.00	0.00
248-000-673-000	Gain/Loss on Sale of Assets	0.00	0.00	0.00	0.00	0.00
248-000-676-404	Transfer From Prop Acq Fund	169,436.00	0.00	0.00	169,436.00	0.00
248-000-676-592	Reimbursement -Admin Fee - w&S	0.00	0.00	0.00	0.00	0.00
248-000-681-000	Reimburse - Insurance Claims	0.00	5,406.89	0.00	(5,406.89)	100.00
248-000-683-000	Reimbursements-Other	0.00	0.00	0.00	0.00	0.00
248-000-685-000	Sponsorships	35,000.00	2,515.00	0.00	32,485.00	7.19
248-000-685-100	Transportaion Sponsorship	17,500.00	0.00	0.00	17,500.00	0.00
248-000-686-000	Downtown Events	18,500.00	5,466.19	0.00	13,033.81	29.55
248-000-686-002	Flower Fair Revenue	0.00	0.00	0.00	0.00	0.00
248-000-686-003	New Year Resolution Run Revenue	0.00	0.00	0.00	0.00	0.00
248-000-686-004	ST EVENT REVENUE	1,500.00	0.00	0.00	1,500.00	0.00
248-000-686-005	ST SPONSOR REVENUE	1,500.00	0.00	0.00	1,500.00	0.00
248-000-686-006	EV CHARGING	500.00	1,529.49	0.00	(1,029.49)	305.90
248-000-687-000	Merchandise Sales	1,000.00	0.00	0.00	1,000.00	0.00
248-000-688-000	Gift Certificate Sales	500.00	3,375.00	0.00	(2,875.00)	675.00
248-000-692-000	Rent	0.00	0.00	0.00	0.00	0.00
248-000-694-000	Miscellaneous	2,500.00	9,548.45	792.35	(7,048.45)	381.94
248-000-696-000	PROCEEDS FROM THE SALE OF BONDS/NOTE	0.00	0.00	0.00	0.00	0.00
Total Dept 000 - REVENUE		1,893,888.00	1,468,103.79	1,301.61	425,784.21	77.52
Revenues		1,893,888.00	1,468,103.79	1,301.61	425,784.21	77.52
Account Category: Expenditures						
Department: 260 GENERAL ACTIVITIES						
248-260-701-000	Executive Director Wages	80,000.00	70,770.08	6,153.92	9,229.92	88.46
248-260-704-000	Wages - Administrative Coordinator	37,188.00	15,786.49	1,781.25	21,401.51	42.45
248-260-706-000	Asst. Executive Director wages	71,000.00	62,808.40	5,461.60	8,191.60	88.46
248-260-706-001	Marketing Coordinator	0.00	0.00	0.00	0.00	0.00
248-260-707-000	Wages - Grounds Coordinator	5,400.00	3,234.44	957.75	2,165.56	59.90
248-260-711-013	OVERTIME	0.00	0.00	0.00	0.00	0.00
248-260-715-000	Social Security	14,810.00	11,673.86	1,098.14	3,136.14	78.82
248-260-716-000	Health Insurance- Medical	12,000.00	21,313.42	5,402.53	(9,313.42)	177.61
248-260-717-000	Life & Disability Insurance	1,320.00	2,109.22	149.90	(789.22)	159.79
248-260-718-000	Dental Insurance	770.00	513.54	85.22	256.46	66.69
248-260-719-000	Pension	5,632.00	7,065.92	546.16	(1,433.92)	125.46
248-260-720-000	Unemployment	0.00	0.00	0.00	0.00	0.00

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 05/31/2025

% Fiscal Year Completed: 91.78

*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

Section 6, Item A.

GL Number	Description	24-25 Amended Budget	YTD Balance 05/31/2025	Activity For 05/31/2025	Available Balance 05/31/2025	% Bdg't Used
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND						
Account Category: Expenditures						
Department: 260 GENERAL ACTIVITIES						
248-260-721-000	Vision Care	653.00	667.34	15.38	(14.34)	102.20
248-260-722-000	Worker's Comp. Insurance	0.00	0.00	0.00	0.00	0.00
248-260-801-000	CONTRACTUAL SERVICES- DOWNTOWN	10,000.00	9,687.50	295.00	312.50	96.88
248-260-801-002	CONTRACTUAL SERVICES - PUBLIC SAFETY	60,000.00	60,000.00	0.00	0.00	100.00
248-260-801-003	CONTRACT SERVICES - DPW FEE	30,000.00	30,000.00	0.00	0.00	100.00
248-260-801-004	CONTRACTUAL SERVICES - PA57	70,000.00	70,000.00	0.00	0.00	100.00
248-260-801-005	Contractual Services- Township	2,700.00	0.00	0.00	2,700.00	0.00
248-260-801-012	Contractual Services-Parking Code En	17,440.00	0.00	0.00	17,440.00	0.00
248-260-801-022	SPECIAL SERVICES- EVENTS	20,000.00	461.90	0.00	19,538.10	2.31
248-260-801-023	Contract Services-DPW event support	10,000.00	300.00	0.00	9,700.00	3.00
248-260-801-033	Contract Services-DPW snow removal	17,000.00	17,000.00	17,000.00	0.00	100.00
248-260-805-000	Audit Fees	4,490.00	3,979.00	0.00	511.00	88.62
248-260-810-000	Legal Services	8,000.00	5,733.25	0.00	2,266.75	71.67
248-260-823-000	Website/Software	6,000.00	2,686.63	198.18	3,313.37	44.78
248-260-823-001	Municipal Software	3,800.00	0.00	0.00	3,800.00	0.00
248-260-829-000	Planner Services	3,500.00	0.00	0.00	3,500.00	0.00
248-260-851-000	Telephone	3,500.00	3,398.88	665.30	101.12	97.11
248-260-900-000	Printing and Publication	500.00	0.00	0.00	500.00	0.00
248-260-920-000	Utilities	7,020.00	6,281.66	792.11	738.34	89.48
248-260-921-000	Municipal Street Lighting	13,740.00	13,455.88	1,981.65	263.19	98.08
248-260-930-000	Repair and Maintenance	0.00	0.00	0.00	0.00	0.00
248-260-930-002	Building Maintenance	1,100.00	306.87	0.00	638.13	41.99
248-260-940-000	Equipment Rental	750.00	102.03	0.00	647.97	13.60
248-260-941-000	Office Rent	16,800.00	16,800.00	0.00	0.00	100.00
248-260-942-000	Office Expenses	5,200.00	3,860.61	251.07	1,336.99	74.29
248-260-942-019	Covid Office Expenses	0.00	0.00	0.00	0.00	0.00
248-260-946-000	Credit Card Fees	100.00	0.00	0.00	100.00	0.00
248-260-955-001	Credit Card Fees	0.00	0.00	0.00	0.00	0.00
248-260-956-000	Dues & Miscellaneous	1,545.00	1,487.88	0.00	57.12	96.30
248-260-957-000	Education & Training	5,000.00	4,905.41	3,434.96	94.59	98.11
248-260-958-000	General Activities Misc	350.00	344.31	0.00	5.69	98.37
248-260-961-000	Tax Tribunal Refunds	0.00	0.00	0.00	0.00	0.00
248-260-962-000	Mileage	1,000.00	668.77	123.91	331.23	66.88
248-260-965-101	Transfer Out - General Fund	0.00	0.00	0.00	0.00	0.00
248-260-965-401	Transfer to Capital Imp Fund	67,616.00	0.00	0.00	67,616.00	0.00
248-260-965-403	TRANSFER TO-DDA PUBLIC INFRASTRUCTUR	0.00	0.00	0.00	0.00	0.00
248-260-965-404	Transfer Out - DDA Property Acq Fund	0.00	0.00	0.00	0.00	0.00
248-260-974-000	Capital Outlay - Equipment	2,000.00	0.00	0.00	2,000.00	0.00
Total Dept 260 - GENERAL ACTIVITIES		617,924.00	447,403.29	46,394.03	170,342.38	72.40
Department: 725 ORGANIZATION						
248-725-822-000	Newsletter	1,800.00	130.00	0.00	1,670.00	7.22
248-725-824-000	Volunteer Recognition & Dvp.	1,000.00	675.21	0.00	324.79	67.52
248-725-825-000	Gift Certificate Redemption	5,000.00	4,466.00	50.00	534.00	89.32
248-725-826-000	Historic Celebration/Education	1,000.00	290.40	0.00	709.60	29.04
248-725-827-000	Awareness Program	1,500.00	694.16	476.19	805.84	46.28
248-725-864-000	Grant & Scholarship Distribution	0.00	0.00	0.00	0.00	0.00

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 05/31/2025

% Fiscal Year Completed: 91.78

*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

Section 6, Item A.

GL Number	Description	24-25 Amended Budget	YTD Balance 05/31/2025	Activity For 05/31/2025	Available Balance 05/31/2025	% Bdgt Used
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND						
Account Category: Expenditures						
Department: 725 ORGANIZATION						
248-725-881-000	Merchandise to Sell	1,000.00	0.00	0.00	1,000.00	0.00
Total Dept 725 - ORGANIZATION		11,300.00	6,255.77	526.19	5,044.23	55.36
Department: 726 DESIGN						
248-726-745-000	Beautification Supplies	2,600.00	1,394.09	0.00	834.12	67.92
248-726-746-000	Hanging Baskets	4,000.00	0.00	0.00	1,293.00	67.68
248-726-801-000	Contractual Services	5,500.00	3,080.24	0.00	2,419.76	56.00
248-726-843-000	Facade Program	23,680.00	14,273.96	0.00	9,406.04	60.28
248-726-845-000	Public Art Program	2,500.00	390.69	0.00	2,109.31	15.63
248-726-883-000	Banners and Holiday Lighting	10,000.00	6,844.08	0.00	3,155.92	68.44
248-726-975-001	Capital Outlay - Beautification	5,000.00	797.77	453.30	4,202.23	15.96
248-726-975-002	Capital Outlay - Streets	500.00	0.00	0.00	500.00	0.00
248-726-980-001	PUBLIC SPACE GRANT-GENERAL	353,619.00	138,988.67	17,727.43	214,630.33	39.30
248-726-980-002	PUBLIC SPACE GRANT-DEVELOPMENT & PRO	242,204.00	116,985.00	100,000.00	125,219.00	48.30
Total Dept 726 - DESIGN		649,603.00	282,754.50	118,180.73	363,769.71	43.53
Department: 728 ECONOMIC DEVELOPMENT						
248-728-801-000	Contractual Services	34,500.00	15,185.63	0.00	19,314.37	44.02
248-728-860-000	Trolley Expense	22,000.00	7,010.04	0.00	14,989.96	31.86
248-728-861-000	DATA AND METRICS	468.00	0.00	0.00	468.00	0.00
248-728-862-000	Training Materials	500.00	57.37	0.00	442.63	11.47
248-728-864-000	Grant & Scholarship Distribution	10,800.00	0.00	0.00	10,800.00	0.00
248-728-886-000	Marketing Materials	2,500.00	10.79	0.00	2,489.21	0.43
248-728-886-001	Blight Reduction	0.00	0.00	0.00	0.00	0.00
248-728-886-002	Social District	750.00	60.00	0.00	690.00	8.00
248-728-888-000	Brand Marketing	50,000.00	19,404.72	2,543.75	30,595.28	38.81
248-728-888-001	Contractual Services Brand Marketing	10,000.00	272.89	0.00	9,727.11	2.73
Total Dept 728 - ECONOMIC DEVELOPMENT		131,518.00	42,001.44	2,543.75	89,516.56	31.94
Department: 729 PROMOTION						
248-729-880-000	Event Promotion	2,000.00	404.71	0.00	1,595.29	20.24
248-729-880-001	Event Promo - Gazebo Series	11,000.00	10,600.00	0.00	400.00	96.36
248-729-880-004	Event Promo - Halloween Parade	2,500.00	1,240.10	0.00	1,259.90	49.60
248-729-880-005	Event Promo - Hmtwn/Holiday Vill	7,500.00	2,832.22	0.00	4,667.78	37.76
248-729-880-006	Event Promo - New Years Res. Run	0.00	0.00	0.00	0.00	0.00
248-729-880-007	Event Promo - Flower Fair	0.00	0.00	0.00	0.00	0.00
248-729-880-008	EVENT PROMO-ICE FEST	250.00	0.00	0.00	250.00	0.00
248-729-880-009	Event Promo-Lake Orion Love Shop to	0.00	0.00	0.00	0.00	0.00
248-729-880-010	PARTNERED EVENTS	1,500.00	0.00	0.00	1,500.00	0.00
248-729-880-011	Restaurant week	2,500.00	0.00	0.00	2,500.00	0.00
248-729-880-012	Sing & Stroll Tree Lighting	12,100.00	3,890.49	0.00	8,209.51	32.15
248-729-880-013	STRONGER TOGETHER-WINTER	2,500.00	384.76	0.00	2,115.24	15.39
248-729-880-014	STRONGER TOGETHER- SUMMER/FALL	1,500.00	128.14	0.00	1,371.86	8.54
248-729-880-015	Winter Activities	12,000.00	5,986.48	0.00	6,013.52	49.89
248-729-880-016	MISC EVENTS-OTHER	2,500.00	0.00	0.00	2,500.00	0.00
248-729-880-017	Movie Night	3,000.00	1,707.69	0.00	1,292.31	56.92
248-729-880-100	Stronger Together- smr fall	5,000.00	0.00	0.00	5,000.00	0.00
248-729-885-000	Port-A-Johns	2,600.00	1,007.50	0.00	1,592.50	

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 05/31/2025

% Fiscal Year Completed: 91.78

Section 6, Item A.

*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

GL Number	Description	24-25 Amended Budget	YTD Balance 05/31/2025	Activity For 05/31/2025	Available Balance 05/31/2025	% Bdgt Used
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND						
Account Category: Expenditures						
Department: 729 PROMOTION						
248-729-895-000	Event Promo-Comm. Sponsorships	0.00	0.00	0.00	0.00	0.00
248-729-975-020	Capital Outlay Parks & rec	0.00	0.00	0.00	0.00	0.00
Total Dept 729 - PROMOTION		68,450.00	28,182.09	0.00	40,267.91	41.17
Department: 730						
248-730-253-885	Knox Box Grant Program	0.00	0.00	0.00	0.00	0.00
248-730-885-100	Knox Box Grant Program	2,000.00	0.00	0.00	2,000.00	0.00
248-730-931-000	Repair & Maintenance-Equipment	0.00	0.00	0.00	0.00	0.00
248-730-965-101	Transfer Out - General Fund	0.00	0.00	0.00	0.00	0.00
248-730-965-301	Interfund TRF 2023 DDA Bond Project	419,709.00	419,709.00	419,709.00	0.00	100.00
248-730-965-404	Transfer Out - DDA Property Acq Fund	0.00	0.00	0.00	0.00	0.00
248-730-965-592	Transfers To Water/Sewer Fund	0.00	0.00	0.00	0.00	0.00
248-730-975-000	Capital Outlay	53,075.00	12,786.68	0.00	40,288.32	24.09
248-730-975-003	DDA Capital Outlay	5,500.00	4,668.94	0.00	831.06	84.89
248-730-975-005	DDA Capital Outlay- wayfinding/Light	0.00	0.00	0.00	0.00	0.00
248-730-975-006	DDA Capital Outlay - Parking	0.00	0.00	0.00	0.00	0.00
248-730-975-009	Capital Outlay - Dumpsters	22,800.00	0.00	0.00	22,800.00	0.00
248-730-975-011	Capital Outlay - Trail Extensi	4,300.00	0.00	0.00	4,300.00	0.00
248-730-975-015	Capitlal Outlay- Outdoor Sound	0.00	0.00	0.00	0.00	0.00
248-730-975-020	Capital Outlay Parks & rec	0.00	0.00	0.00	0.00	0.00
248-730-992-000	Bond Principal	0.00	0.00	0.00	0.00	0.00
248-730-995-000	Bond Interest	0.00	0.00	0.00	0.00	0.00
Total Dept 730		507,384.00	437,164.62	419,709.00	70,219.38	86.16
Expenditures		1,986,179.00	1,243,761.71	587,353.70	739,160.17	62.62
Fund 248 - DOWNTOWN DEVELOPMENT AUTHORITY FUND:						
TOTAL REVENUES		1,893,888.00	1,468,103.79	1,301.61	425,784.21	77.52
TOTAL EXPENDITURES		1,986,179.00	1,243,761.71	587,353.70	739,160.17	62.62
NET OF REVENUES & EXPENDITURES:		(92,291.00)	224,342.08	(586,052.09)	(313,375.96)	
BEG. FUND BALANCE		356,811.12	356,811.12			
END FUND BALANCE		264,520.12	581,153.20			

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 05/31/2025
 % Fiscal Year Completed: 91.78

Section 6, Item A.

*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

GL Number	Description	24-25 Amended Budget	YTD Balance 05/31/2025	Activity For 05/31/2025	Available Balance 05/31/2025	% Bdg't Used
Fund: 301 DOWNTOWN DEV BOND PROJECT 2023						
Account Category: Revenues						
Department: 000 REVENUE						
301-000-300-001	2023 Downtown Dev Tax Exempt Bond Pr	0.00	0.00	0.00	0.00	0.00
301-000-300-002	2023 Downtown Dev Tax Exempt Bond Pr	0.00	0.00	0.00	0.00	0.00
301-000-664-000	Interest Earnings	900.00	1,569.80	130.90	(669.80)	174.42
301-000-671-999	Appropriation from Fund Balanc	0.00	0.00	0.00	0.00	0.00
301-000-699-301	TRF in from DDA	419,709.00	419,709.00	419,709.00	0.00	100.00
Total Dept 000 - REVENUE		420,609.00	421,278.80	419,839.90	(669.80)	100.16
Revenues		420,609.00	421,278.80	419,839.90	(669.80)	100.16
Account Category: Expenditures						
Department: 901 CAPITAL OUTLAY						
301-901-805-000	Audit fees	0.00	0.00	0.00	0.00	0.00
301-901-930-000	Repair and Maintenance	0.00	0.00	0.00	0.00	0.00
301-901-950-000	Demolition & Land Improvement	500,000.00	199,726.63	35,774.86	300,273.37	39.95
301-901-956-000	Dues & Miscellaneous	0.00	0.00	0.00	0.00	0.00
301-901-971-000	Capital outlay - Buildings	0.00	0.00	0.00	0.00	0.00
Total Dept 901 - CAPITAL OUTLAY		500,000.00	199,726.63	35,774.86	300,273.37	39.95
Department: 905 Downtown Dev Bond 2023						
301-905-301-000	Bond Issuance Expense	0.00	0.00	0.00	0.00	0.00
301-905-731-000	2023 Bond Taxable Issuance Expenses	0.00	0.00	0.00	0.00	0.00
301-905-731-001	2023 Tax exempt Bond Issuance Expens	0.00	0.00	0.00	0.00	0.00
301-905-745-001	Property taxes-Orion Twp	0.00	0.00	0.00	0.00	0.00
301-905-920-000	utilities	0.00	0.00	0.00	0.00	0.00
301-905-992-003	2023 DDA BONDS TAXABLE PRINCIPAL SER	60,000.00	60,000.00	0.00	0.00	100.00
301-905-992-004	2023 DDA BONDS TAX EXEMPT PRINCIPAL	150,000.00	150,000.00	0.00	0.00	100.00
301-905-993-001	2023 DDA BOND TAXABLE INTEREST SERIE	76,910.00	76,909.00	0.00	1.00	100.00
301-905-993-002	2023 DDA TAX EXEMPT BOND INTEREST A	132,800.00	132,800.00	0.00	0.00	100.00
Total Dept 905 - Downtown Dev Bond 2023		419,710.00	419,709.00	0.00	1.00	100.00
Expenditures		919,710.00	619,435.63	35,774.86	300,274.37	67.35
Fund 301 - DOWNTOWN DEV BOND PROJECT 2023:						
TOTAL REVENUES		420,609.00	421,278.80	419,839.90	(669.80)	100.16
TOTAL EXPENDITURES		919,710.00	619,435.63	35,774.86	300,274.37	67.35
NET OF REVENUES & EXPENDITURES:		(499,101.00)	(198,156.83)	384,065.04	(300,944.17)	
BEG. FUND BALANCE		2,794,812.47	2,794,812.47			
END FUND BALANCE		2,295,711.47	2,596,655.64			

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 05/31/2025

% Fiscal Year Completed: 91.78

Section 6, Item A.

*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

GL Number	Description	24-25 Amended Budget	YTD Balance 05/31/2025	Activity For 05/31/2025	Available Balance 05/31/2025	% Bdgt Used
Fund: 403 DDA PUBLIC INFRASTRUCTURE FUND						
Account Category: Revenues						
Department: 000 REVENUE						
403-000-671-999	Appropriation from Fund Balanc	0.00	0.00	0.00	0.00	0.00
403-000-699-248	Interfund Transfer In - DDA	0.00	0.00	0.00	0.00	0.00
Total Dept 000 - REVENUE		0.00	0.00	0.00	0.00	0.00
Revenues		0.00	0.00	0.00	0.00	0.00
Account Category: Expenditures						
Department: 901 CAPITAL OUTLAY						
403-901-971-001	SIDEWALK IMPROVEMENT PROGRAM	0.00	0.00	0.00	0.00	0.00
403-901-971-002	PAINT CREEK BANK STABILIZATION PROJE	0.00	0.00	0.00	0.00	0.00
Total Dept 901 - CAPITAL OUTLAY		0.00	0.00	0.00	0.00	0.00
Expenditures		0.00	0.00	0.00	0.00	0.00
Fund 403 - DDA PUBLIC INFRASTRUCTURE FUND:						
TOTAL REVENUES		0.00	0.00	0.00	0.00	0.00
TOTAL EXPENDITURES		0.00	0.00	0.00	0.00	0.00
NET OF REVENUES & EXPENDITURES:		0.00	0.00	0.00	0.00	
BEG. FUND BALANCE		0.00	0.00			
END FUND BALANCE		0.00	0.00			

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 05/31/2025

% Fiscal Year Completed: 91.78

Section 6, Item A.

*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

GL Number	Description	24-25 Amended Budget	YTD Balance 05/31/2025	Activity For 05/31/2025	Available Balance 05/31/2025	% Bdgt Used
Fund: 404 DDA PROPERTY ACQUISITION						
Account Category: Revenues						
Department: 000 REVENUE						
404-000-664-000	Interest Earnings	0.00	104.96	8.72	(104.96)	100.00
404-000-694-000	Miscellaneous Revenue	0.00	0.00	0.00	0.00	0.00
404-000-699-248	Interfund Transfer In - DDA	0.00	0.00	0.00	0.00	0.00
Total Dept 000 - REVENUE		0.00	104.96	8.72	(104.96)	100.00
Revenues		0.00	104.96	8.72	(104.96)	100.00
Account Category: Expenditures						
Department: 901 CAPITAL OUTLAY						
404-901-805-000	Audit Fees	0.00	0.00	0.00	0.00	0.00
404-901-901-000	Debt Service- Parking Deck	0.00	0.00	0.00	0.00	0.00
404-901-930-000	Repair & Maintenance - Bldg	0.00	0.00	0.00	0.00	0.00
404-901-950-000	Demolition & Land Improvement	0.00	0.00	0.00	0.00	0.00
404-901-956-000	Miscellaneous	0.00	0.00	0.00	0.00	0.00
404-901-971-000	Capital Outlay - Building	169,436.00	0.00	0.00	169,436.00	0.00
404-901-980-248	Prop Acq Transfer to DDA	0.00	0.00	0.00	0.00	0.00
404-901-992-000	Bond Principal	0.00	0.00	0.00	0.00	0.00
404-901-995-000	Bond Interest	0.00	0.00	0.00	0.00	0.00
Total Dept 901 - CAPITAL OUTLAY		169,436.00	0.00	0.00	169,436.00	0.00
Expenditures		169,436.00	0.00	0.00	169,436.00	0.00
Fund 404 - DDA PROPERTY ACQUISITION:						
TOTAL REVENUES		0.00	104.96	8.72	(104.96)	100.00
TOTAL EXPENDITURES		169,436.00	0.00	0.00	169,436.00	0.00
NET OF REVENUES & EXPENDITURES:		(169,436.00)	104.96	8.72	(169,540.96)	
BEG. FUND BALANCE		169,464.87	169,464.87			
END FUND BALANCE		28.87	169,569.83			
Report Totals:						
TOTAL REVENUES - ALL FUNDS		2,314,497.00	1,889,487.55	421,150.23	425,009.45	81.64
TOTAL EXPENDITURES - ALL FUNDS		3,075,325.00	1,863,197.34	623,128.56	1,208,870.54	60.59
NET OF REVENUES & EXPENDITURES:		(760,828.00)	26,290.21	(201,978.33)	(783,861.09)	

BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION
Balance As of 05/31/2025

Section 6, Item A.

GL Number	Description	YTD Balance 05/31/2024	05/31/2025
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND			
*** Assets ***			
Account Classification: CASH CHECKING			
248-000-001-000	Cash	568.96	568.96
248-000-007-000	Payroll-checking	(250.00)	(250.00)
	CASH CHECKING	318.96	318.96
Account Classification: CASH SAVINGS			
248-000-002-000	Cash Savings	429,831.28	180,138.63
248-000-010-000	Investment/LGIP County Inv	406,434.72	419,927.84
248-000-011-000	Cash - Payroll Savings	(4,796.64)	(21,503.35)
	CASH SAVINGS	831,469.36	578,563.12
	Total Assets	831,788.32	578,882.08
*** Liabilities ***			
Account Classification: ACCOUNTS PAYABLE			
248-000-202-000	Accounts Payable	3,582.89	(2,560.00)
	ACCOUNTS PAYABLE	3,582.89	(2,560.00)
Account Classification: ACCRUED AND OTHER LIAB			
248-000-213-000	Accrued Property Tax - Est Chargebacks	400.00	400.00
248-000-228-001	FICA w/H - Medicare	0.00	(21.06)
248-000-228-002	FICA- Social Security withheld	0.00	(90.06)
	ACCRUED AND OTHER LIAB	400.00	288.88
	Total Liabilities	3,982.89	(2,271.12)
*** Fund Equity ***			
Account Classification: FUND BALANCE			
248-000-390-000	Fund Balance - Unassigned	498,200.06	356,811.12
	FUND BALANCE	498,200.06	356,811.12
	Total Fund Equity	498,200.06	356,811.12
Total Fund 248:			
TOTAL ASSETS		831,788.32	578,882.08
BEG. FUND BALANCE		498,200.06	356,811.12
+ NET OF REVENUES & EXPENDITURES		329,605.37	224,342.08
+ FUND BALANCE ADJUSTMENTS		2,559.00	0.00
= ENDING FUND BALANCE		830,364.43	581,153.20
+ LIABILITIES		3,982.89	(2,271.12)
= TOTAL LIABILITIES AND FUND BALANCE		831,788.32	578,882.08

BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION
Balance As of 05/31/2025

Section 6, Item A.

GL Number	Description	YTD Balance 05/31/2024	05/31/2025
Fund: 301 DOWNTOWN DEV BOND PROJECT 2023			
*** Assets ***			
Account Classification: CASH CHECKING			
301-000-001-000	Cash	56,386.80	56,386.80
	CASH CHECKING	56,386.80	56,386.80
Account Classification: CASH SAVINGS			
301-000-002-000	CASH	2,334,891.55	2,545,940.49
301-000-011-000	Cash - Payroll Savings	0.00	(3,702.47)
	CASH SAVINGS	2,334,891.55	2,542,238.02
Total Assets		2,391,278.35	2,598,624.82
*** Liabilities ***			
Account Classification: DUE TO INTERFUND			
301-000-214-101	Due to General Fund	6.15	1,969.18
	DUE TO INTERFUND	6.15	1,969.18
Total Liabilities		6.15	1,969.18
*** Fund Equity ***			
Account Classification: FUND BALANCE			
301-000-390-000	Fund Balance - Unassigned	4,944,949.68	2,794,812.47
	FUND BALANCE	4,944,949.68	2,794,812.47
Total Fund Equity		4,944,949.68	2,794,812.47
Total Fund 301:			
TOTAL ASSETS		2,391,278.35	2,598,624.82
BEG. FUND BALANCE		4,944,949.68	2,794,812.47
+ NET OF REVENUES & EXPENDITURES		(2,553,677.48)	(198,156.83)
= ENDING FUND BALANCE		2,391,272.20	2,596,655.64
+ LIABILITIES		6.15	1,969.18
= TOTAL LIABILITIES AND FUND BALANCE		2,391,278.35	2,598,624.82

BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION
Balance As of 05/31/2025

Section 6, Item A.

GL Number	Description	YTD Balance 05/31/2024	05/31/2025
Fund: 404 DDA PROPERTY ACQUISITION			
*** Assets ***			
Account Classification: CASH SAVINGS			
404-000-002-000	Cash-Savings-DDA Property Acq.	169,455.79	169,569.83
CASH SAVINGS		169,455.79	169,569.83
Total Assets		169,455.79	169,569.83
*** Fund Equity ***			
Account Classification: FUND BALANCE			
404-000-390-000	Fund Balance - Unassigned	326,840.70	169,464.87
FUND BALANCE		326,840.70	169,464.87
Total Fund Equity		326,840.70	169,464.87
Total Fund 404:			
TOTAL ASSETS		169,455.79	169,569.83
BEG. FUND BALANCE		326,840.70	169,464.87
+ NET OF REVENUES & EXPENDITURES		(157,384.91)	104.96
= ENDING FUND BALANCE		169,455.79	169,569.83
+ LIABILITIES		0.00	0.00
= TOTAL LIABILITIES AND FUND BALANCE		169,455.79	169,569.83



DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Bill Approval

ATTACHED:

Invoice Register: These are the disbursements that took place last month.

Credit Card Report: Lists the details for the credit charges shown in the invoice register.

RECOMMENDED MOTION: (Roll Call)

To approve disbursements in the amount of \$199,301.20 for May 2025.

INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

EXP CHECK RUN DATES 05/01/2025 - 05/31/2025

POSTED AND UNPOSTED

OPEN AND PAID

Section 7, Item A.

GL Number	Invoice Line Desc	Vendor Name	Invoice Description	Amount	Check Number
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND					
Department: 000 REVENUE					
248-000-228-000	Remittance	MICHIGAN DEPARTMENT OF TRE	Remittance Check	579.51	34670
248-000-228-001	Remittance	IRS	Remittance Check	100.04	389
248-000-228-001	Remittance	IRS	Remittance Check	100.04	389
248-000-228-001	Remittance	IRS	Remittance Check	108.11	390
248-000-228-001	Remittance	IRS	Remittance Check	108.11	390
248-000-228-002	Remittance	IRS	Remittance Check	427.72	389
248-000-228-002	Remittance	IRS	Remittance Check	427.72	389
248-000-228-002	Remittance	IRS	Remittance Check	462.27	390
248-000-228-002	Remittance	IRS	Remittance Check	462.27	390
248-000-230-000	Remittance	IRS	Remittance Check	436.05	389
248-000-230-000	Remittance	IRS	Remittance Check	456.23	390
248-000-232-000	Remittance	AMERICAN UNITED LIFE INSUR	Remittance Check	149.90	34719
248-000-237-002	Remittance	ALERUS FINANCIAL	Remittance Check	136.54	34611
248-000-237-002	Remittance	ALERUS FINANCIAL	Remittance Check	136.54	34667
248-000-247-000	Remittance	PRINCIPAL LIFE INSURANCE C	Remittance Check	147.90	34614
248-000-247-000	Remittance	PRINCIPAL LIFE INSURANCE C	Remittance Check	15.38	34616
248-000-247-000	Remittance	PRINCIPAL LIFE INSURANCE C	Remittance Check	85.22	34673
248-000-247-000	Remittance	PRINCIPAL LIFE INSURANCE C	Remittance Check	15.38	34675
248-000-247-000	Remittance	BLUE CARE NETWORK OF MICHI	Remittance Check	5,402.53	34668
Total Department 000 REVENUE				9,757.46	
Department: 260 GENERAL ACTIVITIES					
248-260-719-000	DC VILLAGE CONTRIBUTIONS	ALERUS FINANCIAL	DC VILLAGE CONTRIBUTIONS MAY 2025	546.16	34677
248-260-801-000	SPAREBOX STORAGE	COMERICA BANK	APRIL CREDIT CARD	295.00	290
248-260-801-033	DPW SNOW REMOVAL CONTRACT	VILLAGE OF LAKE ORION	DPW SNOW REMOVAL CONTRACT	17,000.00	34665
248-260-823-000	MOVAVI.COM WILDWOOD MO	COMERICA BANK	APRIL CREDIT CARD	20.04	290
248-260-823-000	FLOWCODE	COMERICA BANK	APRIL CREDIT CARD	9.95	290
248-260-823-000	SNAPRETAIL	COMERICA BANK	APRIL CREDIT CARD	65.00	290
248-260-823-000	CLICKUP	COMERICA BANK	APRIL CREDIT CARD	57.00	290
248-260-823-000	IONOS INC	COMERICA BANK	APRIL CREDIT CARD	25.00	290
248-260-823-000	ADOBE	COMERICA BANK	APRIL CREDIT CARD	21.19	290
248-260-851-000	MISWITCH	COMERICA BANK	APRIL CREDIT CARD	90.37	290
248-260-851-000	TELEPHONE/INTERNET 8529101	COMCAST	TELEPHONE/INTERNET	574.93	34688
248-260-920-000	ACCT 9100180771613 - 118 N	DTE ENERGY	ELECTRIC- OFFICE	159.30	34631
248-260-920-000	WATER BILL 215 S BROADWAY	VILLAGE OF LAKE ORION	WATER BILL	183.67	34665
248-260-920-000	WATER BILL 165 S BROADWAY	VILLAGE OF LAKE ORION	WATER BILL	330.50	34665
248-260-920-000	100062995376	CONSUMERS ENERGY	CONSUMERS ENERGY UTILITIES	118.64	34689
248-260-921-000	ACCT 920009543389 - 90 S A	DTE ENERGY	90 S ANDERSON ELECTRICITY	414.81	34630
248-260-921-000	ACCT 910018071993 - 165 S	DTE ENERGY	STREET LIGHTS	49.09	34630
248-260-921-000	38 FLINT 910040951659	DTE ENERGY	STREET LIGHTS	839.03	34693
248-260-921-000	22 SHADBOLT 910040951725	DTE ENERGY	STREET LIGHTS	304.69	34693
248-260-921-000	38 WASHINGTON 910040951774	DTE ENERGY	STREET LIGHTS	97.20	34693
248-260-921-000	380 BROADWAY 910040951824	DTE ENERGY	STREET LIGHTS	70.35	34693
248-260-921-000	491 BROADWAY 910040951600	DTE ENERGY	STREET LIGHTS	167.37	34693
248-260-921-000	24 FRONT ST 920009680652	DTE ENERGY	STREET LIGHTS	39.11	34693
248-260-942-000	COPIES AT UPS STORE	MATTHEW GIBB	NATIONAL MAINSTREET CONFERENCE EXPENS	84.27	34640
248-260-942-000	COFFEE AND DONUTS	JANET BLOOM	STRATEGIC PLANNING MEETING REIMBURSEM	31.80	34637
248-260-942-000	ACCOUNT 098024 - EZEKIAL S	COREWELL HEALTH URGENT CAR	NEW EMPLOYEE SCREENING	135.00	34627
248-260-957-000	OAKLAND THRIVE	COMERICA BANK	APRIL CREDIT CARD	75.00	290
248-260-957-000	MARRIOTT PHILAD DTWON	COMERICA BANK	APRIL CREDIT CARD	1,520.99	290

INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

EXP CHECK RUN DATES 05/01/2025 - 05/31/2025

POSTED AND UNPOSTED

OPEN AND PAID

Section 7, Item A.

