



AGENDA

REGULAR MEETING OF THE DOWNTOWN DEVELOPMENT AUTHORITY BOARD

Tuesday, January 20, 2026

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 December 16, 2025

B. Approval of DDA Informational Meeting Minutes of December 16, 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

B. Termination of Trolley Program

C. Merchandise Development

D. Notice of Resignation - Board Member

7. Financial Matters

A. Bill Approval

8. New and Old Business

A. Notice of Resignation - Administrative Coordinator

B. LOLive Concert Series - Contract

C. Seasonal Winter Maintenance (UPDATED)

D. Performance Review of Assistant Director

9. Reports, Resolutions and Recommendations

A. Minute for Mission - Accreditation

B. Transformational Strategy - Committee Structure

C. Committee Meeting Dates – Adopt and Publish

D. Executive Directors Report

E. Assistant Director's Report

10. Board Comments and Training Feedback

11. Next Regular Meeting - February 17, 2026

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: January 20, 2026

TOPIC: Approval of DDA Regular Meeting Minutes of December 16, 2025

RECOMMENDED MOTION: To approve the Downtown Development Authority Board Regular Meeting Minutes of December 16, 2025.



MINUTES

REGULAR MEETING OF THE DOWNTOWN DEVELOPMENT AUTHORITY BOARD

Tuesday, December 16, 2025

6:30 PM

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

(248) 693-8391 ext. 102

1. Call to Order

The December 16, 2025 Downtown Development Authority Regular Meeting was called to order at 6:36 PM by Chairperson Burgess.

2. Roll Call and Determination of Quorum

PRESENT

Chairperson Debbie Burgess
Vice Chairperson Sam Caruso
Treasurer Matt Shell
Secretary Hank Lorant
Board Member Lloyd Coe
Board Member Sally Medina
Board Member Alaina Campbell
President Teresa Rutt

ABSENT

Board Member Chris Barnett

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 November 18, 2025

MOTION made by Treasurer Shell, Seconded by Secretary Lorant, to approve the Downtown Development Authority Board Regular Meeting Minutes of November 18, 2025, as presented

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

4. Approval of Agenda

Executive Director Gibb advised the Board that revised information had been provided for the seasonal snow and ice maintenance item under Regular Business, noting that a more favorable arrangement had been secured and no agenda amendment was required. He also requested that the National Main Street Program “Main Street Now” Conference 2026 be added to the agenda to allow timely registration.

MOTION made by Treasurer Shell, Seconded by Board Member Coe, to approve the Downtown Development Authority Board Regular Meeting Agenda of December 16, 2025 with the addition of 8C. Main Street NOW Conference 2026.

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

5. Call to the Public

George Dandalides thanked local businesses for their contributions and support of the recent parade, noting it as a positive example of businesses giving back to the community.

Adam Piazza raised concerns regarding DDA expenditures for the maintenance of leased parking lots, questioning the sustainability of maintaining properties not owned by the DDA and noting discrepancies between original lease and maintenance arrangements. He expressed concern about long-term financial impacts, particularly related to future parking associated with the Lumber Yard Redevelopment, and urged the DDA to explore renegotiating leases, shifting maintenance responsibilities, and implementing parking as a revenue-generating strategy.

6. Consent Agenda

President Rutt requested clarification regarding Item C, specifically related to electrical upgrade expenses. Executive Director Gibb explained that the costs were primarily associated with electrical system repairs and upgrades to streetscape infrastructure that exceeded the scope of DPW staff expertise, including underground electrical work. Vice Chairperson Caruso asked for clarification regarding LED bulb expenses, and Executive Director Gibb confirmed that the charges reflected the cost of materials and parts, such as bulbs, fuses, and related components, rather than labor. Executive Director Gibb added that the item was included to track ongoing maintenance expenses as streetscape infrastructure continues to age.

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

MOTION made by Treasurer Shell, Seconded by Board Member Coe, to approve the December 16, 2025, Consent Agenda by one vote, as presented.

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

A. Financial Reports

MOTION made by Treasurer Shell, Seconded by Board Member Coe, to receive and file the financial reports for November 2025.

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

B. Preliminary Committee Meeting Dates

MOTION made by Treasurer Shell, Seconded by Board Member Coe, to receive and file the statement(s) of purpose and meeting scheduled for each of the four (4) committees of the Lake Orion DDA/Main Street program, directing staff to provide a final schedule, and adopted statement of purpose, at the Boards January 2026 meeting.

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

C. Electrical Extras - DPW contract (informational)

MOTION made by Treasurer Shell, Seconded by Board Member Coe, to acknowledge and authorize the additional expense in the amount of \$1,544.32 from Design Committee Budget GL 248-726-801-000 as set forth in the memorandum and attachment, and to receive and file the information.

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

D. Grant Disbursement - Main Street Oakland County

MOTION made by Treasurer Shell, Seconded by Board Member Coe, to receive proceeds in the amount of \$2,500 from the Community Foundation of Southeast Michigan, to be deposited into GL 248-000-540-000 County/Federal Program Grants, and to immediately transfer \$2,500 to the Organizational Committee budget GL 248-725-864-000 Grants and Scholarship Distribution for processing of grant proceeds to Boutique Chic from GL 248-725-864-000 Grants and

Scholarship Distribution in the amount of \$2,500 in the December 22, 2025 check run.

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

E. Annual Informational Report

MOTION made by Treasurer Shell, Seconded by Board Member Coe, to receive and file the 2025 Annual Informational Report and direct that a copy is posted on the DDA website under Reporting.

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

7. Financial Matters

A. Bill Approval

MOTION made by Treasurer Shell, Seconded by Secretary Lorant, to approve disbursements in the amount of \$263,611.51 for November 2025.

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

8. New and Old Business

A. Adopt the 2026 Downtown Development Authority Board Meeting Schedule

MOTION made by Treasurer Shell, Seconded by Secretary Lorant, to adopt the Meeting Schedule establishing the 2026 Meeting Dates for the Downtown Development Authority Board for the Village of Lake Orion and to authorize the Clerk to post the schedule pursuant to the Open Meetings Act.

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

B. Seasonal Snow/Ice Maintenance

MOTION made by Treasurer Shell, seconded by Secretary Lorant, to approve the quote from Mitten State LLC for sidewalk and seasonal maintenance in the amount of \$6,000, not to exceed that amount without further action of the Board, with funds from General Activities 248-260-801-000 Contractual Services-Downtown.

President Rutt asked which sidewalks and areas were included in the snow removal contracts. Executive Director Gibb explained that the work would cover the five parking areas for which the DDA has agreements, nearby sidewalks, the Flint Street Alley, limited areas at the Lumber Yard, and spot maintenance at streetscaped intersections. He noted that the work was proposed to be assigned to local contractors rather than Village DPW.

Village Manager McClary stated that Village DPW had submitted a proposal to perform snow removal for parking lots and adjacent sidewalks at a cost of \$7,290 and clarified that DPW was not unwilling to perform the work. Executive Director Gibb, Assistant Director Bloom, and President Rutt discussed prior snow removal costs, noting that the \$17,000 figure from the prior year related to business-owner sidewalks and was separate from parking lot snow removal.

DPW Director Sanchez confirmed that the \$17,000 amount referenced was for snow removal on private business-owner sidewalks and not for public parking lots or sidewalks, and stated that the DDA had elected not to utilize DPW snow removal services for parking lots.

Vice Chairperson Caruso expressed confusion regarding the cost differences between proposals, the scope of services, and the timing of the item being presented to the Board.

Board Member Campbell asked questions and sought clarification regarding which areas were included in the proposed snow removal contracts, including whether the Lumber Yard lot was covered.

Following discussion, Executive Director Gibb stated that the item had not been properly bid, cited procurement policy concerns, and indicated the matter would be readdressed at the January meeting.

No vote was taken and no action was approved.

C. Main Street NOW Conference 2026

MOTION made by Treasurer Shell, Seconded by Secretary Lorant, to approve the travel and attendance of Matthew Gibb and Janet Bloom to the MainStreet NOW Conference in Tulsa, OK from April 16-20, 2026, at a cost, including any reimbursements, not to exceed \$4000, with funding to paid from 248-260-957-000.

VOTING YEA: Burgess, Caruso, Shell, Lorant, Coe, Medina, Campbell, Rutt

VOTING NAY: None

ABSENT: Barnett

MOTION: Carried

9. Reports, Resolutions and Recommendations

A. Executive Director’s Report

Executive Director Gibb provided an update on the lumber yard project, including ongoing load calculations for DTE pre-service planning, water and stormwater analyses, site engineering, and

pre-proposals for potential revenue-generating private users. He noted delays with MDOT processes due to the holiday period and outlined plans to resubmit engineering and water service plans by early January. He noted plans to submit the PA 57 report to Oakland County by December 31, independent of the audit. He reported that the previously scheduled concrete work will be postponed to spring, with materials ordered and site preparation planned for the south wall of the Lumber Yard. He also discussed committee engagement, noting efforts to redefine committee purposes and focus their work. He confirmed that the complete Main Street accreditation package will be submitted before year-end, with the accreditation meeting scheduled for January 14. He advised the Board of his office availability over the holidays and indicated monitoring of snow and related operational needs.

MOTION made by Treasurer Shell, Seconded by Board Member Coe, to receive and file the Executive Directors Report for December 2025.

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

B. Assistant Director’s Report

Assistant Director Bloom highlighted recent holiday events, including Sing and Stroll, Shop Small Saturday, the Downtown LOdown gathering, the Polar Express, and the volunteer pre-party for the lighted parade, noting strong participation from businesses and volunteers. She shared updates on the Resolution Run, indicating that businesses would have the opportunity to include items in runners’ packets to promote local engagement. Ice Fest, scheduled for February 7, was discussed, with plans to expand retail participation, introduce a scavenger hunt, themed food and drinks, and outdoor activities for children. She also described the new sponsorship management platform, SeeMyLegacy, which allows sponsors to register and pay online, view benefits, and track participation.

Assistant Director Bloom recommended continuing successful collaborative events with the Oxford DDA, such as Witches Night, while suggesting potential removal of less impactful events to focus on strategic priorities. Chairperson Burgess noted that future event planning should align with Great American Main Street Award (GAMSA) criteria, and decisions on continuing partnerships would be coordinated through the Executive Committee. Additional updates included the community calendar, social media statistics, Main Street accreditation invitations, volunteer appreciation awards, and the Downtown LOdown event on January 26.

MOTION made by Treasurer Shell, Seconded by Secretary Lorant, to receive and file the Assistant Director’s Report

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

10. Board Comments and Training Feedback

Board Member Coe wished everyone a Merry Christmas and praised the success of the lighted parade, commending the parade committee, volunteers, local businesses, and those who assisted on short notice.

President Rutt shared that she was unable to attend the parade this year due to a family commitment but noted that she heard very positive feedback and thanked the parade committee, volunteers, and businesses.

Board Member Campbell thanked the committee chairs for attending the meeting and expressed appreciation to staff for providing direction for 2026. She highlighted the designated viewing area for volunteers during the parade as a meaningful benefit and clarified that the DDA did incur snow removal costs in the prior fiscal year.

Vice Chairperson Caruso extended holiday greetings, commented on the strong turnout and length of the parade, and thanked organizers for amenities such as fire pits that enhanced the volunteer and attendee experience.

Treasurer Shell offered holiday greetings and thanked staff for their continued hard work.

Secretary Lorant extended holiday wishes and thanked the Board and staff, noting progress made during the year and optimism for the coming year.

Board Member Medina expressed concern regarding the timing and handling of the snow removal cost discussion, emphasizing the importance of improved coordination and earlier communication with the Board.

Chairperson Burgess wished everyone a Merry Christmas, praised the parade committee, volunteers, pre-parade activities, and drone photography, highlighted upcoming volunteer benefits planned for 2026, and encouraged continued collaboration and improved communication among all parties.

11. Next Regular Meeting - January 20, 2026

12. Adjournment

MOTION made by Treasurer Shell, Seconded by Secretary Lorant, to adjourn the December 16, 2025 Downtown Development Authority Board Regular Meeting.

VOTING YEA: Burgess, Caruso, Shell, Lorant, Coe, Medina, Campbell, Rutt

VOTING NAY: None

ABSENT: Barnett

MOTION: Carried

The December 16, 2025 Downtown Development Authority Board Regular meeting adjourned at 7:36PM.

Debbie Burgess
Chairperson

Lynsey Blough, CMC
Deputy Clerk/Treasurer

Sonja Stout
Village Clerk/Treasurer

Date Approved: as presented on January 20, 2026.



DDA SUMMARY SHEET

MEETING DATE: January 20, 2026

TOPIC: Approval of DDA Informational Meeting Minutes of December 16, 2025

RECOMMENDED MOTION: To approve the Downtown Development Authority Board Informational Meeting Minutes of December 16, 2025.



MINUTES

INFORMATIONAL MEETING OF THE DOWNTOWN DEVELOPMENT AUTHORITY BOARD

Tuesday, December 16, 2025

6:00 PM

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

(248) 693-8391 ext. 102

1. Call to Order

The Tuesday, December 16, 2025, Informational Meeting of the Lake Orion Downtown Development Authority Board of Directors was called to order in the Lake Orion Village Hall Council Chambers located in the 21 East Church Street, Lake Orion, MI 48362 by Matthew Gibb, Executive Director, at 6:02 PM.

2. Attendees

Attendee Name	Organization	Title	Status	Arrived
Debbie Burgess	Village of Lake Orion	Chairperson	Present	
Sam Caruso	Village of Lake Orion	Vice Chairperson	Present	
Matt Shell	Village of Lake Orion	Treasurer	Present	6:04 pm
Henry Lorant	Village of Lake Orion	Secretary	Absent	
Chris Barnett	Village of Lake Orion	Board Member	Absent	
Alaina Campbell	Village of Lake Orion	Board Member	Present	
Lloyd Coe	Village of Lake Orion	Board Member	Present	
Sally Medina	Village of Lake Orion	Board Member	Absent	
Teresa Rutt	Village of Lake Orion	Council President	Absent	

STAFF PRESENT:

Matthew Gibb, DDA Executive Director

Janet Bloom, DDA Assistant Director

3. PA-57 Report

Executive Matthew Gibb shared the PA-57 report with the Lake Orion DDA Board and attendees to the meeting. This was the second presentation of the PA-57 Informational Report, as the first presentation was given before the Lake Orion Village Council meeting on December 8, 2025. Per PA-57, the Lake Orion DDA is required to give two informational updates annually.

The report listed the 2025 board of directors, link to the TIF plan, 2025 priorities and focus of projects, budget overview, fund balance outlook, DDA commitment to Capital Improvement in the Village, Update and Adoption of New Strategic Plan, listed the contracts and vendors, and listed reinvestment in the district, economic growth numbers (one vacancy current in the district), growth of communications, volunteer program launch of the Illuminators, List of DDA supported and DDA events, DDA-received grants, and a peek into 2026 plans such as enhancing the grant façade program, public market plans, streetscape electrical review, dumpster/trash updates, and Village Capital Improvement Planning.

4. Call to the Public

Let the record show no public comments were received.

5. Adjournment

The Informational Meeting of the Downtown Development Authority Board adjourned at 6:36 pm.