GL Number	Invoice Line Desc	Vendor Name	Invoice Description	Amount	Check Number
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND					
Department: 260 GENERAL ACTIVITIES					
248-260-957-000	MARRIOTT PHILAD DTOWN	COMERICA BANK	APRIL CREDIT CARD	1,838.97	290
248-260-962-000	OHIO TURNPIKE	COMERICA BANK	APRIL CREDIT CARD	15.50	290
248-260-962-000	HERTZTOLL	COMERICA BANK	APRIL CREDIT CARD	25.95	290
248-260-962-000	HERTZTOLL	COMERICA BANK	APRIL CREDIT CARD	82.46	290
Total Department 260 GENERAL ACTIVITIES				25,288.34	
Department: 725 ORGANIZATION					
248-725-825-000	GIFT CERT REDEMPTION #4687	MESSY DESIGNS	DOWNTOWN DOLLARS REIMBURSEMENT	25.00	34701
248-725-825-000	GIFT CERT REDEMPTION #4624	COOKIES AND CREAM	DOWNTOWN DOLLARS REIMBURSEMENT	25.00	34690
248-725-827-000	GAS, TOLL, UBER, HOSTING B	MATTHEW GIBB	NATIONAL MAINSTREET CONFERENCE EXPENS	476.19	34640
Total Department 725 ORGANIZATION				526.19	
Department: 726 DESIGN					
248-726-975-001	INV D24054/55/56F	ELECTRICAL SYSTEMS, INC.	POLE ASSEMBLY	453.30	34694
248-726-980-001	LAKE ORION MISC	COMERICA BANK	APRIL CREDIT CARD	154.93	290
248-726-980-001	ROOFING/CONSTRUCTION -LUMB	STARRS ROOFING	ROOFING/CONSTRUCTION -LUMBER YARD GRA	17,572.50	34655
248-726-980-002	LUMBERYARD - SECOND DRAW	MICKEY'S CONSTRUCTION LLC	LUMBER YARD SECOND DRAW AND MDOT FENC	100,000.00	34702
Total Department 726 DESIGN				118,180.73	
Department: 728 ECONOMIC DEVELOPMENT					
248-728-888-000	INV 377950 - MARKETING	VIEW NEWSPAPER GROUP	MARKETING	878.00	34664
248-728-888-000	CORNHOLE SPONSORSHIP	SONS OF THE AMERICAN LEGIO	CORNHOLE SPONSORSHIP	250.00	34654
248-728-888-000	THE UPS STORE PRINTS	COMERICA BANK	APRIL CREDIT CARD	32.69	290
248-728-888-000	AMAZON SUPPLIES	COMERICA BANK	APRIL CREDIT CARD	62.98	290
248-728-888-000	THE UPS STORE	COMERICA BANK	APRIL CREDIT CARD	146.58	290
248-728-888-000	THE UPS STORE	COMERICA BANK	APRIL CREDIT CARD	29.83	290
248-728-888-000	THE UPS STORE	COMERICA BANK	APRIL CREDIT CARD	65.68	290
248-728-888-000	STAPLES	COMERICA BANK	APRIL CREDIT CARD	109.03	290
248-728-888-000	PUB CRAWL TSHIRTS	GRACEFULLY CRAFTED BY LORR	ST PATTYS TSHIRTS	629.00	34633
248-728-888-000	SIGNS FOR EVENTS	EPRINT SOLUTION LLC	BRAND MARKETING PRINTING	260.00	34695
248-728-888-000	FLOWER FAIR	AMAZON CAPITAL SERVICES	ART AND FLOWER FAIR SUPPLIES	79.96	34679
Total Department 728 ECONOMIC DEVELOPMENT				2,543.75	
Total Fund 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND				156,296.47	
Fund: 301 DOWNTOWN DEV BOND PROJECT 2023					
Department: 901 CAPITAL OUTLAY					
301-901-950-000	INV 112997 - LUMBER YARD S	PEA GROUP	SURVEY WORK	2,259.13	34649
301-901-950-000	LUMBERYARD TREE REMOVAL	TIMBER BEAST TREE SERVICE	TREE REMOVAL	4,250.00	34657
301-901-950-000	ROLL OFF DUMPSTER DIRE	COMERICA BANK	APRIL CREDIT CARD	574.00	290
301-901-950-000	ROLLOFF DUMPSTER DIRE	COMERICA BANK	APRIL CREDIT CARD	574.00	290
301-901-950-000	GREAT LAKES ACE	COMERICA BANK	APRIL CREDIT CARD	52.03	290
301-901-950-000	ROLLOFF DUMPSTER DIRE	COMERICA BANK	APRIL CREDIT CARD	574.00	290
301-901-950-000	ROLLOFF DUMPSTER DIRE	COMERICA BANK	APRIL CREDIT CARD	574.00	290
301-901-950-000	GREAT LAKES ACE	COMERICA BANK	APRIL CREDIT CARD	137.70	290
301-901-950-000	CONSTRUCTION PORTABLES I24	TURNER SANITATION	PORTABLES	155.00	34715
301-901-950-000	CONSTRUCTION PORTABLES I24	TURNER SANITATION	PORTABLES	125.00	34715
301-901-950-000	MDOT FENCE REPAIR/REPLACEM	MICKEY'S CONSTRUCTION LLC	LUMBER YARD SECOND DRAW AND MDOT FENC	12,000.00	34702
301-901-950-000	SURVEYING LUMBERYARD	PEA GROUP		14,500.00	34712
Total Department 901 CAPITAL OUTLAY				35,774.86	

INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

EXP CHECK RUN DATES 05/01/2025 - 05/31/2025

POSTED AND UNPOSTED

OPEN AND PAID

Section 7, Item A.

GL Number	Invoice Line Desc	Vendor Name	Invoice Description	Amount	Check Number
Fund: 301	DOWNTOWN DEV BOND PROJECT 2023		Total Fund 301 DOWNTOWN DEV BOND PROJECT 2023	35,774.86	

INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

EXP CHECK RUN DATES 05/01/2025 - 05/31/2025

POSTED AND UNPOSTED

OPEN AND PAID

Section 7, Item A.

GL Number	Invoice Line Desc	Vendor Name	Invoice Description	Amount	Check Number
--- TOTALS BY FUND ---					
248			DOWNTOWN DEVELOPMENT AUTHORITY FUND	156,296.47	
301			DOWNTOWN DEV BOND PROJECT 2023	35,774.86	
		Total For All Funds:		192,071.33	



DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Lumber Yard Reconstruction - Change Orders

BACKGROUND BRIEF:

The DDA Board previously approved a contract with Mickey’s Construction for the reconstruction of four structures on the site to enable either activation of the structures or the foundational repair, structural code compliance, and re-roofing of the structures to allow for a detailed interior design plan. The contract approved an anticipated cost ranging from \$380,000 to a cost not to exceed \$425,000 (without further authorization). Several items in the contract work were only partially known as the contract started, due to hidden conditions in the roof and structures that could only be assessed as the work went forward. These four change orders begin to address that work and are part of the initial anticipated contract range.

ANTICIPATE THAT AT THE CONCLUSION OF THIS FIRST PHASE OF RECONSTRUCTION A FINAL INVOICE WILL BE PRESENTED THAT MAY EXCEED THE TOTAL COST NOT EXCEED. THE BOARD CAN ASSESS THAT BASED ON THE CONTINUING PRESENTMENT OF THESE CHANGE ORDERS AS THEY BECOME NECESSARY

FINANCIAL IMPACT:

These costs are anticipated and will be charged against the Public Spaces Grant. We initially invoiced, and have received, \$446,867.25 of the grant. To date we have expended \$267,973.67, leaving a current available balance of \$178,893.58. These change order(s) will be charged against the balance, and under the contract with Mickey’s Construction.

Change Order 01-June 2025: Demolition of fencing, preparation for reinstallation	\$4,000
Change Order 02-June 2025: Demo/Material Prep for Code Compliance: North Roof	\$26,354
Change Order 03-June 2025: Demo and Labor for rebuilding floor of market pavilion	\$9,600
Change Order 04-June 2025: Additional Material following roof removal/exposure	<u>\$4,862.90</u>
	\$44,816.90

RECOMMENDED MOTION:

Move to approve four (4) change orders, as presented, pursuant and under the contract with Mickey's Construction in the total amount of \$44,816.90, payable from GL 248-726-980-001 Public Spaces Grant – General.



CHANGE ORDER

Project Name: 215 S BROADWAY
 Project Address: Mickay's Construction
 Contractor: mike Bartos

Change Order Number: 2025-
 Change Order Date: _____

DESCRIPTION OF CHANGES:

(check here and attach additional pages if more space is needed.)

CHANGE: Demo fence & remove debris

CHANGE: _____

PRICE DETAIL: TOTAL: \$ 4000.00

PRICE. These changes (select one):

- raise the price of the contract to
- do not affect the price of the contract.

PROJECT DURATION. These changes (select one):

- extend shorten the duration of the project _____ days.
- do not affect the duration of the project.

COMPLETION. The new approximate date of completion is:

PAYMENT SCHEDULE. These changes will adjust the payment schedule as follows:

Owner Signature: _____
 Matthew Gibb
 Printed Name Date

Contractor Signature: [Signature]
 Michael Bartos, 4-23-25
 Printed Name Date





CHANGE ORDER

Project Name	2025-
215 S BROADWAY	Change Order Number
Project Address	Change Order Date
<i>Mickey's Construction</i>	
Contractor	

DESCRIPTION OF CHANGES:

(check here and attach additional pages if more space is needed.)

CHANGE: Demo 2x4 Rafter in N. SIDE OF Big BAEN

CHANGE: Demo all shelving units in N. SIDE of Big BAEN

Supply an new Rafter & Headers near per Code.

PRICE DETAIL: TOTAL: \$ 26,354.00

Clean up Debris

PRICE. These changes (select one):

- raise the price of the contract to
- do not affect the price of the contract.

PROJECT DURATION. These changes (select one):

- extend shorten the duration of the project _____ days.
- do not affect the duration of the project.

COMPLETION. The new approximate date of completion is:

PAYMENT SCHEDULE. These changes will adjust the payment schedule as follows:

Owner Signature

Matthew Gibb

Printed Name

Date

Contractor Signature

MIKE BAKTOS

Printed Name

Date





CHANGE ORDER

Project Name	2025-
215 S BROADWAY	Change Order Number
Project Address	Change Order Date
<i>Mckay's Construction</i>	
Contractor	

DESCRIPTION OF CHANGES:

(check here and attach additional pages if more space is needed.)

CHANGE: LABR to DEMO EXISTING WOOD FLOOR IN
FARMERS MARKET AREA. CLEAN UP AREA

CHANGE: FRAME NEW FLOOR IN TREATED LUMBER

PRICE DETAIL: *Clean up Debris*

TOTAL: \$9600.00

PRICE. These changes (select one):

- raise the price of the contract to
- do not affect the price of the contract.

PROJECT DURATION. These changes (select one):

- extend shorten the duration of the project _____ days.
- do not affect the duration of the project.

COMPLETION. The new approximate date of completion is:

PAYMENT SCHEDULE. These changes will adjust the payment schedule as follows:

Owner Signature

Matthew Gibb

Printed Name Date

[Signature]

Contractor Signature

Mike Baets

Printed Name Date





CHANGE ORDER

Project Name

215 S BROADWAY

Project Address

Mickey's Construction

Contractor

2025-

Change Order Number

Change Order Date

DESCRIPTION OF CHANGES:

(check here and attach additional pages if more space is needed.)

CHANGE:

materials for new treated wood

CHANGE:

FRAME & FLOORING IN FARMERS MARKET AREA

PRICE DETAIL:

TOTAL:

\$ 4862.90

materials only

PRICE. These changes (select one):

- raise the price of the contract to
- do not affect the price of the contract.

PROJECT DURATION. These changes (select one):

- extend shorten the duration of the project _____ days.
- do not affect the duration of the project.

COMPLETION. The new approximate date of completion is:

PAYMENT SCHEDULE. These changes will adjust the payment schedule as follows:

[Empty box for payment schedule details]

Owner Signature

Matthew Gibb

Printed Name

Date

Contractor Signature

Mike Barts

Printed Name

Date





DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Lumber Yard – Continuing Demolition Cost

BACKGROUND BRIEF:

The final demolition and land preparation costs are getting smaller and smaller, but some are continuing. The attached invoicing is for:

1. Timber Beast: the maintenance of invasive species control	\$1,950
2. TBD Construct9ion: construction fencing rental	\$4,500
3. PEA Group: costs of maintaining our soil erosion and control permitting	<u>\$315.63</u>
	\$ 6,765.63

FINANCIAL IMPACT:

These costs are anticipated and will be charged against the Demolition line of the bond funding that we have sued throughout the initial site redevelopment work, GL 301-901-950-000 Demolition and Land Improvement.

RECOMMENDED MOTION:

Move to approve three (3) invoices for land improvement, as presented, pursuant and under the ongoing contracts with the identified vendors in the total amount of \$6,765.63 payable from GL 301-901-950-000 Demolition and Land Improvement.



3417 ROGER B CHAFFEE ST. SE #311
GRAND RAPIDS, MI 49548

INVOICE

BILL TO
Lake Orion Downtown Development Authority
118 N Broadway St
Lake Orion, MI 48362

SHIP TO
Lake Orion Downtown Development Authority
118 N Broadway St
Lake Orion, MI 48362

INVOICE 24-0081
DATE 05/27/2025
TERMS Due on receipt
DUE DATE 05/27/2025

DESCRIPTION	AMOUNT
Fencing - 6 months	4,500.00
<hr style="border-top: 1px dashed black;"/>	
BALANCE DUE	\$4,500.00



Timber Beast Tree Service

989 South Glaspie Street | Oxford, Michigan 48371
248-563-3313 | TimberBeastTreeService@gmail.com |
<https://www.TimberBeastTreeService.com/>

RECIPIENT:

Matthew Gibb

215 South Broadway Street
Orion Township, Michigan 48362
Phone: (248) 464-0307

Invoice #1763	
Issued	Jun 09, 2025
Due	Jun 09, 2025
Total	\$1,950.00
Account Balance	\$1,950.00

For Services Rendered

Product/Service	Description	Qty.	Unit Price	Total
Jun 05, 2025				
Underbrush Removal	Cut Down the invasive under brush between the barn and fence lines. This includes the fence lines north of the barn, east of the barn and the fence line south of barn.	1	\$1,950.00	\$1,950.00
Picture for Reference	East Fence line	1	\$0.00	\$0.00
Picture for Reference	North East corner.	1	\$0.00	\$0.00
Picture for Reference	South of barn	1	\$0.00	\$0.00
Notes	Work to be completed by no later than end of day Friday June 6th	1	\$0.00	\$0.00

Thank you for your business, we appreciate you choosing Timber Beast to complete your tree work!

Please note: any requests for additional stump grinding/stump regrinds should be made within 14 days of original stump grinding to avoid additional costs.

Total	\$1,950.00
Account balance	\$1,950.00

Pay Now

PEA 1849 POND RUN
AUBURN HILLS, MI 48326
GROUP 248.689.9090
PEAACCOUNTING@PEAGROUP.COM

Lake Orion Downtown Development Authority
118 N. Broadway St.
Lake Orion, MI 48362

May 31, 2025
Project No: 020-0164.01
Invoice No: 113635

Project Manager KEVIN ROACH

Invoice Total \$315.63

Project 020-0164.01 LAKE ORION LUMBER

E-Mail invoice to: gibb@downtownlakeorion.org

Professional Services Through May 25, 2025

Phase 003 DEMO & SOIL ERROSION PLAN
Demolition and soil erosion plans as requested.

Task OFFICE

Professional Personnel

	Hours	Rate	Amount	
Staff Engineer IV	.50	150.00	75.00	
Totals	.50		75.00	
Total Labor				\$75.00

Reimbursable Expenses

Permit Recording and Review Fees			240.63	
Total Reimbursables			240.63	\$240.63

Total this Invoice \$315.63

PEA Group accepts EFT, Check and credit cards for payment.
PEA Group applies a 3% processing fee to all credit card payments.
Please use the below link for payment to PEA Group via a secure portal:

[Secure Payment Link](#)



DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Façade Grant Application – Lake Orion Bike & Adventure Co.

Façade Grant Application Review – Lake Orion Bike & Adventure Co.

A Façade Grant application was received from the Lake Orion Bike & Adventure Shop at 47 S. Broadway, Lake Orion, MI 48362. It is the former Lake Orion Window and Blind Shop location. The property is owned by MD Broadway LLC (Matt Moore), of which Lake Orion Bike & Adventure Co. are a tenant. They recently opened their doors for business.

The applicant asked to be considered for a Level 2 Historic Preservation grant with matching funds up to \$10,000.

The application was reviewed by the Design Committee on May 27, 2025. Their recommendation is to approve the Façade Grant application at the requested Level 2, providing for a match up to \$8,000.

RECOMMENDED MOTION:

To approve the Façade Grant application received from the Lake Orion Bike & Adventure Co. for a Level 2 Historic Preservation Grant with matching funds up to \$8,000.



The mission of the Lake Orion DDA is to enhance the economic potential and preserve the historical character of the Lake Orion DDA District, *the heart and hub of the Orion Community*, through promotional activities and an organizational structure that focuses on community involvement with local businesses, residents and other stakeholders.

The **Main Street Approach** is a unique economic development strategy that focuses on leveraging existing social, economic, physical and cultural assets to energize community revitalization efforts and help manage success for the long term.

Design: Capitalizes on and enhances the visual aspects of downtown commercial areas to create a safe, appealing and inviting atmosphere. The physical elements such as the storefronts and building architecture, streetscape, public art, street furniture, parking areas, and public spaces are used to convey a positive image for the downtown. Quality maintenance practices such as historic building rehabilitation, adaptive use, appropriate new development, a design review process and long-term planning are also strategies used to enhance the physical appearance of a downtown.

Design Committee Minutes

May 27, 2025

10:30 am – 11:30 am

Lake Orion DDA Office

Committee Members: Chair Lloyd Coe, Linda Crane, and Angela Aycock.

DDA: Matt Gibb, Ex. Dir., and Janet Bloom, Asst. Dir.

Attendees: Linda Crane, Angela Aycock, Matt Gibb, Janet Bloom, and grant application representatives Mike Warner and Tim Marriott.

I. Façade Grant Application Review – Lake Orion Bike & Adventure Co.

The grant request is for the former Lake Orion Window and Blind Shop location at 47 S. Broadway, Lake Orion, MI 48362, which currently houses Lake Orion Bike & Adventure Shop as the tenant and the owner is MD Broadway LLC (Matt Moore). They are opening early June.

The applicant has asked to be considered for a Level 2 Historic Preservation grant with matching funds up to \$10,000.

The improvement this grant is being asked to support are the awning replacement with suggestion to pull the style and color from the kind being used at the Lumber Yard. It was also asking for support for signage and window replacement. It was noted that plans may include sidewall lighting for exterior sign.

The Design Committee, per the new grant application process, completed the scoring for the application. A score of 21 is required to be eligible for the grant. Top score is 40. Scoring team comprised of: Linda Crane, Angela Aycock, Matt Gibb, and Janet Bloom.

Results are as follows:

Category	Maximum Points	Points Earned
Applicant has never received a grant of any type from the Lake Orion DDA.	5	5
The applicant is the owner of the property (and is not a building tenant).	1	0
The existing building condition visually appears to be structurally sound with roof intact.	4	4
The façade project is part of a larger planned building renovation project.	2	1
The proposal meets the Design Guidelines and intent of the Lake Orion DDA Program Goals and/or the municipal design guidelines.	5	5
The extent to which the proposed work will compliment or enhance the appearance of the surrounding area.	10	7
The extent to which the proposed work will enhance the appearance of the property.	10	6
Whether the grant will leverage additional funding for the project.	3	1
Total	40	29

The grant application for **Lake Orion Bike & Adventure Co.** is being recommended to the Lake Orion DDA Board by the Design Committee for the following:

Level 1 grant – no funds were allocated for this grant level

Level 2 grant - \$8,000 matching funds (program has max set at \$10,000)

The Design Committee is pleased to be able to support the work of this downtown business and how it brings back a category of store that services our active community.



FACADE IMPROVEMENT AND PRESERVATION APPLICATION

APPLICANT CONTACT INFORMATION

Please Print

Name: MIKE WARNER

Street Address: 66 PARK ISLAND DR. City, State, Zip:

LAKE ORION, 48362 Phone (daytime): (248) 724-6104 Cell:

SAME

Email Address MIKE @ LAKEORIONBIKES.COM

SITE (BUILDING) OWNERSHIP INFORMATION

Business Name LAKE ORION BIKE + ADVENTURE Co.

Nature of Business: BICYCLE RETAIL/REPAIR, ^{OUTDOOR} EQUIPMENT RENTALS

Address: 47 S. BROADWAY City, State, Zip: LAKE ORION, MI 48362

Are you the building owner? Yes No

If you are not the building owner, please provide the following information:

Building Owner's Name MD BROADWAY, LLC (MATT MOORE)

Building Owner's Address: 1711 E. AUBURN RD., ROCHESTER HILLS, MI 48307

Building Owner's E-mail Address: DAN @ FRANCHISESELECT.NET

Building Owners Phone (daytime): (586) 291-1384

BUSINESS INFORMATION How long have you operated at this location? NEW (2 MONTHS)

Have you ever received a façade grant from the Lake Orion DDA? Yes No

If Yes, when? _____

How many employees are at this location ? Full Time 3 Part time 3

Are you the sole business owner? Yes No Co-owners? Yes No

If yes, provide the names and contact information for all business co-owners:

MIKE WARNER (248) 724-6104
TIM MARQUOTT (248) 343-5523

PROJECT INFORMATION

What level of Grant are you seeking?

- LEVEL 1 - We want to refresh and improve the appearance of our storefront.
- LEVEL 2 - We want to complete a restoration or transformation of our location.

Briefly describe the Scope of Work for the proposed project(s) that you are seeking funding for:

KEEP THE AWNING, BUT REFRESH IT + KEEP ITS HISTORICAL LOOK, REPLACE WINDOWS AND REPLACE EXISTING SIGNAGE WITH NEW DIBOND SIGNS WITH OUR LOGO. PAINTING (INTERIOR + EXTERIOR)

Based on your project bids/cost estimates, how much was the lowest bid/cost estimate and what is the name of the contractor? TOTAL IS APPROXIMATELY \$20,000 WITH MULTIPLE COMPANIES PROVIDING SERVICES/PRODUCTS.

The Lake Orion DDA Façade Improvement Grant Program is a matching grant. Payment of funds under the program is paid on a reimbursement basis. The applicant is required to pay the total project cost up front, and request reimbursement for the approved eligible costs from the Lake Orion DDA *after* the project is complete.

Do you agree to these terms?
 Yes No

The façade grant program requires the participant to include promotion of the grant and the Lake Orion DDA in its marketing, social media and other forms of promotion. This requires the placement of signage in the business, and its storefront, for a period up to one year.

Do you agree to these terms?
 Yes No

APPLICANT'S CERTIFICATION

The Applicant certifies that all information in this application and all information furnished in support of this application, given for obtaining a façade grant under the Façade Improvement Program are true and complete to the best of the Applicant's knowledge and belief. I have read and understand the procedures and agree to follow the Façade Improvements and Historic Preservation Grant Process. I am submitting documentation as required. **Applications submitted without required documentation will not be processed.**

Applicant's Signature: Michael W. Date: 5-5-2025

BUILDING OWNER'S CERTIFICATION

I, as the owner of the building located at 47. S. BROADWAY ST. understand and agree to the submission of this application to the Façade Improvement and Historic Preservation Program. I also agree to the proposed project as detailed in this application. I further understand that if this application is approved, the applicant will be required to enter into a grant agreement with the Lake Orion Downtown Development Authority and that I, as the building owner, will also be required to sign the grant agreement.

Signature of Building Owner: Matt Moru Date: 5/05/25

MAIL OR HAND DELIVER THIS APPLICATION WITH ATTACHMENTS TO:

LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY
Attn: Façade Improvement Program
118 S BROADWAY ST
LAKE ORION, MI 48362

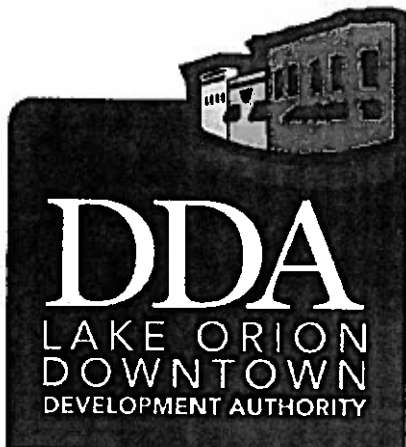
OFFICE USE ONLY

Date of Introductory Meeting: _____ Amount Requested: _____
Date of Application: _____ Anticipated start date: _____
Is MSOC Involved _____
Date Plans Received: _____ Architect: _____
Design Committee Date: _____ Recommendation: _____
Board Presentation Date: _____ Action: _____ Amount: _____
Funding Commitment Letter Dated: _____
Final Inspection: _____ Before and after: _____ Photos
Payment on Grant: _____

APPLICATION REQUIREMENTS

A completed application will consist of the following required documentation:

1. A completed application form.
2. Proof that the business is a "Small Business" as defined herein.
3. Renderings of the proposed work. If the project cost exceeds \$20,000.00, renderings and site plans must be completed by an architect licensed in the state of Michigan.
 - **Building Façade Work:** A rendering of the proposed work must be submitted. The rendering must be neat, detailed and scaled, including window locations, door locations, any existing and/or proposed signs or awnings.
 - **Building Signs:** Where a new building sign is proposed, a scaled rendering/elevation accurately depicting all existing and proposed wall signs must be submitted.
 - **Freestanding Signs:** Where a new freestanding sign is proposed, a formal site plan must be submitted. The site plan must include the following information:
 - o Lot lines w/North arrow
 - o Streets labeled w/ driveway location(s)
 - o Existing structures w/all known easements
 - o Proposed location of freestanding sign(s), with setbacks from property lines
4. A written description of the project plans must be submitted including any information that will assist in understanding the scope of the project, including:
 - Building materials
 - Colors (paint chips, brick/stone color, etc.)
 - Exterior lighting
 - Window and door types
 - Architectural detailing
 - Sign specifications
 - Awnings
 - General renovation details
5. Cost estimates and contractor name(s)
6. Proof that property taxes are current.
7. Proof of business ownership or tenancy (lease agreement).

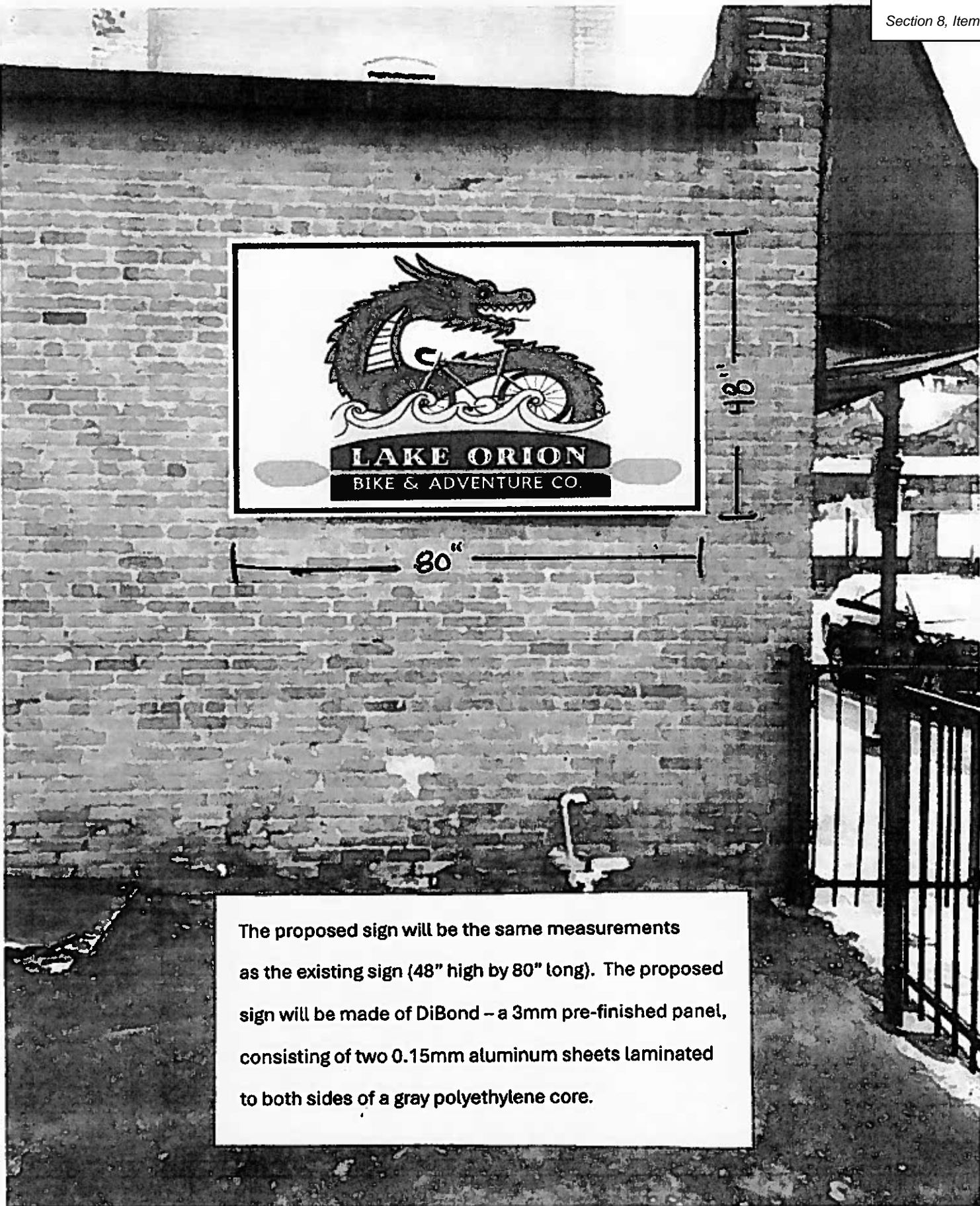


FIND ANSWERS AND SUPPORT

Contact:

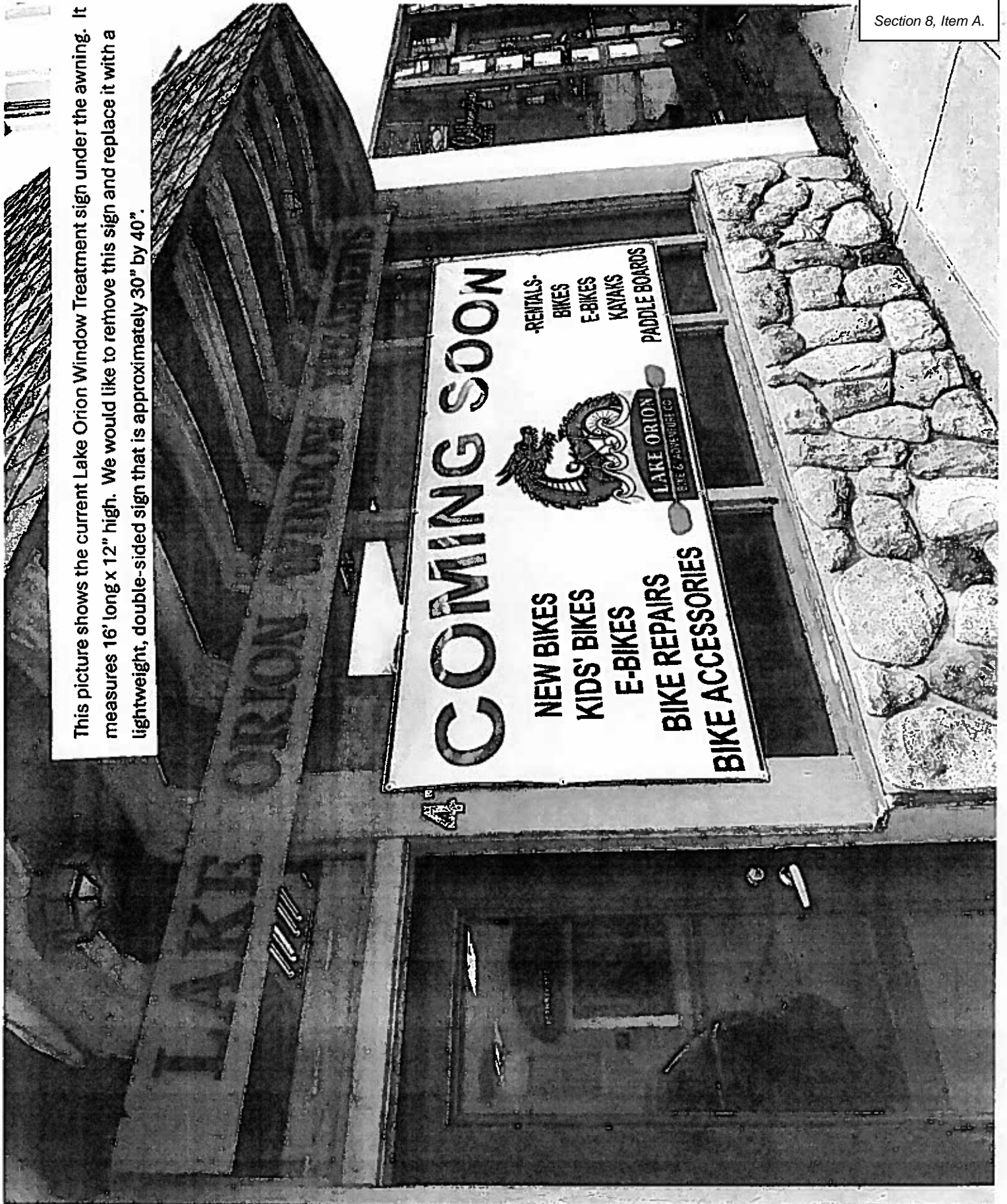
LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY
118 N BORADWAY ST
LAKE ORION MI 48362
(248) 693-9742
gibb@downtownlakeorion.org

"WALK INS WELCOME"



The proposed sign will be the same measurements as the existing sign (48" high by 80" long). The proposed sign will be made of DiBond – a 3mm pre-finished panel, consisting of two 0.15mm aluminum sheets laminated to both sides of a gray polyethylene core.