Debbie Burgess
Chairperson

Janet Bloom
Recording Secretary
DDA Assistant Director

Date Approved: _____



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

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 December 2025.

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 12/31/2025

% Fiscal Year Completed: 50.41

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

Section 6, Item A.

GL Number	Description	25-26 Amended Budget	YTD Balance 12/31/2025	Activity For 12/31/2025	Available Balance 12/31/2025	% Bdg't Used
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND						
Account Category: Revenues						
Department: 000 REVENUE						
248-000-402-000	Current Real Property Taxes	1,047,377.00	682,940.52	0.00	364,436.48	65.20
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	3,370.00	376.98	0.00	2,993.02	11.19
248-000-441-000	Local Community Stabilization Share	15,000.00	17,650.43	0.00	(2,650.43)	117.67
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	10,000.00	0.00	33,500.00	22.99
248-000-540-000	COUNTY/FEDERAL PROGRAM GRANTS PUBLIC	595,823.00	2,500.00	2,500.00	593,323.00	0.42
248-000-582-000	PROPERTY TAXES OTHER UNITS	0.00	0.00	0.00	0.00	0.00
248-000-664-000	Interest Earned	9,708.00	6,941.62	4.78	2,766.38	71.50
248-000-671-999	Appropriation from Fund Balanc	171,128.00	0.00	0.00	171,128.00	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	17,000.00	7,750.00	0.00	9,250.00	45.59
248-000-683-000	Reimbursements-Other	0.00	0.00	0.00	0.00	0.00
248-000-685-000	Sponsorships	35,000.00	2,000.00	0.00	33,000.00	5.71
248-000-685-100	Transportaion Sponsorship	8,500.00	0.00	0.00	8,500.00	0.00
248-000-686-000	Downtown Events	8,000.00	(828.15)	0.00	8,828.15	(10.35)
248-000-686-002	Flower Fair Revenue	2,500.00	0.00	0.00	2,500.00	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	3,500.00	36.00	36.00	3,464.00	1.03
248-000-686-005	ST SPONSOR REVENUE	5,000.00	0.00	0.00	5,000.00	0.00
248-000-686-006	EV CHARGING	4,200.00	562.15	0.00	3,637.85	13.38
248-000-687-000	Merchandise Sales	3,500.00	0.00	0.00	3,500.00	0.00
248-000-688-000	Gift Certificate Sales	4,000.00	350.00	150.00	3,650.00	8.75
248-000-692-000	Rent	0.00	0.00	0.00	0.00	0.00
248-000-694-000	Miscellaneous	8,000.00	95.00	0.00	7,905.00	1.19
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		2,156,542.00	730,374.55	2,690.78	1,426,167.45	33.87
Revenues		2,156,542.00	730,374.55	2,690.78	1,426,167.45	33.87
Account Category: Expenditures						
Department: 260 GENERAL ACTIVITIES						
248-260-701-000	Executive Director Wages	84,000.00	51,038.51	11,215.43	32,961.49	60.76
248-260-704-000	Wages - Administrative Coordinator	32,417.00	10,806.61	2,341.75	21,610.39	33.34
248-260-706-000	Asst. Executive Director wages	73,130.00	35,227.31	8,192.40	37,902.69	48.17
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	5,969.06	0.00	(569.06)	110.54
248-260-711-013	OVERTIME	0.00	0.00	0.00	0.00	0.00
248-260-715-000	Social Security	15,254.00	7,166.52	1,663.84	8,087.48	46.98
248-260-716-000	Health Insurance- Medical	14,820.00	11,546.28	3,102.96	3,273.72	77.91
248-260-717-000	Life & Disability Insurance	1,562.00	884.41	149.90	677.59	56.62
248-260-718-000	Dental Insurance	1,132.00	524.10	89.48	607.90	46.30
248-260-719-000	Pension	6,720.00	7,018.95	0.00	(574.91)	108.56
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 12/31/2025

% Fiscal Year Completed: 50.41

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

Section 6, Item A.

GL Number	Description	25-26 Amended Budget	YTD Balance 12/31/2025	Activity For 12/31/2025	Available Balance 12/31/2025	% Bdg't Used
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND						
Account Category: Expenditures						
Department: 260 GENERAL ACTIVITIES						
248-260-721-000	Vision Care	720.00	90.75	15.38	629.25	12.60
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	20,000.00	11,212.83	8,759.63	8,787.17	56.06
248-260-801-002	CONTRACTUAL SERVICES - PUBLIC SAFETY	103,000.00	34,333.32	0.00	68,666.68	33.33
248-260-801-003	CONTRACT SERVICES - DPW FEE	27,211.00	13,605.16	0.00	13,605.84	50.00
248-260-801-004	CONTRACTUAL SERVICES - PA57	62,643.00	62,643.00	0.00	0.00	100.00
248-260-801-005	Contractual Services- Township	6,700.00	9,296.57	0.00	(2,596.57)	138.75
248-260-801-012	Contractual Services-Parking Code En	0.00	0.00	0.00	0.00	0.00
248-260-801-022	SPECIAL SERVICES- EVENTS	0.00	0.00	0.00	0.00	0.00
248-260-801-023	Contract Services-DPW event support	0.00	0.00	0.00	0.00	0.00
248-260-801-033	Contract Services-DPW snow removal	0.00	0.00	0.00	0.00	0.00
248-260-805-000	Audit Fees	5,900.00	0.00	(2,124.00)	5,900.00	0.00
248-260-810-000	Legal Services	3,500.00	1,833.50	0.00	1,666.50	52.39
248-260-823-000	Website/Software	4,200.00	1,172.99	134.14	3,027.01	27.93
248-260-823-001	Municipal Software	5,000.00	28.85	28.85	4,971.15	0.58
248-260-829-000	Planner Services	1,000.00	0.00	0.00	1,000.00	0.00
248-260-851-000	Telephone	3,500.00	1,680.03	315.19	1,819.97	48.00
248-260-900-000	Printing and Publication	500.00	0.00	0.00	500.00	0.00
248-260-920-000	Utilities	7,800.00	1,318.39	79.45	6,481.61	16.90
248-260-921-000	Municipal Street Lighting	13,780.00	4,714.03	536.54	9,065.97	34.21
248-260-930-000	Repair and Maintenance	1,870.00	0.00	0.00	1,870.00	0.00
248-260-930-002	Building Maintenance	1,200.00	75.93	0.00	1,124.07	6.33
248-260-940-000	Equipment Rental	1,500.00	498.69	48.66	1,001.31	33.25
248-260-941-000	Office Rent	16,800.00	13,305.00	4,200.00	3,495.00	79.20
248-260-942-000	Office Expenses	4,000.00	4,010.48	25.58	(1,626.06)	140.65
248-260-942-019	Covid Office Expenses	0.00	0.00	0.00	0.00	0.00
248-260-946-000	Credit Card Fees	175.00	0.00	0.00	175.00	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	1,900.00	1,217.88	0.00	682.12	64.10
248-260-957-000	Education & Training	8,000.00	438.08	2.50	7,561.92	5.48
248-260-958-000	General Activities Misc	5,900.00	2,178.51	1,354.63	3,721.49	36.92
248-260-961-000	Tax Tribunal Refunds	0.00	0.00	0.00	0.00	0.00
248-260-962-000	Mileage	500.00	111.18	72.94	388.82	22.24
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	112,993.00	0.00	0.00	112,993.00	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	179.82	89.91	1,820.18	8.99
Total Dept 260 - GENERAL ACTIVITIES		656,727.00	294,126.74	40,295.16	360,708.72	44.79
Department: 725 ORGANIZATION						
248-725-822-000	Newsletter	1,000.00	0.00	0.00	941.00	5.90
248-725-824-000	Volunteer Recognition & Dvp.	1,700.00	124.34	0.00	1,515.66	10.84
248-725-825-000	Gift Certificate Redemption	5,000.00	425.00	75.00	4,575.00	8.50
248-725-826-000	Historic Celebration/Education	2,500.00	0.00	0.00	2,500.00	0.00
248-725-827-000	Awareness Program	2,300.00	2,116.08	15.60	(129.30)	105.62
248-725-864-000	Grant & Scholarship Distribution	3,000.00	2,500.00	2,500.00	500.00	83.33

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 12/31/2025

% Fiscal Year Completed: 50.41

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

Section 6, Item A.

GL Number	Description	25-26 Amended Budget	YTD Balance 12/31/2025	Activity For 12/31/2025	Available Balance 12/31/2025	% Bdg't Used
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND						
Account Category: Expenditures						
Department: 725 ORGANIZATION						
248-725-881-000	Merchandise to Sell	1,200.00	0.00	0.00	1,200.00	0.00
Total Dept 725 - ORGANIZATION		16,700.00	5,165.42	2,590.60	11,102.36	30.93
Department: 726 DESIGN						
248-726-745-000	Beautification Supplies	7,620.00	4,550.45	381.60	3,069.55	59.72
248-726-746-000	Hanging Baskets	4,120.00	254.21	0.00	3,865.79	6.17
248-726-801-000	Contractual Services	5,780.00	1,544.32	1,544.32	4,235.68	26.72
248-726-843-000	Facade Program	25,480.00	0.00	0.00	25,480.00	0.00
248-726-845-000	Public Art Program	2,100.00	220.00	0.00	1,880.00	10.48
248-726-883-000	Banners and Holiday Lighting	8,100.00	6,937.45	6,425.06	1,162.55	85.65
248-726-975-001	Capital Outlay - Beautification	2,300.00	280.00	0.00	2,020.00	12.17
248-726-975-002	Capital Outlay - Streets	2,790.00	152.34	152.34	2,637.66	5.46
248-726-980-001	PUBLIC SPACE GRANT-GENERAL	323,000.00	199,267.69	3,429.46	123,732.31	61.69
248-726-980-002	PUBLIC SPACE GRANT-DEVELOPMENT & PRO	212,000.00	40,827.36	0.00	171,172.64	19.26
Total Dept 726 - DESIGN		593,290.00	254,033.82	11,932.78	339,256.18	42.82
Department: 728 ECONOMIC DEVELOPMENT						
248-728-801-000	Contractual Services	17,800.00	6,239.62	0.00	11,560.38	35.05
248-728-860-000	Trolley Expense	18,900.00	1,726.51	0.00	17,173.49	9.13
248-728-861-000	DATA AND METRICS	1,460.00	7.76	7.76	1,452.24	0.53
248-728-862-000	Training Materials	500.00	0.00	0.00	418.32	16.34
248-728-864-000	Grant & Scholarship Distribution	1,000.00	0.00	0.00	1,000.00	0.00
248-728-886-000	Marketing Materials	2,500.00	0.00	0.00	2,500.00	0.00
248-728-886-001	Blight Reduction	0.00	0.00	0.00	0.00	0.00
248-728-886-002	Social District	2,350.00	6.52	0.00	2,343.48	0.28
248-728-888-000	Brand Marketing	23,700.00	20,412.56	2,488.94	106.44	99.55
248-728-888-001	Contractual Services Brand Marketing	12,000.00	0.00	0.00	12,000.00	0.00
Total Dept 728 - ECONOMIC DEVELOPMENT		80,210.00	28,392.97	2,496.70	48,554.35	35.40
Department: 729 PROMOTION						
248-729-880-000	Event Promotion	2,500.00	1,088.74	21.37	1,411.26	43.55
248-729-880-001	Event Promo - Gazebo Series	14,500.00	13,000.00	0.00	1,500.00	89.66
248-729-880-004	Event Promo - Halloween Parade	2,500.00	1,861.37	0.00	638.63	74.45
248-729-880-005	Event Promo - Hmtwn/Holiday Vill	3,000.00	1,084.00	54.00	1,594.08	46.86
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	1,500.00	109.37	0.00	1,390.63	7.29
248-729-880-008	EVENT PROMO-ICE FEST	3,500.00	0.00	0.00	3,500.00	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	1,000.00	0.00	0.00	1,000.00	0.00
248-729-880-012	Sing & Stroll Tree Lighting	7,000.00	3,490.92	3,190.92	3,509.08	49.87
248-729-880-013	STRONGER TOGETHER-WINTER	2,500.00	138.00	138.00	2,362.00	5.52
248-729-880-014	STRONGER TOGETHER- SUMMER/FALL	1,500.00	1,172.30	0.00	327.70	78.15
248-729-880-015	Winter Activities	4,500.00	169.60	169.60	4,330.40	3.77
248-729-880-016	MISC EVENTS-OTHER	2,500.00	1,500.00	0.00	1,000.00	60.00
248-729-880-017	Movie Night	3,500.00	2,693.41	0.00	806.59	76.95
248-729-880-100	Stronger Together- smr fall	0.00	0.00	0.00	0.00	0.00
248-729-885-000	Port-A-Johns	1,600.00	930.00	155.00	670.00	

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 12/31/2025

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GL Number	Description	25-26 Amended Budget	YTD Balance 12/31/2025	Activity For 12/31/2025	Available Balance 12/31/2025	% Bdg 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		53,100.00	27,237.71	3,728.89	25,540.37	51.30
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	420,721.00	0.00	0.00	420,721.00	0.00
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	0.00	0.00	0.00	0.00	0.00
248-730-975-003	DDA Capital Outlay	2,500.00	0.00	0.00	2,500.00	0.00
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	10,000.00	942.85	0.00	9,057.15	9.43
248-730-975-009	Capital Outlay - Dumpsters	5,000.00	0.00	0.00	5,000.00	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	Capitail 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		444,521.00	942.85	0.00	443,578.15	0.21
Expenditures		1,844,548.00	609,899.51	61,044.13	1,228,740.13	33.06
Fund 248 - DOWNTOWN DEVELOPMENT AUTHORITY FUND:						
TOTAL REVENUES		2,156,542.00	730,374.55	2,690.78	1,426,167.45	33.87
TOTAL EXPENDITURES		1,844,548.00	609,899.51	61,044.13	1,228,740.13	33.06
NET OF REVENUES & EXPENDITURES:		311,994.00	120,475.04	(58,353.35)	197,427.32	
BEG. FUND BALANCE		356,811.12	356,811.12			
NET OF REVENUES/EXPENDITURES - 24-25		29,151.34	29,151.34			
END FUND BALANCE		697,956.46	506,437.50			

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 12/31/2025
 % Fiscal Year Completed: 50.41