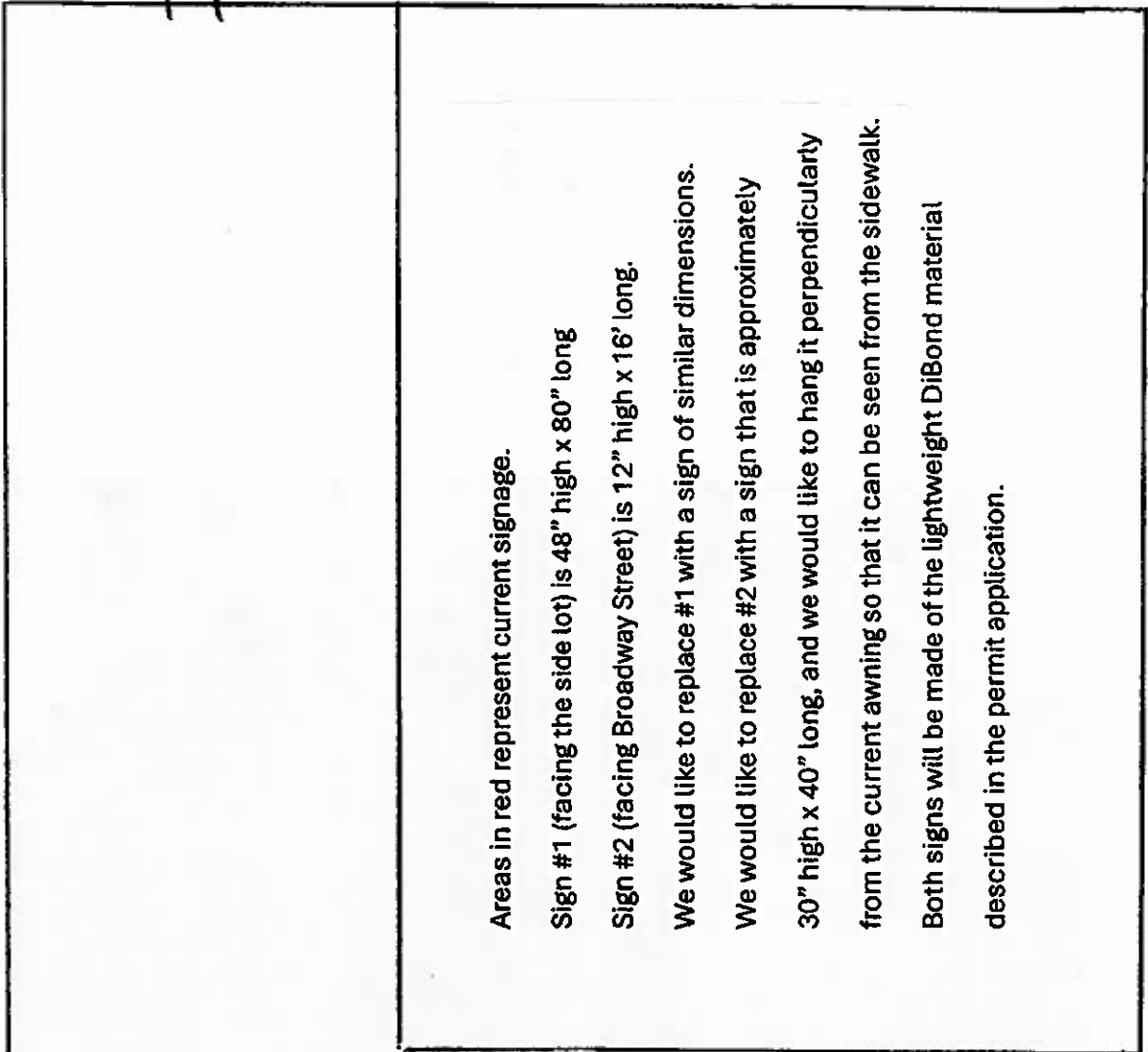
This picture shows the current Lake Orion Window Treatment sign under the awning. It measures 16' long x 12" high. We would like to remove this sign and replace it with a lightweight, double-sided sign that is approximately 30" by 40".



FRONT STREET

ALLEY

SIDEWALK



Areas in red represent current signage.

Sign #1 (facing the side lot) is 48" high x 80" long

Sign #2 (facing Broadway Street) is 12" high x 16' long.

We would like to replace #1 with a sign of similar dimensions.

We would like to replace #2 with a sign that is approximately

30" high x 40" long, and we would like to hang it perpendicularly

from the current awning so that it can be seen from the sidewalk.

Both signs will be made of the lightweight DiBond material

described in the permit application.

47. S. BROADWAY

18.5'

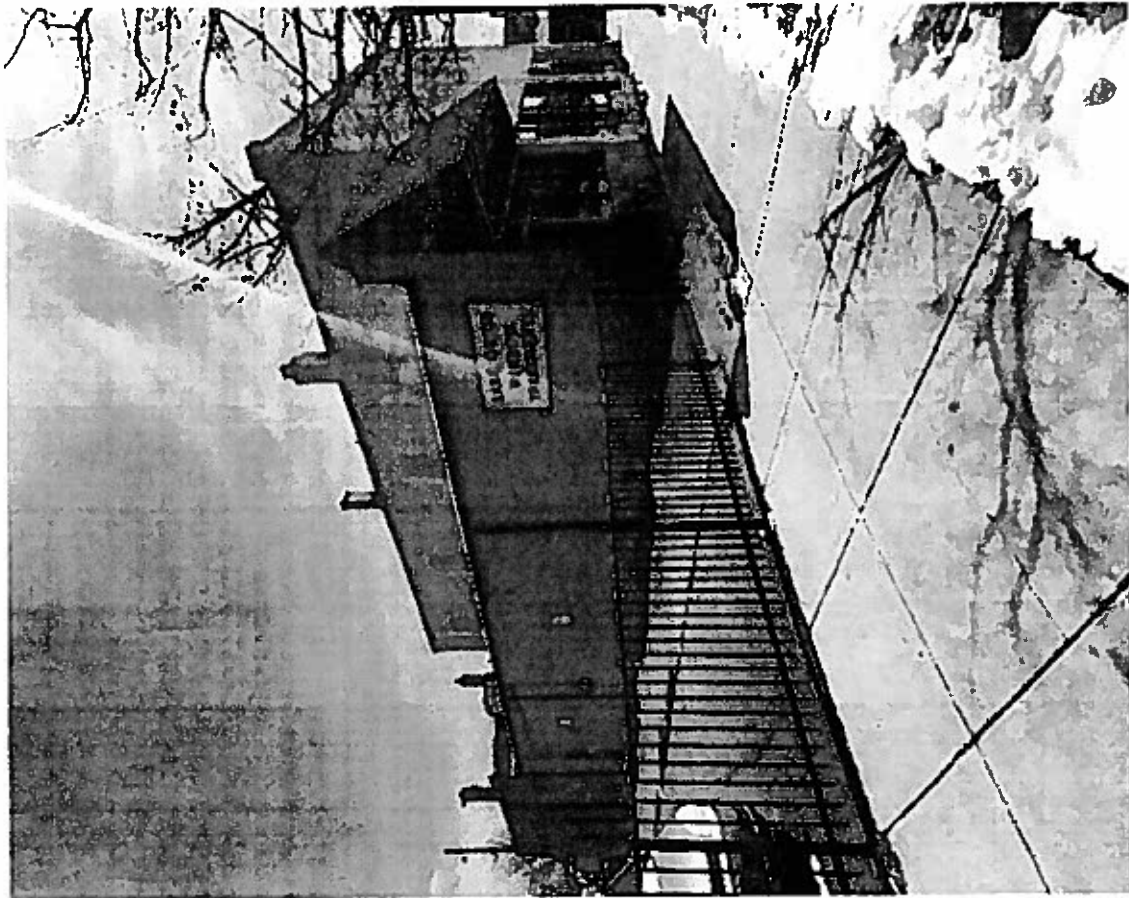
93'

SIDE LOT

SIDEWALK

ROADWAY STREET

This picture shows the existing sign that will be removed. It measures 48" x 80" and will be replaced by a sign with identical measurements.



LEASE AGREEMENT

LEASE AGREEMENT

(1) This Lease made this ___ day of April, 2025 by and between MD BROADWAY LLC, a Michigan limited liability company, 1711 E. Auburn Rd., Rochester Hills, MI 48307 the Lessor, hereinafter designated as the "Landlord"; and LAKE ORION BIKE & ADVENTURE LLC, a Michigan limited liability company, 191 Park Island, Lake Orion, MI 48362 the Lessee, hereinafter designated as the "Tenant".

DESCRIPTION

(2) WITNESSETH: The Landlord, in consideration of the rents to be paid, and the covenants and agreements to be performed by the Tenant, does hereby lease unto the Tenant a portion of the following described premises, situated in Lake Orion, County of Oakland, State of Michigan, to-wit: a portion of the premises c/k/a 47 S. Broadway, Lake Orion, MI 48362, the leased premises described on the attached Exhibit A, (the "premises" or "demised premises"), including the parking lot(s), driveway(s), sidewalks, and landscaped areas, together with any and all appurtenances, rights, privileges and easements benefitting, belonging or pertaining thereto used by Tenant and other Tenants on the premises.

TERM

(3) "Term" shall mean the initial term of this Lease and all extensions and renewals thereof. The "Initial Term" of this lease shall mean the period beginning on the date of this Lease and ending on the November 30, 2026 (free rent period from the date of this Lease and base rent and additional rent to be paid by Tenant to Landlord from June 1, 2025 through November 30, 2026).

RENT

(4) This is a "gross lease" wherein Tenant shall pay to Landlord Monthly Rent in the amount of \$2,900.00, in advance on the first day of each calendar month during the term hereof beginning the first (1st) day of June, 2025 as well as additional rent payable each month in the amount of \$630.83 (taxes and insurance). Landlord may adjust the monthly additional rent for taxes and insurance as the same is billed to Landlord, copies of all billings for same to be provided to Tenant upon request. All Rent shall be paid at the address of Landlord given above or at such other place as Landlord may designate from time to time in writing, without deductions or setoffs whatsoever.

Tenant shall be responsible to pay the utility charges for water, electric, gas and cable services and Tenant shall upon possession, immediately transfer said utilities to Tenants name for direct billing.

The Tenant hereby hires the said premises for the said term, as above mentioned, and covenants well and truly pay, or cause to be paid unto the Landlord, at the dates and times above mentioned, the rent above reserved.

ASSIGNMENT

(5) The Tenant agrees that he will not assign or transfer this lease or hypothecate or mortgage the same or sublet said premises or any part thereof, without the written consent of the Landlord which shall not be unreasonably withheld, conditioned or delayed. Notwithstanding the foregoing, Landlord shall consent to an assignment to (i) an affiliate of Tenant, (ii) a successor to Tenant

pursuant to a merger or consolidation or (iii) a purchaser of the majority of the assets or ownership interests of Tenant. Any assignment, transfer, hypothecation, mortgage or subletting, without said written consent, shall give the Landlord the right to terminate this lease and to reenter and repossess the leased premises, provided, however that the Landlord shall not unreasonably withhold or delay this consent. Any assignment approved by Landlord shall relieve Tenant from the obligations of Tenant under this Lease.

BANKRUPTCY AND INSOLVENCY

(6) The Tenant agrees that, if the estate created hereby shall be taken in execution or by other process of law or if the Tenant shall be declared bankrupt or insolvent, according to law, or any receiver be appointed for the business and property of the Tenant or if any assignment shall be made of the Tenant's property for the benefit of creditors, then in such event this lease may be canceled at the option of the Landlord.

RIGHT TO MORTGAGE

(7) The Landlord reserves the right to subject and subordinate this lease, at all times, to the lien of any mortgage now or hereafter placed upon the Landlord's interest in said premises, and on the land and buildings of which said premises are a part, or upon any buildings hereafter placed upon the land of which the leased premises form a part. Provided Tenant is given the non-disturbance agreement described below, Tenant covenants and agrees to execute and deliver upon demand such further instrument or instruments subordinating this Lease to the lien of any such mortgage or mortgages as shall be desired by the Landlord and any mortgagees or proposed mortgagees, then Tenant covenants and agrees to execute and deliver upon demand such further instrument or instruments subordinating this lease to the lien of any such mortgage or mortgages as shall be desired, by the Landlord, and any mortgage or proposed mortgages, and hereby irrevocably appoints the Landlord the attorney-in-fact, of the Tenant, to execute and deliver any such instrument or instruments for and in the name of the Tenant; provided however that in no event shall the leased premises, and other rights granted to Tenant under this lease be interfered with or interrupted so long as Tenant substantially complies.

USE AND OCCUPANCY

(8) It is understood and agreed between the parties hereto that said premises during the continuance of this lease shall be used and occupied for a bicycle and adventure sport sales and service store including the holding of classes related thereto, and for any other purpose or purposes without the written consent of the Landlord; and that the Tenant will not use the premises for any purpose in violation of any law, municipal ordinance or regulation; and that on any breach of this agreement and that on any breach of the provisions of this paragraph, Tenant shall be in default of this Lease and, following notice and thirty (30) days to cure, the Landlord may at its option terminate this Lease forthwith and re-enter and repossess the premises.

FIRE

(9) It is understood and agreed that, if the premises hereby leased be damaged or destroyed in whole or in part by fire or other casualty during the term hereof, the Landlord will repair and restore the same to good tenable condition, with reasonable dispatch, and that the rent herein provided for shall abate entirely in case the entire premises are untenable and prorated for the portion rendered untenable, in case a part only is untenable, until the same shall be restored a tenable condition; provided, however that if the Tenant shall fail to adjust his own insurance or

to remove his damaged goods, equipment or property within a reasonable time, and as a result thereof, the repairing and restoration is delayed, or if such fire or the cause damaging or destroying the leased premises shall result from the negligence or willful act of the Tenant, his agents or employees, there shall be no abatement of rent; and provided further that, if the Tenant shall use any part of the leased premises for storage during the period of repair, a reasonable charge shall be made therefor against the Tenant; and provided further that in case the leased premises, or the building of which they are a part, shall be destroyed to the extent of more than one-half of the value thereof, the Landlord or Tenant may, at their option, terminate this lease forthwith by a written notice to the other.

REPAIRS

(10) Landlord shall maintain and repair/replace at its sole expense the leased premises, Building and Common Areas, including the HVAC units, parking lot, sidewalks, lighting, landscaping and snow removal, together with the windows and exterior walls, roof, foundation and the structure of the Building in good order and condition, unless damaged by Tenant or its invitees and employees/agents. Tenant shall be responsible for \$1,000.00 of any replacement of HVAC units by Landlord.

INDEMNITY/INSURANCE

(11) Tenant shall defend and indemnify Landlord, and save it harmless from and against any and all liability, damages, costs, or expenses, including reasonable attorneys' fees, arising from any act, omission, or negligence or willful misconduct of Tenant, or the contractors, licensees, agents, servants, employees, guests, invitees, or visitors of Tenant in or about the leased premises, or arising from any accident, injury, or damage, howsoever and by whomsoever caused, to any person or property occurring in or about the premises, provided that the foregoing provision shall not be construed to make Tenant responsible for loss, damage, liability or expense resulting from injuries to third parties caused by the negligence or willful misconduct of Landlord, or of any officer, contractor, licensee, agent, servant, employee, guest, invitee or visitor of Landlord. Tenant's obligation to indemnify Landlord shall survive the expiration or earlier termination of the Term of this Lease.

Landlord shall defend and indemnify Tenant, and save it harmless from and against any and all liability, damages, costs, or expenses, including reasonable attorneys' fees, arising from any act, omission, or negligence or willful misconduct of Landlord, or the officers, contractors, licensees, agents, servants, employees, guests or invitees of Landlord in or about the building or common areas other than the leased premises, or arising from any accident, injury, or damage, howsoever and by whomsoever caused, to any person or property occurring in or about the building or common areas other than leased premises and other than any premises leased to third parties, provided that the foregoing provision shall not be construed to make Landlord responsible for loss, damage, liability or expense resulting from injuries to any person/entity caused by the negligence or willful misconduct of Tenant, or of any contractor, licensee, agent, servant, employee, guest, invitee or visitor of Tenant. Landlord's obligation to indemnify Tenant shall not survive the expiration or earlier termination of the Term of this Lease or any extensions thereof.

REPAIRS AND ALTERATIONS

(12) Except as provided elsewhere in this Lease, Tenant further covenants and agrees that it will, at its own expense during the continuation of this lease, keep the interior of the leased premises and every part thereof, including the plumbing and electrical fixtures, in good repair through ordinary

maintenance; and at the expiration of the term, yield and deliver up the same in like conditions as of the date of this Lease, reasonable use and wear thereof, and damage by elements excepted. The Tenant shall not make any alterations, additions or improvements to said leased premises without the Landlord's written consent; and all alterations, additions or improvements made by either of the parties hereto, upon the premises, except movable office furniture and trade fixtures put in at the expense of the Tenant, shall be the property of the Landlord and shall remain upon, and be surrendered with, the premises at the termination of this lease, without molestation or injury.

Landlord agrees not to unreasonably withhold the consent to alterations and improvements. The Tenant covenants and agrees that if the demised premises consists of only a part of a structure owned or controlled by the Landlord, the Landlord may enter the demised premises at reasonable times and install or repair pipes, wires and other appliances or make any repairs deemed by the Landlord essential to the use and occupancy of other parts of the Landlord's building.

EMINENT DOMAIN

(13) If the whole or any part of the premises shall be taken under the power of eminent domain, the terms of this lease shall cease on the part to be taken on the date of possession of that part which is surrendered; and any unearned rent paid or credit in advance shall be refunded and, from that date, Tenant shall have the right to either cancel this lease and declare the same null and void or to continue in possession of the remainder of the premises under the terms and conditions herein provided, except that the rent shall be reduced in proportion to the amount of the premises taken. The entire award, for the taking of the premises or any part thereof, shall belong to the Landlord, and the Tenant shall have no claim against the Landlord for the dollar value of any unexpired term of this lease. Notwithstanding anything herein to the contrary, the Landlord shall not be entitled to any portion of the award made to the Tenant for Tenant's property, relocation costs, loss of business or other damages to Tenant which would not reduce amounts payable to Landlord.

RESERVATION

(14) The Landlord reserves the right of free access, at all times, to the roof of said leased premises. The Tenant shall not erect any structure for storage or any aerial or use the roof for any purpose without the consent, in writing, of the Landlord.

CARE AND CONDITION OF PREMISES

(15) The premises, land improvements and all HVAC systems and equipment, plumbing, electric, gas and other systems and installations within or serving the premises are in good working order at the Commencement Date. The Tenant shall not perform any acts or carry on any practices which may injure the building or be nuisance or menaces to other Tenants in the building, and shall keep premises under his control clean and free from rubbish and dirt at all times; and it is further agreed that, in the event the Tenant shall not comply with these provisions, the Landlord may enter upon said premises and have rubbish, dirt and ashes removed, and said areas cleaned, in which event the Tenant agrees to pay all charges that the Landlord shall pay for hauling rubbish, ashes and dirt or cleaning said areas. Said charges shall be paid to the Landlord, by the Tenant, as soon as bill is presented to him; and the Landlord shall have the same remedy as is provided for default by Tenant provided in other provisions of this lease, in the event of Tenant's failure to pay.

(16) The Tenant shall, at his own expense under penalty of forfeiture and damages, promptly comply with all lawful laws, orders, regulations or ordinances of all municipal, county and state authorities affecting the premises hereby leased and the cleanliness, safety, occupation and use of same.

RE-ENTRY

(22) In case any rent shall be due and unpaid or if default be made in any of the covenants herein contained or if said leased premises shall be deserted or vacated, then it shall be lawful for the Landlord, his attorney, heirs, representatives and assigns, to re-enter into and repossess the said premises, and the Tenant and each and every occupant to remove and put out.

QUIET ENJOYMENT

(23) The Landlord covenants that the said Tenant, on payment of all the aforesaid installments and performing all the covenants aforesaid, shall and may peacefully and quietly have, hold and enjoy said demised premises for the term aforesaid.

EXPENSES, DAMAGES, AND RE-ENTRY

(24) In the event that the Landlord shall, during the period covered by this lease, obtain possession of said premises by re-entry, summary proceedings or otherwise, the Tenant hereby agrees to pay the landlord the reasonable expense incurred in obtaining possessions of said premises, and also all expenses and commissions which may be paid in and about the letting of the same and all other damages including reasonable attorney fees.

REMEDIES NOT EXCLUSIVE

(25) It is agreed that each and every of the rights, remedies and benefits provided by this lease, shall be cumulative and shall not be exclusive of any other of said rights, remedies and benefits or of any other rights, remedies and benefits allowed by law.

WAIVER

(26) One or more waivers of any covenant or condition, by the Landlord, shall not be construed as a waiver of a further breach of the same covenant or condition.

STORAGE AND REMOVAL OF RUBBISH

(27) The Landlord shall be responsible for furnishing containers for the on-site storage of rubbish and other refuse, and for periodic removal of same. No outside storage shall be allowed by the Tenant unless allowed by Landlord. Landlord shall provide enclosure for said refuse container as required by municipal building code and ordinances.

MODIFICATION

(28) Landlord shall have the right to change or modify the common areas or build on any of the common areas or change the site plan, provided any such change, modification and/or construction shall not unreasonably interfere with Tenant's business operation.

(29) It is agreed that, in this lease, the word he shall be used as synonymous with the words she, it and they; and the word his synonymous with the words her, its, and their.

(30) The covenants, conditions, and agreements made and entered into by the parties hereto are declared binding on their respective heirs, successors, representatives and assigns.

GROSS LEASE: TAXES, INSURANCE, MAINTENANCE, WATER, AND SEWER

(31) This Lease is to be considered a "gross lease", wherein Landlord shall, at its sole cost and expense and without additional payment from Tenant pay all property taxes (excluding personal property taxes of Tenant), maintenance of the building (within which the premises are located) property and casualty insurance for the building within which the premises are located (except as otherwise required of Tenant in this Lease), the common area maintenance, and the maintenance, repairs and replacements of equipment, systems and improvements that are Landlord's responsibility as provided in this Lease. Any cost or obligation not specially assigned to Tenant under this Lease shall be an obligation/cost of Landlord.

WAIVER OF JURY TRIAL

(32) Landlord and Tenant hereby waive, to the extent not prohibited by law, the right to a jury trial in any action or proceeding between and among them or their successors arising out of this Lease or Tenant's occupancy of the premises or its right to occupy the premises. Tenant hereby waives the right to interpose a counterclaim in any proceeding instituted by Landlord against Tenant to terminate this Lease, to obtain possession to the premises, or to recover rent.

(33) In case any rent shall be due and remain unpaid for more the fifteen (15) days after written notice or if default be made in any of the other covenants, agreements, stipulations or conditions herein contained and such default shall continue for a period of thirty (30) days after written notice of such default, or if the leased premises shall be deserted or vacated, Landlord in addition to other rights or remedies it may have by law or under the Lease shall have the immediate right to re-entry and may remove all persons and property from the leased premises; such property of Tenant may be sold or may be removed and stored in any other place in the building in which the leased premises is situated, or in any other place, for the account of and at the expense and at the risk of Tenant. Tenant hereby waives all claims for damages except those occasioned by the negligence of Landlord or its agents which may be caused by the re-entry of Landlord and taking possession of the leased premises or removing or storing of furniture and property as herein provided, and will save Landlord harmless from any loss, costs or damages occasioned by Landlord, thereby, and no such re-entry shall be considered or construed to be forcible entry.

Should Landlord elect to re-enter as herein provided or should it take possession pursuant to legal proceedings or pursuant to any notice provided for by law, it may either terminate this Lease or it may from time to time, without terminating this Lease, re-let the premises or any part thereof upon such terms and conditions as Landlord in its sole discretion may deem advisable, with the right to make alterations and repairs to the leased premises. Rentals received by Landlord from such re-letting shall be applied as follows:

First, to the payment of any indebtedness, other than rent due hereunder from Tenant to Landlord; including all damages sustained by Landlord as a result of the default of Tenant, including reasonable attorney fees;

Second, to the payment of rent due and unpaid hereunder;

Third, to the payment of any reasonable cost of such reletting, including reasonable attorney fees;

Fourth, to the payment of the reasonable cost of any alterations or repairs to the premises;

and the residue, if any shall be held by Landlord and applied in payment of future rent as the same may become due and payable hereunder. Should such rentals received from such re-letting during any month be less than that amount agreed to be paid that month by Tenant hereunder, the Tenant shall pay such deficiency to Landlord. Such deficiency shall be calculated and paid monthly.

No such re-entry or taking possession of the premises by Landlord shall be construed as an election on its part to terminate this Lease unless a written notice of such intention be given to Tenant or unless the termination thereof be decreed by a Court of competent jurisdiction. Notwithstanding any such re-letting without termination, Landlord may at any time thereafter elect to terminate this Lease for such previous breach. Should Landlord at any time terminate this Lease for any breach, or decide not to so terminate, in addition to any other remedy, it may recover from Tenant all damages it may incur by reason of such breach, including past due unpaid ren and the cost of recovering the premises.

The above shall not limit the remedies at law or equity Landlord may have in the case of breach of the Lease by Tenant.

NOTICE

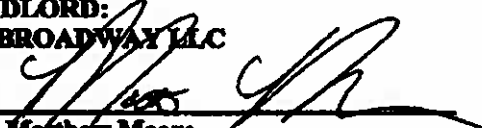
(40) All notices, requests and other communications under this Lease will be in writing and will be delivered (i) in person, (ii) by registered or certified mail, return receipt requested, (iii) by recognized overnight delivery service providing positive tracking of items (for example, Federal Express).

All such notices, requests and other communications shall be deemed to have been sufficiently given for all purposes hereof only upon receipt by the party to whom such notice is sent. Notices by the parties may be given on their behalf by their respective attorneys.



IN WITNESS HEREOF, The parties have hereunto set their hands and seals the day and year first above written.

WITNESSED BY:

LANDLORD:
MD BROADWAY LLC

By: 
Matthew Moore
Member

TENANT:
LAKE ORION BIKE & ADVENTURE LLC

By: 
Michael Warner
Member

Member

LTM LLC

CONSTRUCTION PROPOSAL

915 S. OPDYKE RD AUBURN HILLS MI 48326
TIM MARRIOTT 248-343-5523

CUSTOMER
 L.O. BIKE & ADVENTURE 47 S.
 BROADWAY LAKE ORION MI
 48362
 ESTIMATE NO C-12
 DATE 5/20/2025
 ATTENTION
 MIKE WARNER
 PHONE
 248-724-6104
 info@LakeOrionBikes.com
 PROJECT
 EXTERIOR STORE FRONT
 PAYMENT TERMS
 COD
 DUE DATE
 UPON COMPLETION

QTY	DESCRIPTION	AMOUNT
3	EXTERIOR-FRONT REPLACE DARK TINTED FRONT GLASS <78"x47-1/2 doublepane> TO CLEAR	\$ 3,896.00
1	EXTERIOR FRONT-ABOVE STONE-PAINT TO MATCH REST OF	\$ 1,825.00
1	EXTERIOR FRONT REPAIR EACH SIDE OF OVERHANGE & RESTORE, REMOVE CLOTH & REPLACE CLOTH AWNING COVERING TO MATCH BUILDING	\$ 4,100.00
1	EXTERIOR FRONT REMOVE & REPLACE & REWIRE OLD LIGHT FIXTURES WITH MODERN VINTAGE FIXTURES	\$ 1,565.00
4	EXTERIOR NORTH EXPOSED WALL REPAIR BASEMENT WINDOW COVERS	\$ 1,250.00
1	EXTERIOR FRONT-REMOVE COMPLETE WINDOW BENCH AND RESTORE FOR WINDOW DISPLAYS	\$1,860.00
1	EXTERIOR-REMOVE & DISPOSE OF EST 55 FT BLACK FENCING, REPAIR ANY & ALL POSSIBLE TRIP HAZARDS FOR PUBLIC WALKWAY	\$950.00
TOTAL		\$ 15,446.00

SIGN BELOW TO ACCEPT QUOTE:

AUTHORIZED REP

DATE



DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Additional Credit Card

BACKGROUND BRIEF:

In the course of running and administering the many facets of the DDA, it becomes necessary to facilitate the purchase of goods and services through the Comerica Credit Card, which charges against the general accounts of the village. This card is subject to spending and procurement policies, spending limits, transactional limits and other protective factors that maintain the integrity of the privilege.

On many occasions, the Assistant Director, who is responsible for event preparation, special programming and other purchasing heavy matters, is compelled to use the card issued to the Executive Director, often causing confusion, and delay as the rights to the use of the card are honored.

Without changing any limits imposed against the DDA for the number of monthly transactions, or the restraints of any policy guiding the use and limits of the right, it is requested that an additional card is issued for use against the Comerica Account in the name of the Assistant Director, Janet Bloom.

FINANCIAL IMPACT:

The Credit Card activity of the DDA is reconciled monthly. This additional card would be handled in the same fashion. There is no anticipation that a second card would alter current budget activity as the current spending is most often delayed. This is substantially problematic when the Asst. Director is preparing for events from remote locations.

RECOMMENDED MOTION:

Move to approve and adopt a RESOLUTION TO ISSUE A SECOND CREDIT CARD FOR USE BY ASSISTANT DIRECTOR in the form attached hereto and direct the delivery of the Resolution to the Village for action



RESOLUTION NO. 2025-003

WHEREAS, the Lake Orion Downtown Development Authority (“DDA”) has established a credit/debit account with Comerica Bank for the purpose of facilitating timely and efficient payment for authorized purchases and expenses related to DDA operations and programming; and

WHEREAS, the DDA currently maintains a single credit card associated with its credit account that is assigned to its Executive Director; and

WHEREAS, the Board finds it necessary and appropriate to authorize the Assistant Director to have similar charging privileges to better support the operations of the DDA and ensure continuity in financial processing and authorized purchasing.

NOW, THEREFORE, BE IT RESOLVED:

1. That the DDA Board hereby requests and authorizes the Village Clerk/Treasurer to take all necessary steps to secure a second credit card tied to the existing DDA credit account;
2. That the second credit card shall be issued in the name of Janet Bloom, for use solely in connection with legitimate and authorized business of the Downtown Development Authority;
3. That all purchases made using this card shall comply with applicable Village purchasing policies, credit card use policies, and DDA procedures;
4. That the DDA shall be responsible for monitoring and reconciling all charges on the second card in the same manner as is currently in place for the existing DDA credit card.

Motion offered by: _____ Seconded by: _____

Yeas: _____ Nays: _____ Absent: _____

ADOPTED this __ day of _____, 2025.

Debbie Burgess, Chair

Downtown Development Authority



DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Paving Repair(s) – Tarr Lot

BACKGROUND BRIEF:

Pursuant to our lease agreement for the Tarr Parking Lot (across from the DDA Office) we have a general obligation for maintenance. A request has been made from the owner of the lot that we perform patching and asphalt maintenance on the lot. Inspection does reveal that there are large areas of crumbling asphalt that present trip and other hazards. While this is open and obvious, we do have a standard we want to present, and a liability we want to avoid.

The owner has made it clear they are interpreting our lease as this maintenance being our responsibility.

FINANCIAL IMPACT:

We did not receive any response to our prior RFP posting. The office has worked to find direct quotes for the repair of the damaged areas and recommend your consideration of the removal and replacement of the larger area, as identified in the quote(s).

It is recommended we approve the quote from BSI Paving titled “1 spot R&R”, in the amount of \$7,189.83. this would be a single source quote, awarded at the discretion of the Board. The reasons for the single source is predominantly based on the fact that six other providers were contacted and all either failed to respond or had no interest. BSI is a local firm, willing to assist this need and is the only responsive entity. Prior RFP inquiry for the site, as previously authorized by the Board, went without response.

Funding for this project may be assessed against GL 248-730-975-000 – Capital Outlay which has a current balance in excess of \$40,000. The project is in compliance with our TIF Plan and would be an obligation under the lease agreement based on notes supporting the formation of the agreement.

RECOMMENDED MOTION:

Move to approve and authorize a contract with BSI Paving, for paving maintenance and repair at 115 N Broadway St., at a cost not to exceed \$7,189.83, w/funding from GL 248-730-975-000 – Capital Outlay

1 SPOT R&R



BSI Paving
 2651 Metamora Rd.
 Oxford, MI 48371
 info@birminghamsealcoat.com
 (248) 647-8373

For: Lake Orion DDA Downtown Development Authority
 Job Address: 115 North Broadway Street
 Lake Orion, MI 48362
 (248) 464-0307

Salesman/Customer Rep

Dan Albani
 DAlbani@bsipaving.com
 (248) 813-7748

Job Id 2506-7140516-01	Job # 2025-392	Document # 2025-0659	Document Amount	\$7,189.83
Document Date 06/04/2025				

Description

Asphalt	\$7,189.83
---------	------------

ASPHALT Full depth repair R&R
 Approx. 850 SF - 1 area - lime green on map
 - Remove asphalt to a depth of (4") and export all material off site
 - Grade and compact existing sub-base material
 **If poor sub-base found - additional charges will apply to correct
 - Install 2" Asphalt Leveling Course and compact
 - Apply SS-1h tack asphalt binder
 - Install 2" Asphalt Wearing Course and compact

Total **\$7,189.83**

Customer Rep Signature:

<i>Dan Albani</i>
06/04/2025

Customer Signature:

Signature
Signature Date

Note:

Price does not include permits, bonds, inspections, SESC, staking, survey, prints, testing, traffic control, lane closure
 Base stone needed at \$55/ton | undercutting at \$55/cyd | if poor subgrade found - additional charges will apply
 If ANY existing pavement breaks during service - customer responsible for replacement costs
 If existing pavement found thicker than 4" - additional charges will apply
 If any basin, drain, pipe, culvert, or underground work found needed - additional charges will apply
 Basin block need at \$250.00/row/basin | if basin rebuild found needed additional \$2750.00/basin (up to 3' deep)
 Priced for all work being done in (1) phase/mob - additional charges will apply if more wanted or needed...
 ...minimums and mobilizations may apply
 Due to matching existing pavement/elevations no guarantee/warranty against water shed, pitch, pooling, ponding, holding
 Anything not listed is an exclusion and will result in additional charges
 Customer responsible for all irrigation, restoration, grass, landscape, plants, trees, garden, edging, siding, awning,...
 ...overhang, decking, fencing, railing, posts, pillars, mailbox, doors, brick, veneer, paver, paver reset
 Pricing shown is if all work is approved - otherwise all pricing subject to change/increase

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(248) 647-8373

Lake Orion DDA Downtown Development Authority/25
01
115 North Broadway Street
Lake Orion, MI 48362

Section 8, Item C.

Attached Images

Aerial_1_spot_R&R_lime_green_area_.png





2651 Metamora Rd. Oxford, MI
Office: (248) 647-8373
www.BSIpaving.com

Section 8, Item C.

Customer Information

Lake Orion DDA Downtown Development Authority
115 North Broadway Street Lake Orion
Michigan 48362 (248) 464-0307

Job Address & Project Number

115 North Broadway Street, Lake Orion, Michigan, 48
2025-392

Your Sales Representative

Dan Albani
DALbani@bsipaving.com
(248) 813-7748

DATE SUBMITTED

06/04/2025

Estimator Notes:

- Landscape restoration not included unless specifically noted. BSI is not responsible for damage to irrigation systems when not properly marked. Customer will be notified when work is to be performed. It is the customer's responsibility to make sure the irrigation systems are shut off as to not cause damage to the work performed.
- Price does not include permits, bonds, inspections, SESC, staking, survey, prints
- Base stone needed at \$45/ton | undercutting at \$45/cyd | if poor subgrade found - additional charges will apply to correct
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- If any unforeseen structures, objects, buried components, or voids found once cap removed - additional charges will apply
- Customer responsible for ALL irrigation, restoration, grass, landscape, plants, trees, garden, edging, siding, awning, overhang, decking, fencing, siding, railing, posts, pillars, mailbox, brick, veneer, paver, paver reset

PAYMENT TERMS 30% Down Payment, Balance Due Upon Completion

3% CHARGE FOR ALL CREDIT CARD TRANSACTIONS

REMAINING BALANCE DUE UPON COMPLETION OF WORK

DUE TO THE RISING COSTS IN MATERIALS ALL PROPOSALS ARE SUBJECT TO PRICE ADJUSTMENTS IF NOT SIGNED BY QUOTE EXPIRATION DATE.

DUE TO EXTREME MARKET VOLATILITY AND PENDING U.S. GOVT. SECTION 232 TRADE CASES ALL PRICES AND AVAILABILITY ARE SUBJECT TO CHANGE WITHOUT NOTICE. ALL QUOTES TO BE CONFIRMED AT TIME OF ORDER.

BEGINNING 2023, PRICING FOR ANY ASPHALT RELATED PROJECT WILL SEE INCREASES ANYWHERE FROM \$10-\$15 PER TON. PLEASE CONTACT YOUR SALES PERSON FOR ADDITIONAL INFORMATION.

THIS PROPOSAL MAY BE WITHDRAWN AT OUR DISCRETION IF NOT ACCEPTED WITHIN 15 DAYS OF 06/04/2025

Signature
Signature Date

Dan Albani
06/04/2025

Lake Orion DDA Downtown Development Authority

Dan Albani

Customer

Sales Rep

BY SIGNING YOU AGREE TO OUR WARRANTY, TERMS AND CONDITIONS.

PRICE IS NON-NEGOTIABLE AFTER SIGNING FOR PROJECT, PLEASE CONTACT YOUR SALES REPRESENTATIVE FOR ANY QUESTIONS REGARDING YOUR QUOTED PRICE.

WARRANTY COVERAGE: Work quoted in our proposals is covered by our standard warranty against defects in materials and workmanship for a period of 12 months (unless specified otherwise) subject to the terms and conditions contained herein. Due to the volatility of the crude oil market and the potential for geopolitical issues, prices quoted are valid for 30 days from issue date of the proposal, unless specified otherwise.

STANDARD TERMS : This contract shall be subject to the following general conditions and standard terms of the contract printed below. Birmingham Sealcoat Inc., will be referred to as contractor or BSI. The owner, architect, client or Customer to whom this proposal/contract is addressed and authorized by will be referred to as "Customer". A finance charge of 1-1.5% per month will be added to all past due accounts, an annum of 18%.

Payment is due in full upon completion of work or upon invoicing of completed work. In addition, Customer shall pay all costs and attorney fees incurred by BSI in collecting any sums due to BSI.

NO ORAL AGREEMENTS: It is expressly understood that all terms, agreements, and conditions relating to this contract are only those expressed in writing herein, and that there are no oral representations, undertakings, terms, agreements or conditions of any kind.

CHANGES: No changes or alterations in the specifications shall be allowed except in writing and at prices agreed upon at the time the changes are authorized.

EXTRA WORK: Any additional work requested beyond the specifications on the reverse side will be outlined in writing on a separate proposal form. Extra work performed on a time & material basis shall be signed for at the time the work is performed. The lack of a representative of the Customer does not relieve the Customer from payment obligation for the work billed.

ESTIMATED OR APPROXIMATE QUANTITIES: Quantities and areas in this proposal are approximate, arrived at for estimating purposes only. In addition, it is understood that payment is to be made on actual quantities of work completed and actual areas covered unless otherwise indicated.

PROPERTY LINES/STAKING: The Customer shall establish and designate property lines, limits, grade, and stakes and shall be obligated to pay for work performed as ordered in the event the property lines established and designated by Customer trespass on other property. Also, the Customer shall be responsible for any damages caused hereby to the owner of any property encroached on by work specified in this proposal.

DELAYS/TIME OF COMPLETION: BSI shall complete this work within a reasonable time, but shall not be held responsible for delays beyond the control of the contractor.

SUB GRADES: No material shall be placed on a wet, unstable or frozen sub-grade. A suitable sub-grade is a condition precedent to the requirement of performance of this contract.

MINIMUM GRADE: BSI reserves the right to refuse to construct a pavement unless minimum grades of 1% are possible for surface drainage. If construction is performed with less than a minimum grade of 1%, it is understood that water ponding may occur and that there is no warranty attached to the work as to satisfactory surface drainage. Depressions over 3/4" can be filled.

WATER DRAINAGE: BSI will make water drain as best as possible. However, we make no guarantees against drainage of new or old pavement of any type when resurfacing and not replacing the project in its entirety. Skin patching is above the existing surface and Customer understands skin patching may hinder drainage or flow of water.

PERMITS: Customers of the work shall obtain and pay for any and all permits, inspections or assessments if they are required, unless otherwise noted. Permits, if obtained by BSI, will be billed with labor cost of \$150.00 per hour plus costs of permits, bonds, inspects, etc.

TRAFFIC MANAGEMENT/CONTROL: If traffic management is needed - Customer is liable for any and all costs relating to traffic management/control.

ZONING

REQUIREMENTS & REGULATIONS: BSI assumes no responsibility for determining whether Customer has the legal right or authority to perform the work as specified. Notwithstanding that such work might be deemed to violate any ordinance, zoning regulation, or other law, the Customer shall, nevertheless, be obligated to pay for the work performed as ordered.

EXISTING AREA AND JOB SITE : Customer understands that BSI is not responsible for any existing area, such as but not limited to, grass, asphalt/concrete pavement, or otherwise that may be damaged, disturbed, or otherwise from ingress or egress of the jobsite. Customer is responsible for all restoration and/or repair costs to existing area that may occur during service.

CONCRETE CRACKING: BSI strives for precision in all of our work. Although there are things outside of our control like concrete cracking. With all concrete

jobs we will input control joint(s) – this is to try and make the concrete crack where we want it to. Concrete will crack soon after it is poured a times, happen the same day. Even with control joints there is no way to guarantee that it will not crack in other places. Cracks that are 3/16" of one inch or less (in height or gap) are considered normal and are within industry standards and ARE NOT considered a warranty issue.

ASPHALT CRACKING: Asphalt, especially when a surface is "resurfaced" or "skin patched" will have at the least "reflective cracking"; Which is the reproduction of cracks that were covered by the resurfacing or patching. This type of cracking can happen relatively quickly, and they are normally larger than the original cracks covered up. This is normal and not considered a warranty issue. Asphalt cracking of something that has been completely removed and replaced may be a warranty issue and will be evaluated on a situational basis.

IRRIGATION: BSI is not responsible for any irrigation systems or components. Customer understands that irrigation components or lines are normally buried very shallow and will be hit or damaged during service. Customer assumes all responsibility and cost of irrigation systems.

STOCKPILING MATERIALS: BSI shall be permitted to stockpile materials necessary to perform its work on the Customer's property or adjacent to the site of the work at no cost.

HIDDEN OBJECTS: BSI assumes no responsibility for removing, damaging, or inadvertently destroying hidden objects encountered during the performance of their work, nor the cost associated with same. It is explicitly the responsibility of the Customer to inform BSI of anything that cannot be seen prior to removal of any objects.

THICKNESS OF ASPHALT PAVEMENT: All descriptions of pavement in this proposal refer to average thickness. Variations in sub-grade and technical limitations may result in variations from the average. BSI warrants that sufficient material will be used on the project as to result in the average thickness specified.

SOIL CONDITIONS: BSI assumes no responsibility for any unusual soil conditions encountered that are not specifically referred to in this proposal. Also, BSI assumes no responsibility for the excavation, removal or disposal of any contaminated soils encountered during any excavation for the Customer. The Customer will pay any extra cost for such conditions incurred by BSI.

TREE ROOTS: Contractor shall not be responsible for any damage to trees occasioned by the removal of tree or tree roots in preparing the site.

UNDERGROUND STRUCTURES: It is the Customer's responsibility to advise contractor of the existence and location of all underground structures such as sewers, water lines, gas lines, etc., which might be encountered by BSI in the performance of its work. BSI shall be deemed to have notice of the existence of only those structures specifically referred to in this proposal and of the location thereof as indicated in this proposal. If a condition develops in the performance of BSI's work where the identity or location of the underground structures varies from those specified herein, any extra cost incurred thereby in moving, protecting or covering same, or otherwise, shall be borne by the Customer.

COLD WEATHER CONDITIONS: Effective October 1st, jobs are subject to winter conditions (50 degrees or below). Roller marks and asphalt marks may be visible due to cold weather temperatures and are not considered a warranty issue.

STREET PRINT®: The sample card replicates as closely as possible the Street Bond Surface System. Natural pigments are used in the colorants, and as a result some color variation may occur. It is recommended that these colors be applied in an inconspicuous area of asphalt to verify color choice.

STAMPED CONCRETE: Color samples shown represent the color of the finished product as closely as possible when sealed with two coats of hard bright sealer. Variations occur due to differences in cement aggregate, water/cement ratio, weather, finishing and application methods.

NOTICE OF COMMENCEMENT: Notice of Commencement is requested per Sec. 570.1108a (1)(9)(10)(11) of the Michigan Construction Lien Act 497 of 1980, on any signed contract.

LIMITATION OF LIABILITY: IN RECOGNITION OF THE RELATIVE RISKS, REWARDS, AND BENEFITS OF THE PROJECT TO BOTH THE CUSTOMER AND BSI, THE RISKS HAVE BEEN ALLOCATED SUCH THAT THE CUSTOMER AGREES THAT, TO THE FULLEST EXTENT PERMITTED BY LAW, BSI'S LIABILITY TO CUSTOMER FOR ANY AND ALL INJURIES, CLAIMS, LOSSES, EXPENSES, DAMAGES, OR CLAIMS EXPENSES ARISING OUT OF THIS AGREEMENT FROM ANY CAUSE OR CAUSES SHALL NOT EXCEED THE VALUE OF THE FEE RECEIVED BY BSI FOR THE SERVICES PROVIDED BY BSI.

STANDARD TERMS OF CONTRACT: Customer shall not withhold payment to BSI in the event of any dispute arising out of this contract. In the event of a dispute, Customer will deposit any unpaid balance due on this contract with a mutually agreed upon bank, which will act as an Escrow Agent until the dispute is resolved. Any dispute arising out of this contract that cannot be resolved between the Customer and BSI shall be submitted to an arbitrator who shall be a

registered engineer or architect selected by both parties. In the event the parties cannot agree upon such an arbitrator, the American Institute shall select the arbitrator and the arbitration proceedings shall be governed by their rules. The decision of the arbitrator shall be binding upon the parties and enforceable in a Circuit Court for the State of Michigan. The arbitrator shall be empowered to direct the Escrow Agent to disburse the funds held in escrow to the proper party and to direct such other relief as he determines necessary. The cost of the arbitration shall be borne equally by both parties. In the event of an anticipatory breach of this contract by Customer, BSI shall be entitled to liquidated damages equal to 25% of the total contract amount. The Customer shall pay BSI all costs, including actual attorney's fees, incurred by contractor in enforcing this contract, including collection of any payment due herein. I have read all pages and agreed to these general conditions. The general conditions and prices and specifications associated with this contract are hereby accepted. Birmingham sealcoat Inc. is authorized to perform this work.

SCHEDULING PAYMENT AND HOLD: Birmingham Sealcoat Inc. requires a 30% deposit on the total proposed amount with signatures on the proposal in order to be put in queue for scheduling of work and to begin work. Remaining balance for a residential Customer is due upon completion of the job. Commercial work terms will be specified between BSI representative and the Customer. Any exceptions to the above must have management approval. In the event deposit and proposal signatures are not both together and input, the job will not be considered for scheduling and the job will be put into the "hold queue" until necessary documents/payments have been collected from Customer.

CANCELLATION NOTICE REQUIREMENTS: Birmingham Sealcoat Inc. requires at least 24-hour notice prior to start of day job was scheduled. Failure to produce sufficient notification will result in a \$25.00 service fee.

MEDIA RELEASE WAIVER By signing this proposal you waive your right to have your property photographed or video recorded by Birmingham Sealcoat Inc. to be used in any way shape or form. This includes but may not be limited to social media, advertisement or educational purposes.

Disclaimer of Union Benefit Plan Contribution Liability: Notwithstanding any term or provision on this quote or the bid package to the contrary, BSI shall not under any circumstances, agree to make any contributions to any of the operating engineers' fringe benefit plans, including, without limitation, the operating engineers' local 324 pension plan ("Plan"). If awarded this work, a condition to BSI accepting this award shall be that the contractor represent and agree that the subcontract/purchase order shall not require BSI to make any contributions to any of the operating engineers' fringe benefit plans, including without limitation, to the plan.

By signing customer acknowledges that you have read, understand, and agree to ALL terms and conditions. By signing customer understands and agrees that permit acquisition process will start immediately after contract is signed. Customer agrees to pay for ALL permit, bond, inspection, review, administrative time, and any other associated fees even if customer cancels the work.

Signature
Signature Date

3 SPOT R&R



BSI Paving
 2651 Metamora Rd.
 Oxford, MI 48371
 info@birminghamsealcoat.com
 (248) 647-8373

For: Lake Orion DDA Downtown Development
 Authority
 Job Address: 115 North Broadway Street
 Lake Orion, MI 48362
 (248) 464-0307

Salesman/Customer Rep

Dan Albani
 DAlbani@bsipaving.com
 (248) 813-7748

Job Id 2506-7140516-01	Job # 2025-392	Document # 2025-0661
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Document Amount	\$5,809.71
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Document Date 06/04/2025

Description

Asphalt	\$5,809.71
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ASPHALT Full depth repair R&R
 Approx. 593 SF - 3 areas - red on map
 - Remove asphalt to a depth of (4") and export all material off site
 - Grade and compact existing sub-base material
 **If poor sub-base found - additional charges will apply to correct
 - Install 2" Asphalt Leveling Course and compact
 - Apply SS-1h tack asphalt binder
 - Install 2" Asphalt Wearing Course and compact

Total **\$5,809.71**

Customer Rep Signature:

<i>Dan Albani</i>
06/04/2025

Customer Signature:

Signature
Signature Date

Note:

Price does not include permits, bonds, inspections, SESC, staking, survey, prints, testing, traffic control, lane closure
 Base stone needed at \$55/ton | undercutting at \$55/cyd | if poor subgrade found - additional charges will apply
 If ANY existing pavement breaks during service - customer responsible for replacement costs
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 If any basin, drain, pipe, culvert, or underground work found needed - additional charges will apply
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Lake Orion DDA Downtown Development Authority/25
01
115 North Broadway Street
Lake Orion, MI 48362

Section 8, Item C.

Attached Images

Aerial_photo.png





2651 Metamora Rd. Oxford, MI
Office: (248) 647-8373
www.BSIpaving.com

Section 8, Item C.

Customer Information

Lake Orion DDA Downtown Development Authority
115 North Broadway Street Lake Orion
Michigan 48362 (248) 464-0307

Job Address & Project Number

115 North Broadway Street, Lake Orion, Michigan, 48
2025-392

Your Sales Representative

Dan Albani
DALbani@bsipaving.com
(248) 813-7748

DATE SUBMITTED

06/04/2025

Estimator Notes:

- Landscape restoration not included unless specifically noted. BSI is not responsible for damage to irrigation systems when not properly marked. Customer will be notified when work is to be performed. It is the customer's responsibility to make sure the irrigation systems are shut off as to not cause damage to the work performed.
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PAYMENT TERMS 30% Down Payment, Balance Due Upon Completion

3% CHARGE FOR ALL CREDIT CARD TRANSACTIONS

REMAINING BALANCE DUE UPON COMPLETION OF WORK

DUE TO THE RISING COSTS IN MATERIALS ALL PROPOSALS ARE SUBJECT TO PRICE ADJUSTMENTS IF NOT SIGNED BY QUOTE EXPIRATION DATE.

DUE TO EXTREME MARKET VOLATILITY AND PENDING U.S. GOVT. SECTION 232 TRADE CASES ALL PRICES AND AVAILABILITY ARE SUBJECT TO CHANGE WITHOUT NOTICE. ALL QUOTES TO BE CONFIRMED AT TIME OF ORDER.

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THIS PROPOSAL MAY BE WITHDRAWN AT OUR DISCRETION IF NOT ACCEPTED WITHIN 15 DAYS OF 06/04/2025

Signature
Signature Date

Dan Albani
06/04/2025

Lake Orion DDA Downtown Development Authority

Dan Albani

Customer

Sales Rep

BY SIGNING YOU AGREE TO OUR WARRANTY, TERMS AND CONDITIONS.

PRICE IS NON-NEGOTIABLE AFTER SIGNING FOR PROJECT, PLEASE CONTACT YOUR SALES REPRESENTATIVE FOR ANY QUESTIONS REGARDING YOUR QUOTED PRICE.

WARRANTY COVERAGE: Work quoted in our proposals is covered by our standard warranty against defects in materials and workmanship for a period of 12 months (unless specified otherwise) subject to the terms and conditions contained herein. Due to the volatility of the crude oil market and the potential for geopolitical issues, prices quoted are valid for 30 days from issue date of the proposal, unless specified otherwise.

STANDARD TERMS : This contract shall be subject to the following general conditions and standard terms of the contract printed below. Birmingham Sealcoat Inc., will be referred to as contractor or BSI. The owner, architect, client or Customer to whom this proposal/contract is addressed and authorized by will be referred to as "Customer". A finance charge of 1-1.5% per month will be added to all past due accounts, an annum of 18%.

Payment is due in full upon completion of work or upon invoicing of completed work. In addition, Customer shall pay all costs and attorney fees incurred by BSI in collecting any sums due to BSI.

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CHANGES: No changes or alterations in the specifications shall be allowed except in writing and at prices agreed upon at the time the changes are authorized.

EXTRA WORK: Any additional work requested beyond the specifications on the reverse side will be outlined in writing on a separate proposal form. Extra work performed on a time & material basis shall be signed for at the time the work is performed. The lack of a representative of the Customer does not relieve the Customer from payment obligation for the work billed.

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DELAYS/TIME OF COMPLETION: BSI shall complete this work within a reasonable time, but shall not be held responsible for delays beyond the control of the contractor.

SUB GRADES: No material shall be placed on a wet, unstable or frozen sub-grade. A suitable sub-grade is a condition precedent to the requirement of performance of this contract.

MINIMUM GRADE: BSI reserves the right to refuse to construct a pavement unless minimum grades of 1% are possible for surface drainage. If construction is performed with less than a minimum grade of 1%, it is understood that water ponding may occur and that there is no warranty attached to the work as to satisfactory surface drainage. Depressions over 3/4" can be filled.

WATER DRAINAGE: BSI will make water drain as best as possible. However, we make no guarantees against drainage of new or old pavement of any type when resurfacing and not replacing the project in its entirety. Skin patching is above the existing surface and Customer understands skin patching may hinder drainage or flow of water.

PERMITS: Customers of the work shall obtain and pay for any and all permits, inspections or assessments if they are required, unless otherwise noted. Permits, if obtained by BSI, will be billed with labor cost of \$150.00 per hour plus costs of permits, bonds, inspectors, etc.

TRAFFIC MANAGEMENT/CONTROL: If traffic management is needed - Customer is liable for any and all costs relating to traffic management/control.

ZONING REQUIREMENTS & REGULATIONS: BSI assumes no responsibility for determining whether Customer has the legal right or authority to perform the work as specified. Notwithstanding that such work might be deemed to violate any ordinance, zoning regulation, or other law, the Customer shall, nevertheless, be obligated to pay for the work performed as ordered.

EXISTING AREA AND JOB SITE : Customer understands that BSI is not responsible for any existing area, such as but not limited to, grass, asphalt/concrete pavement, or otherwise that may be damaged, disturbed, or otherwise from ingress or egress of the jobsite. Customer is responsible for all restoration and/or repair costs to existing area that may occur during service.

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jobs we will input control joint(s) – this is to try and make the concrete crack where we want it to. Concrete will crack soon after it is poured a times, happen the same day. Even with control joints there is no way to guarantee that it will not crack in other places. Cracks that are 3/16" of one inch or less (in height or gap) are considered normal and are within industry standards and ARE NOT considered a warranty issue.

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HIDDEN OBJECTS: BSI assumes no responsibility for removing, damaging, or inadvertently destroying hidden objects encountered during the performance of their work, nor the cost associated with same. It is explicitly the responsibility of the Customer to inform BSI of anything that cannot be seen prior to removal of any objects.

THICKNESS OF ASPHALT PAVEMENT: All descriptions of pavement in this proposal refer to average thickness. Variations in sub-grade and technical limitations may result in variations from the average. BSI warrants that sufficient material will be used on the project as to result in the average thickness specified.

SOIL CONDITIONS: BSI assumes no responsibility for any unusual soil conditions encountered that are not specifically referred to in this proposal. Also, BSI assumes no responsibility for the excavation, removal or disposal of any contaminated soils encountered during any excavation for the Customer. The Customer will pay any extra cost for such conditions incurred by BSI.

TREE ROOTS: Contractor shall not be responsible for any damage to trees occasioned by the removal of tree or tree roots in preparing the site.

UNDERGROUND STRUCTURES: It is the Customer's responsibility to advise contractor of the existence and location of all underground structures such as sewers, water lines, gas lines, etc., which might be encountered by BSI in the performance of its work. BSI shall be deemed to have notice of the existence of only those structures specifically referred to in this proposal and of the location thereof as indicated in this proposal. If a condition develops in the performance of BSI's work where the identity or location of the underground structures varies from those specified herein, any extra cost incurred thereby in moving, protecting or covering same, or otherwise, shall be borne by the Customer.

COLD WEATHER CONDITIONS: Effective October 1st, jobs are subject to winter conditions (50 degrees or below). Roller marks and asphalt marks may be visible due to cold weather temperatures and are not considered a warranty issue.

STREET PRINT®: The sample card replicates as closely as possible the Street Bond Surface System. Natural pigments are used in the colorants, and as a result some color variation may occur. It is recommended that these colors be applied in an inconspicuous area of asphalt to verify color choice.

STAMPED CONCRETE: Color samples shown represent the color of the finished product as closely as possible when sealed with two coats of hard bright sealer. Variations occur due to differences in cement aggregate, water/cement ratio, weather, finishing and application methods.

NOTICE OF COMMENCEMENT: Notice of Commencement is requested per Sec. 570.1108a (1)(9)(10)(11) of the Michigan Construction Lien Act 497 of 1980, on any signed contract.

LIMITATION OF LIABILITY: IN RECOGNITION OF THE RELATIVE RISKS, REWARDS, AND BENEFITS OF THE PROJECT TO BOTH THE CUSTOMER AND BSI, THE RISKS HAVE BEEN ALLOCATED SUCH THAT THE CUSTOMER AGREES THAT, TO THE FULLEST EXTENT PERMITTED BY LAW, BSI'S LIABILITY TO CUSTOMER FOR ANY AND ALL INJURIES, CLAIMS, LOSSES, EXPENSES, DAMAGES, OR CLAIMS EXPENSES ARISING OUT OF THIS AGREEMENT FROM ANY CAUSE OR CAUSES SHALL NOT EXCEED THE VALUE OF THE FEE RECEIVED BY BSI FOR THE SERVICES PROVIDED BY BSI.

STANDARD TERMS OF CONTRACT: Customer shall not withhold payment to BSI in the event of any dispute arising out of this contract. In the event of a dispute, Customer will deposit any unpaid balance due on this contract with a mutually agreed upon bank, which will act as an Escrow Agent until the dispute is resolved. Any dispute arising out of this contract that cannot be resolved between the Customer and BSI shall be submitted to an arbitrator who shall be a

registered engineer or architect selected by both parties. In the event the parties cannot agree upon such an arbitrator, the American Institute shall select the arbitrator and the arbitration proceedings shall be governed by their rules. The decision of the arbitrator shall be binding upon the parties and enforceable in a Circuit Court for the State of Michigan. The arbitrator shall be empowered to direct the Escrow Agent to disburse the funds held in escrow to the proper party and to direct such other relief as he determines necessary. The cost of the arbitration shall be borne equally by both parties. In the event of an anticipatory breach of this contract by Customer, BSI shall be entitled to liquidated damages equal to 25% of the total contract amount. The Customer shall pay BSI all costs, including actual attorney's fees, incurred by contractor in enforcing this contract, including collection of any payment due herein. I have read all pages and agreed to these general conditions. The general conditions and prices and specifications associated with this contract are hereby accepted. Birmingham sealcoat Inc. is authorized to perform this work.

SCHEDULING PAYMENT AND HOLD: Birmingham Sealcoat Inc. requires a 30% deposit on the total proposed amount with signatures on the proposal in order to be put in queue for scheduling of work and to begin work. Remaining balance for a residential Customer is due upon completion of the job. Commercial work terms will be specified between BSI representative and the Customer. Any exceptions to the above must have management approval. In the event deposit and proposal signatures are not both together and input, the job will not be considered for scheduling and the job will be put into the "hold queue" until necessary documents/payments have been collected from Customer.

CANCELLATION NOTICE REQUIREMENTS: Birmingham Sealcoat Inc. requires at least 24-hour notice prior to start of day job was scheduled. Failure to produce sufficient notification will result in a \$25.00 service fee.

MEDIA RELEASE WAIVER By signing this proposal you waive your right to have your property photographed or video recorded by Birmingham Sealcoat Inc. to be used in any way shape or form. This includes but may not be limited to social media, advertisement or educational purposes.

Disclaimer of Union Benefit Plan Contribution Liability: Notwithstanding any term or provision on this quote or the bid package to the contrary, BSI shall not under any circumstances, agree to make any contributions to any of the operating engineers' fringe benefit plans, including, without limitation, the operating engineers' local 324 pension plan ("Plan"). If awarded this work, a condition to BSI accepting this award shall be that the contractor represent and agree that the subcontract/purchase order shall not require BSI to make any contributions to any of the operating engineers' fringe benefit plans, including without limitation, to the plan.

By signing customer acknowledges that you have read, understand, and agree to ALL terms and conditions. By signing customer understands and agrees that permit acquisition process will start immediately after contract is signed. Customer agrees to pay for ALL permit, bond, inspection, review, administrative time, and any other associated fees even if customer cancels the work.

Signature
Signature Date

LEASE AGREEMENT

This Lease Agreement ("Agreement"), made and entered into on December 4, 2019 between the **VILLAGE OF LAKE ORION**, a Michigan Municipal Corporation ("Lessee"), whose address is 21 East Church Street, Lake Orion Michigan 46362, the **VILLAGE OF LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY**, a Michigan Municipal Corporation (Lessee") (collectively "the Lessees"), whose address is 118 N. Broadway, Lake Orion, MI 48362, and **TARR PROPERTIES, LLC**, a Michigan Limited Liability Company, ("Lessor") whose address is 850 Abseguami Tr., Lake Orion, Michigan 48362.

WHEREAS, the Lessor is the owner of the following described property, to wit:

North 90 feet of lots 7&8, Block 14 Hemingway's Plat in the village of Lake Orion Parcel Identification No. 09-02-441-04; and

WHEREAS, the Lessor desires to lease the south half of the described property; and

WHEREAS, the Lessees desire to lease the south half of the parking lot portion of the property ("Parking Lot") for public parking purposes as shown in Exhibit A; and

WHEREAS, the parties have agreed to enter into this Lease of property to enable the Lessees to proceed with providing public parking,

NOW, THEREFORE, FOR THE COVENANTS AND AGREEMENTS HEREIN MADE, IT IS HEREBY AGREED AS FOLLOWS:

- 51 1. This Agreement shall be for a term commencing on January 1, 2023 and shall expire on December 31, 2024, and shall be renewable with Lessor's consent for an additional ~~two (2)~~ ^{one (1)} years. 3
2. The Lessees shall have use of the south half of the parking lot for public parking purposes and the right to control the use of and access to the south half of the parking lot and the existing gate, subject to the Lessor's continuous right to access the north half of the parking lot including the building.
3. The Lessor shall reserve for use to be determined in his discretion the north half of the property, which includes seven (7) parking spaces and access to and use of the building.
4. The Lessees shall provide -general maintenance of the entire parking lot during that period it is being used for public parking purposes under the terms of this

lease, including snow removal from the parking lot and the sidewalk, debris and weed removal from the parking lot only, and mowing.

5. The Lessees shall be responsible for necessary repairs to the parking lot during the term of this lease including those as a result of damage caused by activity attributable to the use of the parking lot for public parking other than normal wear and tear.
6. The Lessees shall be permitted to erect signage indicating "Public Parking" and agree to remove said signage at its cost at termination of the lease. The fabrication of the signs will be coordinated by the DDA at the DDA's sole expense. The Village DPW will install and remove the signs at the DDA's sole expense.
7. Lessees shall limit public parking to no more than twenty-three (23) consecutive hours per twenty-four (24) hour period.
8. During the term of this Lease, the Lessees shall maintain liability insurance on said property providing a minimum of \$1,000,000.00 limits and will hold the Lessor harmless from any claim or liability arising out of the Lessee's use of said property.
9. Payment shall be made from Lessees to Tarr Properties as a prorated amount for reimbursement of taxes for the public parking area on the south side of the property.
10. The Lessor represents and warrants to the Lessees that it has good marketable title to the leased property and is the owner in fee thereof.

This lease shall be binding upon and inure to the benefit of the parties hereto, their heirs, representatives, successors and assigns.

Witnessed and Dated:

Diane Kochis

Dated: 8/30/23

LESSOR:
TARR PROPERTIES, LLC

By: Jesse Tan

Its: owner

LESSEES:

VILLAGE OF LAKE ORION

Witnessed and Dated:

Amanda Faust

Dated: 8-30-23

Jerry Naresh

By: ~~Kenneth Van Portfliet~~ Jerry Naresh
Its: Village President

Witnessed and Dated:

Diane Kochis

Dated: 8/30/23

LAKE ORION DDA

Molly K. LaLone

By: Molly K. LaLone
Its: Executive Director



115 North Broadway

Property outline in Red

South half of the parking lot
in Green—area of public
Parking.



DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Strategic Plan 2025-2030 – Final Draft

BACKGROUND BRIEF:

Over the course of the past seven months the board has engaged in a series of meetings to review our TIF Plan, re-learn the legal aspects of our funding, and engage in the facilitated discussion of our updated strategic plan.

POW Strategies, through Christina Sheppard -Decius, has provided a comprehensive document setting forth the details, discussion points, and action concepts of a revised and update strategic plan for the DDA. To make the plan more directed, and in a format more readily submittable for grants, Main Street, and other opportunities, the plan has been focused into a concise document, using the larger plan document as an exhibit/resource. The action plans designed by POW would be incorporated into the plan as provided on the final page.

Staff is recommending that the Plan is discussed at this meeting and referred for a final review and any additional thoughts or updates with the plan returning to the DDA Board for possible approval at the next meeting.

FINANCIAL IMPACT:

The plan is supported by the TIF Plan, is in compliance therewith, and has no other budget impact.

RECOMMENDED MOTION:

Move to accept the final draft Strategic Plan 2025-2030 and refer the final draft to the _____ committee for final discussion, comment and supplement, with the Final Strategic Plan being brought back to the Board at its July 2025 meeting for possible adoption.

Strategic Plan

2025-2030



Lake Orion Downtown Development Authority

An Accredited Main Street America Program



Approved by DDA: _____



We present, with hope and excitement, the Lake Orion Downtown Development Authority’s (DDA) Strategic Plan for 2025-2030. This Plan establishes the mission, vision, values and strategic direction of the Lake Orion Downtown Development Authority and is the foundation for its commitment to the principals and goals of Main Street America, a guiding program for our Historic Downtown.

The undersigned are unified in our pledge to secure the future of Lake Orion with the same passion, history and vision that built it.

Debbie Burgess, Chair

Sam Caruso, Vice-Chair

Matthew Shell, Treasurer

Hank Lorant, Secretary

Teresa Rutt, Council President

Darwin McClary, Village Manager

Chris Barnett, Orion Supervisor

Alaina Campbell, Board Member

Sally Medina, Board Member

Llyod Coe, Board Member

Matthew Gibb, Executive Director

Janet Bloom, Assistant Director

Purpose

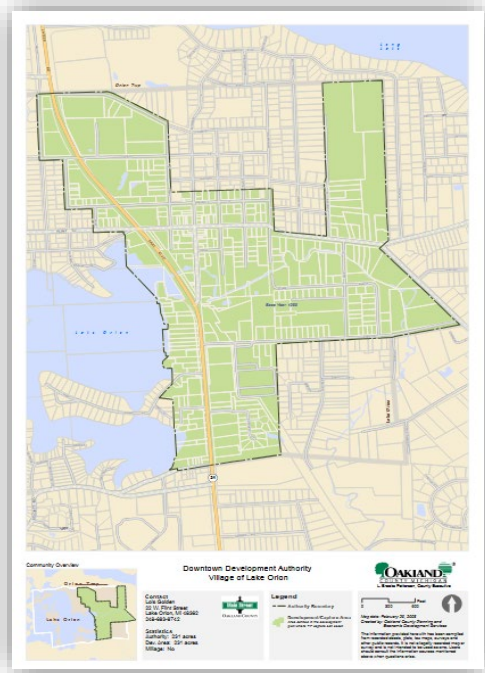
Nestled in the heart of Oakland County, Lake Orion is a bustling village with a rich history and vibrant lifestyle. Known for its motto, “Where Living is a Vacation,” Lake Orion offers both residents and visitors the perfect blend of small-town charm and modern amenities. Lake Orion is more than just a place to visit, it’s a thriving year-round community that continues to draw people in with its unique mix of natural beauty, recreational opportunities, and a warm, welcoming atmosphere.

Lake Orion’s downtown, guided and supported by the DDA since 1985, has won acclaim from multiple organizations, including accreditation from Main Street America for eighteen consecutive years. The expectations of preserving our historic character, and the need to grow and sustain a balanced and economically sustainable community create a substantial responsibility and challenge for those charged with developing and governing the Lake Orion community. A significant part of that load is shouldered by the Lake Orion Downtown Development Authority.

This is the DDA’s Strategic Plan for 2025-2030. It is a declaration of our intended work, established through our mission, vision, and shared values and articulated through a series of inter-connected goals and action plans. Our progress toward achieving these goals, and the mission they support, will be prepared, tracked and assessed so that a report of our effort and results is continuously made public. The progress made, and the lessons learned shall act as a guide to update this plan, as needed, for the benefit of this community.

The DDA, through its Board and staff, welcome ideas and input from everyone. The meetings of the DDA Board are open for comment and ideas, whether in person, by mail, email or by direct contact with staff. Contact information for the DDA, and more information about the organization, is available at www.downtownlakeorion.org, or by calling the DDA office (248) 693-9742

This map delineates the downtown district that is the primary focus of the DDA and this Strategic Plan.



Mission

We are a community of innovative economic stewards focused on preserving and enhancing the Lake Orion DDA District to drive prosperity and a strong sense of connection for all.

Vision

A lively lakeside downtown, where all ages come together for endless fun, connection, and unforgettable experiences in unique businesses, community spaces, and historic and natural treasures.

To achieve this vision, the DDA will work to meet the following benchmarks.