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GL Number	Description	25-26 Amended Budget	YTD Balance 12/31/2025	Activity For 12/31/2025	Available Balance 12/31/2025	% 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	604.48	103.28	295.52	67.16
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	420,721.00	0.00	0.00	420,721.00	0.00
Total Dept 000 - REVENUE		421,621.00	604.48	103.28	421,016.52	0.14
Revenues		421,621.00	604.48	103.28	421,016.52	0.14
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	174,500.00	138,656.94	125.00	35,843.06	79.46
301-901-956-000	Dues & Miscellaneous	0.00	0.00	0.00	0.00	0.00
301-901-971-000	Capital outlay - Buildings	672,520.00	202,562.97	0.00	469,957.03	30.12
Total Dept 901 - CAPITAL OUTLAY		847,020.00	341,219.91	125.00	505,800.09	40.28
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	500.00	0.00	(500.00)	100.00
301-905-731-001	2023 Tax exempt Bond Issuance Expens	0.00	500.00	0.00	(500.00)	100.00
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	0.00	0.00	60,000.00	0.00
301-905-992-004	2023 DDA BONDS TAX EXEMPT PRINCIPAL	160,000.00	0.00	0.00	160,000.00	0.00
301-905-993-001	2023 DDA BOND TAXABLE INTEREST SERIE	73,921.00	36,960.50	0.00	36,960.50	50.00
301-905-993-002	2023 DDA TAX EXEMPT BOND INTEREST A	126,800.00	63,400.00	0.00	63,400.00	50.00
Total Dept 905 - Downtown Dev Bond 2023		420,721.00	101,360.50	0.00	319,360.50	24.09
Expenditures		1,267,741.00	442,580.41	125.00	825,160.59	34.91
Fund 301 - DOWNTOWN DEV BOND PROJECT 2023:						
TOTAL REVENUES		421,621.00	604.48	103.28	421,016.52	0.14
TOTAL EXPENDITURES		1,267,741.00	442,580.41	125.00	825,160.59	34.91
NET OF REVENUES & EXPENDITURES:		(846,120.00)	(441,975.93)	(21.72)	(404,144.07)	
BEG. FUND BALANCE		2,794,812.47	2,794,812.47			
NET OF REVENUES/EXPENDITURES - 24-25		(213,923.66)	(213,923.66)			
END FUND BALANCE		1,734,768.81	2,138,912.88			

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 12/31/2025

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GL Number	Description	25-26 Amended Budget	YTD Balance 12/31/2025	Activity For 12/31/2025	Available Balance 12/31/2025	% Bdgt Used
Fund: 404 DDA PROPERTY ACQUISITION						
Account Category: Revenues						
Department: 000 REVENUE						
404-000-664-000	Interest Earnings	0.00	45.33	8.30	(45.33)	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	45.33	8.30	(45.33)	100.00
Revenues		0.00	45.33	8.30	(45.33)	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	45.33	8.30	(45.33)	100.00
TOTAL EXPENDITURES		169,436.00	0.00	0.00	169,436.00	0.00
NET OF REVENUES & EXPENDITURES:		(169,436.00)	45.33	8.30	(169,481.33)	
BEG. FUND BALANCE		169,464.87	169,464.87			
NET OF REVENUES/EXPENDITURES - 24-25		113.28	113.28			
END FUND BALANCE		142.15	169,623.48			

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 12/31/2025

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GL Number	Description	25-26 Amended Budget	YTD Balance 12/31/2025	Activity For 12/31/2025	Available Balance 12/31/2025	% Bdgt Used
Report Totals:						
	TOTAL REVENUES - ALL FUNDS	2,578,163.00	731,024.36	2,802.36	1,847,138.64	28.35
	TOTAL EXPENDITURES - ALL FUNDS	3,281,725.00	1,052,479.92	61,169.13	2,223,336.72	32.07
	NET OF REVENUES & EXPENDITURES:	(703,562.00)	(321,455.56)	(58,366.77)	(376,198.08)	

BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION
Balance As of 12/31/2025

Section 6, Item A.

GL Number	Description	YTD Balance 12/31/2024	12/31/2025
Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND			
*** Assets ***			
248-000-001-000	Cash	568.96	568.96
248-000-002-000	Cash Savings	387,834.30	97,769.70
248-000-007-000	Payroll-checking	(250.00)	(250.00)
248-000-010-000	Investment/LGIP County Inv	414,553.51	429,768.19
248-000-011-000	Cash - Payroll Savings	(4,308.78)	(23,690.47)
Total Assets		798,397.99	504,166.38
*** Liabilities ***			
248-000-202-000	Accounts Payable	24.00	(2,560.00)
248-000-213-000	Accrued Property Tax - Est Chargebacks	400.00	400.00
248-000-228-001	FICA W/H - Medicare	(7.02)	(21.06)
248-000-228-002	FICA- Social Security withheld	(30.02)	(90.06)
Total Liabilities		386.96	(2,271.12)
*** Fund Equity ***			
248-000-390-000	Fund Balance - Unassigned	356,811.12	356,811.12
Total Fund Equity		356,811.12	356,811.12
Total Fund 248:			
TOTAL ASSETS		798,397.99	504,166.38
BEG. FUND BALANCE - 24-25		356,811.12	356,811.12
+ NET OF REVENUES/EXPENDITURES - 24-25		0.00	29,151.34
+ NET OF REVENUES & EXPENDITURES		441,199.91	120,475.04
= ENDING FUND BALANCE		798,011.03	506,437.50
+ LIABILITIES		386.96	(2,271.12)
= TOTAL LIABILITIES AND FUND BALANCE		798,397.99	504,166.38

BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION
Balance As of 12/31/2025

Section 6, Item A.

GL Number	Description	YTD Balance 12/31/2024	12/31/2025
Fund: 301 DOWNTOWN DEV BOND PROJECT 2023			
*** Assets ***			
301-000-001-000	Cash	56,386.80	56,386.80
301-000-002-000	CASH	2,566,269.30	2,110,909.45
301-000-011-000	Cash - Payroll Savings	(630.32)	(26,414.19)
Total Assets		2,622,025.78	2,140,882.06
*** Liabilities ***			
301-000-214-101	Due to General Fund	1,969.18	1,969.18
Total Liabilities		1,969.18	1,969.18
*** Fund Equity ***			
301-000-390-000	Fund Balance - Unassigned	2,794,812.47	2,794,812.47
Total Fund Equity		2,794,812.47	2,794,812.47
Total Fund 301:			
TOTAL ASSETS		2,622,025.78	2,140,882.06
BEG. FUND BALANCE - 24-25		2,794,812.47	2,794,812.47
+ NET OF REVENUES/EXPENDITURES - 24-25		0.00	(213,923.66)
+ NET OF REVENUES & EXPENDITURES		(174,755.87)	(441,975.93)
= ENDING FUND BALANCE		2,620,056.60	2,138,912.88
+ LIABILITIES		1,969.18	1,969.18
= TOTAL LIABILITIES AND FUND BALANCE		2,622,025.78	2,140,882.06

BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION
Balance As of 12/31/2025

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GL Number	Description	YTD Balance 12/31/2024	12/31/2025
Fund: 404 DDA PROPERTY ACQUISITION			
*** Assets ***			
404-000-002-000	Cash-Savings-DDA Property Acq.	169,522.51	169,623.48
Total Assets		169,522.51	169,623.48
*** Fund Equity ***			
404-000-390-000	Fund Balance - Unassigned	169,464.87	169,464.87
Total Fund Equity		169,464.87	169,464.87
Total Fund 404:			
TOTAL ASSETS		169,522.51	169,623.48
BEG. FUND BALANCE - 24-25		169,464.87	169,464.87
+ NET OF REVENUES/EXPENDITURES - 24-25		0.00	113.28
+ NET OF REVENUES & EXPENDITURES		57.64	45.33
= ENDING FUND BALANCE		169,522.51	169,623.48
+ LIABILITIES		0.00	0.00
= TOTAL LIABILITIES AND FUND BALANCE		169,522.51	169,623.48



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

TOPIC Termination of Trolley Program

BACKGROUND BRIEF:

As part of the Stronger Together effort between our organization and the Oxford DDA, a program was initiated that jointly shared the use, cost and maintenance of a Trolley to bring guests of our communities back and forth within fun and safe transportation. The program was a great success, and has been awarded by Oakland County, and recognized by multiple groups.

Unfortunately, the trolley has suffered continual and expensive repairs over the past year and our operating partner, NOTA, has increasingly found difficulty in keeping the driver based operation sustainable in their own mandated plan and operations. The trolley was once again non-operational for our signature use, the “Polar Express”, compelling the partnership to share in the expense of a third party vendor to make this annual “wait list” program a success.

The need to spend outside the already delayed and oft “out of service” trend is the last measure of keeping the current program in tact and running. To do so would push the limits of the intent outside the bounds of our transformational strategy and without substantial change is no longer advisable.

The Executive Director, in response to ongoing and anticipated decisions on further repair and maintenance cost elected to provide notice to Oxford that the Lake Orion DDA is discontinuing its participation.

FINANCIAL IMPACT: The DDA budgeted \$18,900 in GL 248-728-860-000 for Trolley Expenses. Through 12.31.25 we have expended \$1,726.51 due to the constant state of inoperability. With only a few remaining small invoices to close out this program expenses, this budget surplus will be needed to meet adjustments for other core expenses as the budget year moves forward.

RECOMMENDED MOTION:

Receive and file the Letter from the Executive Director to Oxford DDA dated January 8, 2026 terminating participation in the Trolley Program.



118 N. Broadway, Lake Orion, MI 48362
Phone: 248-693-9742 Fax: 248-693-9749
www.downtownlakeorion.org

Matthew Gibb, Executive Director

January 8, 2026

Kimberly Smith, Executive Director
OXFORD DOWNTOWN DEVELOPMENT AUTHORITY
22 W Burdick St
Oxford, MI 48371

Re: Stronger Together Trolley Program

Ms. Smith,

I hope this finds your office, and your great team at the Oxford DDA, well and rested for the New Year. I am writing to you concerning the status and necessary decision of our Board regarding the Stronger Together Trolley.

Our Board was provided a current assessment of the Trolley Program, through which we detailed the status and performance metrics for the Trolley and included discussion notes from our Main Street Committee(s). At this time, Lake Orion is electing to discontinue its participation in the program for a variety of reasons, including, the continual mechanical and operational challenges of the Trolley itself.

Without any assigned fault to the effort, the trolley simply seems ready to retire and with the changes imposed by NOTA for their operation of the route(s), the value and cost is now prohibitive of our partnership. I am mindful that there may be prior expenses that await our participation, to that end please make sure I have any invoicing for our consideration.

This has been a great initiative, and reflection, of the awesome power of our partnership and mutual respect of the communities. Our commitment to that mutual success doesn't waver as a result of this decision but remains steadfast to the next great idea.

Regards,

Matthew A Gibb

cc. Debbie Burgess, LODDA Board Chair



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

TOPIC Merchandise Development

BACKGROUND BRIEF:

The Executive Director is coordinating two program expansions that have generated a demand and ask for marketing and promotional hats, and other logo and identity based products. We are working with the Organization Committee, whom through a volunteer/reimbursable expenses has designed graphics and logos for the “Illuminators” and for the “Lumber Yard Paint Creek”.

We made some prototype hats and are now seeking to work with local suppliers and businesses in the district to start building a merchandise base. The intent of this is to build both awareness and offer hats and bike gear for sale to gain revenue against the marketing effort.

We have previously secured approval and invoicing for t-shirts prior to the volunteer recruitment effort at Dragon on the Lake and have worked with a vendor to detail patches for hats, vests etc. We now intend to continue that work using Tapestry Collective (fka Broadway Embroidery) for future Illuminators program needs and Right Hook for the Lumber Yard. This continues previously approved source and cost, and maintains continuity in the effort, without a new quote or vendor replacement.

This request is to authorize the finishing of hats for the Lumber Yard promotion.

FINANCIAL IMPACT: The DDA budgeted \$1,200 in GL 248-725-881-000 for Merchandise to Sell and budgeted \$2,500 in GL 248-728-886-000 for Marketing Materials. The organization has yet to expend any sums from these accounts.

- Right Hook Cost \$13 /hat - Total \$1300 (100 hats in four styles)
- Other options
 - Vista Print (\$1770)
 - Rushordertees (\$1980)
 - 4Imprint (\$1236)

We want to keep this local.

RECOMMENDED MOTION:

Authorize the Executive Director to utilize Right Hook for the creation of 100 hats at a cost not to exceed \$1300, with funds equally from GL 248-725-881-000 and GL 248-728-886-000



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

TOPIC Notice of Resignation – Board Member

BACKGROUND BRIEF:

It is with regret we announce the resignation of Sally Medina from our Board. Sally has been a tremendous asset to the knowledge, growth and positive attitude of the Board. She will be missed.

A special tribute to Sally’s work and commitment to our Downtown will be presented at the Illuminators Awards Night on January 28th.

EXECUTIVE DIRECTOR RECOMMENDATION

The Executive Director received a quick and strong response from Todd Garis, the owner of Motor City Granite, who is willing and quite excited at the possibility of being appointed to succeed Sally’s rather large foot prints of excellence. Mr. Garis was encouraged to submit an application of interest, which has been done, and it is filed with the village.

In accord with our By Laws and Village Policy, the appointment of the new board member is at the discretion of the Village Council President.

RECOMMENDED MOTION:

Move to accept the resignation of Sally Medina with regret, and direct the Executive Director to work with the Village Council President to secure a new appointment from the business community prior to our next meeting of February 17, 2026, if possible.

VILLAGE OF LAKE ORION
DOWNTOWN DEVELOPMENT AUTHORITY
BOARD OF DIRECTORS
BYLAWS

The main function or purpose of the following Bylaws is to establish the rules of operation for the Village of Lake Orion Downtown Development Authority (DDA). In addition to establishing procedure, the Bylaws also describe the organizational framework of the DDA, and in general terms, define the duties and responsibilities of the Board of Directors.

Village of Lake Orion
Lake Orion, Michigan 48362

(Adopted by DDA Board Sept. 10, 1985)
(Approved by Village Council Sept. 23, 1985)
(Amended by DDA Board Feb. 8, 2000, Article V, Sec. 1) (Amendment approved by Village Council Feb. 14, 2000) (Amended by DDA Board Nov. 8, 2005)
(Amendment approved by Village Council Nov. 14, 2005) (Adopted by DDA Board May 13, 2008)
Amendment approved by Village Council May 27, 2008)
(Amended by DDA Board June 14, 2016) – Article VI, Section 1)
(Amendment approved by Village Council August 8, 2016)
(Amendment approved by Village Council, September 14, 2020)

ARTICLE I: AUTHORITY

The rules and procedures of the DDA are subordinate and subject to Public Act 57 of the Compiled Laws of Michigan of 2018, as amended, and Ordinance No. 36.01, as amended, of the Village of Lake Orion.

ARTICLE II: TITLE

The title of the legal entity shall be "Village of Lake Orion Downtown Development Authority or "DDA". The title of the governing body shall be "The Village of Lake Orion Downtown Development Authority Board of Directors", or "Board of Directors"

ARTICLE III: MEMBERS

Section 1

The Board of Directors shall be composed of the following nine (9) members: The Village President and eight (8) persons who shall be appointed by the Village President, such appointment to be subject to approval by a majority vote of the members-elect of the Village Council.

Section 2

The terms of office of the members of the Board of Directors shall begin on the first day of November nearest the date of their appointment. The term of office of each member of the Board of Directors shall be four (4) years. All members shall hold office until their successors are appointed. Vacancies occurring otherwise than through the expiration of the term shall be filled for the unexpired term by the Village President, subject to approval by a majority of the Village Council. (Amended DDA 11-08-05, V.C. 11-14-05)

Section 3

Members of the Board of Directors may, after a public hearing, be removed from office in accordance with the provisions of the statute under which these Bylaws are adopted.

Section 4

Before casting a vote on a matter on which a member may reasonably be considered to have a conflict of interest, the member shall disclose the potential conflict of interest to the board. The Board of Directors may vote to have the member abstain from voting. Failure of a member to disclose a potential conflict of interest as required by this subsection constitutes malfeasance in office

Section 5

The DDA Board Chair may recommend replacement for any board member with more than three absences with a 12-month period.