- Improve the quality of life
- Create a sense of place
- Attract and retain residents, businesses and talent
- Spur private reinvestment
- Increase property value in and around the area

The benchmarks of this plan will be met through new and ongoing DDA efforts, including,

- Infrastructure improvements to streets, sidewalks, lighting, sewer and water
- Design of public gathering places and parks
- Revitalization of vacant and underutilized properties
- Rehabilitation of historic buildings, assets and facades
- Mixed-use and middle-housing infill developments
- Business recruitment and retention programs
- Safety, security and maintenance programs
- Marketing, special events and promotions

Values

The **Values** of DDA Board guide Board decisions, processes and operations. The Values, along with the Mission and Vision serve as “filters” for decision making.

The Board Values are:



COMMUNITY



COMMITMENT
TO PRESERVING
& NURTURING
KEY ASSETS



WELCOMING



INTEGRITY

SWOT Analysis

This plan incorporates and the strengths and weaknesses of the DDA and community, including its assets and ideological challenges.

Strengths	Weaknesses	Opportunities	Threats	Key Assets
Staff	Connection to Lake	Lumberyard Project	People without Knowledge of Happenings	Lakes/Trails/Greenspace
Beautiful Downtown	Lack of Volunteers/Committee Depth	Retail Product Gap Fill	Members of Council Wanting to Shrink or Dismantle DDA	Lumberyard
Lakes/Trails/Natural Features	Quantity & Variety of Retail & Small Food Places	Greenspace	Lack of Village Mgt. Support	Businesses & Restaurants - Unique Shops
	Village Relationship	Increase Pedestrian Traffic	Higher Sq. Ft. Rent/Price	

Needs Assessment

Needs assessments are used to understand what's lacking in an organization or community and what resources or changes are needed to meet those unmet needs.

Physical	Economic	Social	Organizational
Façade Improvements	Small Business Support Tools/Growth	Family Activities	Decision on Outsource Vs. Village Contracts
Lumberyard Improvements	Coordinated Marketing	Activities for All Businesses	Volunteers & Revised Structure
Cross Highway Access	Money to Improve M-24	Unique/Bigger Events (don't just do it to do it)	Community Involvement/Vision
Dumpster Enclosures (and litter control)	More Retail	Business Incentive Promotion	Less Battles
Greenspace Expansion	Grants	Placemaking for All Ages	Increase Communication/Transparency
More Gathering Spaces	Promote Tourism		

Measuring Success

Measuring success is an essential component of a strategic plan. It helps organizations track their progress, identify areas for improvement, and ensure that they are on track to achieve their long-term goals. The following metrics are not an exhaustive list, but represent trackable results that can be reported, analyzed and applied to ongoing updates and extensions of the purpose and mission of the plan.

There will be progress when the Board is presented with tangible evidence of:

- Broad-based Community Support/Buy-in
- Large Volunteer Force
- Financial Strength/Support to Meet Goals, Projects and Needs
- Target Market Grows
- A Community for All Ages
- Diversity & Retention of Businesses
- Strong DDA/Village Relationship
- GAMSA Winner/National Recognition

Stakeholders

The success of the DDA and, more importantly, of Lake Orion’s downtown, will depend on partnership, collaboration and the unification of stakeholders around priorities and plans for the community.

Stakeholders include but are not limited to:

Property Owners

- Downtown Businesses
- Village and Orion Residents
- Developers and Investors
- Nonprofit Organizations
- Village and Township Government
- Oakland County Government
- MainStreet Oakland County
- Orion Area Chamber of Comm.

- Regional Partnership(s)
- University/Community College(s)
- Southeast Michigan Council of Gov.
- Mich. Department of Transportation
- Lake Orion Lake Association
- Orion Township Library
- Lake Orion Community Schools
- Neighborhood Organizations



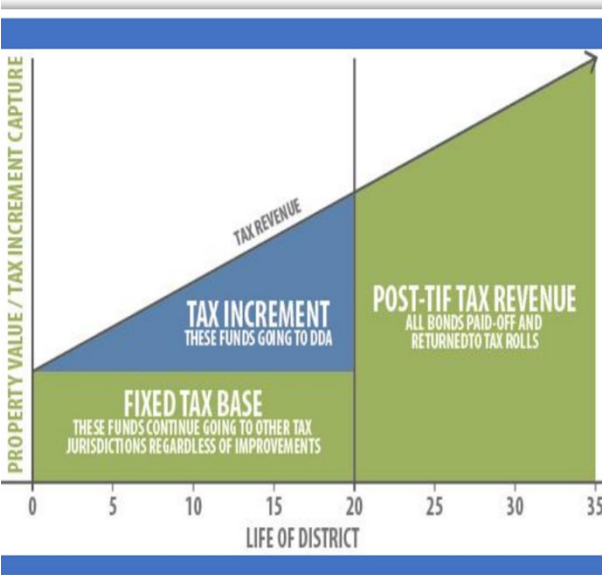
How is the DDA Funded?

It's important to understand how the DDA is funded to carry out its mission. Part 2 of the Recodified Tax Increment Financing Act, Public Act 57 of 2018, governs the creation and operations of Downtown Development Authorities. The Act provides several different ways that DDA's can partner with municipalities, property owners and developers to finance public improvements in a defined downtown area. These include, levying mills on DDA property owners, special assessments on property within the DDA, and tax Increment Financing, also known as TIF. The Lake Orion DDA primarily uses TIF to fund its plan.

Under TIF, a specific area within the DDA is defined, a development plan is adopted, and the property tax revenues, above those paid to the village and other authorities from the base year, are transferred to the DDA to be used to finance public improvements needed to carry out the development plan. Revenues through TIF may be the sole source of financing for these public projects or they may be used in combination with other financing or funding sources.

The statutory purpose of TIF, created by the DDA Act, is to help municipalities correct and prevent deterioration of downtown business districts, encourage historic preservation and promote economic growth in the designated downtown area. Since many downtowns are the oldest areas in a community, providing and upgrading infrastructure is essential for downtown prosperity. The DDA statute provides for the use of TIF, setting up a mechanism for partnerships with other benefitting taxing units who also have a stake in the health of downtown, ensuring funds are used for needed public improvements. Public investment is a catalyst for private investment creating the tax revenue to pay for the public improvements.

When a TIF district is created, its current taxable value is established and that is the value base for the duration of the TIF's existence. As long as the TIF District exists, the Village, and other taxing authorities, continues to receive revenues normally generated by the taxable value base. TIF revenues are generated from the difference between the new annual taxable value and the value base. That difference between new value and base value is placed into the TIF Fund and used for public improvements identified in the TIF development plan.



As an example, some of the public projects already completed from Lake Orion TIF include:

- Streetscapes
- Parking Lots
- Paint Creek Pedestrian Bridge
- Event and Festival Utilities
- Utility Relocation
- Public Art
- Wayfinding Signage
- Downtown Repair and Maintenance
- Public Space Improvements
- Park Improvements
- On-going Maintenance

Transformational Strategies

The Main Street Approach is centered around Transformation Strategies. A Transformational Strategy articulates a focused, deliberate path to revitalizing or strengthening a downtown or commercial district’s economy. Each Transformation Strategy is implemented through activities in the four broad areas of work represented by the Four Points: Economic Vitality, Design, Promotion, and Organization.

The DDA Board has engaged and analyzed the district’s market position and reflected and included the community’s attitudes, metrics, demographics and opportunities to focus the identity and priority goals of the DDA. Acknowledging that an effective Transformational Strategy serves a particular customer segment, responds to an underserved market demand, or creates a differentiated destination, this plan is built with actions and goals intended to build and support two Transformational Strategies.



**LAKESHORE
ECONOMY**



**COMMUNITY
BUILDING**

Areas of Focus

Over the course of this plan the DDA will focus on five areas to accomplish defined goals and actions to implement these transformational strategies.



LAKESHORE ECONOMY

FOCUS AREA	GOALS
1. Enhance Downtown Connections	<ul style="list-style-type: none"> • Gateway Project – Lumberyard • Trail Access & Amenities • Walkable Lake Access • Community Gathering & Green Spaces for All Ages (Public & Private)
2. Grow Local Tourism Business	<ul style="list-style-type: none"> • Business Mix Analysis and Recruitment Strategy • Small Business Support Tools/Growth • Lakeshore-centric and Trail-based Events & Promotions - Signature Events, Recreational Activities for Families & All Ages • Tourism Marketing –Co-op & Coordinated Business Opportunities
3. Create Great First Impressions	<ul style="list-style-type: none"> • Façade Improvements • Dumpster Enclosures





COMMUNITY BUILDING

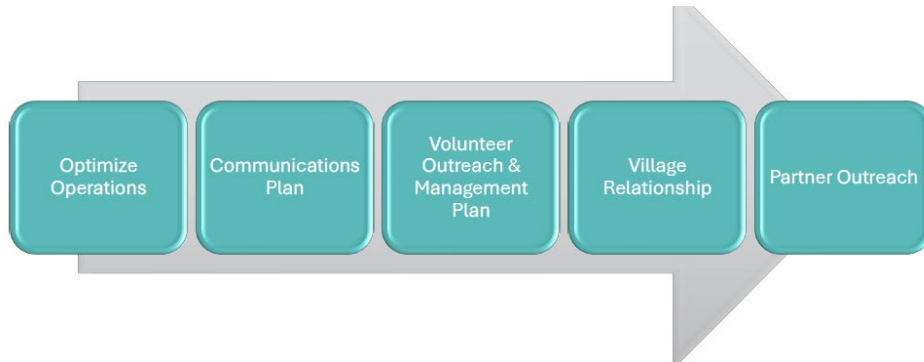
FOCUS AREA	GOALS
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1. Strengthen Local Partnerships

- Optimize Operations – Contracts & Accounts
- Improve Village Partnership
- Expand Other Organizational Partnerships for Volunteer Resources & Project Alignment
- Grants/Foundations/Resources

2. Increase Community Involvement & Understanding

- Refreshed Communications & Brand Messaging Plan
- Volunteer Outreach & Management Plan



The Action Plans attached hereto are incorporated into this Strategic Plan

1 MISSION: <i>We are a community of innovative economic stewards focused on preserving and enhancing the Lake Orion DDA District to drive prosperity and a strong sense of connection for all.</i>															
2 DOWNTOWN VISION: <i>A lively lakeside downtown, where all ages come together for endless fun, connection, and unforgettable experiences in unique businesses, community spaces, and historic and natural treasures.</i>															
3 ORGANIZATION VISION: <i>To be a Catalyst, Connectors, Leaders, Innovative, and assure Integrity.</i>															
4 METRICS OF SUCCESS: Broad-based Community Support/Buy-in, Large Volunteer Force, Financial Strength & Support to Meet Goals, Projects & Deliver on Program Needs, Target Market Grows, A Community for All Ages , Diversity & Retention															
5															
6 STRATEGY	OBJECTIVE	PRIORITY	TASKS	TIMELINE	COMMITTEE	ACTION ITEMS	PROJECT CHAMPIONS (Individual(s))	PARTNERS	RESOURCES NEEDED	FUNDS NEEDED	STATUS	COMMUNITY PRESERVE & NUTURE KEY ASSETS		WELCOMING INTEGRITY	
6 Lakeshore Economy															
	Enhance Downtown Connections	1													
			Gateway Project – Lumberyard	2025-28	All Committees	Activation & Business Plan						x	x	x	x
						Fundraising Plan									
						Communications & Storytelling									
			Trail Access & Amenities	2026-27	Design Committee	Amenities Needs Assessment						x	x	x	
						Installation of Amenities & Art									
						Directional & Interpretive Signage									
			Walkable Lake Access		Design & Promotions Committee	Crosswalk Improvements									
				2025-27								x	x	x	x
						Greens Park Activation									
			New Community Gathering & Green Spaces for All Ages (Public & Private)		Design & Organization Committee	Identify Locations						x		x	
				2027											
						Concept Designs & Budgets									
						Grant Research & Applications									
	Grow Local Community & Tourism Business	2													
			Business Recruitment	2025	EV Committee	Business Mix Analysis						x	x	x	
						Recruitment Strategy & Market Profile Summary									
						Business Location Incentive									
			Business Retention		EV Committee	Assess & Provide Small Business Support Tools						x	x	x	x
				2026											
						Business Assistance Team/Retention Visits									
						Identify Business or Product Expansion Opportunities									

													COMMUNITY PRESERVE & NUTURE KEY ASSETS				WELCOMING INTEGRITY	
STRATEGY	OBJECTIVE	PRIORITY	TASKS	TIMELINE	COMMITTEE	ACTION ITEMS	PROJECT CHAMPIONS (Individual(s))	PARTNERS	RESOURCES NEEDED	FUNDS NEEDED	STATUS							
27	Lakeshore Economy (cont.)	Grow Local Community & Tourism Business (cont.)	Lakeshore-centric and Trail-based Events & Promotions - Signature Events, Recreational Activities for Families & All Ages	2025-27	Promotions Committee	Annual Assessment of Events						x	x		x	x		
28						Focus on Unique Signature Events												
29						Enhance promotions with cross-marketing												
30						Create Collaborations amongst Destinations												
31						Make it easy for businesses to promote												
32						Support or Create Activity Events – ie: bike rides, runs, swims (start & stop downtown), boat parade tie-in; businesses open later, work with high school events												
33																		
34			Tourism Marketing – Co-op & Coordinated Business Opportunities	2025-26	Promotions Committee	Enhance Online Presence & Searchability						x			x	x		
35						Leverage Partnerships with Local & Regional Tourism & Recreation-based Organizations & Businesses												
36																		
37		Create Great First Impressions	Façade Improvements	2025	Design Committee	Target Priority Buildings							x			x		
38						Budget Accordingly												
39			Dumpster Enclosures	2026	Design & EV Committee	Develop Plan for Consolidated Locations & Public Areas of Improvement									x	x		
40						Fund/Installation of Public Improvements & Consolidated Locations												
41						Update Code of Ordinance for Private Dumpsters (if needed)												

											COMMUNITY PRESERVE & NUTURE KEY ASSETS				WELCOMING INTEGRITY			
42	STRATEGY	OBJECTIVE	PRIORITY	TASKS	TIMELINE	COMMITTEE	ACTION ITEMS	PROJECT CHAMPIONS (Individual(s))	PARTNERS	RESOURCES NEEDED	FUNDS NEEDED	STATUS						
43	Community Building																	
44		Strengthen Local Partnerships	1	Optimize Operations	2025	Board/Organization Committee	Reorganize/Assess Contracts & Accounts						x			x		
45				Improve Village Partnership	2025	Board/Organization Committee	Annual/Bi-annual Working Meetings						x		x	x		
46							Define Roles & Responsibilities											
47							Communication Plan											
48				Expand Other Organizational Partnerships for Volunteer Resources & Project Alignment	2025-26	Organization Committee	Identify Partners & Goal Requests						x		x	x		
49							Determine Common Goals/Collaborations											
50				Fundraising Plan	2025-26	Organization Committee	Identify & Pursue Grants/Foundations/Resources							x				
51																		
52		Increase Community Involvement & Understanding	2	Refreshed Communications & Brand Messaging Plan	2025	Organization & Promotions Committee	Identify Audiences, Key Issues/Needs, Messaging , Approach & Communication Tools for each						x		x	x		
53							Revise/Refresh Content											
54				Volunteer Outreach & Management Plan	2025-26	Organization Committee	Identify Needs, Roles & Responsibilities						x		x	x		
55							Create Recruitment Pitch, Job Descriptions, Informational Resources											
56							Develop Reward/Recognition System											
57							Training for Volunteers & Board Members											
58							CRM											
59																		
60																		
61	Identify Project Champions, Resources Needed and Funds Needed.																	
62	Resources needed can include number of volunteers, other organizations, research/data, vendors, etc.																	

2025



Strategic Plan



THE VALUE OF STRATEGIC PLANNING

- **Provides a Roadmap and Direction to Success**
 - Keeps you Focused and Aligns Resources with Goals
- **POW!er Forward – you'll be Proactive – Not Reactive**
 - Makes you more Efficient and Effective
- **Defines your Competitive Advantage**
 - Identifies New Opportunities and Innovations



STRATEGIC PLAN BEST PRACTICES

A good strategic plan starts with knowing your community's vision and your organization's role in helping to achieve it.

Next:

- Assess your strengths, weaknesses, opportunities, threats and key assets; as well as the four forces of value.
- Evaluate what's completed and still on the docket.
- **Prioritize – Prioritize – Prioritize**
- Establish metrics and timelines

A strategic plan is generally good for three (3) – five (5) years.

YOUR MISSION

At its Strategic Planning Session on January 9, 2025, the Lake Orion DDA spent time streamlining its mission and vision statements, as well as establishing core values. While the current mission statement is sufficient, creating something that is succinct and memorable for Board members to articulate easier is needed, as well as defining the “why”.

Current: To enhance the economic potential and preserve the historical character of the Lake Orion DDA District, the heart and hub of the Orion Community, through promotional activities and an organizational structure that focuses on community involvement with local businesses, residents, and other stakeholders.

Who Is the DDA: A Community of Innovators; stewards of economic growth

What the DDA Does: Celebrate, Preserve & Enhance; Drive the Direction

Why the DDA Does It: Prosperity for all; Sense of Community

Who the DDA Does It For: The community, local businesses, residents and stakeholders

YOUR REVISED MISSION - OPTIONS

1

*To enhance the economic potential and preserve the historical character of the Lake Orion DDA District, the heart and hub of the Orion Community, **to foster prosperity and a strong sense of connection for all.***

2

We are a community of innovative economic stewards dedicated to preserving, enhancing, and driving the growth of Lake Orion DDA District, the heart of our community, to foster prosperity and a strong sense of connection for all.

3

We are a community of innovative economic stewards focused on preserving and enhancing the Lake Orion DDA District to drive prosperity and a strong sense of connection for all.

YOUR FINAL REVISED MISSION (#3)

We are a community of innovative economic stewards focused on preserving and enhancing the Lake Orion DDA District to drive prosperity and a strong sense of connection for all.

CORE VALUES

THE IMPORTANCE OF CORE VALUES

- Defines Culture & Identity
- Sets Expectations
- Guides Behavior
- Helps Decision-Making
- Key in Developing the Vision

Use these core values to evaluate future needs, goals, deliverables and decision-making. Any action, project or program should have a minimum of one of these core values.

LAKE ORION DDA CORE VALUES

Ask yourself, “Is this project, program, action _____”



COMMUNITY



COMMITMENT
TO PRESERVING
& NURTURING
KEY ASSETS

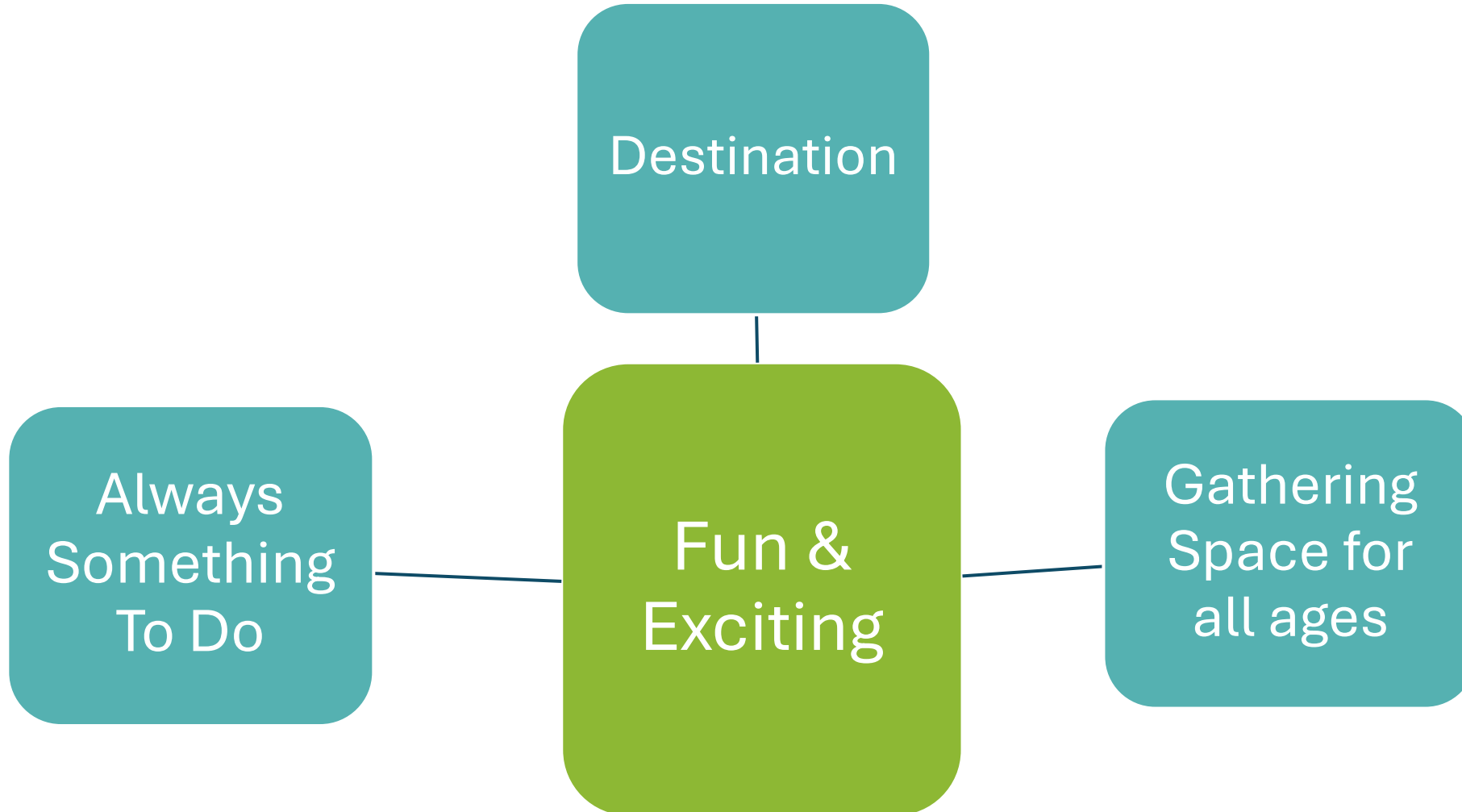


WELCOMING



INTEGRITY

DOWNTOWN VISION PILLARS

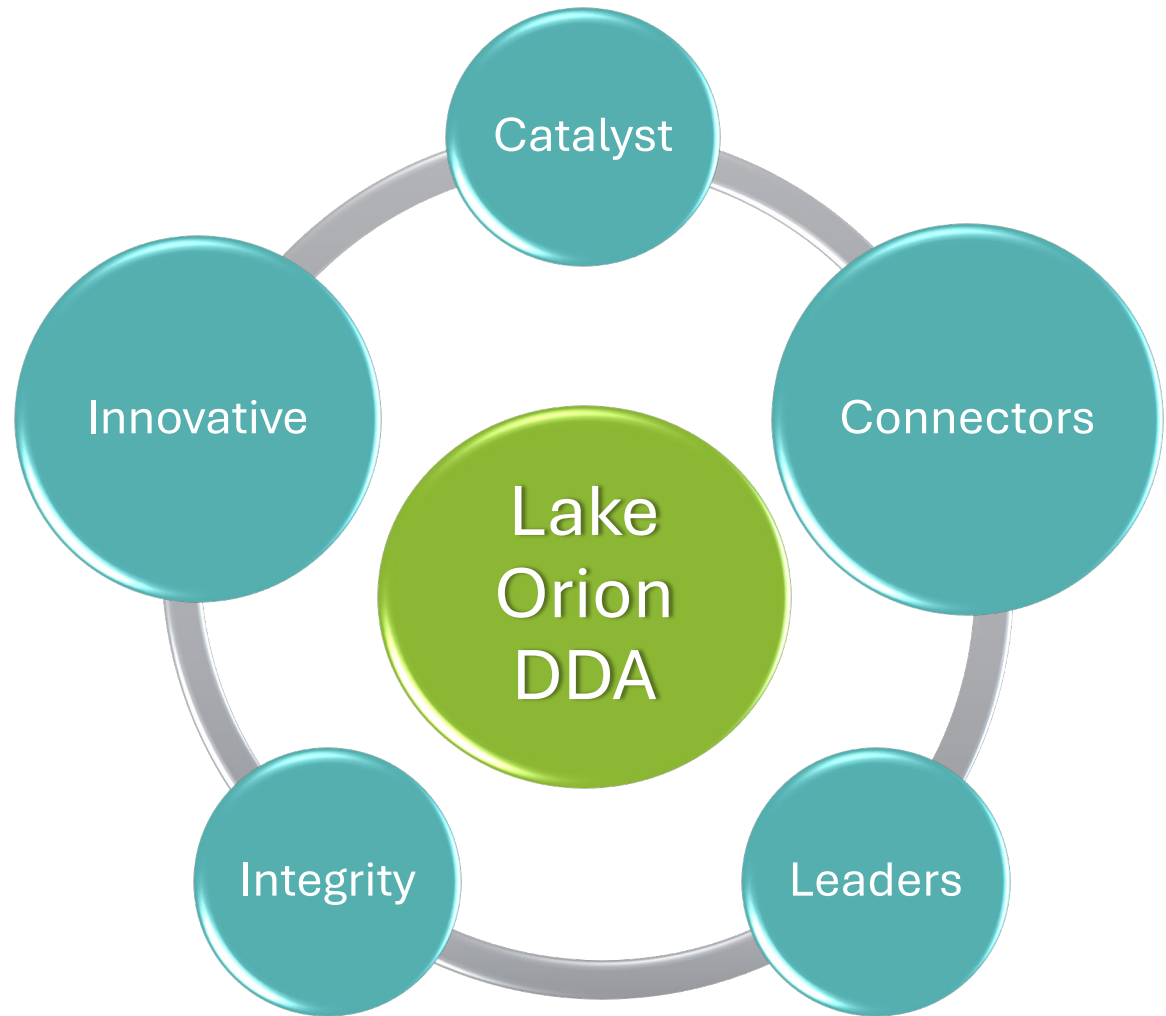


VISION

A lively lakeside downtown, where all ages come together for endless fun, connection, and unforgettable experiences in unique businesses, community spaces, and historic and natural treasures.



ORGANIZATION VISION PILLARS



DDA ROLE

- Improve the quality of life
- Create a sense of place
- Attract and retain residents, businesses and talent
- Spur private reinvestment
- Increase property value in and around the area

The Work a DDA Does or Can Do

- Infrastructure improvements to streets, sidewalks, lighting, sewer and water
- Design of public gathering places and parks
- Revitalization of vacant and underutilized properties
- Rehabilitation of historic buildings, assets and facades
- Mixed-use and middle-housing infill developments
- Business recruitment and retention programs
- Safety, security and maintenance programs
- Marketing, special events and promotions

SWOT ANALYSIS

Strengths	Weaknesses	Opportunities	Threats	Key Assets
Staff	Connection to Lake	Lumberyard Project	People without Knowledge of Happenings	Lakes/Trails/Greenspace
Beautiful Downtown	Lack of Volunteers/Committee Depth	Retail Product Gap Fill	Members of Council Wanting to Shrink or Dismantle DDA	Lumberyard
Lakes/Trails/Natural Features	Quantity & Variety of Retail & Small Food Places	Greenspace	Lack of Village Mgt. Support	Businesses & Restaurants - Unique Shops
	Village Relationship	Increase Pedestrian Traffic	Higher Sq. Ft. Rent/Price	

Listed above is the primary SWOT analysis voted by the DDA Board. For a full list, please refer to the notes in attachments.

NEEDS ASSESSMENT

Physical	Economic	Social	Organizational
Façade Improvements	Small Business Support Tools/Growth	Family Activities	Decision on Outsource Vs. Village Contracts
Lumberyard Improvements	Coordinated Marketing	Activities for All Businesses	Volunteers & Revised Structure
Cross Highway Access	Money to Improve M-24	Unique/Bigger Events (don't just do it to do it)	Community Involvement/Vision
Dumpster Enclosures (and litter control)	More Retail	Business Incentive Promotion	Less Battles
Greenspace Expansion	Grants	Placemaking for All Ages	Increase Communication/Transparency
More Gathering Spaces	Promote Tourism		

Listed above is the primary needs assessment voted by the DDA Board. For a full list, please refer to the notes in attachments.

MOVING FORWARD & TIF PLAN PROJECTS

Moving Forward	TIF Plan Priorities	Timeline
Lumberyard	Gateway Project	2025-28
Better Working Relationship with Village Council & Mgt.	Managing Infrastructure Account (ADDED AFTER SESSION)	2025
More Boutique Variety	Façade Improvement	2025
Communication & Brand/Mantra	Branding & Communication (be specific about next steps)	2025
Being the Resource to Businesses	Business Recruitment & Marketing (be specific about next steps)	2025
Focus on Future	Admin Support & Services (be specific about next steps)	2025-28
	Safe Lake Access	2025-27
	Dumpsters	2026



METRICS OF SUCCESS

- Broad-based Community Support/Buy-in
- Large Volunteer Force
- Financial Strength & Support to Meet Goals, Projects & Deliver on Program Needs
- Target Market Grows
- A Community for All Ages
- Diversity & Retention of Businesses
- Strong DDA/Village Relationship
- GAMSA Winner/National Recognition

KEY STRATEGIES



**LAKESHORE
ECONOMY**



**COMMUNITY
BUILDING**



LAKESHORE ECONOMY

Section 8, Item D.

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DOWNTOWN
DEVELOPMENT AUTHORITY

**Grow Local
Community &
Tourism
Business**

**Enhance
Downtown
Connections**

**Create Great
First
Impressions**



LAKESHORE ECONOMY



Enhance Downtown Connections

Gateway Project – Lumberyard

Trail Access & Amenities

Walkable Lake Access

Community Gathering & Green Spaces for All Ages (Public & Private)



GATEWAYS - LUMBERYARD

VISION

- Visualize Your Activation Plan
 - Public gathering/event space - preserve and rehabilitate main barn – develop an activation plan
 - Retail activation - open storefront to Paint Creek Trail; create a market village incorporating existing sheds
 - Preserve sightlines to trail & add amenities to connect
- Develop & Communicate an Action Plan Timeline
- Share Storytelling/History
- Develop a Funding Campaign
- Devise a Business Plan

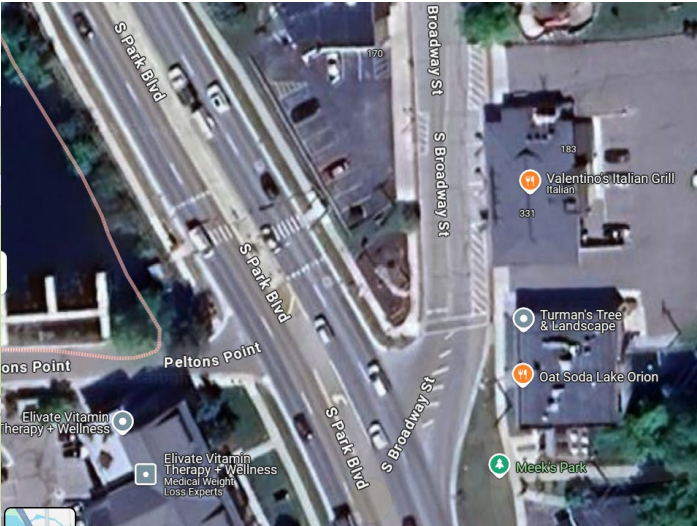




WALKABLE LAKE ACCESS / TRAIL AMENITIES

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TRAFFIC LIGHT
WARRANTED?

MORE VISUAL
CROSSWALKS

TRAIL AMENITIES/DOWNTOWN CONNECTIONS

- Restrooms & doggie stations
- Drinking fountains for people & pups
- Bike racks, repair stations
- Public art directional signage/QR code self-guided tours
- Signage to things downtowns and interpretive signage
- Shaded rest areas, benches and tables
- Lighting
- Destination Activities in Greens Park



EXPANDING GATHERING SPACES

Plant Seeds

- Identify Locations/Opportunities
- Don't Forget Private Businesses/Sites
- Visualize what's needed with Conceptual Designs
- Take Advantage of Design Assistance from MSOC



**From
Small
to
Large
Spaces**

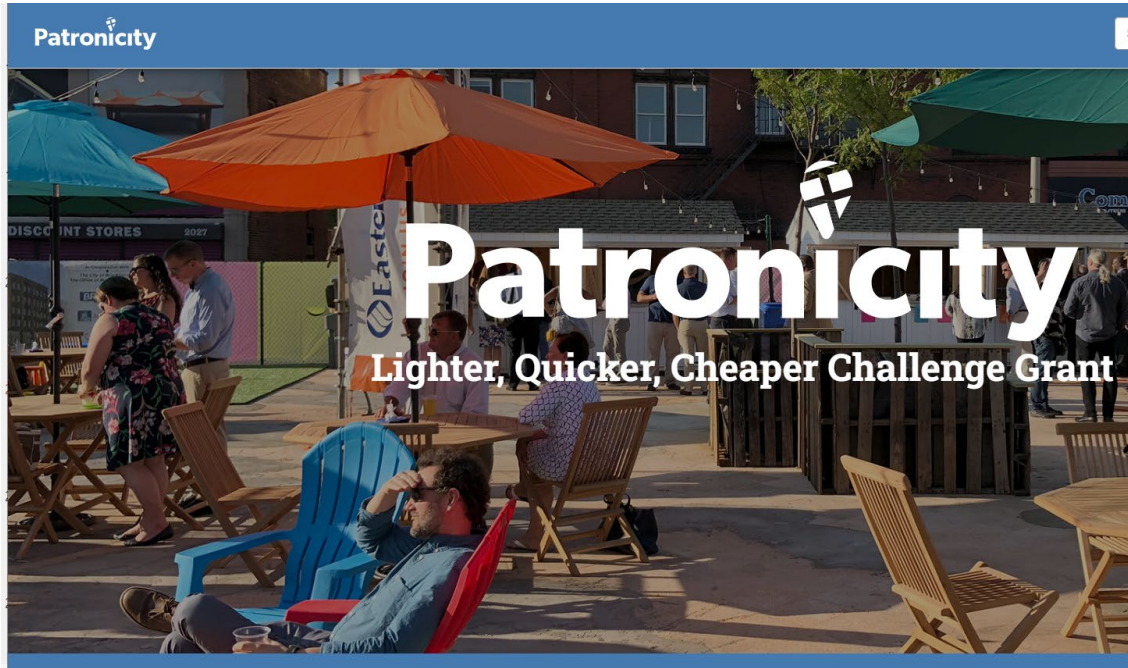




LQC

Lighter, Quicker, Cheaper

- Project for Public Spaces <https://www.pps.org/article/lighter-quicker-cheaper>
- <https://www.patronicity.com/lqc-grant>



A selection of interventions and projects from around the world. Refer to our [great LQC Intervention site](#) for case studies.



LHF

Low Hanging Fruit

Section 8, Item D.

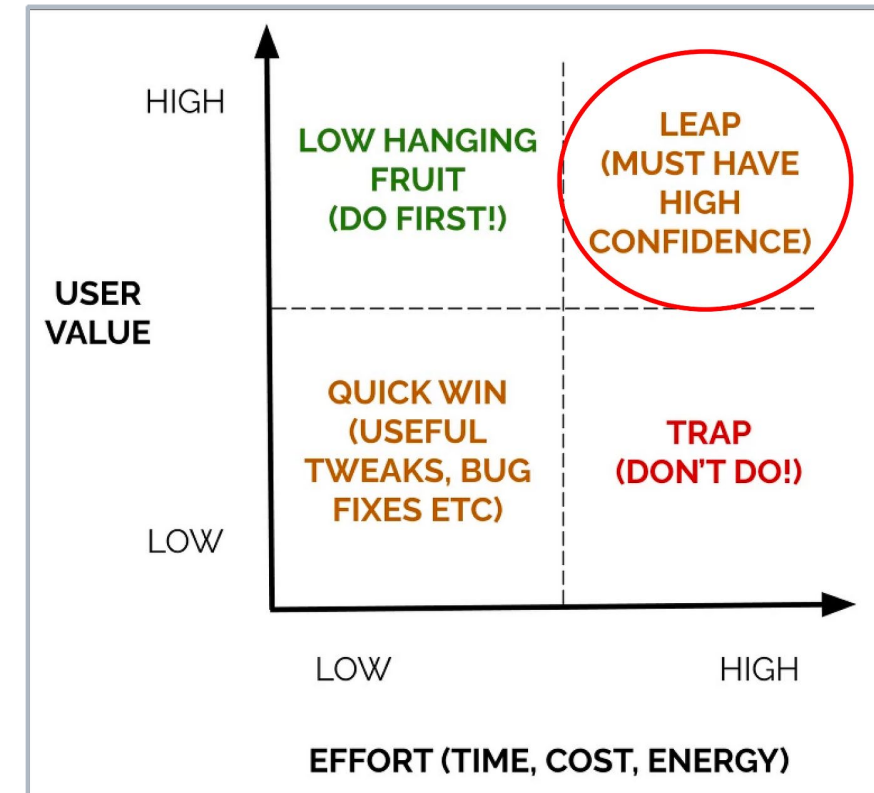
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The Strategy

- Integrate Low Hanging Fruit Projects with harder tasks, but don't solely rely on them.
- Plan for the hard stuff, while implementing something easy.

The Benefits

- Sense of Accomplishment
- Activates/Rewards/Sustains Volunteerism
- Minimal Effort
- High Impact - Immediate Results & Awareness
- Cost-Effective & “Budgetable”





LAKESHORE ECONOMY



Grow Local Tourism Business

Recruitment - Business Mix Analysis and Recruitment Strategy

Retention - Small Business Support Tools/Growth

Lakeshore-centric and Trail-based Events & Promotions - Signature Events, Recreational Activities for Families & All Ages

Tourism Marketing – Co-op & Coordinated Business Opportunities



WHY DOWNTOWN LAKE ORION?

Defining What Local Tourism Means to LO

Section 8, Item D.

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#1 Reason Why People (Residents & Consumers) Choose Lake Orion – Access to Lakes, Nature, Recreation

- #1 Reason Why Businesses Locate to Lake Orion – Access to the People Who Choose Lake Orion

What is Tourism for LO?

- An Emotional Connection to a Place
- Offers Natural, Cultural & Man-made Attractions/Businesses
- Lake Orion offers its residents and customers a mix of tourism niches - Experiential, Heritage, Eco, Sustainable, Event, Cultural Heritage, Nature & Adventure

BE A TOURIST IN YOUR OWN BACKYARD!

Local tourism is about connecting with communities, supporting local businesses, and experiencing authentic culture.

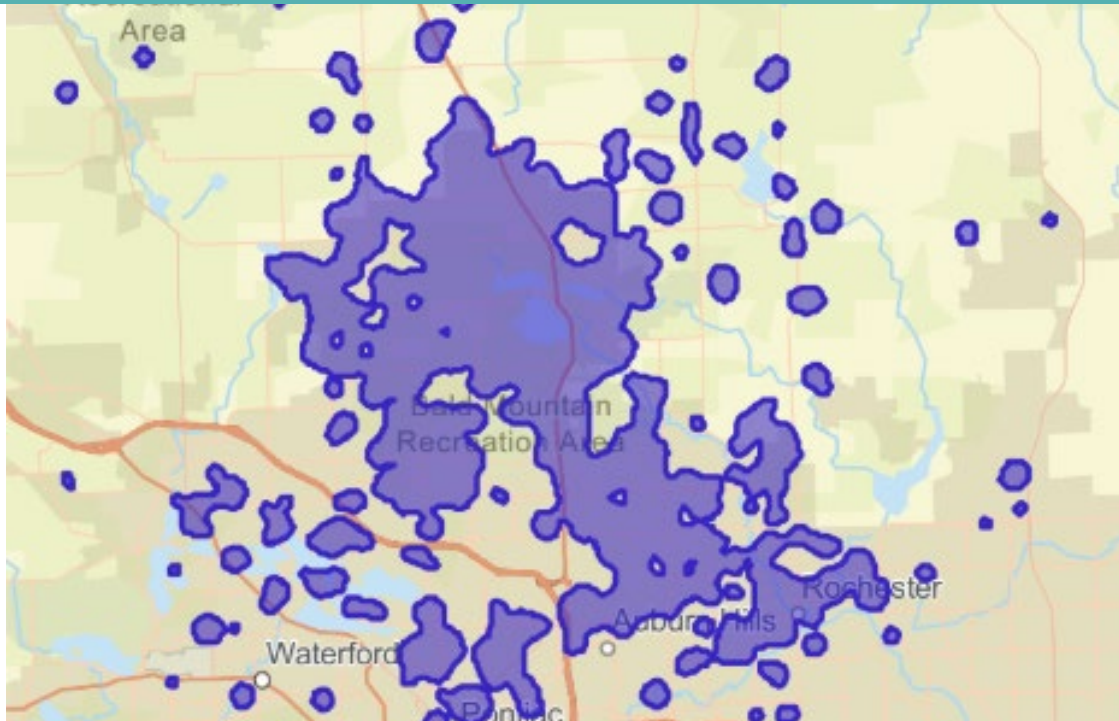


LAKE ORION DDA TARGET MARKET AREA

Section 8, Item D.

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PRIMARY AUDIENCE



70% of Visitors

Lake Orion/Orion Twp
Oxford
Auburn Hills
Rochester
Rochester Hills
Pontiac
Waterford
Independence Twp

Demographics

\$94.6k Median HH Income
39.5 Median Age
\$77.8k Disposable Income

Consumer Trends

485.9k Unique Visitors
2.6m Visits
5.37 Visit Frequency
105 min. Avg. Stay

Targeted Marketing:

- Grow Visitor Duration & Frequency from Existing Consumer Base
- Target towards Recreationalists via Social Media Ads/Messaging about Assets/Recreation
- Co-op Marketing Goes A Long Way!
- Geo-Fencing/Push Notifications – Leverage Other Media Partners



BUSINESS OPPORTUNITIES

Advantage Leakage

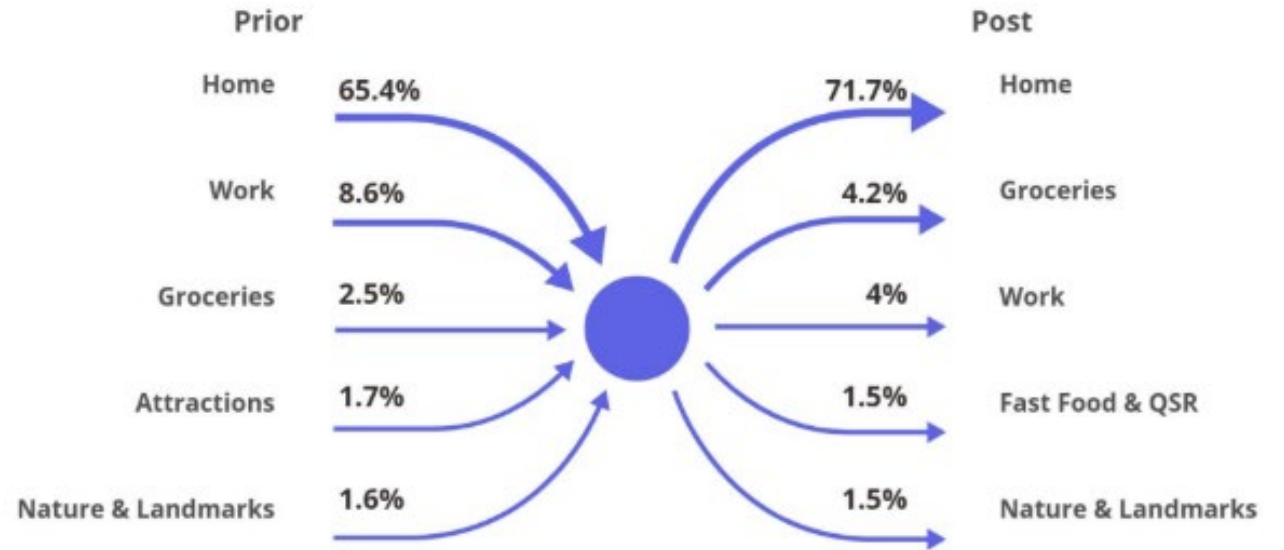
- Nature & Landmarks

Sales Leakage

- Grocery
- QSR Foods

Competition

- Great Lakes Mall
- Auburn Mile
- Baldwin Commons
- Hampton Village Centre
- Village of Rochester Hills
- Somerset
- Adams Marketplace



Retail Needs:

- Recreation/Outdoor
- Grocery
- Home
- Travel-Related

Service Needs:

- Quick-Serve Food



BUSINESS RECRUITMENT

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➤ Retail

- Children's Clothing Stores
- More Boutiques & Clothing, Shoes, Accessories
- Bookstore
- Home Décor
- Outdoor Gear, Clothing & Rentals

➤ Fitness Focused Services

➤ Food/Restaurant

- Bakery
- Quick Serve Deli / Soup
- Boating/Biking Grab-n-Go – Mini-Market (healthy snacks, meals and group shareables)


➤ Experiential Businesses (arts, creative businesses)

➤ Lodging

Lean Into Businesses that Grow the Lakeshore Economy

- **Create Incentives Geared at this Sector**
- **Unique Selling Proposition is the Lake & Trails Connections**

SAMPLE MARKET PROFILE



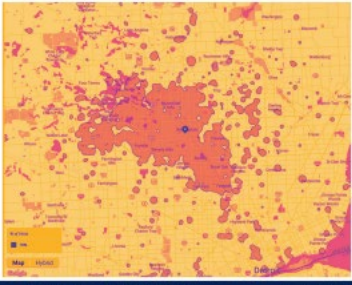
RETAIL MARKET PROFILE

DOWNTOWN OVERVIEW

Nationally ranked as one of the top 20 economically prosperous cities, Birmingham is a highly sought after community in Michigan to live, work and visit. Located in the heart of Oakland County, a county of over one million residents, Birmingham is easily accessible from major transportation arteries in the Metro Detroit region and attracts visitors throughout Southeast Michigan and beyond. Recognized for its vibrant, walkable downtown, the Birmingham Shopping District (BSD) features national and local fashion boutiques, home furnishing retailers, galleries, salons and award-winning restaurants. Its affluent clientele outpaces the country's income and education levels, making it an ideal location to market and grow your business.



Market Area

- 500K+ CONSUMER TRADE AREA
154 SQUARE MILES
- 41.75 MEDIAN AGE
AFFLUENT & EDUCATED
- \$727K MEDIAN HOME VALUE
ACTIVE, SOPHISTICATED & CONNECTED
- \$200K LOCAL AVERAGE INCOME
\$113K - TRADE AREA AVERAGE INCOME



CONSUMER TRAITS

- Affluent & Upscale
- Tech Savvy & Connected
- Urban & Sophisticated
- Engaged in Community, Arts & Culture
- Seeks Healthy Foods & Activities
- Shops Home Furnishings, Fashion, Arts, Media, Entertainment, Luxury Products & Personal Care
- Devours Gourmet Foods & Wine While Needing Quick Serve Options Daily

BSD Office: (248) 530-1200 BSDinfo@bhamgov.org ALLINBirmingham.com



DOWNTOWN PROFILE

Economic Dashboard

- 106 RETAILERS/65 RESTAURANTS
600+ BUSINESSES
- 30 NEW BUSINESSES SINCE 2022
10 MORE IN PROGRESS
- 99% RETAIL OCCUPANCY
1.5 MILLION SQ. FT. OF SPACE
- 89% OFFICE OCCUPANCY
2 MILLION SQ. FT. OF SPACE

MARKET REACH & IMPACT

- 13 MILLION IMPRESSIONS
TARGETED CAMPAIGNS
- 250,050 WEB VISITS
7,816 PARTNER REFERRALS
- 569,400 SOCIAL MEDIA REACH
19,816 FOLLOWERS
- 59 EVENTS
300,000+ ATTENDEES
- 7 MILLION VISITORS
2-HOUR AVERAGE STAY
(data provided by placet.ai)

For more market insights and available properties, contact the Birmingham Shopping District.

Retail Mix



Category	Percentage
Apparel & Accessories	41.2%
General Merchandise	8.3%
Furniture & Decor	13.2%
Jewelry & Watches	15.2%
Specialty Retail & Gifts	14.2%

Downtown Birmingham is a premiere destination for shopping, dining, events and tourism in Michigan, offering one-of-a-kind national and local brands. Notable apparel and accessory retailers include Faherty, Anthropologie, lululemon, Roots, Evereve, St. Croix Shop, Moosejaw, Lucida Fine Jewelry, and Brilliant Earth, as well as exclusive fashions from Tender, Barbara Boz and more. The downtown is a regional hotspot for home furnishings, including CB2, RH, Serena & Lily, West Elm, Ethan Allen and the list goes on. Food connoisseurs frequent the downtown cafes, high-quality restaurants, fine dining and fast-fresh fare from national brands like Hyde Park Steakhouse, sweetgreen and Starbucks to local award-winning favorites such as Market North End, Forest, Hozel's, Rugby Grille, Phoenecia, Madam and many more.

The luxurious Townsend and Daxton hotels welcome thousands of visitors annually. Over 300 professional offices, two movie theaters, two active parks and more than 10,000 homes within walking distance all contribute to the bustling foot traffic downtown. Ample parking with over 5,000 spaces is conveniently located throughout downtown offering two-hour free parking in five public decks daily.

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2023 VISIT USAGE ANALYSIS

CONSUMER SURVEY INSIGHTS

The Birmingham Shopping District (BSD) surveyed residents, business owners, downtown employees and visitors of their typical usage of Downtown Birmingham. As well as ideas to continue fostering a vibrant and engaging downtown experience that will grow their patronage. The survey was conducted online from August - September 2023 with almost 300 participants, a majority being residents and female between the ages of 30-79.

The following information provides a summary of those results that will be used in the economic strategy for Downtown Birmingham in regards to business development, physical and environmental design, community programming and promotions. Overall, the survey reveals a strong desire for a balanced mix of affordable, unique and family-friendly retail offerings, as well as community design ideals that grow connections, outdoor experiences and social gathering. Peak downtown visit times were between 11 a.m. - 2 p.m. and 5 - 8 p.m. Thursday - Sunday.

Market Demand

- AFFORDABILITY**
 - Casual & Fresh Dining Options
 - Convenience & Everyday Essentials
 - Women & Teen Apparel
- WELL-KNOWN BRANDS & LUXURY**
Conversely Still in Demand
- DIVERSE OPTIONS**
 - Bookstores, Media & Technology
 - Family-friendly & Health-related Shops & Food
 - Interactive & Entertainment-based Retail
 - Wider Variety of Authentic Cuisine
 - Specialty Markets
 - Sweet Treats (ie: Ice Cream & Desserts)
 - Balance of Service Businesses
- LOCAL ENTREPRENEURS**
 - Specialty Stores & Boutiques
 - Artisans and Makers
 - Unique Products
- SOCIAL & CULTURAL GATHERING SPACES**
 - Wine Bars, Distilleries & Breweries
 - Music Venues & Rooftop Cafes/Bars
 - Creative Centers
- OPEN LONGER/MORE HOURS**
 - 16% for Retail & 9% for Restaurants

Trip Purpose

By Percentage Surveyed



Trip Purpose	Percentage
Library	53
Parks	56
Shopping	39
Work	32
Dining	83
Business	68
Specialty Retail	51
Office	57
Events	32

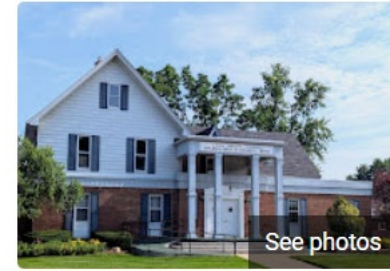
COMMUNITY DESIGN

- Grow activation of parks, community spaces and events
- Recreational and family activity spaces
- Bike infrastructure
- Trail access and green space extensions
- Walking tours
- Public art
- Parking circulation and easy access

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GROW LOCAL TOURISM



See photos



Section 8, Item D.



See outside

Lake Orion Downtown Development Authority

4.1 ★★★★★ 9 Google reviews

City government office in Lake Orion, Michigan

Enhance listings and searchability:
• Add downtown and assets to other listings & Google page

AllTrails Search Explore Saved Shop Log in

Back to Explore Hiking / United States / Michigan / Lake Orion

Best trails in Lake Orion

★ 4.4 (4,046 reviews)

Looking for the best hiking trails in Lake Orion? Whether you're getting ready to hike,

TrailLink http://www.trailink.com

Find A Trail - Bike paths near me

We're A Non-Profit All About Helping You Enjoy The Outdoors. Register Now! Find Georgia **Trail** Descriptions, **Trail** Maps...

Bike Trails
We Help You Find Long-Distance Comprehensive Bike Trails.

Find Trail Near Me
Find a nearby trail Exercise outdoors today

Trail Itineraries
Detailed Multi-Day Itineraries. Self-Guided Trail Tours.



GROW LOCAL TOURISM

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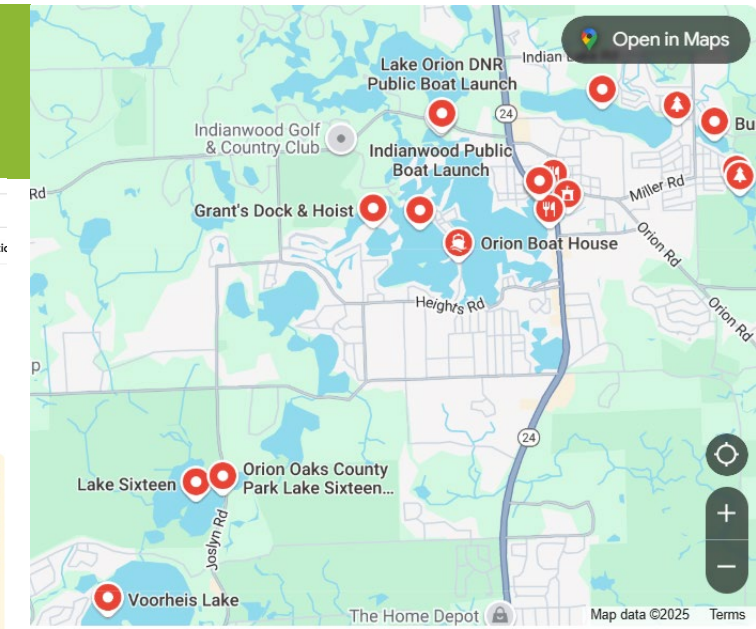
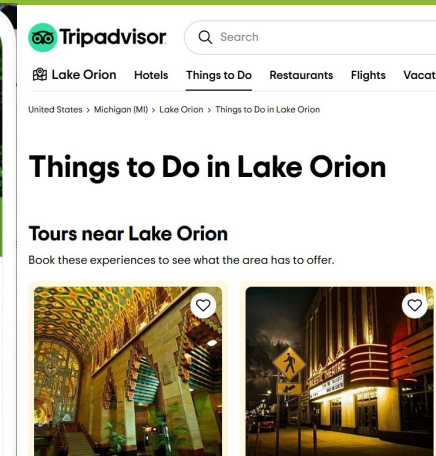
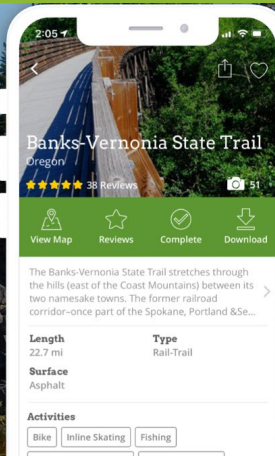
Leverage Partnerships with other Tourism & Recreation-based Organizations/Businesses



Get the Free TrailLink App

Download on the App Store | GET IT ON Google Play

Scan the QR code to get TrailLink on your phone





GROW LOCAL TOURISM

Events and promotions should have one of the following purposes:

- Build community awareness/brand recognition
- Ring registers
- Community goodwill and engagement

- Unique Signature Events
- Not Every Event is a Good Event – Evaluate!
- Enhance promotions with cross-marketing
- Create Collaborations amongst Destinations
- Make it easy for businesses to promote
- Support or Create Activity Events – ie: bike rides, runs, swims (start & stop downtown), boat parade tie-in; businesses open later, work with high school events






EVENT ASSESSMENT

Involve Partners & Stakeholders in the Evaluation Process

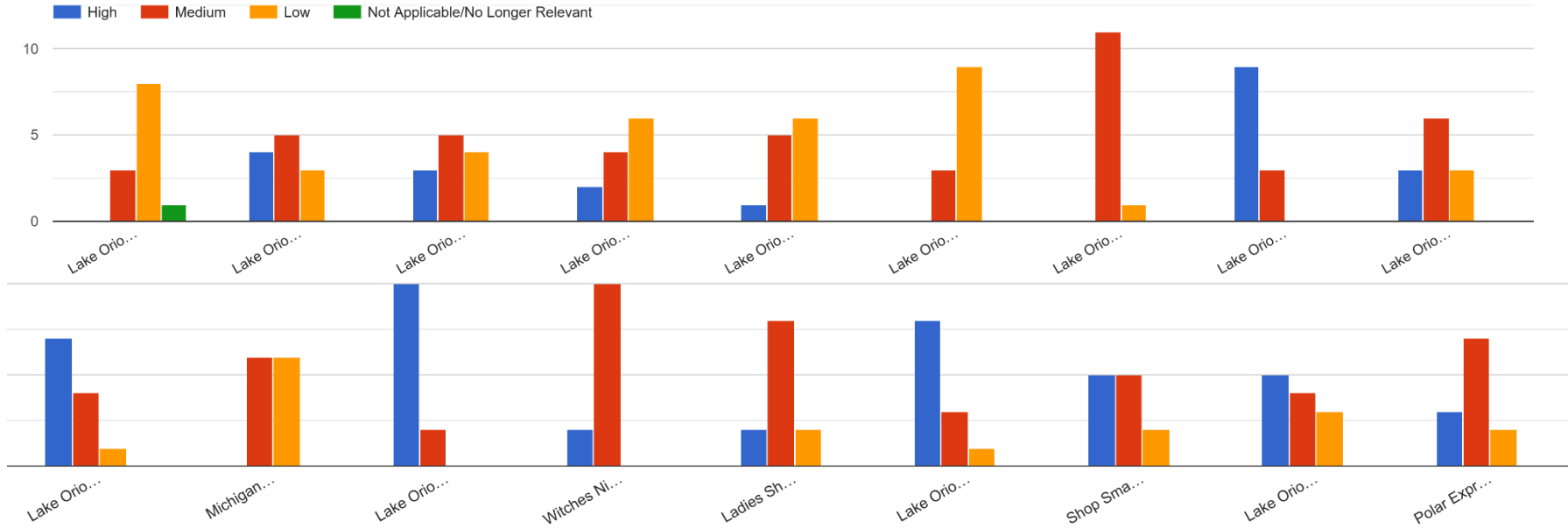
Event Assessment Steps

1. Define the Goal of the Event
(Signature, Community/Goodwill, Retail Sales or Educational)
2. Target Audience
3. Vision, Mission & Core Value Alignment
4. Set Goals & Track Metrics 

- Calculate Expense and Income Actuals/Ratio
- Track Social Media Reach/ Engagement
- News Media/Organic Reach
- Track Advertising Spend and Impact
- Business Participation
- Business Impact/Sales
- Attendance
- Local vs. Visitor Attendance %
- SWOT
- Community Impressions/ Economic Impacts



DDA EVENT ASSESSMENT



High Priority

Music Concerts
 Halloween Extravaganza

Medium-High Priority

Ice Fest
 Movie Night
 Holiday Shopping Night
 Shop Small
 Horse & Carriage Rides
 Shopping Passport

Medium Priority

Ladies Shopping Night
 Polar Express
 Witches Night
 Oktoberfest Pub Crawl
 80's Ladies Night
 Restaurant Week

Low-Medium Priority

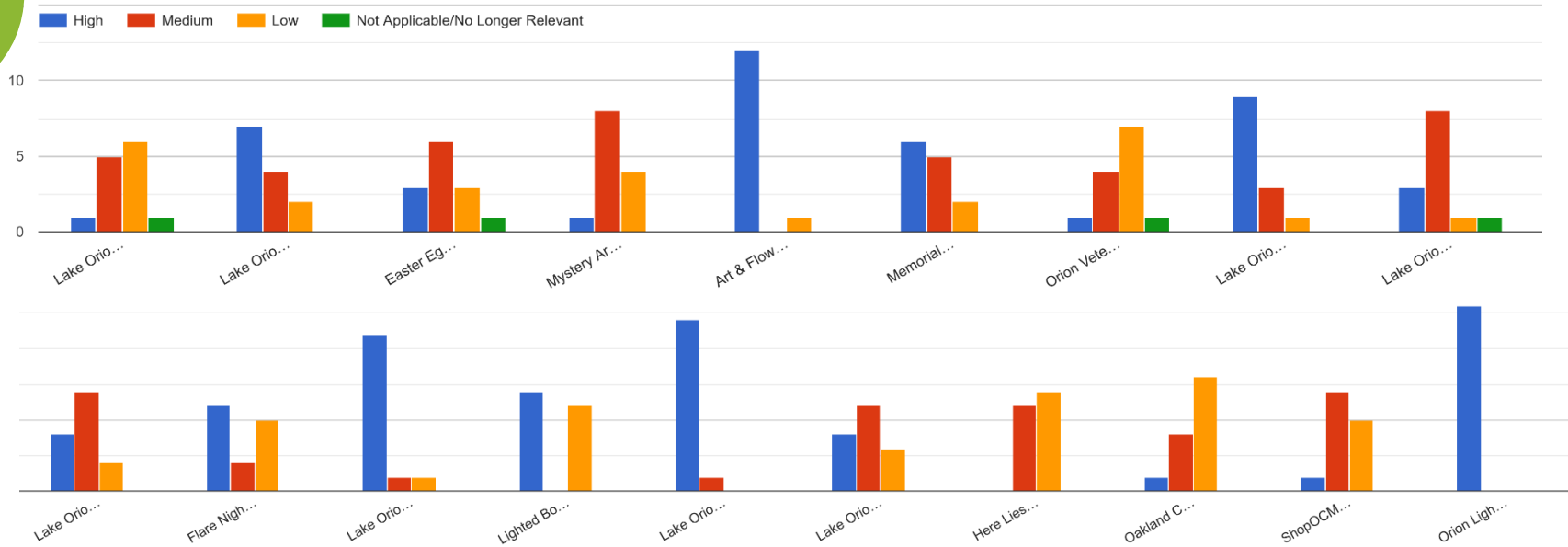
Stronger Together Shopping
 Passport
 St. Paddy's Day Pre-Game
 Michigan Downtown Day

Low Priority

Photography & Art Contest
 Letterboxing



THIRD-PARTY EVENT ASSESSMENT



High Priority

- Christmas Parade
- Dragon on the Lake
- Boat Parade
- Art & Flower Fair

Medium-High Priority

- Pub Crawl
- Jubilee Carnival
- Memorial Day Parade
- Ice Cup Challenge

Medium Priority

- Zombie Walk & Poker Run
- Boat Parade
- Flare Night
- Restaurant Week
- Easter Egg Hunt

Low-Medium Priority

- Resolution Run
- Art Stroll
- Veteran's Memorial Day Race
- Cemetery Tours
- Local Gems Sweepstakes
- ShopOCMainStreet.com



LAKESHORE ECONOMY

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Create Great First Impressions

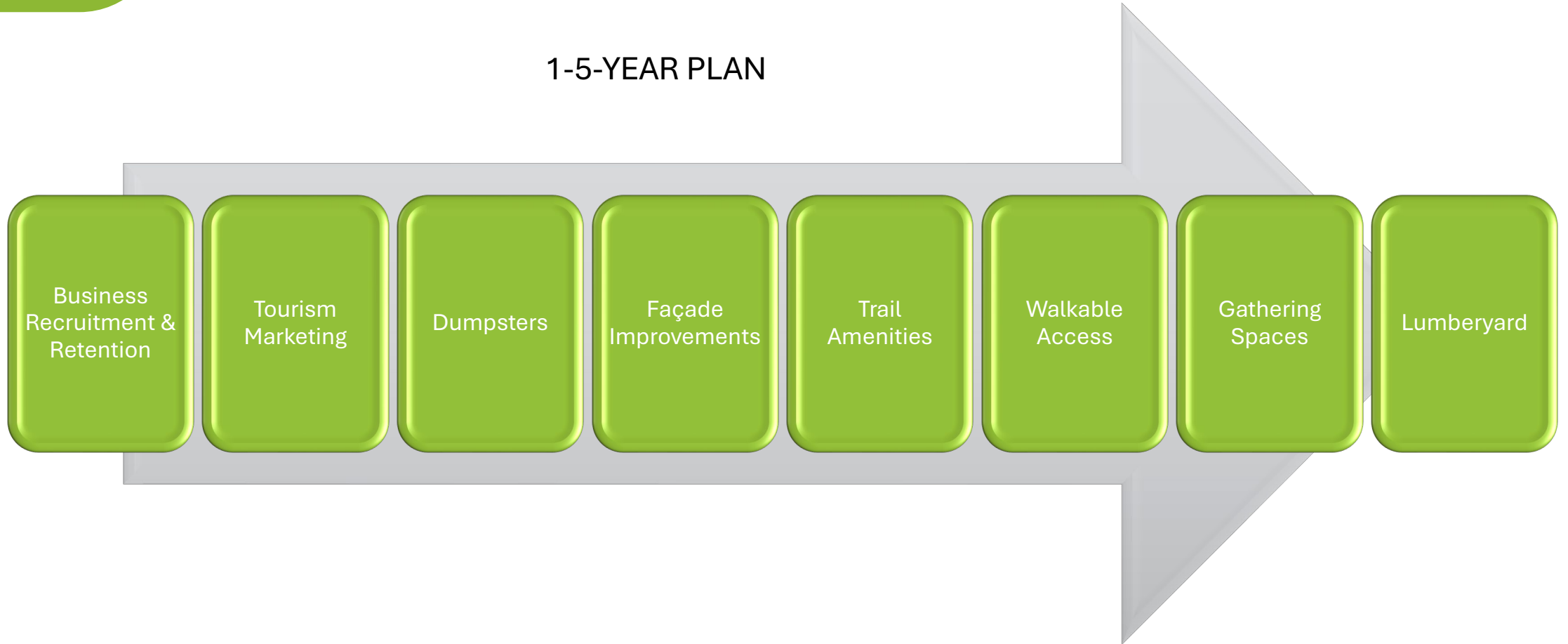
Façade Improvements
Dumpster Enclosures





ACTION STEPS

1-5-YEAR PLAN





COMMUNITY BUILDING

Section 8, Item D.