Section 6

Board Members shall participate and be an active member on at least one DDA committee. Appointment to the committee to be reviewed annually.

ARTICLE IV: OFFICERS

Section 1

The officers of the Board of Directors shall be:

A Chairman, who shall preside at all meetings and shall have such other duties as further prescribed in the Bylaws, and shall have authority to preside at all Adjourned Meetings, Public Hearings, and call and preside at all Special Meetings.

A Vice-Chairman, who shall, in the absence of the Chairman or his inability to act shall have the power to function in the same capacity as the Chairman.

A Secretary, who shall have authority to execute documents in the name of the Board of Directors and shall perform such other duties as the Board of Directors may determine.

A Treasurer, who shall assist the director in establishing the annual budget, oversee financial reporting and coordinate with the contractor for financial services, (who need not be a member of the Board of Directors) who shall disburse the funds of the Downtown Development Authority as may be ordered by the Board of Directors, taking proper vouchers for such disbursements, and shall render to the Board of Directors, at the regular meetings of the Board of Directors, or whenever they may require, an account of all his/her transactions as Treasurer and of the financial condition of the DDA. The Treasurer shall give the DDA a bond if required by the Board of Directors in a sum, and with one or more sureties satisfactory to the Board of Directors, for the faithful performance of the duties of the office, and for the restoration to the DDA in case of his/her death, resignation, retirement, or removal from office of all books, papers, vouchers, money, and other property of whatever kind in his/her possession or under his/her control belonging to the DDA.

Section 2

The officers of the Board of Directors shall be elected each year for a one-year term by the Board of Directors at their first regular meeting in November, and shall hold office until their successors are elected and assume office. (Amended DDA 11-08-05, V.C. 11-1405)

Section 3

Delegation of Duties of Officers. In the absence of any officer of the DDA, or for any other reason that the Board of Directors may deem sufficient, the Board of Directors may delegate as it may deem appropriate, the powers or duties any other officer, to any director, provided a majority vote of the Board of Directors.

Section 4

Director. The Board of Directors may employ and establish the compensation of a "Director" subject to the approval of the Village Council of the Village of Lake Orion. The Director shall serve at the pleasure of the Board of Directors. A member of the Board of Directors is not eligible to hold the position of Director. Before entering upon the duties of office, the Director shall take and subscribe to the constitutional oath, and furnish bond, by posting a bond in the penal sum determined by the ordinance establishing the DDA, payable to the DDA, for the use and benefit of the DDA, approved by the Board of Directors and filed with the Village Clerk. The premium on the bond shall be deemed an operating expense of the DDA, payable from funds available to the DDA for expense of operation. The Director shall be the Chief Executive Officer of the DDA. Subject to the approval of the Board of Directors, the Director shall supervise, and be responsible for, the preparation of plans and the performance of the functions of the DDA in the manner authorized by Act 57 of the Public Acts of 2018. The Director shall attend the meetings of the Board of Directors, and shall render to the Board of Directors and to the Village Council a regular report covering the activities and financial condition of the DDA. If the Director is absent or disabled, the Board of Directors may designate a qualified person as Acting Director to perform the duties of the office. Before entering upon the duties of office, the Acting Director shall take and subscribe to the oath, and furnish a bond as required of the Director. The Director shall furnish the Board of Directors with information or reports governing the operation of the DDA as the Board of Directors require.

Section 5 (Amended 5/15/20)

Contracted Financial Services. The Treasurer's Office for the Village of Lake Orion provides General Accounting services to the DDA including the Annual Audit, Annual Budget assistance and budget amendments, Fixed assets accounting, reconciliation of bank statements and maintenance of the Village and DDA General Ledger and Financial Statements. In addition the Treasurer's Office assistance includes Payroll Administration, Accounts Payable Services, and Treasury Services, including, but not limited to, deposit and investment of funds, banking services, and tax and special assessment collections. Benefits processing, Sales Tax reporting and transferring of fund to the State of Michigan for DDA merchandise sales, and Property Tax collection are also handled by the Treasurer's Office.

Section 6 (Amended 5/15/20)

Contracted Clerk Public Record Services. The Lake Orion Village Clerk is responsible for assisting the DDA with the agenda and packet, as needed. The Village Clerk services as the Chief Administrator for the Village’s legislative software, which is used by the DDA Board for agenda, packet and minutes. In addition, the Clerk serves as the recording secretary for the DDA meetings and maintains all the official meeting minute records. Record Management services are provided by the Clerk and includes, but is not limited to, maintenance of records related to all major projects, contractor insurance records, all personnel records, DDA equipment records and real property records. Maintenance of the Boards membership appointments, including placement on the Village Council Agenda for Council President appointment of members is handled by the Village Clerk. In addition, the Clerk is responsible for administering all Oaths of Office to DDA Board members. The Clerk is responsible for maintaining all insurance records, including claims and the annual renewal.

ARTICLE V: MEETINGS

Section 1

The Board of Directors shall hold one (1) Regular Meeting each month unless there is no business on the Agenda; in such case there shall be no meeting. (Amended DDA 2-8-00, V.C. 2-14-00)

Any Regular Meeting may be adjourned to a definite date, by a majority vote of a quorum of the members. Adjourned or Special Meetings may be held at any time or place established by the Board of Directors. Special Meetings may be held as necessary, subject to the call of the Chairman or Acting Chairman or upon the request of a majority of the Board of Directors. (Amended DDA 05-13-08, V.C. 05-27-08)

Section 2

All Meetings of the Board of Directors shall be held in accordance with the provisions of PA 230 of 1976, the Open Meetings Act. Parliamentary procedure at Board of Directors meetings shall be governed by Robert's Rules of Order. The Chairman shall be the Parliamentarian.

ARTICLE VI: THE ORDER OF BUSINESS

Section I (Amended by DDA Board 6/14/2016; VC 08/08/16, Amended 5/15/20)

The order of business for a Regular Meeting shall be, at a minimum:

1. Call to Order.
2. Roll Call and Determination of Quorum.

3. Approval of Minutes
4. Presentations
5. Call to the Public.
6. Approval of Agenda
7. Financial Matters
8. Reports, Resolutions, and Recommendations
9. Call to the Public
10. Board Comments
11. Adjournment

Section 2

The Chairman shall have the discretion to change the order of business whenever he deems it advisable to do so either before or during the progress of the meeting.

Section 3 (Amended DDA 11-08-05, V.C. 11-14-05)

The order of business for the Annual Meeting, to be the Board of Directors' first Regular

Meeting in November, shall be:

Call to order by Chairman or Vice-Chairman

1. Roll call
2. Determination of a quorum
3. Election of new officers
4. Taking of chair by new Chairman
5. Regular order of business

ARTICLE VII: QUORUM

For the transaction of ordinary business at any Regular Meeting, Adjourned Meeting, or Special Meeting, five (5) members shall constitute a quorum. An affirmative vote of at least five (5) members of the Board of Directors shall be necessary in order to make a decision.

In the absence of a quorum, the Village Manager can serve as an alternate member with property interest. (Approved by VLO March 26, 2018)

ARTICLE VIII: MINUTES

Section 1

The Board of Directors shall keep a set of Minutes of all Regular and Adjourned Meetings and at Special Meetings where official business was transacted. These Minutes shall become a public record and shall be filed with the Village Clerk.

Section 2

The Secretary or the Chairman shall sign all Minutes, after approval by the Board of Directors members, at the following meeting.

ARTICLE IX: COMMITTEES

There may be special committees as the Board of Directors may, from time to time, deem necessary.

ARTICLE X: AMENDMENT OF BYLAWS

These Bylaws may be changed or added to by the affirmative vote of six (6) out of nine (9) members. No change shall be made unless written notice to amend shall be filed with the Secretary at the Regular Meeting preceding the meeting at which the motion to change is to be made. This requirement may be waived by the Board of Directors by a unanimous vote of the full Board or Directors.

ARTICLE XI: CONTRACTS, LOANS, CHECKS AND DEPOSITS

Section 1 - Contracts

The Board of Directors may authorize any officer or officers, agent or agents, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the DDA and such authority may be general or confined to specific instances.

Section 2 - Checks, Drafts, etc.

All checks, drafts, or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the DDA, shall be signed manually or by facsimile signature by such officer or officers, agent or agents of the DDA and in such manner as shall be determined by resolution of the Board of Directors.

Section 3 – Deposits

All funds of the DDA Authority not otherwise employed shall be deposited to the credit of the DDA in such banks, trust companies, or other depositories as the Board of Directors may select

ARTICLE XII: FISCAL YEAR

The fiscal year of the DDA shall correspond at all times to the fiscal year of the Village of Lake Orion.

ARTICLE XIII: CERTIFICATION

The undersigned, being, respectively, the duly appointed Clerk of the Village of Lake Orion, and the duly appointed Chairman of the Lake Orion Downtown Development Authority do hereby certify that the foregoing Bylaws were adopted at a meeting of the DDA Board of Directors on September 10, 1985 and approved by the Village Council at its meeting of September 23, 1985, subsequently amended as follows:


DDA Board of Directors meeting of February 8, 2000 and approved by the Village Council on February 14, 2000.


DDA Board of Directors meeting of November 8, 2005 and approved by the Village Council on November 14, 2005.

DDA Board of Directors meeting of May 13, 2008 and approved by the Village Council on May 27, 2008.

DDA Board of Directors meeting of May 13, 2008 and approved by the Village Council on June 14, 2016.

DDA Board of Directors meeting of September 8, 2020 and approved by the Village Council on September 14, 2020.


Susan C. Galezcka, CMC MiPMC
Village of Lake Orion Clerk


Debbie Burgess
Village of Lake Orion DDA
Chairman of the Board of Directors



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

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 \$51,697.78 for December 2025.

INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

POST DATES 12/01/2025 - 12/31/2025

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	854.68	35509
248-000-228-001	Remittance	IRS	Remittance Check	96.95	411
248-000-228-001	Remittance	IRS	Remittance Check	96.95	411
248-000-228-001	Remittance	IRS	Remittance Check	121.92	412
248-000-228-001	Remittance	IRS	Remittance Check	121.92	412
248-000-228-001	Remittance	IRS	Remittance Check	96.50	413
248-000-228-001	Remittance	IRS	Remittance Check	96.50	413
248-000-228-002	Remittance	IRS	Remittance Check	414.57	411
248-000-228-002	Remittance	IRS	Remittance Check	414.57	411
248-000-228-002	Remittance	IRS	Remittance Check	521.29	412
248-000-228-002	Remittance	IRS	Remittance Check	521.29	412
248-000-228-002	Remittance	IRS	Remittance Check	412.61	413
248-000-228-002	Remittance	IRS	Remittance Check	412.61	413
248-000-230-000	Remittance	IRS	Remittance Check	418.54	411
248-000-230-000	Remittance	IRS	Remittance Check	616.32	412
248-000-230-000	Remittance	IRS	Remittance Check	417.55	413
248-000-231-002	Remittance	PRINCIPAL LIFE INSURANCE C	Remittance Check	7.66	35513
248-000-232-000	Remittance	AMERICAN UNITED LIFE INSUR	Remittance Check	149.90	35507
248-000-237-002	Remittance	ALERUS FINANCIAL	Remittance Check	290.39	35394
248-000-237-002	Remittance	ALERUS FINANCIAL	Remittance Check	381.92	35450
248-000-237-002	Remittance	ALERUS FINANCIAL	Remittance Check	298.08	35506
248-000-247-000	Remittance	BLUE CARE NETWORK OF MICH	Remittance Check	1,042.96	35451
248-000-247-000	Remittance	PRINCIPAL LIFE INSURANCE C	Remittance Check	89.48	35512
248-000-247-000	Remittance	PRINCIPAL LIFE INSURANCE C	Remittance Check	15.38	35514
Total Department 000 REVENUE				7,910.54	
Department: 260 GENERAL ACTIVITIES					
248-260-801-000	TRACTOR SUPPLY	COMERICA BANK	MATT CC NOV	413.44	328
248-260-801-000	TRACTOR SUPPLY	COMERICA BANK	MATT CC NOV	21.19	328
248-260-801-000	SNOW REMOVAL	MITTEN STATE PRO SERVICES,	SNOW REMOVAL	6,000.00	35427
248-260-801-000	INV 34593104	CHARTER TOWNSHIP OF ORION	REMOVAL OF BANNERS	425.00	35401
248-260-801-000	EST. 1015	HAUXWELL, TIMOTHY	SNOW REMOVAL	1,900.00	35481
248-260-823-000	FLOWCODE	COMERICA BANK	MATT CC NOV	9.95	328
248-260-823-000	SNAPRETAIL	COMERICA BANK	MATT CC NOV	65.00	328
248-260-823-000	CLICKUP	COMERICA BANK	MATT CC NOV	38.00	328
248-260-823-000	ADOBE	COMERICA BANK	MATT CC NOV	21.19	328
248-260-823-001	IONOS	COMERICA BANK	MATT CC NOV	28.85	328
248-260-851-000	MISWITCH	COMERICA BANK	MATT CC NOV	90.75	328
248-260-851-000	COMCAST	COMERICA BANK	MATT CC NOV	224.44	328
248-260-920-000	118 N BROADWAY	DTE ENERGY	STREET LIGHTS	79.45	35410
248-260-921-000	165 S BROADWAY	DTE ENERGY	STREET LIGHTS	30.55	35410
248-260-921-000	90 S ANDERSON	DTE ENERGY	STREET LIGHTS	423.32	35410
248-260-921-000	24 FRONT ST	DTE ENERGY	STREET LIGHTS	39.83	35473
248-260-921-000	380 S BROADWAY	DTE ENERGY	STREET LIGHTS	42.84	35473
248-260-940-000	UHAUL RENTAL	COMERICA BANK	MATT CC NOV	20.09	328
248-260-940-000	UHAUL	COMERICA BANK	MATT CC NOV	28.57	328
248-260-941-000	OFFICE RENT	NICK SCHILLACE	RENT - JAN-MAR 2026	4,200.00	35489
248-260-942-000	INV 96396	Darwe1 ENTERPRISES LLC	INV 96396	25.58	35408
248-260-957-000	MDA CONFERENCE ROCH	COMERICA BANK	JANET CC NOV	2.50	328
248-260-958-000	MESSY DESIGNS LIBRARY SUPP	COMERICA BANK	JANET CC NOV	24.38	328

INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

POST DATES 12/01/2025 - 12/31/2025

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					
248-260-958-000	DOLLAR TREE LIBRARY SUPP	COMERICA BANK	JANET CC NOV	(11.66)	328
248-260-958-000	BROADWAY LIBRARY SUPP	COMERICA BANK	JANET CC NOV	35.61	328
248-260-958-000	DOLLAR TREE LIBRARY SUPP	COMERICA BANK	JANET CC NOV	19.61	328
248-260-958-000	AMAZON	COMERICA BANK	MATT CC NOV	139.00	328
248-260-958-000	SPAREBOX	COMERICA BANK	MATT CC NOV	285.00	328
248-260-958-000	GREAT LAKES ACE	COMERICA BANK	MATT CC NOV	119.80	328
248-260-958-000	MENARDS	COMERICA BANK	MATT CC NOV	77.89	328
248-260-958-000	CLEANING INV 0330	PRESTIGE CLEANING MI	CLEANING	500.00	35438
248-260-958-000	IMPACT AWARDS INV 24187	ORION AREA CHAMBER OF COMM	IMPACT AWARDS	140.00	35434
248-260-958-000	WATER COOLER INV 247499	CRYSTAL WATER COMPANY	WATER COOLER	25.00	35470
248-260-962-000	MILEAGE REIMB 104.2 X .70	JANET BLOOM	MILEAGE REIMBURSEMENT	72.94	35485
248-260-974-000	HUSKY BAGS	HOME DEPOT CREDIT SERVICES	GARBAGE BAGS	89.91	35419
Total Department 260 GENERAL ACTIVITIES				15,648.02	
Department: 725 ORGANIZATION					
248-725-825-000	DD REIMB 4734,4731	GREEN HIPPO GIFTS	DOWNTOWN \$ REIMB	50.00	35416
248-725-825-000	4616	BOUTIQUE CHIC	DOWNTOWN DOLLARS	25.00	35466
248-725-827-000	USPS	COMERICA BANK	MATT CC NOV	15.60	328
248-725-864-000	GRANT	BOUTIQUE CHIC	CMTTY FOUND OF SE MI GRANT	2,500.00	35466
Total Department 725 ORGANIZATION				2,590.60	
Department: 726 DESIGN					
248-726-745-000	HARVEST TIME	COMERICA BANK	MATT CC NOV	169.60	328
248-726-745-000	HARVEST TIME	COMERICA BANK	MATT CC NOV	212.00	328
248-726-801-000	PER DEC 16 AGENDA	VILLAGE OF LAKE ORION	ELECTRICAL EXPENSES	1,544.32	35505
248-726-883-000	MENARDS	COMERICA BANK	MATT CC NOV	233.96	328
248-726-883-000	AMAZON	COMERICA BANK	MATT CC NOV	91.10	328
248-726-883-000	BANNERS AND HOLIDAY LIGHTS	SANTA'S LIGHT CREW	HOLIDAY LIGHTS	6,100.00	35498
248-726-975-002	HOME DEPOT	COMERICA BANK	MATT CC NOV	152.34	328
248-726-980-001	CHARTER TWP OF ORION	COMERICA BANK	MATT CC NOV	822.40	328
248-726-980-001	ROLL OFF DUMPSTER	COMERICA BANK	MATT CC NOV	100.00	328
248-726-980-001	ROLL OFF DUMPSTER	COMERICA BANK	MATT CC NOV	574.00	328
248-726-980-001	HOME DEPOT	COMERICA BANK	MATT CC NOV	351.72	328
248-726-980-001	MENARDS	COMERICA BANK	MATT CC NOV	1,581.34	328
Total Department 726 DESIGN				11,932.78	
Department: 728 ECONOMIC DEVELOPMENT					
248-728-861-000	THE UPS	COMERICA BANK	MATT CC NOV	7.76	328
248-728-888-000	MICHAELS	COMERICA BANK	MATT CC NOV	105.98	328
248-728-888-000	MICHAELS	COMERICA BANK	MATT CC NOV	211.96	328
248-728-888-000	INV 130 FB EMAIL AND BANNE	DEBRA NOVARA	DEBRA NOVARA OF NOVARA DESIGN, LLC	115.00	35409
248-728-888-000	INV 1761	20 FRONT STREET CONCEPTS,	ADVERT/MKTING	300.00	35397
248-728-888-000	ADS INV 391837	VIEW NEWSPAPER GROUP	ADS	1,756.00	35504
Total Department 728 ECONOMIC DEVELOPMENT				2,496.70	
Department: 729 PROMOTION					
248-729-880-000	LITTLE CAESARS	COMERICA BANK	JANET CC NOV	21.37	328
248-729-880-005	INV 2964 POLAR XPRESS	EPRINT SOLUTION LLC	INV 2964	54.00	35474
248-729-880-012	GFS STORE	COMERICA BANK	JANET CC NOV	400.26	328
248-729-880-012	GFS STORE	COMERICA BANK	JANET CC NOV	(209.34)	328
248-729-880-012	SPARKFUSION	COMERICA BANK	MATT CC NOV	600.00	328

INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

POST DATES 12/01/2025 - 12/31/2025

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: 729 PROMOTION					
248-729-880-012	CARRIAGE - HOMETOWN HOLIDAY	BLACKSTONE STABLES	CARRIAGE RIDES	2,150.00	35462
248-729-880-012	SANTA	BRAD JACOBSEN	SANTA SING AND STROLL	250.00	35467
248-729-880-013	INV 2950	EPRINT SOLUTION LLC	POLAR EXPRESS BANNERS	138.00	35413
248-729-880-015	HARVEST TIME	COMERICA BANK	MATT CC NOV	169.60	328
248-729-885-000	I29034 201 S BROADWAY	TURNER SANITATION	PORTABLES	155.00	35445
Total Department 729 PROMOTION				3,728.89	
Total Fund 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND				44,307.53	
Fund: 301 DOWNTOWN DEV BOND PROJECT 2023					
Department: 901 CAPITAL OUTLAY					
301-901-950-000	I29035 215 S BROADWAY	TURNER SANITATION	PORTABLES	125.00	35445
Total Department 901 CAPITAL OUTLAY				125.00	
Total Fund 301 DOWNTOWN DEV BOND PROJECT 2023				125.00	

INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

POST DATES 12/01/2025 - 12/31/2025

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	44,307.53	
301			DOWNTOWN DEV BOND PROJECT 2023	125.00	
		Total For All Funds:		44,432.53	



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

TOPIC Notice of Resignation - Administrative Coordinator

BACKGROUND BRIEF:

Our administrative coordinator, Emily, provided her notice of resignation. She had found work closer to home and doing work more suited to her goals. We will miss her. Emily's last day was January 9, 2026.

Staff is in a stronger position to better describe and fill the role in the organization. The beginnings of that is to acknowledge the resignation and start on the process of approving a job description.

FINANCIAL IMPACT: This position is budgeted at \$20 per hour, without benefits. A final budget and employment agreement will be presented to the Board upon hiring.

RECOMMENDED MOTION:

Move to accept the resignation of Emily Dziegielewski with regret and to refer the draft Updated and Revised Job Description to the Organization and Executive Committee(s) for comment, adoption and advertising in the final discretion of the Executive Director.

Administrative Coordinator - Community & Business Engagement

Reports To:	Executive Director, Downtown Development Authority
Supervision:	Interns and volunteers as assigned
Schedule:	30 hours per week (occasional evenings/wknds for meetings/events)

POSITION OVERVIEW

The Administrative Coordinator is a high-visibility, community-facing role that supports the Executive Director while serving as a confident and proactive representative of the Downtown Development Authority. This position is ideal for someone who is comfortable speaking with business owners, residents, volunteers, and public officials, and who enjoys advocating, presenting, persuading, and building relationships in a public setting.

This is not a passive administrative role. The successful candidate will be outgoing, articulate, and unafraid to initiate conversations, explain programs, and represent downtown interests in meetings, presentations, and daily interactions.

KEY RESPONSIBILITIES

Community & Business Engagement

- Serve as a visible and approachable point of contact for downtown businesses, property owners, volunteers, and community members.
- Confidently communicate DDA programs, initiatives, deadlines, and opportunities in person, by phone, and in writing.
- Assist in preparing and delivering presentations, talking points, and outreach materials for meetings, committees, and public forums.
- Support business outreach efforts by helping explain incentives, programs, events, and participation opportunities.

Communications & Content Creation

- Draft, edit, and manage written communications including weekly community e-newsletters, bi-weekly business e-newsletters, and special announcements.
- Assist with award/certificate preparation, press materials, and public-facing messaging.
- Coordinate non-event flyers, brochures, surveys, and informational materials.
- Assist with website and digital content in coordination with the Executive Director.

Administrative & Organizational Support

- Serve as a key administrative resource to the Executive Director, Committees, Staff and DDA Board.
- Assist with preparation of board and committee agenda packets.
- Maintain working knowledge of all active work plans and initiatives.
- Provide bookkeeping support using BS&A accounting software.
- Track and report gift/merchandise sales, attendance, volunteers, event data.
- .Maintain up to date communication records for community and business engagement.
- Maintain office organization and records.

Volunteer & Program Support

- Assist in coordinating volunteers, interns, and committees.
- Track participation, communications, and follow-ups.
- Support special programs as assigned.

REQUIRED SKILLS & ATTRIBUTES

- Fearless communicator comfortable initiating conversations.
- Strong oral presentation and interpersonal skills.
- Excellent written communication skills.
- Highly organized and detail-oriented.
- Professional and solutions-oriented demeanor.

PREFERRED QUALIFICATIONS

- Experience in sales, outreach, communications, or community engagement.
- Familiarity with municipal or downtown organizations.
- Knowledge of Main Street programs a plus.

TECHNOLOGY & TOOLS

- Microsoft Office
- Google Drive
- WordPress
- Email marketing platforms
- Social media
- Canva or Adobe Suite

COMPENSATION

- \$20/hour, depending on qualifications



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

TOPIC Contract – LOLive Concert Series

BACKGROUND BRIEF:

The DDA is again seeking to contract with 20 Front Street to bring a world class music series to the Gazebo in downtown. Last year received statewide attention and was regarded as one of the best public music series regionally. The contract is for a fixed amount of \$13,000 to deliver eight (8) concert days. The language provides that 20 Front Street is to not only provide and handle all talent fees, but the contract includes the costs of booking and royalty, and further requires marketing that includes not only the series but the benefits of the downtown. This marketing reach expands our network of tourism based marketing to a list of more than 15,000 dedicated followers.

We annually budget for this series, and the increase in talent, the addition of local opening acts, and the coordination of sound, weather and marketing are all leading to making this series a larger music based element of our Lakeshore Economy transformational strategy.

FINANCIAL IMPACT: This particular budget item is handled in a cross over fashion. We have budgeted \$14,500 in GL 248-729-880-001, anticipating this contract and ancillary marketing expenses. However, the budget expense is always on a lagging basis, meaning we pay as the series is performed NOT when its contracted. That means we paid for the summer 2025 series out of this present budget for 25-26.

By entering this contract it obligates the DDA to budget for the series expenses in the 26-27 budget, but it is necessary to contract for this now, to start the process of booking and promotion.

RECOMMENDED MOTION:

Move to approve the contract with 20 Front Street Concepts LLC for the booking, promotion and performance of the 2026 LOLive Concert Series at a cost not to exceed \$13,000 with funds to be budgeted and paid in the 26-27 Budget from GL 248-729-880-001.

AGREEMENT TO PROVIDE LIVE MUSIC ENTERTAINMENT

This agreement (“Agreement”) is entered into on this 28th day of May, 2025, between **the VILLAGE OF LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY** (“DDA”) whose address is 118 N. Broadway Street, Lake Orion, MI 48362 and **20 FRONT STREET CONCEPTS, LLC** (“20 Front St.”), whose address is 20 E. Front St, Lake Orion, MI 48363.

RECITALS

WHEREAS, 20 Front St. offers booking, marketing and management of live music entertainment; and

WHEREAS, the DDA desires to sponsor live music in the DDA District to further the DDA mission statement of enhancing the DDA District; and

WHEREAS, 20 Front St. has previously provided live music for the "LO Live! Music Series” in Children's Park; and

WHEREAS, the parties now desire to enter into an agreement for 20 Front St. to provide live music to be held in the gazebo (“Gazebo”) at Children's Park located in the DDA District of the Village of Lake Orion for 2025 consistent with the terms herein; and

WHEREAS, the parties desire to enter into an agreement for 20 Front St. to provide live music entertainment, including the booking, marketing and management of live music entertainment in Children's Park at the Gazebo for the LO Live Summer Concert Series (“LO Live Summer Concert Series”) on the following concert dates: **July 8, 15, 22, 29** and **August 5, 12, 19, and 26** totaling **8 concerts**.

AGREEMENT

NOW THEREFORE, based upon the foregoing statements, the DDA and 20 Front St. agree to the following terms, conditions and representations with consideration acknowledged and accepted by both parties.

1. Services Provided. 20 Front St. shall provide, to the DDA, live music entertainment, including the booking, marketing and management of live music entertainment in Children's Park at the Gazebo for the LO Live Summer Concert Series (“LO Live Summer Concert Series”) on the following concert dates: July 8, 15, 22, 29 and August 5, 12, 19, and 26 totaling 8 concerts (“eight concerts”).

2. Cost of Services. The total cost for the services described in this Agreement is not to exceed Thirteen Thousand Dollars (\$13,000.00). The services included in the Cost of Services are to be budgeted as follows:

- (a) National Touring Artist Fees: \$7,500.00
- (b) Local Artist – Open Act: \$800.00
- (c) Sounds System Rental/Sound Engineer: \$2,400.00
- (d) Booking/Marketing/Promotion Fees: \$2,300.00

3. Invoices and Payment. 20 Front St. shall, via email, bill the DDA for the LO Live! Summer Concert Series in the following manner. In June of 2025, 20 Front St. shall email two invoices to the DDA for the concerts to be held on **July 8, 15, 22, and 29**. In July of 2025, 20 Front St. shall email two invoices to the DDA for the concerts to be held on **August 5, 12, 19, and 26**. The DDA shall issue checks to 20 Front Street Concepts LLC as the payee. The address for 20 Front St. is 20 E. Front Street, Lake Orion MI 48363. 20 Front St.’s EIN # is: 81-2686064. The DDA can contact the staff of 20 Front St. by emailing Lisa Sokol at lsokol414@gmail.com or emailing Allan Goetz at allan@20frontstreet.com or emailing kevinbessert@gmail.com.

4. Sponsorship Revenue. The DDA shall retain all sponsorship revenue and will assist on the nights of the events governed herein with capacities, announcements and giveaways. 20 Front St. will provide a banner at the Gazebo and one banner from the upper sidewalk fence with a donation link to support 20 Front St. and to advertise future events, concerts and shows. 20 Front St. may also have a table of merchandise or concert information and opportunities to invite attendees to learn more about 20 Front St.

5. Term of Agreement. This Agreement shall commence January 1, 2025 and shall end August 31, 2025 without any further action by any party. The Lake Orion Downtown Development Board approved the terms of the proposal at the regular Lake Orion DDA Board meeting December 17, 2024 in preparation for the 2025 planning season.

6. Termination of Agreement. Either party may terminate this Agreement at any time, for any reason or no reason upon the provision of not less than fourteen (14) days written notice to the other party.

7. Indemnification, Waiver and Insurance. 20 Front St. agrees to indemnify, defend and hold harmless, the DDA, the Village of Lake Orion and its elected Council Members, Boards, Commissions, employees, and agents for any claims, actions, damages, liability occurring in connection with the services provided by 20 Front St. as identified herein. 20 Front St. also waives any right of recovery it has, now or later, against the DDA, the Village of Lake Orion and its elected Council Members, Boards, Commissions, employees, agents, for any loss or damage arising from said services. 20 Front St. shall obtain and maintain during the entire term of this Agreement liability insurance insuring against damage to persons or property for said services, which policy shall list the DDA, the Village of Lake Orion and its elected Council Members, Boards, Commissions, employees, agents, as additional insureds and shall provide the DDA with an insurance binder showing the existence of the insurance evidencing the DDA, the Village of Lake Orion and its elected Council Members, Boards, Commissions, employees, agents as additional insureds.

8. Assignment. 20 Front St. shall not assign or transfer its rights under this Agreement without the prior written consent of the DDA. The DDA shall not assign or transfer its rights under this Agreement without the prior written consent of 20 Front St.

9. Binding Effect. This Agreement shall be binding upon and inure to the benefit of 20 Front St and its respective heirs, representatives, successors and assigns. In addition, this



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

TOPIC Seasonal Winter Maintenance (UPDATED)

BACKGROUND BRIEF:

At the December meeting of the Board, discussion occurred regarding the parking lots either owned or leased by the DDA as “PUBLIC PARKING” and how the maintenance and snow/ice conditions would be serviced through the 245-26 winter season. The matter was tabled for further investigation and report.

Significant findings and recommendations from staff:

1. The Public Parking added by our reinvestment of TIF dollars into the cost for use and maintenance is making a significant impact downtown. Eliminating these lots would result in the loss of nearly 100 publicly available parking spots for our district.
2. The question of “why is the DDA maintaining private property?” is a non-starter. The DDA has a functional responsibility to provide safe and accessible parking and walkways to and from the commercial and residential areas of the approved TIF District. In the absence of a more foundational solution, the leasing and maintenance of privately owned property is essential. Asking a property owner to donate valuable space in the District, out of kindness, is a ridiculous notion.
3. The availability of DPW as a resource for maintenance has been re-asked and affirmed. It is our direct understanding that if the DDA is interested in obtaining new financial quotes from the Village DPW that we can ask this Board to authorize and direct a request to Village Council to re-open the base contract we have with the Village for DPW services. It is our recommendation that effort is not necessary as a solution that allows the DPW to focus its priorities without this added cost to the DDA is available.

Following the last Board meeting multiple requests for pricing were made, which are summarized:

1. DDA invested/leased Parking Lot Plowing:
 - Arrowhead \$500/push, \$9,000-11,000 for balance of season
 - Whelan Seasonal \$450/push, \$10,000 for balance of season
 - Hi Hill \$21,000 (restated from prior quotes)
 - Dan’s Snow \$475/push

Currently engaged Emergency Service – Hauxwell at \$400/push, or \$5700 through March 1

2. Sidewalks. Alley and Lumber Yard:

We have secured Mitten State, a new local company for \$6,000 to do all sidewalk, intersection and approach maintenance through March 1, with an adjustment if the season extends.

I/THE EXECUTIVE DID NOT RECEIVE ANY ADDITIONAL QUOTES FOR THIS WORK, AT THE QUALITY WE DEMANDED, AND NO ONE SEEMED INTERESTED IN A SIDEWLAK ONLY CONTRACT.

RECOMMENDED MOTION:

1. Move to approve Mitten State LLC for sidewalk and seasonal maintenance in the amount of \$6,000, not to exceed that amount without further action of the Board, with funds from General Activities 248-260-801-000 Contractual Services-Downtown.
2. Move to authorize the Executive Director to use Tim Hauxwell for the plowing, salting and maintenance of DDA owned and leased public parking areas at a cost not to exceed \$5700, with funding from General Activities 248-260-801-000 Contractual Services-Downtown.



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

TOPIC Performance Review of Assistant Director

Closed session optional under MCL 15.268 (a)

BACKGROUND BRIEF:

The Executive Committee conducted performance evaluations of its Executive Director and Assistant Director on September 16, 2025. The Committee reported the results of that process to the Board who now seeks additional information and input from the Assistant Director regarding the performance of certain responsibilities under the Assistant Director contract.

The Board will hear a general report and detailed overview of the work and performance by and from the Assistant Director and may ask questions or engage in a discussion of the information provided.

Michigan law provides that a performance review of this nature may be conducted in a closed session at the exclusive request of the contracted party, in this case the Assistant Director. At the time of the calling of this agenda item, the Board Chair will inquire as to the preference of the Assistant Director and conduct the meeting as appropriate.

FINANCIAL IMPACT: This is a means of reporting information and gathering performance information as requested by the Board and therefore no financial action is intended at this time.

RECOMMENDED MOTION:

Upon receipt of the report and information from the Assistant Director it is in the discretion of the Board to elect to take any, or no, action.

If further information or analysis is needed by the Board it is recommend that a specific motion of referral to the Executive Committee is made granting the committee the authority to seek any additional materials or information sufficient to resolve any questions or intent of the Board.



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

TOPIC Minute for Mission – Accreditation Update

BACKGROUND BRIEF:

The DDA is 25 year member of the National Main Street America Program, and have achieved the level of Accredited for 18 years. We recently went through an annual Evaluation for Accreditation and provided a self-assessment and multiple supporting materials which is attached for public notice and retention into our records.

This matter is presented for discussion.

FINANCIAL IMPACT: This is a means of reporting information and gathering performance information as requested by the Board and therefore no financial action is intended at this time.

RECOMMENDED MOTION:

No action is required, but the Board may provide action by motion as might be warranted following discussion.

LAKE ORION MAIN STREET ACCREDITATION 2026

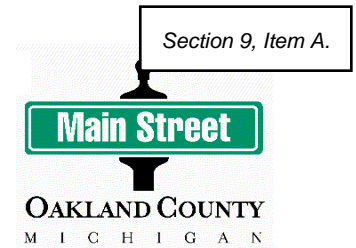


EMBRACING THE SIX STANDARDS



Main Street America and MSOC Year-End Evaluation

Lake Orion MI



January 14, 2026 (Wednesday)

PURPOSE AND SUMMARY

The Main Street Community Assessment Visit is an important evaluative service offered to local Main Street programs to review the progress made towards building a comprehensive revitalization program.

Your Main Street Community Assessment Visit has the following objectives:

1. Determine the progress the program has made to meet or maintain the current Main Street America Assessment Criteria.
2. Understand the Main Street America Standards discuss what steps being taken align with this holistic framework.
3. Recognize strengths and celebrate the growth and accomplishments of the past year.
4. Identify needs, trends and obstacles that might challenge the district and the program's efforts.
5. Determine technical assistance and services that can continue to grow and sustain the local Main Street Program.

AGENDA

- **9:00 a.m. Introductory meeting with staff and MSOC**
Location: Lake Orion DDA 118 N Broadway St., Lake Orion
General overview and introduction to Lake Orion
- **9:45 a.m. Meeting with Main Street Board**
Location: Village Hall – 21 E Church St. Lake Orion
 - Overview of the Accreditation Standards by MSA
 - MSA overview on how the Program meets current National Accreditation Criteria and expectations based on Program's self-assessment.
 - Opportunity for the Main Street Board to highlight the organization's direction for the past year and its priorities for 2025 and 2026.
- **Noon Lunch with Board Chair and Village Mgr. (Village Council President/Clerk)**
Location: Rise Lounge 45 W Flint, Lake Orion
- **1:30 p.m. Community Walk Thru**
- **2:00 p.m. Stakeholder Meeting**
Location: 20 Front Street Concert Space (20 Front St. Lake Orion)
 - Downtown business and building owners, residents and representatives of organizations with a presence in downtown to meet with the team and share their perspectives on the local economic environment and value of the Main Street program.
 - City leaders and staff to highlight the City's vision and support to the district's revitalization and the Main Street program.
- **4:00 p.m. Adjourn**
- **4:30 p.m. OPTIONAL: Short Tour of the Lumber Yard Project**
- **5:30 p.m. End of Evaluation**

In the spirit of compliance with the Americans with Disabilities Act, individuals with a disability should feel free to contact the Village office, at least seventy-two (72) hours in advance of the meeting, if requesting accommodations.

Posted: January 6, 2026



- Baseline Requirements
- Cumulative Average Scores
- Additional Information
- Explanation

Baseline Requirements

	LP
1. A Board of Directors formed by a representative base of the district stakeholders and community members, dedicated to leading the district's Main Street program. Please upload your Board of Directors document.	Yes
2. Communities over 5,000 in population must employ an FTE program director. Communities under 5,000 in population must employ a 20-hour minimum per week program director.	Yes
3. Identified Transformation Strategy to direct the work of the program, based on community input and market understanding. What is your Transformation Strategy? Other Date Adopted by Board of Directors 08/19/25	Yes
4. Detailed work plans aligned with the selected Transformation Strategy that outlines programming across the Main Street Four Points. Work plans must include the project, expected (measurable) outcomes, specific tasks needed to accomplish the project, assignments of those tasks showing volunteer and staff responsibilities, timelines, and budgets. Please upload your Transformation Strategy Work Plan document.	Yes
5. A dedicated budget for the district's revitalization programming and the Main Street program's operations. Please upload your Program Budget document. What is your program's annual operating budget? The total revenue projection is \$1,047,000, with the overall appropriation broken down into three primary categories; (1) Operational Costs, including appropriation for staffing, programming, capital investment, and economic development (approx. \$290,000), (2) Municipal Services, including public safety, DPW and general obligations (approx. \$310,000), and (3) debt service on Bond Funding for the Gateway Project (approx \$420,000) What percentage of your funding comes from government sources? This optional question helps inform MSA's research and advocacy efforts! Annually 85-90%	Yes
6. Demonstrated support from the municipality for the Main Street program. This can include leadership participation, funding, in-kind donations and philosophical support.	Yes
7. Reinvestment statistics are reported as required by the Coordinating Program (monthly, quarterly, or annually).	Yes
8. Be a member in good standing with Main Street America and appropriately use the Main Street America and Coordinating Program logos on the program's website and/or social media.	Yes
9. An Annual Report, Info-graphic, press release or other documentation to explain the progress of your program last year.	Yes

Cumulative Average Scores

Please refer to the [Explanation](#) section for more details about each standard.

	LP
Standard I: Broad-Based Community Commitment to Revitalization	5
I. Partnerships and Collaborations	5
Indicator I	5
II. District and Community Outreach	5
Indicator I	5
III. Communication and Public Relations	5
Indicator I	5
Indicator II	5
Standard II: Inclusive Leadership and Organizational Capacity	LP
Standard II: Inclusive Leadership and Organizational Capacity	4.44
I. Inclusive Organizational Culture and Diverse Volunteer Engagement	4.33
Indicator I	4
Indicator II	4
Indicator III	5
II. Active Board Leadership and Supporting Volunteer Base	4
Indicator I	5
Indicator II	3
Indicator III	4
III. Professional Staff Management	5
Indicator I	5
Indicator II	5
IV. Effective Operational Structure	5
Indicator I	5
Standard III: Diversified Funding and Sustainable Program Operations	LP
Standard III: Diversified Funding and Sustainable Program Operations	4.6
I. Balanced Funding Structure	4
Indicator I	4
II. Strategic Revenue Development and Fundraising	4
Indicator I	4
III. Budget and Work Plan Alignment	5
Indicator I	5
IV. Financial Management and Best Practices	5
Indicator I	5
Indicator II	5
Standard IV: Strategy-Driven Programming	LP
Standard IV: Strategy-Driven Programming	4.33
I. Planning Guided by Inclusive Community and Market-Informed Inputs	5
Indicator I	5
II. Defining Direction Through Transformation Strategy Identification and Development	4
Indicator I	4
III. Strategy-Aligned Comprehensive Work Planning and Implementation Across All Four Points	5
Indicator I	4

Standard V: Preservation-Based Economic Development

4.5

I. Preservation Ethics and Education on History and Cultural Assets

Section 9, Item A.

Indicator I

5

Indicator II

4

II. Standards and Best Practices for Place-Based, People-Focused Design

5

Indicator I

5

III. Promotion of Historic, Heritage, and Cultural Assets

4

Indicator I

4

LP

Standard VI: Demonstrated Impact and Results

4.5

I. Demonstrating The Value of Main Street

4

Indicator I

4

II. Measuring and Packaging Quantitative and Qualitative Outcomes

4.5

Indicator I

5

Indicator II

4

III. Promoting Progress and Demonstrating Impact and Results

5

Indicator I

5

Date of last on-site visit
12/16/25

What year was your program started?
2001

Standard I: Broad-Based Community Commitment to Revitalization

Standard One reflects that successful and sustainable revitalization efforts are not just the work of a single individual but should be the result of a community-wide effort that brings the public and private sectors together with a strong sense of ownership in their downtown or commercial district. This Standard reviews the Main Street organizations' essential role in fostering a culture of inclusion, engagement, collaboration, and commitment from all sectors of the community. Launching a program, growing it incrementally from one year to the next, and sustaining success for the long run are only possible through a diversity of strong partnerships and collaborations, continued outreach, and communication.

I. Partnerships and Collaborations

Indicator I

LP

The Lake Orion Main Street Program has been a coordinating entity for more than 20 years, blending its own work plan based approach to community improvement with the leadership and creative talents of multiple organizations and government entities in the community.

Government: The Village Council President is a sitting member of our Board, and plays an active role in our work plan development. Staff meets with the Village Manager and his team not less than twice monthly to discuss ongoing efforts and the Manager attends and participates in all Board meetings. Likewise, the Orion Township supervisor is a sitting member of the Board, upholding a longstanding tradition of welcoming the leadership and voice of our immediate and surrounding government partners. this partnership allows the program to be the central historic downtown to a community of more than 40,000 residents and businesses ranging from the General Motors Assembly Plant to Prime Time Comics and Cards. The collaboration allows each organization to provide its own talent and budget to needed work, examples; Lake Orion Main Street builds and provides a quarterly promotion of all activities happening Downtown in Orion Living Magazine and contributes to its production, the Township parks dept. provides bucket trucks and staff to hang banners and add workers to difficult clean up projects, the Village offers a contract for DPW add-on services where small details are cleaned, painted and kept free from trash.

Non-Profit: We have a legacy of partnership with multiple non-profits, many of whom have taken over established downtown events and programming. Main Street coordinates an annual "calendar" meeting for the dozens of events happening in the community, but the partnership goes far beyond.

The Lake Orion Art Center maintains its office and local artist gallery downtown and has partnered to restore the Flint St Alley Signs, their Director and a Board Member sit on several committees and work teams, and they are currently preserving the Starry Night Art saved for re-placement at the Historic Lumber Yard Gateway Project.

The Orion Public Library hosts the Storybook Stroll twice per year, placing storybook pages in windows of businesses and promoting downtown for families and friends.

The Lake Orion Lions host the Spring Egg Hunt and Jubilee

The Lake Orion Rotary co-hosts and plans the Winter Ice Fest and brings 18 holes of "Ice Golf" through and amongst the businesses of downtown.

The Chamber of Commerce hosts business training and networking downtown and takes on the responsibility for ribbon cuttings and new openings.

Fiscal Support: Lake Orion Main Street helps businesses and programs apply for grants and training resources with great success. Recent examples include the award of two (2) small business grants from Genisys Bank/Southeast Michigan Foundation supporting equipment needs and capital growth.

II. District and Community Outreach

Indicator I

LP

Lake Orion Main Street attacks communication through both traditional and modern/social based applications. Up to Section 9, Item A. advertorials and marketing is placed in the local print publication "Lake Orion Review" and its partners, reaching more than 60,000 households weekly. That print based communication is blended with Township and Village publications and newsletters, allowing information to reach every household, and thereby every demographic.