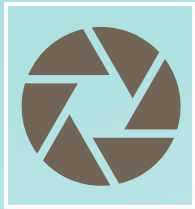
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**Strengthen
Local
Partnerships**

**Increase
Community
Involvement &
Understanding**



COMMUNITY BUILDING



Strengthen Local Partnerships

Optimize Operations – Contracts & Accounts

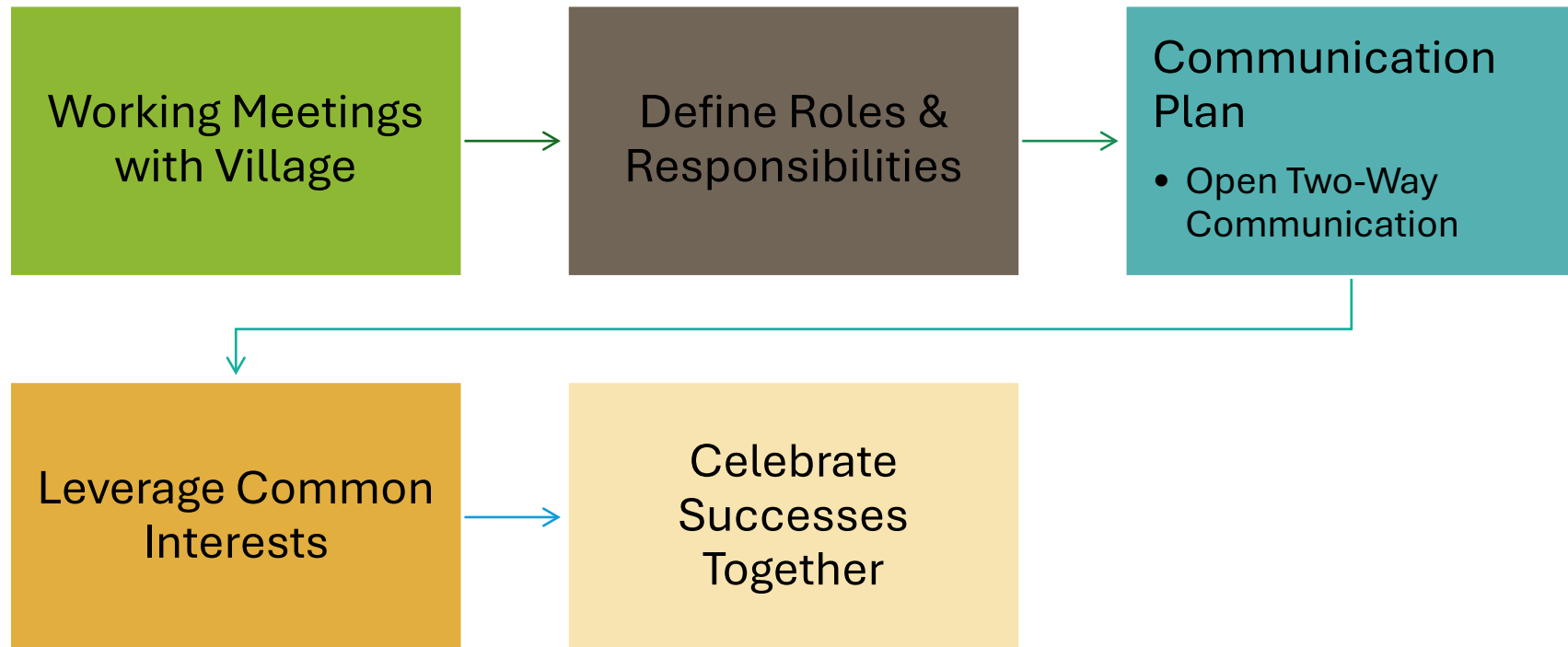
Improve Village Partnership

Expand Other Organizational Partnerships for Volunteer Resources & Project Alignment

Grants/Foundations/Resources



STRENGTHEN LOCAL PARTNERSHIPS (Village)





STRENGTHEN LOCAL PARTNERSHIPS (Other Organizations)

List & Identify Partners (Potential & Existing)

Determine Your Goal

Meet with Partners

Identify Common Goals, Potential Collaborations & Action Plan

***Leverage Templates & Resources –**

Michigan Main Street
Solution Center

<https://www.miplace.org/programs/michigan-main-street/resources/>



COMMUNITY BUILDING



Increase Community Involvement & Understanding

Refreshed Communications & Brand
Messaging Plan

Volunteer Outreach & Management
Plan



INCREASE COMMUNITY INVOLVEMENT & UNDERSTANDING

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Elements of a Volunteer Outreach, Communications & Marketing Plan

- Define Audiences
- Define Issues/Needs of Each Audience
- Determine Goals/Objectives
- Determine Messaging
- Set Metrics of Success
- Communication & Training Tools
- Evaluation



INCREASE COMMUNITY INVOLVEMENT & UNDERSTANDING

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Volunteer Management Planning

- Be Strategic - Look at needs, skills, interests and diverse representation when assessing Board and committee needs. Current Needs:
 - *Wealth*
 - Historic Knowledge
 - Human Resources
 - Capital Improvement
 - Technology
- Roles & Responsibilities - Arm volunteers with resources to understand their role, expectations and needs. Develop job descriptions and tasks.
- Leverage Resources – Michigan Main Street Solution Center
<https://www.miplace.org/programs/michigan-main-street/resources/>



INCREASE COMMUNITY INVOLVEMENT & UNDERSTANDING

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DEVELOPMENT AUTHORITY

On-board & Train Volunteers on:

- Vision/Mission
- Strategy
- Action Plan
- DDA Roles & Responsibilities
- Volunteer Roles & Responsibilities
- Tasks
- Elevator Pitch

Other Areas of Board & Committee Trainings Suggested

- Role of Management/Staff
- OMA
- CVT Master Plan
- Zoning Ordinance
- Bylaws
- Market Analysis
- Comprehensive Four-Point Approach
- Recruitment Strategy
- Historic District
- Comms & Marketing Strategy
- Funding (ie: 2 Mill/PSD)



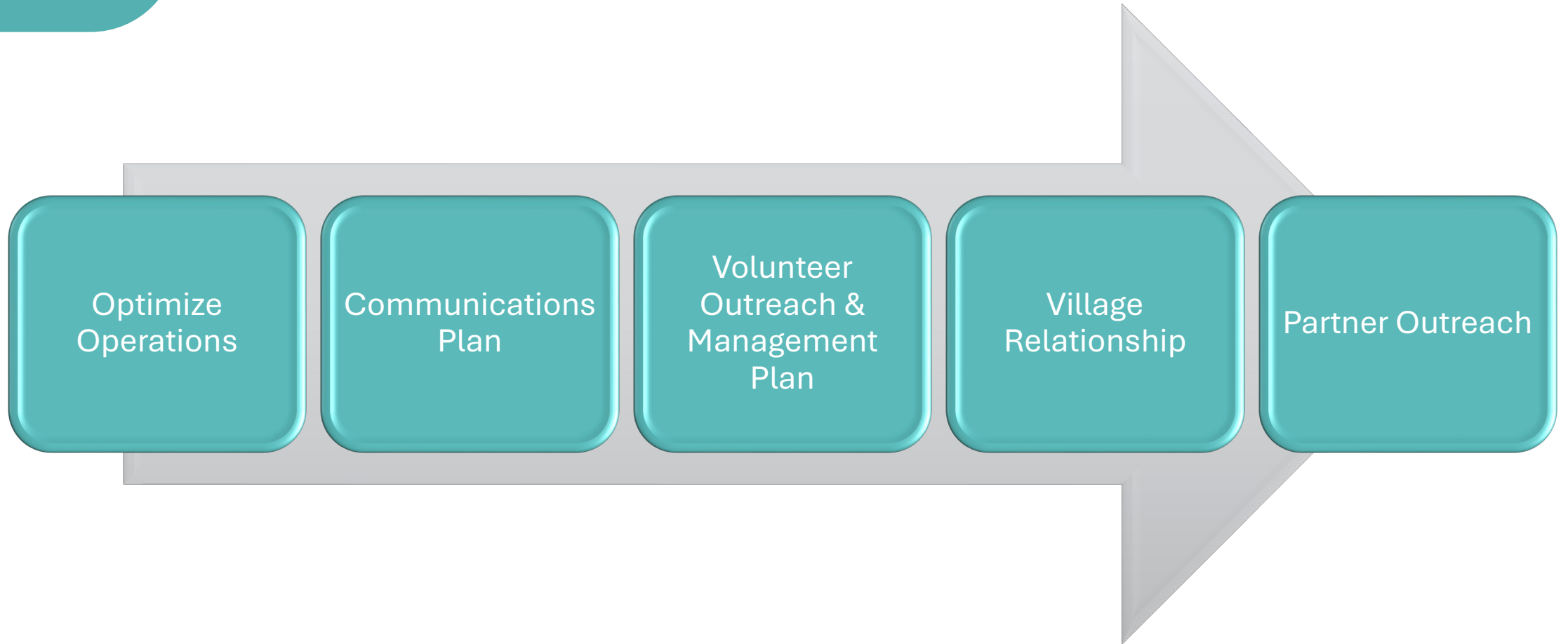
CREATING YOUR PITCH



- Introduce Self
- State Organization Mission
- State Vision for Downtown
- Why You're Doing It
- Share a Success
- Share One Goal/Project
- Share Where Help Is Needed
- State How to Get Involved



ACTION STEPS



MAIN STREET GUIDING PRINCIPLES

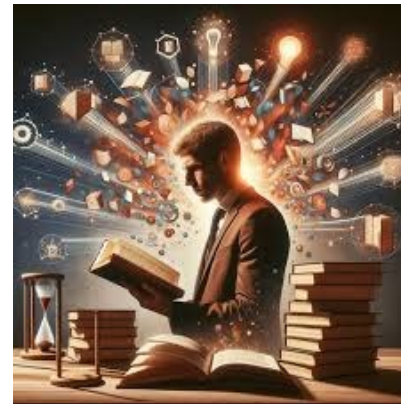
THE EIGHT TO LIVE BY



COMPREHENSIVE



INCREMENTAL



SELF-HELP



PARTNERSHIPS



IDENTIFYING &
 CAPITALIZING ON
 EXISTING ASSETS



QUALITY



CHANGE



IMPLEMENTATION

STRATEGY SUMMARY

STRATEGY

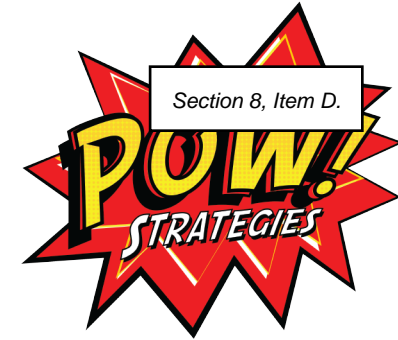
OBJECTIVE

LAKESHORE ECONOMY

- Enhance Downtown Connections
- Grow Local Tourism Business
- Create Great First Impressions that Last

COMMUNITY BUILDING

- Strengthen Local Partnerships
- Grow Community Involvement & Understanding



SAMPLE STRATEGIC ACTION PLAN

STRATEGY	OBJECTIVE	Activity/ Task	Start Date	Deadline	Assigned To	Volunteers Needed	Budget	Completed	Core Values
Business Growth	Increase Retention	Conduct Retention Visits	April	June	Jane Smith	5	\$0		Progressive
		Create a Business Resource Self-Help Guide	February	April	John Doe	2	\$500		Resourceful
		Create a Micro-Loan for Expansions	May	September	Bill Johnson	3	\$25,000		Future Driven
Total						7	\$25,500		



NEXT STEPS

- Utilize the strategic action plan worksheet to plan, track and monitor your achievements.
- Refine:
 - Timelines
 - Metrics of success
 - Responsible parties (individuals, committees)
 - Resources (partners, funding or tools needed)
- Annually assess the Strategic Plan for the next 3 years at a dedicated meeting.
- Stay focused on the **Key 2 Strategies!**
- POW! Strategies to provide the final Strategic Plan, including a trackable “Action Plan” spreadsheet.





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DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Schedule Annual Review(s) - Executive Staff

BACKGROUND BRIEF:

Completing an annual executive staff assessment and review for the Downtown Development Authority (DDA) is essential to ensure accountability, support professional growth, and align staff performance with the organization’s strategic goals. This process provides an opportunity to evaluate the effectiveness of leadership, identify strengths and areas for improvement, and set clear objectives for the year ahead. It also fosters transparency between the board and executive staff, ensuring that expectations are met and that resources are being used efficiently to advance the DDA’s mission of revitalizing and promoting the downtown district. Regular reviews help maintain high performance standards and ensure the DDA continues to serve the community effectively.

FINANCIAL IMPACT:

RECOMMENDED MOTION

Move to Schedule separate, annual assessment and review of performance for each of the Executive Director And Assistant Director by _____ (board or committee) on or before _____, to include a recommendation on compensation for fiscal year 25-26



EXECUTIVE DIRECTOR EVALUATIONS



ABOUT THE SOLUTION CENTER

The Main Street Solution Center is a free access portal to resources for communities and organizations working to revitalize and strengthen their local economies. The Solution Center's curated resources are designed to help guide and inspire local leaders and advocates as they navigate the complexities of downtown and neighborhood business district revitalization and economic growth.

ABOUT THE PARTNERSHIP

This Main Street Solution Center publication was underwritten by Michigan Main Street and Main Street Iowa. Their generous support demonstrates a shared vision and ongoing commitment to freely share knowledge, experience, tools, and best practices to fuel revitalization and economic growth in their own communities, and in locales spanning the nation.



ABOUT THE CREATORS

Leigh Young, AICP is Senior Main Street Specialist with Michigan Main Street and a driving force behind the creation of the Main Street Solution Center. Her deep passion for planning, placemaking, community engagement, and sustainable urban development is evident in her work to advance the cause for revitalization and economic development in downtown and neighborhood business districts across Michigan.

Jay Schlinsog, CMSM is the owner of Downtown Professionals Network (DPN), a Franklin, TN-based firm specializing in innovative, market-driven downtown and business district revitalization and economic development solutions. He brings more than thirty years of experience gained while serving as chief executive with chamber and district management organizations, and through his work with communities and organizations across the United States.

Ben Muldrow is a partner at Arnett Muldrow & Associates, a consultancy renowned for its creative approach to economic development, branding, and marketing strategies for small towns and cities across the nation. He brings an innovative mindset and a deep understanding of the unique dynamics of community branding to each engagement, blending traditional community values with modern marketing techniques to help communities and districts unlock their potential.

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EXECUTIVE DIRECTOR EVALUATIONS

Supervising and evaluating the executive director – or the organization’s chief staff person – is among the most important responsibilities undertaken by the boards of downtown and district management organizations. Yet, for all its importance, a meaningful and effective process designed to support and strengthen the organization’s chief executive need not be overly complicated.

PERFORMANCE STANDARDS

One of the first tasks is to develop a set of performance standards. The executive director’s job description should already outline areas of general responsibility and, thus, should serve as the foundation for the performance evaluation tool. Job descriptions vary from organization to organization, but areas common to downtown and district management organizations include:

- Providing leadership and assistance to the board in developing and reviewing the organization’s mission, goals, and strategies.
- Managing and directing the organization’s operations and activities.
- Implementing board policies and directives.
- Reporting the organization’s activities to the board.
- Ensuring the organization’s financial resources are properly managed, and reporting the organization’s financial position to the board.
- Hiring, supervising, and evaluating staff.
- Recruiting, developing, supporting, and monitoring the work of volunteers.
- Communicating the goals, purposes, and programs of the organization to partner organizations, the news media, and other audiences.
- Assisting the board in developing and implementing a fundraising and resource development plan.

The simplest approach might involve re-formatting the job description document as a form to collect input from board members, the executive director, and other selected individuals (e.g. government liaisons, colleagues, major funders, staff, etc.) from whom input is sought. An accompanying grading scale may also be used to benchmark and track performance.

A second approach to, or component of, the evaluation might identify specific, measurable objectives translated from the job description and other planning documents, like an organization’s annual work plan or strategic plan, to benchmark and track the executive director’s progress and performance.



Suppose your organization has placed a priority on improving its visibility with critical audiences. Rather than saying the executive director is responsible for improving the organization’s image-building communications and visibility, you might choose to establish a performance goal in one of the following ways:

Example A

The executive director will increase the frequency of written and in-person communications initiated by the organization with local government policymakers, including quarterly reports to the director of Community Development and the chair of the City Council’s Development Committee on the organization’s accomplishments, plans, and needs.

- This goal provides clear direction for the executive director, and performance can be measured by verifying quarterly reports are delivered, at minimum, to the individuals and groups identified.

Example B

The executive director will oversee the development and execution of a plan that includes a timeline, benchmarks and goals for increasing the organization’s positive exposure using tools and media that reach and connect with our five target audiences, and will provide quarterly updates to the board on the plan’s effectiveness.

· This goal does not identify the exact means by which the organization’s positive exposure will be enhanced, or the specific media and tools that will be used to connect with the five targeted audiences - that would be the purpose of the plan. This approach, for performance evaluation purposes, provides opportunities for board input and checkpoints to ensure the plan - which also, ultimately, will be reviewed for its effectiveness - is in place and implementation activities remain on track.



Key Steps

Much like the evaluation tool and selected performance standards, the evaluation process can look different from organization to organization. Still, a well-orchestrated process designed to establish the board's expectations, clarify responsibilities, enhance communications, identify professional development opportunities, and strengthen the organization's leadership includes:

- Developing performance standards and a form to gather input.
- Determining who should conduct the evaluation – usually assigned by the board and comprised of at least two or three board members, often including the board chair and treasurer.
- Gathering input from board members and, where appropriate, from external partners, such as local government officials, partner organizations and colleagues, major funders, etc.
- A self-evaluation, using the same form, completed by the executive director.
- Compiling and summarizing individual responses, along with the executive director's self-evaluation and the committee's compensation recommendation, to create a consolidated, overall evaluation report.
- Presenting the evaluation report to the executive director, usually in a one-on-one meeting with the board chair, to discuss findings and conclusions, to outline a plan for furthering professional development, and to discuss performance standards for the upcoming year.
- Presenting the evaluation report, along with any written comments submitted by the executive director included as an attachment, to the full board for its formal approval.



Best Practices

Use the following hints and tips, and refer to tools and resources listed at the end of this document, as guidance for creating or fine-tuning the performance standards and process used to evaluate your organization's chief executive.

- Be diligent, and plan and work accordingly, to complete the annual performance evaluation just prior to or on the executive director's employment anniversary.
- Get a head start by collecting examples of performance evaluation forms from peer organizations. Adapt approaches and questions that are relevant to your organization, but remain mindful of your existing executive director's job description and the organization's distinct purpose, mission, and goals.
- Crafting performance standards and creating the evaluation tool is often a job best suited to a smaller committee comprised of board members, with input from the executive director. The full board, however, should be asked to review and approve the committee's draft.
- Incorporate a grading system (e.g. Exceeds Requirements, Achieves Requirements, Needs Improvement, Fails to Meet Requirements, Not Sure) with space for comments to help minimize time required of individuals to complete the evaluation tool, and to aid efforts to tabulate and summarize responses.
- Conduct periodic, less formal interim reviews throughout the year to update progress on performance standards, troubleshoot obstacles, re-examine time and resource commitments, and to help maintain an open performance-related dialog between the board, the board president (and/or the executive committee or personnel committee), and the executive director.
- Use the evaluation process to identify opportunities for, and to direct resources and support toward, furthering your executive director's professional development.
- Some aspects of the performance evaluation may best be accomplished by a board-appointed committee of the board (e.g. executive committee or personnel committee). However, all board members should be asked to complete the evaluation form, and the final evaluation report should be approved by the full board.
- Upon conclusion of each annual review, take time to ensure performance evaluation standards, the executive director's job description, and relevant organization governing, policy, and planning documents are in sync.



ADDITIONAL RESOURCES

[A Simple Way to Conduct an Executive Director Performance Review \(Free Template\) by Joan Garry](#)

[Executive Director Performance Evaluation Form Template | The Management Center](#)

[Reviewing the Executive Director Performance | Sask Culture](#)

[City of Howell \(MI\) DDA/Main Street Director Performance Appraisal Form](#)

[Main Street Director Evaluation Form](#)

[Employee Evaluation Form](#)





DDA ACTION SUMMARY SHEET

MEETING DATE: May 7, 2025

TOPIC Adoption of Downtown Development Authority 2025-26 Budget

BACKGROUND BRIEF:

The DDA Budget Task Force has met, including meeting with the Village Council Ad Hoc committee, and in concert with staff recommendations, the attached Budget is being presented to adopt and appropriate for fiscal year 2025-2026.

Budget notes:	Proposed General Operating TIF Revenue	\$1,047,377.00
	Funds Dedicated for the Village Benefit	\$192,854.00
	Funds Dedicated to Village CIP	\$112,942.00
	Lumber Yard (bond) debt service	\$420,722.00
	Balance of Available funds (less grant/sponsor)	\$320,859.00

FINANCIAL IMPACT:

As stated in the 25-26 Budget, as proposed

RECOMMENDED MOTION:

Move to approve and adopt the 2025-2026 Budget for the Lake Orion Downtown Development Authority, as presented.

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	DEPT. REQUESTED	25-26 MGR APPROVED
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND								
Department: 000 REVENUE								
248-000-402-000	Current Real Property Taxes	934,065	772,911	987,129	962,797	0	1,047,377	1,047,377
248-000-412-000	Property Tax - DPPT P/Y & C/Y	972	1,475	0	3,154	0	3,370	3,370
248-000-441-000	Local Community Stabilization	10,094	15,971	15,000	14,034	0	15,000	15,000
248-000-445-000	Penalties & Interest on Taxes	0	0	2,000	0	0	2,000	2,000
248-000-539-000	State Grants	2,813	3,500	43,500	0	0	43,500	43,500
248-000-540-000	COUNTY/FEDERAL PROGRAM GRANTS	0	0	595,823	446,867	0	595,823	595,823
248-000-582-000	Intergovernment - Police	15,927	201,996	0	0	0	0	0
248-000-664-000	Interest Earned	4,973	5,833	2,500	12,902	0	9,708	9,708
248-000-671-999	Appropriation from Fund Balan	0	0	0	0	0	171,128	171,128
248-000-676-404	Transfer From Prop Acq Fund	0	0	169,436	0	0	169,436	169,436
248-000-681-000	Reimburse - Insurance Claims	12,465	7,218	0	5,407	0	17,000	17,000
248-000-683-000	Reimbursements-Other	10,000	0	0	0	0	0	0
248-000-685-000	Sponsorships	38,750	11,276	35,000	2,515	0	35,000	35,000
248-000-685-100	Transportaion Sponsorship	16,183	21,907	17,500	0	0	8,500	8,500
248-000-686-000	Downtown Events	19	5,121	18,500	5,466	0	8,000	8,000
248-000-686-002	Flower Fair Revenue	0	305	0	0	0	2,500	2,500
248-000-686-004	ST EVENT REVENUE	20,361	0	1,500	0	0	3,500	3,500
248-000-686-005	ST SPONSOR REVENUE	0	0	1,500	0	0	5,000	5,000
248-000-686-006	EV CHARGING	16	634	500	1,529	0	4,200	4,200
248-000-687-000	Merchandise Sales	195	0	1,000	0	0	3,500	3,500
248-000-688-000	Gift Certificate Sales	3,425	355	500	3,375	0	4,000	4,000
248-000-694-000	Miscellaneous	683	765	2,500	9,298	0	8,000	8,000
Total Department 000:		1,070,941	1,049,267	1,893,888	1,467,344	0	2,156,542	2,156,542

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	DEPT. REQUESTED	25-26 MGR APPROVED
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND								
Department: 260 GENERAL ACTIVITIES								
248-260-701-000	Executive Director Wages	58,299	45,476	80,000	70,770	0	82,400	82,400
248-260-704-000	Wages - Administrative Coordi	20,248	30,948	37,188	15,786	0	32,417	32,417
248-260-706-000	Asst. Executive Director wage	24,068	28,244	71,000	62,808	0	73,130	73,130
248-260-707-000	Wages - Grounds Coordinator	1,403	1,819	5,400	3,234	0	5,400	5,400
248-260-711-013	OVERTIME	947	0	0	0	0	0	0
248-260-715-000	Social Security	7,930	8,104	14,810	11,674	0	15,254	15,254
248-260-716-000	Health Insurance- Medical	6,630	2,878	12,000	21,313	0	14,820	14,820
248-260-717-000	Life & Disability Insurance	917	331	1,320	2,109	0	1,562	1,562
248-260-718-000	Dental Insurance	475	222	770	514	0	1,132	1,132
248-260-719-000	Pension	5,003	4,365	5,632	6,520	0	6,720	6,720
248-260-721-000	Vision Care	99	46	653	667	0	720	720
248-260-801-000	CONTRACTUAL SERVICES- DOWNTOW	234	18,000	10,000	9,688	0	20,000	20,000
248-260-801-002	CONTRACTUAL SERVICES - PUBLIC	60,000	52,000	60,000	60,000	0	103,000	103,000
248-260-801-003	CONTRACT SERVICES - DPW FEE	30,000	25,814	30,000	30,000	0	27,211	27,211
248-260-801-004	CONTRACTUAL SERVICES - PA57	70,000	58,333	70,000	70,000	0	62,643	62,643
248-260-801-005	Contractual Services- Townshi	2,700	0	2,700	0	0	6,700	6,700
248-260-801-012	Contractual Services-Parking	21,000	18,200	17,440	0	0	0	0
248-260-801-022	SPECIAL SERVICES- EVENTS	20,000	17,333	20,000	462	0	0	0
248-260-801-023	Contract Services-DPW event s	10,000	8,667	10,000	300	0	0	0
248-260-801-033	Contract Services-DPW snow re	15,000	13,000	17,000	17,000	0	0	0
248-260-805-000	Audit Fees	1,545	2,950	4,490	3,979	0	5,900	5,900
248-260-810-000	Legal Services	12,726	17,497	8,000	5,733	0	3,500	3,500
248-260-823-000	Website/Software	6,828	4,343	6,000	2,687	0	4,200	4,200
248-260-823-001	Municipal Software	1,248	3,676	3,800	0	0	5,000	5,000
248-260-829-000	Planner Services	4,715	675	3,500	0	0	1,000	1,000
248-260-851-000	Telephone	3,247	2,902	3,500	2,824	0	3,500	3,500
248-260-900-000	Printing and Publication	182	0	500	0	0	500	500
248-260-920-000	Utilities	4,199	5,811	7,020	6,163	0	7,800	7,800
248-260-921-000	Municipal Street Lighting	29,474	6,418	13,740	11,938	0	13,780	13,780
248-260-930-000	Repair and Maintenance	705	58	0	0	0	1,870	1,870
248-260-930-002	Building Maintenance	1,020	323	1,100	307	0	1,200	1,200
248-260-940-000	Equipment Rental	70	0	750	102	0	1,500	1,500
248-260-941-000	Office Rent	12,000	12,000	16,800	16,800	0	16,800	16,800
248-260-942-000	Office Expenses	5,150	2,478	5,200	3,861	0	4,000	4,000
248-260-946-000	Credit Card Fees	9	0	100	0	0	175	175
248-260-956-000	Dues & Miscellaneous	1,036	1,209	1,545	1,488	0	1,900	1,900
248-260-957-000	Education & Training	8,965	919	5,000	4,905	0	8,000	8,000
248-260-958-000	General Activities Misc	739	0	350	344	0	7,500	7,500
248-260-962-000	Mileage	1,537	38	1,000	669	0	500	500
248-260-965-401	Transfer to Capital Imp Fund	0	0	67,616	0	0	112,942	112,993
248-260-965-404	Transfer Out - DDA Property A	110,000	157,500	0	0	0	0	0
248-260-974-000	Capital Outlay - Equipment	5,200	1,235	2,000	0	0	2,000	2,000
Total Department 260:		(565,548)	(553,812)	(617,924)	(444,645)	0	(656,676)	(656,727)

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	DEPT. REQUESTED	25-26 MGR APPROVED	25-26
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND									
Department: 725 ORGANIZATION									
248-725-822-000	Newsletter	882	455	1,800	130	0	1,800	1,800	
248-725-824-000	Volunteer Recognition & Dvp.	282	0	1,000	675	0	1,700	1,700	
248-725-825-000	Gift Certificate Redemption	9,365	2,460	5,000	4,416	0	5,000	5,000	
248-725-826-000	Historic Celebration/Educatio	1,588	580	1,000	290	0	2,500	2,500	
248-725-827-000	Awareness Program	1,637	233	1,500	694	0	1,500	1,500	
248-725-864-000	Grant & Scholarship Distriubu	1,000	0	0	0	0	500	500	
248-725-881-000	Merchandise to Sell	75	211	1,000	0	0	1,200	1,200	
Total Department 725:		(14,829)	(3,939)	(11,300)	(6,205)	0	(14,200)	(14,200)	

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	DEPT. REQUESTED	25-26 MGR APPROVED	25-26
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND									
Department: 726 DESIGN									
248-726-745-000	Beautification Supplies	1,574	648	2,600	1,394	0	7,620	7,620	
248-726-746-000	Hanging Baskets	3,353	0	4,000	0	0	4,120	4,120	
248-726-801-000	Contractual Services	5,172	3,650	5,500	3,080	0	5,780	5,780	
248-726-843-000	Facade Program	0	5	23,680	14,274	0	25,480	25,480	
248-726-845-000	Public Art Program	2,250	0	2,500	391	0	2,100	2,100	
248-726-883-000	Banners and Holiday Lighting	9,639	6,000	10,000	6,844	0	8,100	8,100	
248-726-975-001	Capital Outlay - Beautificati	473	0	5,000	344	0	2,300	2,300	
248-726-975-002	Capital Outlay - Streets	0	0	500	0	0	2,790	2,790	
248-726-980-001	PUBLIC SPACE GRANT-GENERAL	0	0	353,619	138,989	0	323,000	323,000	
248-726-980-002	PUBLIC SPACE GRANT-DEVELOPMEN	0	0	242,204	16,985	0	212,000	212,000	
Total Department 726:		(22,461)	(10,303)	(649,603)	(182,301)	0	(593,290)	(593,290)	

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	DEPT. REQUESTED	25-26 MGR APPROVED	25-26
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND									
Department: 728 ECONOMIC DEVELOPMENT									
248-728-801-000	Contractual Services	6,563	4,750	34,500	15,186	0	17,800	17,800	
248-728-860-000	Trolley Expense	34,246	19,133	22,000	7,010	0	18,900	18,900	
248-728-861-000	DATA AND METRICS	0	0	468	0	0	1,460	1,460	
248-728-862-000	Training Materials	457	0	500	57	0	500	500	
248-728-864-000	Grant & Scholarship Distriubu	0	0	10,800	0	0	1,000	1,000	
248-728-886-000	Marketing Materials	1,325	0	2,500	11	0	2,500	2,500	
248-728-886-002	Social District	3,390	232	750	60	0	2,350	2,350	
248-728-888-000	Brand Marketing	29,945	18,837	50,000	19,065	0	23,700	23,700	
248-728-888-001	Contractual Services Brand Ma	27,500	23,255	10,000	273	0	12,000	12,000	
Total Department 728:		(103,426)	(66,207)	(131,518)	(41,662)	0	(80,210)	(80,210)	

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	DEPT. REQUESTED	25-26 MGR APPROVED	25-26
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND									
Department: 729 PROMOTION									
248-729-880-000	Event Promotion	1,796	308	2,000	405	0	2,500	2,500	
248-729-880-001	Event Promo - Gazebo Series	17,342	10,170	11,000	10,600	0	14,500	14,500	
248-729-880-004	Event Promo - Halloween Parad	2,015	2,451	2,500	1,240	0	2,500	2,500	
248-729-880-005	Event Promo - Hmtwn/Holiday V	8,215	7,934	7,500	2,832	0	3,000	3,000	
248-729-880-007	Event Promo - Flower Fair	0	0	0	0	0	1,500	1,500	
248-729-880-008	EVENT PROMO-ICE FEST	0	0	250	0	0	3,500	3,500	
248-729-880-010	PARTNERED EVENTS	0	0	1,500	0	0	1,500	1,500	
248-729-880-011	Restaurant week	0	0	2,500	0	0	1,000	1,000	
248-729-880-012	Sing & Stroll Tree Lighting	12,212	11,754	12,100	3,890	0	7,000	7,000	
248-729-880-013	STRONGER TOGETHER-WINTER	682	349	2,500	385	0	2,500	2,500	
248-729-880-014	STRONGER TOGETHER- SUMMER/FAL	22,704	0	1,500	128	0	1,500	1,500	
248-729-880-015	Winter Activities	8,658	7,019	12,000	5,986	0	4,500	4,500	
248-729-880-016	MISC EVENTS-OTHER	0	0	2,500	0	0	2,500	2,500	
248-729-880-017	Movie Night	2,194	999	3,000	1,708	0	3,500	3,500	
248-729-880-100	Stronger Together- smr fall	553	722	5,000	0	0	0	0	
248-729-885-000	Port-A-Johns	2,124	1,794	2,600	1,008	0	1,600	1,600	
248-729-895-000	Event Promo-Comm. Sponsorship	43	0	0	0	0	0	0	
Total Department 729:		(78,538)	(43,500)	(68,450)	(28,182)	0	(53,100)	(53,100)	

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	25-26 DEPT. REQUESTED	25-26 MGR APPROVED
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND								
Department: 730								
248-730-885-100	Knox Box Grant Program	0	0	2,000	0	0	2,000	2,000
248-730-931-000	Repair & Maintenance-Equipmen	3,146	0	0	0	0	0	0
248-730-965-301	Interfund TRF 2023 DDA Bond P	0	0	419,709	419,709	0	419,709	420,721
248-730-965-404	Transfer Out - DDA Property A	104,178	0	0	0	0	0	0
248-730-975-000	Capital Outlay	387	1,636	53,075	12,787	0	0	0
248-730-975-003	DDA Capital Outlay	2,521	5,871	5,500	4,669	0	2,500	2,500
248-730-975-005	DDA Capital Outlay- Wayfindin	39,266	0	0	0	0	0	0
248-730-975-006	DDA Capital Outlay - Parking	251,181	0	0	0	0	10,000	10,000
248-730-975-009	Capital Outlay - Dumpsters	0	0	22,800	0	0	5,000	5,000
248-730-975-011	Capital Outlay - Trail Extens	0	0	4,300	0	0	4,300	4,300
248-730-975-020	Capital Outlay Parks & rec	25,705	0	0	0	0	0	0
Total Department 730:		(426,384)	(7,507)	(507,384)	(437,165)	0	(443,509)	(444,521)
Fund 248 - DOWNTOWN DEVELOPMENT AUTHORITY FUND:								
TOTAL ESTIMATED REVENUES		1,070,941	1,049,267	1,893,888	1,467,344	0	2,156,542	2,156,542
TOTAL APPROPRIATIONS		1,211,186	685,268	1,986,179	1,140,160	0	1,840,985	1,842,048
NET OF REVENUES & APPROPRIATIONS:		(140,245)	363,999	(92,291)	327,184	0	315,557	314,494
BEG. FUND BALANCE		638,446	498,200	356,811	356,811	356,811	356,811	356,811
FUND BALANCE ADJUSTMENTS		0	2,559		0			
END FUND BALANCE		498,201	864,758	264,520	683,995	356,811	672,368	671,305

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	DEPT. REQUESTED	25-26 MGR APPROVED	25-26
Fund: 301 DOWNTOWN DEV BOND PROJECT 2023									
Department: 000 REVENUE									
301-000-300-001	2023 Downtown Dev Tax Exempt	3,533,382	0	0	0	0	0	0	0
301-000-300-002	2023 Downtown Dev Tax Exempt	1,480,827	0	0	0	0	0	0	0
301-000-664-000	Interest Earnings	91	1,622	900	1,439	0	900	900	900
301-000-671-999	Appropriation from Fund Balan	0	0	0	0	0	700,000	0	0
301-000-699-301	TRF in from DDA	0	0	419,709	419,709	0	419,709	420,721	420,721
Total Department 000:		5,014,300	1,622	420,609	421,148	0	1,120,609	421,621	421,621

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	DEPT. REQUESTED	25-26 MGR APPROVED	25-26
Fund: 301 DOWNTOWN DEV BOND PROJECT 2023									
Department: 901 CAPITAL OUTLAY									
301-901-950-000	Demolition & Land Improvement	0	2,250	500,000	172,947	0	174,500	174,500	
301-901-971-000	Capital Outlay - Buildings	0	2,120,875	0	0	0	672,520	672,520	
Total Department 901:		0	(2,123,125)	(500,000)	(172,947)	0	(847,020)	(847,020)	

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	DEPT. REQUESTED	25-26 MGR APPROVED
Fund: 301 DOWNTOWN DEV BOND PROJECT 2023								
Department: 905 Downtown Dev Bond 2023								
301-905-731-000	2023 Bond Taxable Issuance E	69,350	500	0	0	0	0	0
301-905-731-001	2023 Tax exempt Bond Issuance	0	500	0	0	0	0	0
301-905-745-001	Property taxes-Orion Twp	0	3,353	0	0	0	0	0
301-905-992-003	2023 DDA BONDS TAXABLE PRINCI	0	75,000	60,000	60,000	0	60,000	60,000
301-905-992-004	2023 DDA BONDS TAX EXEMPT PRI	0	180,000	150,000	150,000	0	150,000	160,000
301-905-993-001	2023 DDA BOND TAXABLE INTERES	0	60,931	76,910	76,909	0	76,910	73,921
301-905-993-002	2023 DDA TAX EXEMPT BOND INTE	0	105,778	132,800	132,800	0	132,800	126,800
Total Department 905:		(69,350)	(426,062)	(419,710)	(419,709)	0	(419,710)	(420,721)
Fund 301 - DOWNTOWN DEV BOND PROJECT 2023:								
TOTAL ESTIMATED REVENUES		5,014,300	1,622	420,609	421,148	0	1,120,609	421,621
TOTAL APPROPRIATIONS		69,350	2,549,187	919,710	592,656	0	1,266,730	1,267,741
NET OF REVENUES & APPROPRIATIONS:		4,944,950	(2,547,565)	(499,101)	(171,508)	0	(146,121)	(846,120)
BEG. FUND BALANCE		0	4,944,950	2,794,812	2,794,812	2,794,812	2,794,812	2,794,812
END FUND BALANCE		4,944,950	2,397,385	2,295,711	2,623,304	2,794,812	2,648,691	1,948,692

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	25-26 DEPT. REQUESTED	25-26 MGR APPROVED
Fund: 403 DDA PUBLIC INFRASTRUCTURE FUND								
Department: 000 REVENUE								
403-000-699-248	Interfund Transfer In - DDA	0	0	0	0	142,469	112,993	112,993
Total Department 000:		0	0	0	0	142,469	112,993	112,993
Fund 403 - DDA PUBLIC INFRASTRUCTURE FUND:								
TOTAL ESTIMATED REVENUES		0	0	0	0	142,469	112,993	112,993
TOTAL APPROPRIATIONS		0	0	0	0	0	0	0
NET OF REVENUES & APPROPRIATIONS:		0	0	0	0	142,469	112,993	112,993
BEG. FUND BALANCE		0	0	0	0	0	142,469	142,469
END FUND BALANCE		0	0	0	0	142,469	255,462	255,462

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	DEPT. REQUESTED	25-26 REQUESTED	25-26 MGR APPROVED
Fund: 404 DDA PROPERTY ACQUISITION									
Department: 000 REVENUE									
404-000-664-000	Interest Earnings	189	104	0	96	0	0	0	0
404-000-699-248	Interfund Transfer In - DDA	214,178	157,500	0	0	0	0	0	0
Total Department 000:		214,367	157,604	0	96	0	0	0	0

BUDGET REPORT FOR VILLAGE OF LAKE ORION

Calculations As of 04/30/2024

Section 8, Item F.

GL Number	Description	22-23 Activity	23-24 Activity	24-25 Amended Budget	24-25 Activity	24-25 Projected	25-26 DEPT. REQUESTED	25-26 MGR APPROVED
Fund: 404 DDA PROPERTY ACQUISITION								
Department: 901 CAPITAL OUTLAY								
404-901-971-000	Capital Outlay - Building	0	0	169,436	0	0	169,436	169,436
404-901-992-000	Bond Principal	100,000	300,000	0	0	0	0	0
404-901-995-000	Bond Interest	10,000	15,000	0	0	0	0	0
Total Department 901:		(110,000)	(315,000)	(169,436)	0	0	(169,436)	(169,436)
Fund 404 - DDA PROPERTY ACQUISITION:								
TOTAL ESTIMATED REVENUES		214,367	157,604	0	96	0	0	0
TOTAL APPROPRIATIONS		110,000	315,000	169,436	0	0	169,436	169,436
NET OF REVENUES & APPROPRIATIONS:		104,367	(157,396)	(169,436)	96	0	(169,436)	(169,436)
BEG. FUND BALANCE		222,473	326,841	169,465	169,465	169,465	169,465	169,465
END FUND BALANCE		326,840	169,445	29	169,561	169,465	29	29
Report Totals:								
TOTAL ESTIMATED REVENUES - ALL FUNDS		6,299,608	1,208,493	2,314,497	1,888,588	142,469	3,390,144	2,691,156
TOTAL APPROPRIATIONS - ALL FUNDS		1,390,536	3,549,455	3,075,325	1,732,816	0	3,277,151	3,279,225
NET OF REVENUES & APPROPRIATIONS:		4,909,072	(2,340,962)	(760,828)	155,772	142,469	112,993	(588,069)
BEG. FUND BALANCE - ALL FUNDS		860,920	5,769,990	3,321,088	3,321,088	3,321,088	3,463,557	3,463,557
FUND BALANCE ADJUSTMENTS - ALL FUNDS		0	2,559	0	0	0	0	0
END FUND BALANCE - ALL FUNDS		5,769,992	3,431,587	2,560,260	3,476,860	3,463,557	3,576,550	2,875,488



DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Village Budgetary Resolution – PA57 Administrative Fee

BACKGROUND BRIEF:

PA 57 ADMIN FEE: Following multiple meetings, adhoc committee engagements, and concession, it was offered the Executive Director, and accepted by the Village Manager, that the charge by the Village for the administration of the DDA TIF would be accomplished via Council Resolution. While the sue of a defined contract was proposed and sought by DDA Staff, end the end, it is easier for the Village to use a resolution.

The intent of a contract remains satisfied by this approach as the Village has justified the charged expenses in the resolution for the upcoming fiscal year. That justification will be reviewed annually as the resolution only applied year over year.

FINANCIAL IMPACT:

The fee for administering our TIF has been set at \$62,643. This is included in our budget.

RECOMMENDED MOTION:

Move to receive and file A RESOLUTION ASSESSING A REASONABLE PRO RATA SHARE OF THE FUNDS OF THE LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY FOR THE COST OF HANDLING AND AUDITING THE FUNDS OF THE DDA AGAINST THE FUNDS OF THE AUTHORITY PURSUANT TO MCL 125.4228(2).

VILLAGE OF LAKE ORION
COUNTY OF OAKLAND
STATE OF MICHIGAN

RESOLUTION NO. _____

A RESOLUTION ASSESSING A REASONABLE PRO RATA SHARE OF THE FUNDS OF THE LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY FOR THE COST OF HANDLING AND AUDITING THE FUNDS OF THE DDA AGAINST THE FUNDS OF THE AUTHORITY PURSUANT TO MCL 125.4228(2).

WHEREAS, the Michigan Recodified Tax Increment Financing Act, Public Act 57 of 2018, authorizes the Village Council of the Village of Lake Orion to assess a reasonable pro rata share of the funds of the Lake Orion Downtown Development Authority (DDA) for the cost of handling and auditing the funds against the funds of the DDA; and

WHEREAS, the Village Council desires to establish a fair, uniform, and consistent policy for assessing such costs against the funds of the DDA;

NOW, THEREFORE, BE IT RESOLVED that the Village Council for the Village of Lake Orion, pursuant to Section 228(2) of the Michigan Recodified Tax Increment Financing Act, Public Act 57 of 2018, being MCL 125.4228(2), does hereby establish the following policy for the assessment of a reasonable pro rata share of the funds of the Lake Orion Downtown Development Authority for the cost of handling and auditing the funds against the funds of the DDA as follows:

VILLAGE MANAGER: The Village Manager will be available for up to two (2) hours per week for general consultation, budget preparation assistance, and attendance at DDA Board meetings at a cost equal to five percent (5%) of the total personnel cost for the Village Manager (salary and fringe benefits).

VILLAGE CLERK: The Village Clerk’s office will provide the same routine clerk services to the DDA up to four (4) hours per week, including attendance at DDA Board meetings and preparation of meeting notices and minutes, as are provided to other departments of the Village generally, except FOIA request management. The Clerk’s office will not prepare meeting agendas or provide secretarial, research, special project, or any other administrative tasks that the director or staff of another department are generally expected to perform. The cost for these services is 10% of the total budget of the Village Clerk Department.

VILLAGE TREASURER: The Village Treasurer/Finance office will provide the same routine treasury/finance services to the DDA up to four (4) hours per week as are provided to other departments of the Village generally. The cost for these services is 10% of the total budget of the Village Treasurer Department.

INFORMATION TECHNOLOGY: The Village will provide necessary information technology services, software, and computer server equipment, including maintenance, upgrade, and replacement, as are necessary to perform the administrative services under the contract for the DDA. The cost for these services is 10% of the total budget of the Information Technology Department. Costs for all computer hardware and software unique to the operations of the DDA shall be the responsibility of the DDA.

GENERAL ACTIVITIES: The Village's general support services costs are contained within the General Activities Department of the General Fund, including Village Hall operation, maintenance, and repair costs. The Village will provide Village Hall facilities for DDA Board regular and special meetings as part of these costs in addition to the use of the Village's facilities to house, maintain, and operate those services performed on behalf of the DDA by the Village under this policy. The cost for these services will be 10% of the budget of the General Activities Department of the Village (excluding pension, workers compensation-elected/lifeguards, health insurance-retiree, retiree 115 trust, postage, copier lease, solid waste collection, telephone, election supplies, and dues & miscellaneous). The DDA will be responsible for performing its own copying, printing, telephone, and mailing services at the DDA office.

INSURANCE/BOND, ENGINEERING, AUDIT, AND LEGAL SERVICES: The DDA will be responsible for 100% of all such costs incurred by the DDA. If the DDA requires the Village to invoice for these services, an additional 10% administrative fee will apply to all such costs. The DDA will be responsible for 100% of the cost of regular or special audits or other special financial accounting or reporting services allocable solely to the DDA.

BE IT FURTHER RESOLVED that the Village Manager shall calculate annually the cost assessment of the services to be provided by the Village on behalf of the DDA at the same time that the final budget of the Village is prepared and shall include such assessed charges in the appropriate revenue account of the Village's General Fund budget for approval by the Village Council. Such assessment shall be due and payable on July 1 of each year. The Village Manager shall be responsible for calculating and reporting to the Village Council for

approval any necessary changes in the cost assessment as a result of any considerable change in scope of services to be provided by the Village to the DDA.

BE IT FURTHER RESOLVED that the Village Council does hereby determine that, in accordance with MCL 125.4228(2), the Lake Orion Downtown Development Authority Board of Directors shall establish an appropriate item in its annual budget to cover the costs of the Village to provide the services under this policy and shall remit full payment to the Village not later than July 31 of each year for that fiscal year's services.

BE IT FURTHER RESOLVED, that, based upon the recommendation of the Village Manager, the Village Council does hereby determine that the FY 2025-26 reasonable fee for the handling and auditing of the funds of the Lake Orion Downtown Development Authority shall be \$62,643.

THIS RESOLUTION WAS DULY ADOPTED BY THE LAKE ORION VILLAGE COUNCIL DURING ITS REGULAR MEETING HELD ON _____, 2025.

Sonja Stout
Village Clerk



DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Village Budgetary Contract – Public Safety

BACKGROUND BRIEF:

PUBLIC SAFETY: Historically the Village has demanded that the amount of TIF proceeds/budget that is represented by the capture of increased revenue earned under the police millage levy (meaning the funding lost to the police by the lawful operation of the Village approved TIF plan) be returned to the Village. This is not only an improper use of TIF, but against all statutory authority and statutory interpretation. The Executive Director and the Chief have acknowledged the illegality of the historic demand and have assessed how the DDA may still be an active part and support of the Chief’s new approach to public safety. The support of an additional officer and collaborated code enforcement services have bene included in the form of a contract for that purpose. The attached contract was prepared by the Police Chief, without assistance from Village Council, and is proposed for acceptance by the DDA. It is in an acceptable form and contains those two areas of participation important to the DDA’s mission under the adopted TIF Plan.

FINANCIAL IMPACT:

The contracted cost for the Public Safety services offered by contract is \$103,000. This is included in our budget.

RECOMMENDED MOTION:

Move to approve the ENHANCED PUBLIC SAFETY AGREEMENT, as presented, authorizing the Executive Director to prepare an executory copy and sign the same on behalf of the DDA.

ENHANCED PUBLIC SAFETY AGREEMENT
Lake Orion Downtown Development Authority
and
Village of Lake Orion

This Agreement is entered into this _____ day of _____, 2025 between the **Village of Lake Orion**, a Michigan municipal corporation, whose address is 21 E Church Street, Lake Orion, Michigan 48362 (hereafter "Village"), and the **Lake Orion Downtown Development Authority** whose address is 118 N. Broadway St., Lake Orion MI 48362 (hereafter "DDA").

RECITALS

WHEREAS, the Village of Lake Orion ("Village") is responsible for providing municipal policing services to ensure public safety within its jurisdictional boundaries, including the Downtown Development District; and

WHEREAS, the Lake Orion Downtown Development Authority ("DDA") desires to enhance public safety and support economic vitality within the Downtown Development District by contracting with the Village for enhanced police services in addition to the Village's standard policing obligations; and

WHEREAS, the Village agrees to continue to provide general policing services to the entire Village, and the DDA agrees to fund the cost of the additional, enhanced police services within the Downtown Development District as set forth in this Agreement;

WHEREAS, the Village agrees to continue to provide general code enforcement services to the entire Village, and the DDA agrees to fund the cost of the additional, enhanced code enforcement services within the Downtown Development District as set forth in this Agreement;

IT IS AGREED AS FOLLOWS:

1. **SERVICES TO BE PROVIDED** – The Village Police Department shall provide to the DDA, in addition to all general policing services performed within and for the Village, the following specific services:

- A. **Enhanced Public Safety Services:** The Village and the DDA will jointly fund the position of the DDA-designated officer as follows: An additional sworn officer will be assigned primarily to provide enhanced patrol and public safety services within the DDA boundaries. While Village-wide public safety needs may occasionally require temporary reassignment, the officer's principal duties will focus on the DDA area, including proactive patrols, community engagement, event support, and code enforcement assistance.

Enhanced Services shall include:

- Routine foot and vehicular patrols focused on high-traffic DDA areas during peak hours, particularly evenings and weekends.
- Focused visibility in pedestrian-heavy zones to deter nuisance behavior, address quality-of-life concerns, and provide a sense of safety for visitors, patrons, and business owners.
- Proactive outreach and routine contact with downtown business owners, managers, and employees to foster relationships, discuss concerns, and collaboratively identify solutions.
- After-hours door checks and perimeter walkthroughs to ensure business premises are secure.
- Parking enforcement related to on street and public lot parking to deter and address overnight parking violations in public spaces.
- Additional patrol coverage during post-event periods to address elevated activity in bars, restaurants, and pedestrian areas following parades, festivals, carnivals, or other events.
- Monitoring for disorderly conduct, public intoxication, traffic safety, and crowd management after special events conclude.
- Documentation and referral to Code Enforcement of observed ordinance violations related to signage, property maintenance, or other infractions.
- Participation in meetings with the DDA and Village staff to report trends, address recurring issues, and align safety initiatives with community priorities.

The Police Chief shall provide the DDA with a monthly report summarizing overall police officer activity within the DDA zone, including a general overview of services provided, incidents addressed, and proactive police services conducted. This report shall serve as supporting documentation for monthly invoices of enhanced services.

- B. The Village and the DDA will jointly fund a Full-Time Code Enforcement Officer whose primary responsibility will be to provide enhanced code enforcement services within the DDA boundaries. While the officer may address Village-wide code issues, their primary focus will be on the DDA area.

Enhanced Services shall include:

- Proactive enforcement of applicable ordinances with a focus on education and compliance rather than punitive action.
- Real-time inclusion of the DDA in code enforcement notifications, allowing for timely collaboration among the DDA, Code Enforcement, and property owners to resolve issues effectively.

- Regular coordination with businesses and property owners to promote a welcoming and well-maintained downtown environment, helping individuals understand requirements and offering assistance in achieving compliance.
- Bi-weekly coordination meetings with DDA executive staff and the Police Chief to provide updates on enforcement trends and align strategies impacting the DDA.
- Attendance at Lo-Down community meetings to present recurring code issues using accessible formats (e.g., PowerPoints) and to engage directly with community members.
- Participation in DDA board meetings as needed to provide updates, solicit feedback, and coordinate enforcement efforts.
- Proactive community outreach to foster strong relationships with DDA stakeholders and promote ordinance awareness and voluntary compliance.
- Assistance in developing programs and initiatives supporting property maintenance, beautification, and public safety goals aligned with the DDA's mission.
- Quarterly walk-throughs of the DDA district with DDA and Village staff to identify and address issues collaboratively.
- Establishment of a dedicated email contact for the DDA, allowing for direct communication with the Code Enforcement Officer to promptly address concerns and coordinate responses.

The Police Chief shall provide the DDA with a monthly report summarizing code enforcement activity within the DDA District. In addition to the monthly report, the DDA shall be promptly notified of relevant code infractions issued within the district. This notice shall include sufficient details to inform both the DDA and the affected property owner or complainant of the nature of the violation, along with available options for resolution, compliance guidance, and the opportunity to cure the issue. This collaborative approach is intended to support transparency, facilitate timely resolution, and promote voluntary compliance.

2. PERSONNEL – The Village, through its Police Chief shall employ and supervise all personnel which are necessary for the Village Police Department in the performance of its duties and functions under this Agreement. The DDA shall not be liable for the direct payment of any salaries, wages, or other compensation to any police personnel, and the DDA does hereby disclaim any liability in that regard, unless it has failed to make payment to the Village for the services rendered, except as otherwise specifically stated herein. In the event that the DDA fails to make timely payment to the Village for services rendered, the DDA shall remain obliged for all sums due and owing under the provisions of this agreement and payment by the Village for Police Department services shall not act as either an expressed or an implied waiver relative to the obligations for payment of said compensation by the DDA.

The Village shall have the responsibility for hiring, terminating, discharging, disciplining,

supervising and paying for any and all personnel as are required to provide the services under this agreement.

3. **EQUIPMENT AND TRAINING** – The Village Police Department shall be responsible for providing all necessary training for personnel assigned to enhanced services under this Agreement, for police officers and code enforcement officers. The Village shall also be responsible for the maintenance, replacement, and operational readiness of all Village-owned equipment used in the provision of these services. This includes, but is not limited to, police vehicles, uniforms, firearms, duty gear, software programs, radio equipment, bullet-resistant vests, and conducted energy weapons (e.g., Tasers).

All costs associated with the training, equipment, and operational readiness of personnel providing enhanced services within the DDA District are deemed ancillary costs and are included in the total fixed contract amount. No additional or separate charges shall be billed to the DDA for these purposes.

4. **INSURANCE** – The Village shall be responsible for the maintenance of all insurance for the protection of the Village Police Department equipment and personnel, as well as liability. Any insurance policy wherein the DDA or Village is named as insured and wherein coverage is for the Village Police Department function described in this Agreement, including but not limited to insurance for police vehicles, general liability, police professional, umbrella liability, insurance for acts or omissions of Village Police Officers, the Village may include the DDA and its Officials as an additional insured on such policies of insurance. The DDA has the right to examine all insurance policies pertaining to police work on an annual basis.

5. **COST OF SERVICES** – The cost of services provided under this agreement, which shall be funded by the Lake Orion Downtown Development Authority, shall be based upon the following:

As to Enhanced Public Safety Services articulated in this Agreement, the DDA agrees to pay the Village a flat monthly fee, for a total annual contract amount of **\$85,000**. This amount is fixed for the term of the Agreement and covers all personnel time, resources, and ancillary costs associated with the delivery of services. No overtime or any additional charges shall apply.

- The Village of Lake Orion shall assign one (1) full-time Police Officer whose primary responsibility will be to provide enhanced public safety services within the Downtown Development Authority (DDA) District. This officer shall be assigned to perform approximately 2,080 hours of service annually, consistent with a full-time employee schedule. This total includes any accrued time off (e.g., vacation, sick leave, or other approved absences), as defined in the POAM contract and no additional personnel will be provided to backfill during such absences.

- While this officer's primary assignment will be within the DDA district, the Village reserves the right to reassign the officer to other areas within the Village as operational needs require.
- The DDA shall reimburse the Village for eighty percent (80%) of the salary, benefits, and ancillary costs associated with the dedicated officer, reflecting the officer's primary presence and service within the DDA.
- The Village shall be responsible for the remaining twenty percent (20%) of the salary, benefits, and ancillary costs, accounting for occasional reassignment throughout the Village.
- Additional Police Department personnel may also contribute to the delivery of enhanced public safety services within the DDA, and such support is included in the total cost for enhanced services outlined in this Agreement.

As to Enhanced Code Enforcement Services articulated in this Agreement, the DDA agrees to pay the Village a flat monthly fee, for a total annual contract amount of **\$17,000**. This amount is fixed for the term of the Agreement and covers all personnel time, resources, and ancillary costs associated with the delivery of services. No overtime or any additional charges shall apply.

- The Village of Lake Orion shall assign one (1) full-time Code Enforcement Officer whose primary responsibility will be to provide enhanced code enforcement services within the Downtown Development Authority (DDA) District. This officer shall be assigned to perform approximately 2,080 hours of service annually, consistent with a full-time employee schedule. This total includes any accrued time off (e.g., vacation, sick leave, or other approved absences), as defined in the POAM contract and no additional personnel will be provided to backfill during such absences.
- While the officer's primary focus will be within the DDA boundaries, the Village may reassign the officer as needed to support code enforcement throughout the Village to ensure consistent, equitable enforcement.
- The DDA shall reimburse the Village for thirty percent (30%) of the salary, benefits, and ancillary costs associated with the assigned officer, reflecting the officer's substantial presence and duties within the DDA.
- The Village shall be responsible for the remaining seventy percent (70%) of the salary, benefits, and ancillary costs, reflecting the officer's additional responsibilities Village-wide.
- This shared cost model ensures accountability while supporting the mutual interests of the DDA and the Village in maintaining a well-managed, business-friendly downtown

environment.

- Additional Code Enforcement personnel may also contribute to the delivery of enhanced code enforcement services within the DDA, and such support is included in the total cost for enhanced services outlined in this Agreement.

6. **PAYMENT** – The DDA shall pay monthly payments by the end of the calendar month based upon the amount determined under Section 5 above.

7. **DURATION OF AGREEMENT** – This Agreement shall become effective on July 1, 2025, and shall continue in effect through June 31, 2026. However, either party may withdraw from this Agreement by giving sixty (60) days written notice to the other party.

8. **DISPUTE RESOLUTION** – The Village Police Chief shall be responsible for the administration of this agreement and shall make every effort to resolve any differences or disagreements that may arise hereunder with the DDA. Recommendations for any changes or amendments to this Agreement may be made by the Downtown Development Authority Executive Director, the Village Manager, or the Chief of Police, subject to approval by the Village Council and DDA Board of Directors.

9. **COST RECOVERY** – All monies collected for fines, costs, and judgments for violations of local ordinances and state statutes shall be retained by the Village of Lake Orion. Such revenues shall not be credited toward or offset against the contract amount specified in this Agreement. As part of this contract, the Lake Orion Police Department will provide fully redacted reports related to incidents involving property damage to DDA owned property, including any insurance information when available, at no extra cost. These reports will be sent within seven (7) business days after the incident. The Police Department will also assist the DDA in the cost recovery process when appropriate, including providing documentation necessary for insurance or restitution claims.

10. **AMENDMENT** – This agreement may be amended by the parties, only in writing and signed by all parties.

IN WITNESS, the parties have executed this Agreement this ____ day of _____, 2025.

VILLAGE OF LAKE ORION, a
Michigan Municipal Corporation

LAKE ORION DOWNTOWN
DEVELOPMENT AUTHORITY (DDA)

BY: _____
Darwin McClary
Village Manager

BY: _____
Debbie Burgess
Chairperson



DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Assistant Director’s Report

Assistant Director’s Report

RECOMMENDED MOTION:

To Receive and File the Assistant Director’s Report



MEMORANDUM

Janet Bloom – Assistant Director

June 17, 2025

Completed Events/Activities:

June 7 – National Trails Day. We welcomed over 100 people at the Lumber Yard at Paint Creek new trailhead location. Over 50 suggestions were received, from all ages, on what amenities community members wanted onsite. We wish to thank all those who participated in the guided bike ride, run, and walk. Our partners with this event included: Lake Orion Bike & Adventure Co., Orion Parks and Recreation, Cookies & Cream, Oat Soda, and Our Water (via SEMCOG). Thank you to those who helped prep the site and volunteer the day of the event!

June 7 – DIA Inside/Out Public Launch Day.

The Main Event – 25th Anniversary Celebration by Main Street Oakland County (MSOC)

was held June 12 at The Roxy.

The Main Event was a fun evening recognizing the past year’s successes, celebrating and

networking with other downtown leaders, elected and appointed officials, economic developers, and small business owners from across Oakland County. We were also joined by Oakland County Executive David Coulter, Kathy LaPlante of National Main Street, and a recorded message by Governor Whitmer.

Alaina Campbell, owner of Cookies and Cream, was entered in for the “Legacy of Main Street Excellence Award”. It was a highly competitive field and the honor was bestowed on another business in another DDA district. Thank you, Alaina, for all you do – we certainly recognize the hard work you do in Downtown Lake Orion!

The **2026 Main Event Awards** submission information will be released January/February in 2026 with an anticipated deadline of early April. We are pulling a team together to work on the submissions with us! If you would like to be included, please let us know.

Upcoming DDA Events:

Downtown Lake Orion Restaurants are participating in the LOAS Restaurant Week (June 23-29) and the LOAS Pub Crawl (June 27).

July 9, 16, 23, 30 – LOLive! Music Concerts 6:30- 8 pm (DDA)

July 18 – Outdoor Movie Night – Date Night – dusk (DDA)

See attached **Summer Calendar** to see Downtown Lake Orion annual events and

those weekly activities that happen in our downtown (i.e. cornhole, trivia, fiber arts, live music, etc.)

We encourage other community organizations to let us know of event dates to add to the community calendar.

Social Media Stats

Downtown Lake Orion Facebook:

Followers: June: 10,684 (added 102)

Estimated Reach: Previous: 21,200; Current: 23,300 (# of people who saw content at least once)

Engagement: Previous: 8,700; Current: 6,500 (reactions, comments, shares, or clicks on our posts)

Views: 64,314 (# of times our content was played or displayed. Includes reels, videos, posts, stories, and ads.)

Downtown Lake Orion Business Group:

137 members (no change)

Instagram:

4,223 (added 25)

X (formerly Twitter):

1,547 (no update-working on account access)

Activities

5/20: Monthly Planning/Zoning Development Internal meeting

5/20: DDA Regular Board Meeting

5/21: Lake Orion DDA/Oxford DDA meeting

5/27: Downtown LOdown at Oat Soda

5/28: Dragon Community Champions Meeting hosted by Lake Orion School District

5/28: Org. Committee subgroup – Volunteer Program meeting

5/28: DDA Executive team and Village Manager monthly meeting

6/3: Bagels & Brew – Edward Jones Investments – Grant Fodor – Orion Area Chamber event

6/3: Lake Orion DDA and Orion Area Chamber of Commerce monthly meeting

Conferences/Showcases/Trainings/Awards/Assessments/Webinars:

5/21: Visit Oakland County Tourism Diagnostic Webinar

6/4 – 6/5: Michigan Downtown Association Summer Workshop in Traverse City

Grant Submissions:

T-Mobile Grant (up to \$50,000) – due by June 30. Selected project must be shovel ready along with five letters of support. Response within 60 days of close date.

Cassandra, a new resident in Lake Orion is volunteering to assist with this grant.

Invasive Species Grant – we are obtaining more information from Oakland County on this resource.

Levitt Music Grant – Due by June 30 and cover three years of outdoor performances.

Committee Meetings:

Organization Committee – May 21, 2025

Promotions Committee – June 4, 2025

Design Committee – May 19, 2025 & May 27, 2025

Economic Vitality Committee – canceled

Add to Your Calendar:

JUNE 16: Oakland County Tourism meeting in Farmington at 6 pm

JUNE 23: Downtown LOdown - Location: Cookies & Cream. 4-5:30 pm. This is a business owners meeting of our Downtown Lake Orion businesses.

JUNE 25 (Proposed date): Celebration of the Downtown Lake Orion **National Main Street Accreditation:** Proposed date of Wednesday, June 25, 5 – 6:30 pm. More details to come!

JULY 14: The Future of AI is Now! Oakland Thrive/Lake Orion DDA/Oxford DDA Joint Training. Presenter: Princess Castleberry; 9:30-10:30 am; Oxford Village Community.

Respectfully Submitted,

Janet Bloom

bloom@downtownlakeorion.org

cell (248) 320-7599

2025 SUMMER EVENTS JUNE - AUGUST

Monthly

Historic Sign Tour
Orion Twp Public Library/DDA Storybook Stroll
Little Free Libraries
Gallery Shows at Orion Art Center
Paddle Boat Pub Tours and Orion Boat Tours at Green's Park

Weekly on Mondays

Movie Night at Irish Tavern, 8pm

Weekly on Tuesdays

Heritage Spinning & Weaving Social Knitting, 6-8pm
Cookies & Cream Kids Night, 6-9pm (Starting June)
Lake Orion Horseshoe Club League, 7pm
Wine Social Party Games, 7-9pm

Weekly on Wednesdays

Opiration Irish Tavern, 7-9pm
LOLive! Music Concerts at Children's Park, 6:30-8pm
July: 9, 16, 23, 30 and August: 6, 13, 20, 27
Music Bingo! Oat Soda, 7-9pm

Weekly on Thursdays

Sons of American Legion Downtown Cornhole League, 7pm
313 Pizza Bar Music Bingo, 7-10pm
Wine Social Live Music, 7-10pm
Trivia Night Irish Tavern, 8-10pm
O'Cigar Bar, Ladies Night

Weekly on Fridays

ABeanToGo Live Music, 9-11am or 3-5pm
Heritage Spinning & Weaving Social Knitting, 6-9pm
Wine Social DJ, 8-12pm
Cookies & Cream Live Music, 7-8pm (June-Aug)
313 Pizza Bar Karaoke, 9-12pm

Weekly on Saturdays

ABeanToGo Live Music, 9-11am or 3-5pm
Irish Tavern Karaoke, 9am-2pm
Wine Social DJ, 8-12pm

Weekly Multiple Days

20 Front St Live Concerts: Tix at 20frontstreet.com
Live Music at Wildwood Amphitheatre

Everyday Free Parking & Social District

FOR MORE INFORMATION VISIT
WWW.DOWNTOWNLAKEORION.ORG



2025 ANNUAL EVENTS



May

- May- Oct. DIA Inside/Out Art Installation -10 Locations (DDA)
- 10 LOvely Lake Orion - Spring Clean Up in Downtown 9am-12pm (DDA)
- 17-18 Art & Flower Fair (Orion Art Center)
- 26 Memorial Day Services & Parade (Village/American Legion)
- 26 Orion Veterans Memorial Day Race (Twp./Orion Veterans Memorial)
- 26 Navy Memorial at Children’s Park 10am (Village/American Legion)

June

- June-Aug. Paddle Boat Pub Tours and Orion Boat Tours at Green’s Park
- 7 National Trails Day at the Lumberyard at Paint Creek (DDA)
- 7 Youth Fishing Derby at Green’s Park (Lake Orion Lake Assoc.)
- 17 Orion Area Chamber 75th Year Celebration at Paint Creek CC
- 19-22 Lake Orion Jubilee Carnival (Lions Club)
- 23-29 Lake Orion American Summer Restaurant Week (LO/Oxford) (LOAS)
- 27 Lake Orion American Summer Pub Crawl (LO/Oxford) (LOAS)

July

- 4 Flare Night on Lake Orion (Lions Club)
- 5 Lake Orion Fireworks (LO Fireworks Foundation)
- 9, 16, 23, 30 LOLive! Music Concerts at Children’s Park 6:30-8pm (DDA)
- 18 Outdoor Movie Night (Date Night) (DDA)
- 27 Lake Orion Kids & Kops Car Show (and Pancakes) 8am – 1pm (LOPD)

August

- 6, 13, 20, 27 LOLive! Music Concerts at Children’s Park 6:30-8pm (DDA)
- 15 Outdoor Movie Night (Teen Movie Night) (DDA)
- 21-24 Lake Orion Dragon on the Lake (Orion Art Center)
- 22 Lighted Boat Parade (Lake Orion Lake Association)

Downtown Trolley Express

Fridays 5-9pm

Saturdays 4-10pm



Trolley Stops:

LO: N. Broadway/Shadbolt & S. Broadway/Flint

OX: W. Burdick behind Museum & N. Washington/East St.

Please note the events listed here could change unexpectedly due to unforeseen circumstances.

FOR MORE INFORMATION VISIT
WWW.DOWNTOWNLAKEORION.ORG





DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Executive Directors Report

BACKGROUND BRIEF:

The Report is provided as an update of ongoing work and effort of the Director

FINANCIAL IMPACT:

RECOMMENDED MOTION

Receive and file the Executive Directors Report for June 2025.

EXECUTIVE DIRECTOR REPORT

Matthew Gibb – Executive Director

June 17, 2025



I. NEWS AND UPDATES

- a. **NEW BUSINESS DEVELOPMENT.** The office has been regularly involved in resolving lack of response and direction for the processing and consideration of licenses inspections and other matters necessary to getting businesses running or sustained;
 - i. **Lake Orion Bike & Adventure.** They are open, after help coordinating inspections, fie review, and delays in signage and other permits.
 - ii. **Sagebrush Cigar Bar.** The redevelopment license has been processed through council and further help s being provided to guide the necessary documentation to the state (in the absence of knowledge from counsel for the business)
 - iii. **New Wine Tasting Room.** Not much support here other than working on lease rate and infrastructure with the property owner.
- b. **BEAUTIFICATION.** Zeke and I got the flower baskets hung, planted flowers at the lumber yard, fixed fencing, and are otherwise keeping up with the early season work.

II. TO DO'S AND MORE

1. Repair Man – replaced the solenoid on the four-wheeler and fixed the starter. Ordered and replaced the tires. Working on a trailer so we can implement much of the not-done work in the downtown area.
2. Non-Profit. Thought on the name and identity of this is attached.
3. STAFF ANNUAL REVIEW(S). On the agenda.

Respectfully Submitted,

Matthew Gibb

gibb@downtownlakeorion.org

(248) 464-0307

As we kick around the concept of what to name the non profit so we can get this moving. I was focusing on basic identifiers,

Orion Alliance – suggested by Lloyd Coe, represents community unity

Orion Advantage – used by Matt in 2009 as part of the GM campaign, reflects “why you should come”

Orion Assembly – this is throw back to our heritage reflecting the Assembly Hotel on Bellevue in our heyday and the GM plant name

Or more eccentric (which is my preference as a single vote...

I changed my mind. How about a powerful metaphor — **“holding the flame of the dragon”** — that can identify as a deeply rooted symbol in Lake Orion’s identity. The dragon connects to the town’s history, school mascot, and lore, but also symbolizes **power, guardianship, transformation, and legacy**. If you're incorporating that into the nonprofit’s identity, you can lean into imagery of **carrying the flame forward**, being **the steward of the spirit of Orion**, or **igniting vision** rooted in a storied past.

Here’s how that metaphor can translate into naming and branding ideas:

Conceptual Meaning of “Holding the Flame of the Dragon”

- **Guardianship of legacy:** You’re carrying something sacred — history, culture, and identity.
- **Catalyst for change:** Fire transforms. You’re sparking growth, vision, and action.
- **Community pride:** It’s about ownership of a shared symbol that’s emotional and unifying.
- **Inspiration & resilience:** A dragon’s flame is powerful, enduring, and mystical — it lights the way forward.

Name Ideas Inspired by This Theme

Flame & Legacy Focus

- **Dragon’s Flame Initiative**
- **Orion Flame Collaborative**
- **Keeper of the Flame – Orion**
- **The Dragon’s Light (my favorite so far)**
- **Flame Forward Orion**
- **Ignite Orion**
- **Torch of Orion**

Stewardship & Heritage Emphasis

- **Guardians of the Flame**

- **Orion Legacy Keepers**
- **The Dragon's Path Project**
- **Stewards of the Flame**
- **Dragon's Legacy Collaborative**

Vision & Planning Oriented

- **Flame of the Future**
- **Orion Vision Flame**
- **The Dragon Plan**
- **The Ember Project**
- **Light the Way – Orion**

Blended Naming with Historical or Economic Focus

- **Flame & Forge – Orion Collaborative** (symbolizes shaping the future with vision and legacy)
- **Depot & Flame Initiative** (rail + fire = past meets power)
- **The Dragon's Corridor** (connecting economic vitality and heritage through a symbolic "path")
- **Flame Harbor Foundation** (lake imagery + fire = unique and poetic)

Possible Taglines

- "Holders of the Flame."
- "Where the Dragon's Light Guides the Future."
- "Honoring Legacy. Igniting What's Next."
- "From Fire to Future – Orion's Vision Starts Here."
- "Holding the Flame That Built Lake Orion."

Lets get these thoughts, and yours going so we decide on this before the July 4th festivities. That's your target...



DDA ACTION SUMMARY SHEET

MEETING DATE: June 17, 2025

TOPIC Lumber Yard Progress Report

BACKGROUND BRIEF:

To better keep the board and Public informed as to progress, events, and next steps in the Lumber Yard at Paint Creek project, a monthly Progress Report will be provided and then published on the DDA website.

I WILL BE PRESENTING A REPORT ON THE SCREEN IN THE VILLAGE HALL

FINANCIAL IMPACT:

As outlined in the Report

RECOMMENDED MOTION

Move to Receive and File the Progress Report dated June 17, 2025.