Creative banner and sign placement is instrumental to the work plans adopted annually, that prescribe timely placement in areas where a diverse cross section of age, race, and gender will observe the opportunities. Our print often outweighs the use of social and online sources, including our very detailed website, but a plan exists for social too, which is showcased in these metrics

Metrics as Reported for 2025

ShopOCMainStreets.com:

2025 Sales: \$15,202.75 (as of Dec. 3)

Snap Retail:

63 e-newsletters created, 16,954 interactions, 3,566 customers

Open Rate: 29.1%, industry standard is 20-25%

X: current followers: 1,539, 90 posts

Instagram: current followers: 4,399

Views: 90.9K

Content Interactions: 1.2K

Link Clicks: 620

Visits: 2.1K

Follows: 535

Reach: 13.5K

Facebook – Downtown Lake Orion:

starting followers: 10,457

current followers: 11,160

Views: 1.3 M

Content Interactions: 12.8K

Link Clicks: 4.4K

Visits: 33.6K

Follows: 917

Facebook – Downtown Business Owners Private Page: starting followers:133

current followers: 147

Google Business Analytics:

Business Profile Interactions: 918 (July 2025 – Dec 2025)

Calls made from Business Profile: 54

Direction Requests from Business Profile: 616

Website Clicks made from Business Profile: 248

People Viewed Business Profile: 5,056

III. Communication and Public Relations

Indicator I

LP

Lake Orion Main Street maintains a broad work plan for communicating the role and value of the program;

+The Executive Director holds a regular "Update" agenda item on each Village Council Agenda, speaking twice per months on the goals and success of the program.

+The Executive Director plans and co-hosts extensive video informational projects highlighting the historic preservation, development, and value being brought to the district, which are aired on local public television and posted on the program web site.

+Main Street hosts monthly district meetings entitled the "LODown" where business and community members are updated, but most importantly the director facilitates an open round table discussion where issues, ideas and concerns are shared. Local officials are invited and attend.

+bi-monthly, Main Street recruits and encourages a local leader to write an advertorial in the Lake Orion Review extolling that periods story of success and program attitude. this reaches more than 26,000 residents in the community.

+the Executive Director provides annual updates through annual meetings (noticed to all taxing jurisdictions) and upon invite of others to events like the "State of the Community"

+Main Street staff sit on planning committees for regional communications, meet monthly with Chamber of Commerce Staff,

Indicator II

LP

Lake Orion Main Street has a developed and implemented a branding and color guide. It has a strong logo, and also has created a brand and logo for the community/downtown that follows the history of the town (the "Dragon") and the four points of Main Street.

The program uses several social media platforms and leans heavily on the Lake Orion Review (traditional print distribution) for telling the story of the work an value of the Main Street program in Lake Orion.

The Annual Informational Report, posted on the website, www.downtownlakeorion.org, shares abundant detail as to the work and progress of the program.

Overall Standard Notes

LP: For more than 20 years, the Lake Orion Main Street program has served as a central coordinating entity for downtown revitalization intentionally aligning its annual work plan with the leadership, resources, and expertise of local government, nonprofit organizations, and private-sector partners. These partnerships demonstrate shared responsibility for both the district's success and the sustainability of the

Main Street program.

Local Government Partnerships

The Lake Orion Main Street program maintains deeply integrated partnerships with both the Village of Lake Orion and the Township of Orion. Elected officials and senior staff are directly engaged in governance, strategy development, and implementation. The Village Manager, Township President and the Orion Township Supervisor are sitting members of the Main Street/DDA Board and actively participate in work plan development and policy alignment. The Executive Director meets with the Village Manager and staff no less than twice monthly, and the Manager attends and participates in all Board meetings. Section 9, Item A.

This collaboration allows the Main Street program to function as the historic downtown for a broader community of more than 40,000 residents and businesses, ranging from large regional employers to small independent retailers. Each governmental partner contributes unique monetary and non-monetary resources, including coordinated communications, public works support, staff assistance, equipment use, and targeted downtown maintenance services that directly advance annual work plan goals.

Nonprofit & Civic Partnerships

Lake Orion Main Street has a long-standing history of collaboration with nonprofit and civic organizations, many of which now independently lead signature downtown events and programming. The program convenes an annual community calendar meeting to coordinate dozens of events and avoid duplication, while also maintaining ongoing partnerships that extend far beyond scheduling.

Examples include:

The Lake Orion Art Center, which maintains a downtown presence, collaborates on public art and historic preservation projects, and actively participates in Main Street committees.

The Orion Public Library, which hosts the Storybook Stroll twice annually in downtown storefronts.

Civic organizations such as the Lake Orion Lions and Rotary Clubs, which lead major downtown events including the Spring Egg Hunt, Jubilee, Winter Ice Fest, and Ice Golf.

The Chamber of Commerce, which provides business training, networking, and manages ribbon cuttings and business openings downtown.

These partnerships reflect shared leadership, volunteer engagement, and coordinated implementation of programming aligned with Main Street priorities.

Private-Sector & Fiscal Collaboration

Lake Orion Main Street actively supports downtown businesses through grant identification, application assistance, and access to training resources. Recent successes include multiple small-business grant awards supporting equipment investment and capital growth. Sponsorships, partnerships, and cooperative promotions further demonstrate private-sector investment in downtown revitalization.

Communications & Promotion Partnerships

The program leads a comprehensive, multi-platform communications strategy that is amplified through municipal, nonprofit, and media partners. Traditional print media, municipal newsletters, digital platforms, public television, and coordinated branding are used together to reach all demographics across the community. These efforts are supported by strong performance metrics across print, email marketing, social media, and web engagement.

Elected officials, partner organizations, and community leaders actively participate in promoting downtown initiatives through shared messaging, advertorials, public meetings, videos, and events—reinforcing the visibility, value, and shared ownership of the Main Street program.

Accountability & Reporting

The Lake Orion Main Street program documents and communicates its impact through regular Board updates, public presentations, district meetings, annual informational reports, and online reporting. These efforts ensure transparency, reinforce partnerships, and clearly demonstrate how collaborative resources are translated into measurable outcomes for downtown revitalization.

Standard II: Inclusive Leadership and Organizational Capacity

Section 9, Item A.

Strong, thriving communities don't just happen. They need effective leaders at all levels, from a broad base of volunteers to dedicated professional staff offering their time, talents, and passion for this work. Standard Two reflects the value we place on PEOPLE as Main Street's greatest resource and our belief that everyone in the community has a place in Main Street. This Standard encourages Main Street programs to place a strong priority on human capital and develop a clear operational structure and practices that increase the organization's capacity to engage all sectors of the community and leverage their participation in their revitalization efforts.

I. Inclusive Organizational Culture and Diverse Volunteer Engagement

Indicator I

LP

There is a large focus on drawing participation from all levels of economic and cultural backgrounds in the community. Accommodations are made for cultural norms such as work times, days of the week and personal/religious demands, and particular attention is paid to age and gender demographics to assure there is a broad base of talent and vision for the organization.

All meetings and event notices are posted as inclusive, in English and Spanish (the secondary language predominantly in the district). Accessibility for those with mobility, and other challenges, to events and programs in the district is a priority for planning and maintaining our walks and locations. Programming is done with a mindful understanding that all are welcome, and no disruptive or inappropriate materials are used.

Indicator II

LP

Lake Orion Main Street has implemented a new Volunteer Approach and built a program around the effort, the "Illuminators". The Organization Committee leads this new sub-group, which is intended to shine a light on all that is good in our community, through pop-up welcoming events, to hands on clean up days, to property tours, and more. At the first Illuminator's event the group secured interest commitments from sixty-two (62) new people and families.

Volunteer opportunities are promoted in newspapers, social media and direct email. The best approach is through online sources like Peach Tree (students and families) and when we personally invite the high school students for community service hours.

Each new member of the volunteer team, and the Illuminators, is welcomed, informed as to who they are working with, trained on the task, and thanked.

The annual report revealed last year's effort hosted 251 volunteers who worked 626 hours.

The organization hosts an annual Illuminators Night (as it is now called) to welcome new interest and to award and thank a large contingent of volunteers. Awards range from the "Strongest Paddler" giving homage to the Dragon on the Lake festival as our most dedicated/appearing volunteer to the "Handy Man" for always bringing tools.

Indicator III

LP

The current DDA Board meets all milestones listed –

- A. District business owners: D. Burgess and A. Campbell
- B. District Property Owners: S. Caruso and L. Coe
- C. Residents: H. Lorant and M. Shell
- D. Community business: S. Medina
- E. Institutions: T. Rutt and C. Barnett

II. Active Board Leadership and Supporting Volunteer Base

Indicator I

LP

The Board has a remarkable record of being "present" and active in the message and voice of Main Street.

1. Each committee is chaired by a Board Member, meeting not less than once per month. As part of this work they guide agendas and help recruit participation.
2. Board attendance is required by our bylaws, with absences noted and privately discussed when recurring. Great news is there is NEVER a discussion as no Board member has missed more than three meetings in the last year, and seven members only had one absence.
3. Board Members additionally sit on special committees for Budget, Executive Committee, and Capital Improvement. These meetings are called as needed, as published and minutes kept, and boast a 90% attendance measure over all meetings and members.
4. Four (4) Board members participated in all three levels of training in the past year, each conducted through the Coordinating Program or their recommended consultant; TIF knowledge and messaging, Renewed Transformational Strategy Development, and Board Responsibility. Four (4) others made two out of three, and two (2) other attended a Coordinating Program training on Legal Aspects of Budgets and TIF.

Every Board member participated and helped in an event or program. Some brought family and served donuts, other wore costumes, tied ribbons around corn stalks, and many were there as advocates and supporters.

The most significant training and effort was around mutually building answers to "sidewalk" questions, "What is Main Street", "What Do You Do", "Where Does Your Money Come From"

Indicator II

LP

Board members have historically made substantial sponsor based financial commitments to Main Street. Often r Section 9, Item A. products, production capacity, and staff time and labor, which is a defined benefit to Main Street, but certainly a cost to their business.

Lake Orion is in the process, and has filed formation documents, of creating a non-profit arm to boost fundraising and financial commitment beyond traditional sponsorships and business to business support. this new non-profit will be ready to launch in 2026 with active offerings in 2027.

Indicator III

LP

Board members all chair a committee or serve directly on the Budget Task Force or the Executive Committee. Beyond that leadership, each member brings their own time and talent to the program through in kind services and advocacy. Elected leaders on the Board provide access to staff and networks making valuable resources more readily at hand. Business owners provide materials and time, and assist in clean up, business recruitment, published messaging and policy work. Residents provide group advocacy and neighborhood connection.

Lake Orion Main Street maintains four core committees aligning with the Four Point Approach. as a new focus, each committee is re-unifying its directional purpose under the newly adopted Transformational Strategy and further adopting a statement purpose of each work plan, and in the case of promotion and design each event and project. These statements will align not only with our mission and plan, but be tied to an element of consideration for GAMSA.

III. Professional Staff Management

Indicator I

LP

Our program employs a full time Executive Director and a full time Assistant Director. Staff also includes a part time Administrative Coordinator and a part time grounds and maintenance person.

All positions are supported by a job description and are annually reviewed. Staff attends training at least quarterly, and is regularly enrolled in Main Street, Michigan Downtown and other resource based conferences, webinars, and leadership events. The Board provides a budget for staff training and growth.

Full time staff meet neatly weekly with the Board Chair and provide monthly updates directly to the Board

Indicator II

LP

The Board has implemented a comprehensive approach to engaging, training, empowering, and reviewing its Executive Director.

1. The Executive Director is hired and engaged directly through the Board, and is not a reporting position to its municipal partner at the Village of Lake Orion.
2. The position is a salary position, carrying a variety of benefits, including compensation for opting out of insurance and other perks.
3. The Board budgets all salary and benefit needs and also appropriates substantial allocations for training, travel related programming and conferences, and appropriate memberships and associations.
4. The Executive Director meets with the Board Chair weekly, and with the Executive Committee, or a portion thereof, several times per month as needed.
5. An annual review is conducted that starts with a self evaluation by the Executive Director and ends with an in person interview and review that results in recommendations and advice for the next year. this report is brought to the Board for notice and filing and then passed to the Village Council for public knowledge.

As to succession planning, the Board, in its redesign in 2023, created a companion position of an Assistant Director. That role is subject to, and the beneficiary of, the same outline as set forth above. It is likewise independently reviewed and reported for performance matters annually.

IV. Effective Operational Structure

Indicator I

LP

The organization meets all stated goals and publishes the same on its website. Insurance is maintained through its municipal partner.

Overall Standard Notes

LP: Lake Orion Main Street places people at the center of its revitalization strategy by intentionally cultivating inclusive leadership, broad volunteer participation, and strong professional capacity. The organization actively engages residents across economic, cultural, age, and gender demographics by accommodating work schedules, religious and cultural considerations, language access (English and Spanish), and mobility needs in all meetings, communications, and programming. Events and initiatives are designed to be welcoming, accessible, and appropriate for all audiences, reinforcing a culture of inclusion and respect.

Volunteer engagement is a cornerstone of the program. The newly launched Illuminators initiative, led by the Organization Committee, expands community participation through welcoming events, clean-up days, property tours, and hands-on projects. In its first event alone, the Illuminators secured interest commitments from 62 new individuals and families. Volunteer opportunities are broadly promoted through newspapers, social media, email, school platforms, and direct outreach, with special attention to engaging students and families. All volunteers receive clear orientation, task training, and recognition. In the past year, 251 volunteers contributed 626 hours of service, supported by an annual recognition event celebrating service, leadership, and community spirit.

The Board of Directors provides active, accountable leadership and maintains a strong supporting volunteer base. Each committee is chaired by a Board member and meets at least monthly, with Board attendance expectations clearly enforced and consistently met. Board members also serve on standing and special committees, including Budget, Executive, and Capital Improvement, with attendance expectations at 90 percent. Board members regularly participate in events, advocacy, and volunteer activities, reinforcing visibility, trust, and community connection. Ongoing Board education is prioritized, with members completing multiple levels of Main Street and Coordinating Program training in governance, finance, TIF, strategy, and legal responsibilities.

Lake Orion Main Street maintains a professional staffing structure that supports operational excellence and long-term sustainability. The organization employs a full-time Executive Director, a full-time Assistant Director, and part-time administrative and maintenance staff, each supported by defined job descriptions, annual reviews, and regular training. Staff engage in quarterly professional development, participate in state and national Main Street, downtown, and leadership programs, supported by a dedicated training budget, weekly leadership meetings, and monthly Board updates ensure transparency and accountability. Section 9, Item A.

Effective operational practices further strengthen organizational capacity. The Board directly hires, supports, evaluates, and plans for succession in its executive leadership, including the creation of an Assistant Director role to ensure continuity. Committees align their work plans with the adopted Transformational Strategy, with defined purposes that support inclusive engagement and equitable revitalization outcomes. Together, these practices demonstrate Lake Orion Main Street's commitment to inclusive leadership, strong governance, professional management, and a resilient organizational structure capable of engaging the full community in its revitalization efforts.

Standard III: Diversified Funding and Sustainable Program Operations

Section 9, Item A.

A successful revitalization program must have the financial resources necessary to carry out its work and sustain its operations. Program sustainability relies on diversity of revenue streams as dependency on one primary or only source could jeopardize the program's operations. Through this Standard, Main Street programs demonstrate a priority for ensuring that the community is investing in the Main Street organization and programming efforts through a comprehensive and balanced funding structure that ensures successful and sustainable revitalization efforts.

I. Balanced Funding Structure

Indicator I

LP

The broad base of the organizations funding is a dedicated TIF (Tax increment Financing) plan that was amended in 2020 and extended to remain in effect through 2039. Recent changes in County and State policy make this plan very difficult to amend or rescind resulting in a strong funding base during this extended period.

Additionally, Main Street strives to make all events, promotions and programs revenue neutral through sponsorships, ticket sales, and in kind partnerships with local businesses, vendors or school volunteer groups. Examples include; Presenting sponsors for the LOLive Summer concert Series, Character Volunteer corp(s) volunteering time from Middle School Robotics teams, and the waiting list for tickets to ride the Polar Express Trolley to see Santa Clause.

Lake Orion Main Street continues to be a driver of investment and real estate growth in the downtown. Budget is allocated to support redevelopment, historic repurposing/preservation, and most significantly the seamless transfer of tenants as the district grows and matures. In the past year the program has assisted 17 new businesses through permitting, licensing, and more, resulting in more than \$2 million new investment, therefore increased TIF value.

Main Street continues to find grants, and is currently the beneficiary of a \$595,000 supporting grant from Oakland County for its historic Lumber Yard Gateway project.

We miss a score of Five(5) only as we roll out a new sponsorship approach, using a new a MSA found company at Main Street NOW.

II. Strategic Revenue Development and Fundraising

Indicator I

LP

The Organization and the Board are committed to a strong plan for funding, budget and our goal of tying all of our financial planning to an elemental goal and purpose. For each of our work plans, we now include review and adoption of a purpose statement that defines how the objective of the effort, funding and time supports the achievement of an element of the GAMSAs standards. We are doing this to focus everything we do away from party planning and meeting, to a definitive baseline of long term downtown sustainability.

To Support these efforts

- + The Board reviews financial(s), budget status and revenue projections monthly.
- + A budget Task Force (made up of four Board members and the Executive Director) meets regularly to assess and direct project specific goals, cash flow and budget tracking, and the annual DDA Budget
- + Committees are charged with balancing the cost of capital investment, programming, and event cost against budgeted revenue and each committee has a separate budget, broken down into multiple general ledger lines by program, project, or focus.
- + Committees are charged with finding budget support through sponsors, volunteers, or by offering their own time or business support to pour hot chocolate, hang corn stalks, or clear ice.

Lake Orion Main Street strives to maintain an generally accepted accounting practice of holding a 20% fund balance reserve through its general fund balance and budgets to retain this amount as a constant in its annual budgeting practices. Currently, this amount is being met, but we have formed two new Non-Profit arms that will act to diversify our funding/grant/revenue opportunities as we onboard the Lumber Yard project, and deal with our commitment to public infrastructure investment through the recently adopted 75/25 capital split with our partners in the Village of Lake Orion.

III. Budget and Work Plan Alignment

Indicator I

LP

Lake Orion Main Street provides a detailed budget that sets forth revenue and expenses in a manner that directly reflects the mission, purpose and planning of the organization. Highlights of the budget include:

1. Revenue. In lieu of a general revenue line, we break this down into multiple/tracked items so we can budget and follow progress in areas like state, local and federal grants, local funding, misc. revenue, and other measures intended by the Board and adopted through our annual priority planning.
2. General Operations: All salaries, office expenses, memberships, and other operational costs are tracked separately to allow for us to properly contract and align services against programming.
3. Main Street Four Points. We maintain four separate budget areas, one for each Point, and break down those four areas into core elements of the Transformational Strategy and the annually adopted work plan (focus).

IV. Financial Management and Best Practices

Indicator I

LP

The organization has adopted a fundamental Budget Policy. This policy approach ingrains a detailed and thoughtful planning, reviewing and adopting an annual budget. It roughly follows;

Section 9, Item A.

1. The Executive Director prepares a budget 5 months prior to the new budget year.
2. The proposed budget is sent to the Budget Task Force (board based) for review and insight against the TIF and Strategic Plan.
3. A recommended budget is brought to the Board.
4. Upon Board pre-approval, it is sent to the Village for statutory approval and returned to the Board for final consideration and adoption.
5. Monthly budget and P&L based statements are presented to the Board, questions answered, and financial statements approved.

All purchasing and budget management is conducted under the strict provisions of two procurement policies. The Village maintains a policy that the Organization, as a division of the Village through its DDA TIF, is adhered to. The second policy is that of the DDA, which includes a rider for the gate way project. These policies are kept on the organizations website for public awareness.

Lastly, all finances of the organization are subject to, and proceed through, a full annual audit in cooperation with the Village and general accounting standards.

Indicator II

LP

The bylaws, descriptions and policies of the organization are consistent with the mission and objectives of both the Strategic Plan, but importantly, follow established accounting practices.

All budget reports, presented and reviewed monthly at the Board level and weekly at the staff level, are tracked with budget amount, current period expenses, total budget use, and balance available. Budget adjustments are made on a regular basis, within fund and by Board action, to keep the budget in line with trends.

Overall Standard Notes

LP: Lake Orion Main Street demonstrates a strong and sustainable financial foundation supported by diversified revenue streams, disciplined financial management, and intentional alignment between funding, work plans, and long-term revitalization outcomes. The program's funding model prioritizes stability while actively expanding revenue diversity to ensure resilience and long-term sustainability.

Balanced Funding Structure

The primary funding source for Lake Orion Main Street is a dedicated Tax Increment Financing (TIF) plan, amended in 2020 and extended through 2039. Recent county and state policy changes make this plan difficult to amend or rescind, providing a reliable and predictable revenue base that supports long-range planning and program continuity. This stable public investment reflects the community's commitment to downtown revitalization and the Main Street program.

To reduce reliance on any single funding source, the organization actively supplements TIF revenue through sponsorships, ticket sales, grants, and in-kind partnerships. Events, promotions, and programs are intentionally structured to be revenue-neutral whenever possible, leveraging presenting sponsors, volunteer organizations, school groups, and business partnerships to offset operational costs while maximizing community engagement.

Strategic Revenue Development and Fundraising

Lake Orion Main Street actively pursues grant opportunities and private-sector investment to advance revitalization goals. Recent successes include securing a \$595,000 Oakland County grant supporting the historic Lumber Yard Gateway Project, as well as assisting downtown businesses in obtaining external funding for capital improvements and equipment purchases.

The program continues to refine its sponsorship and fundraising strategies, including the rollout of a new sponsorship approach informed by national Main Street best practices. These efforts reflect a deliberate shift toward diversified, mission-driven revenue development tied directly to strategic priorities rather than short-term event dependence.

Budget and Work Plan Alignment

Financial planning is intentionally aligned with adopted work plans and strategic objectives. Each annual work plan includes a defined purpose statement that articulates how funding, staff time, and programming advance specific Main Street elements and long-term downtown sustainability goals. This approach represents a conscious move away from reactive or event-driven budgeting toward a performance-based model focused on measurable impact.

Committees are assigned individual budgets tied to specific programs or projects and are responsible for balancing costs with identified revenue sources, sponsorships, volunteer support, or in-kind contributions. This structure reinforces fiscal accountability at all levels of the organization.

Financial Management and Best Practices

Lake Orion Main Street adheres to rigorous financial management practices consistent with generally accepted accounting standards. The organization maintains a target fund balance reserve of approximately 20% within its general fund to support financial stability and risk management, a benchmark that is currently being met.

Oversight and accountability are reinforced through:

Monthly Board review and approval of financial statements, budget status, and revenue projections

A standing Budget Task Force comprised of Board members and the Executive Director to guide budget development, cash flow management, and project-level financial oversight

A formal budget development and adoption process beginning five months prior to each fiscal year and proceeding through Board and statutory municipal approval

Procurement and purchasing conducted under adopted Village and DDA policies, publicly posted for transparency

Annual independent audits conducted in coordination with the Village

Budget performance is tracked regularly using detailed financial reports that show budgeted amounts, current-period expenditures, total usage, and remaining balances. Adjustments are made by Board action as needed to respond to trends and maintain fiscal alignment.

Commitment to Long-Term Sustainability

To further diversify funding and prepare for future capital and operational demands, Lake Orion Main Street has established nonprofit entities to support grant eligibility, fundraising, and project-specific investment—particularly related to the Lake Orion Main Street Development and public infrastructure partnerships. These steps reflect a proactive commitment to sustainable operations, balanced funding, and long-term downtown vitality.

Section 9, Item A.

Standard IV: Strategy-Driven Programming

Main Street has built a strong track record for making change happen in communities across the country. Change is a guiding principle for Main Street. But rather than letting change just happen, Main Street programs define and manage it from one year to the next through a strategy-driven work plan and aligned implementation process. Standard Four brings together all integrated components that must be in place to plan and successfully implement the revitalization work. Centered around Main Street's Four Point Approach, these integrated components are driven by a local Transformation Strategy(s) aligned through community participation and based on understanding of the district's unique and competitive market position.

I. Planning Guided by Inclusive Community and Market-Informed Inputs

Indicator I

LP

Our strength is in our knowledge. the organization is building on the efforts implemented in the past two years and are adding key resources;

1. We have taken a very proactive approach to the BOOMS tracker system to build out our business inventory and real estate key knowledge. This is transforming our access to data and compelling a better state of readiness when questions and opportunities arise. This is coordinated through the Economic Vitality committee.

2. We have gained an account to the Village DPW base program for asset mapping and work order tracking, a program called "silversmith". We have populated the program to show all capital infrastructure assets in the district, e.g. streetlights, benches, banners, and more. this allows us to manage the downtown assets as part of our work in the Design Committee.

3. Our research and data collection showing trends, real estate and business demands continues to be guided by metrics gained from our coordinating partner and their broad access to PlacerAI; we continue to hold monthly LODown business and community roundtable discussions where first hand knowledge is shared; we engaged a third party expert in real estate market demands and assessments which brought a comprehensive study in retail demand areas for the downtown (this will be a bi-annual report); and we maintain active membership in associations (i.e Michigan Retailers Assoc., ICSC, CBOR and others).

We brought historic data, and newly discovered trending to the Board in its effort to redefine our Transformational Strategy (2025-2030) that was adopted in August 2025. The metrics and knowledge weighed heavily in both the concepts of tourism based economic sustainability and the core infrastructure responsibilities in building a more cohesive community.

II. Defining Direction Through Transformation Strategy Identification and Development

Indicator I

LP

In August 2025 the Board adopted a renewed and re-focused Transformational Strategy to shape the goals of the next five years. Two main concepts were chosen; (1) become a tourism based destination economy by reflecting our history and our place in the region thus being a "Lakeshore Economy", and (2) build a stronger community by casting a broader demographic net and finishing the work to repair those legacy infrastructure and relationship hiccups that interfere with the mission, calling this simply "Community Building".

To get this new strategy moving we have already launched a new Committee focus on a restated and renewed mission and basis for everything we do. Each work plan must be based in mission and have a specific purpose statement which aligns to one or more of the GAMSAs standards, setting a high bar for approval and budgeting.

Our Organization and Design Committees are sharing the work plan development for setting a series of key performance indicators to gauge how well we are restoring partner relationships and building a knowledgeable and trained volunteer base.

Our Promotion Committee is doing the same, marking each event and opportunity with a specific purpose that will be reported as a "Minute for Mission" at our Board meetings. Likewise, Economic Vitality is building on the data underlying the strategy to create work plans around business attraction and the completion of the Lumber Yard Gateway.

Those plans adopted for 2026 are included in this application, with several more in progress.

III. Strategy-Aligned Comprehensive Work Planning and Implementation Across All Four Points

Indicator I

LP

The Entire Board participated in multiple training meetings, refreshing its knowledge of how the organization is financed, how to "pitch" what Main Street is and its importance in building Lake Orion, and, through a series of facilitated sessions, a new and data driven Transformational Strategy. The Board then implemented its plan to restate the role, work and member type for each of its committees, particularly those based on the four Points. An explanation of the significance of the four points, and the work behind the committees they represent has been issued in both print and electronic format. the newly formed Illuminators Group has taken charge of using the updated communication to role out to the 60+ interested members who signed on to learn about the organization in the fall.

The work plans developed under this new strategy include a description, an objective, a statement of success, roles and responsibilities, estimated budgets and revenues, and an outline of steps and tasks. These are presented to the Board monthly for progress reporting by the Executive Director

Overall Standard Notes

LP: Lake Orion Main Street manages change through a disciplined, data-driven planning process grounded in community participation and market understanding. Over the past two years, the organization has significantly strengthened its knowledge base through business and real estate tracking in BOOMS, downtown asset mapping and work-order management through the Village's Silversmith system, coordinating-program metrics and PlacerAI data, monthly business and community roundtables, and third-party retail demand studies. These inputs directly informed the Board's adoption of a renewed 2025–2030 Transformational Strategy in August 2025, defining two clear directions: building a tourism-based "Lakeshore Economy" rooted in local identity, and strengthening community connections through inclusive engagement and infrastructure completion. All committee work plans, budgets, and projects are now required to align with the strategy and the Four Point Approach, with defined objectives, success measures, and monthly Board reporting. This integrated approach ensures programming is intentional, accountable, and aligned with Lake Orion's competitive market position and long-term revitalization goals.

Standard V: Preservation-Based Economic Development

Successful Main Street efforts are built on the guiding principle that district economic development is obtained by preserving its unique historic and cultural assets. Standard Five confirms our strong belief that a community's own place-based and diverse cultural assets reflect the richness and strength of its identity and establishes a competitive market advantage.

I. Preservation Ethics and Education on History and Cultural Assets

Indicator I

LP

The entirety of the Main Street downtown district is a Registered Historic District where the overarching priority is the enhancement and promotion of the history, place and "legend" of the community.

- + We are updating our award winning historic way-finding and video "Then and Now" location program.
- + We regularly host interviews and historical lessons from heritage families, incorporating the stories into events and programming.
- + We partner with the historical society to bring the "Here Lies" cemetery tours telling the stories of our past.
- + We write, apply for, and obtain grants for historic preservation.
- + We built, promote and maintain a program for facade improvement and reconstruction, including design and research services.
- + The historic lumber yard gateway project seeks to rehabilitate and restore three main structures of historic significance into public space for markets and congregation.

Indicator II

LP

The "Here Lies" tours and local television video productions highlight our commitment to educating the public on the value of our historic assets and the effort and process of their preservation.

Examples:

https://youtu.be/zPuja_OxAQ8?si=vEiS6USkl-9ZlnJT

<https://youtu.be/lwSdxisPUI?si=azOQAxIM3nvbBlte>

Staff maintains memberships in the Michigan Historic Preservation Network and attends State Historic Preservation events and educational programming.

II. Standards and Best Practices for Place-Based, People-Focused Design

Indicator I

LP

Presently working on projects that indicate the commitment to these goals.

1. Adaptive Reuse of the 1926 Lake Orion High School. Providing guidance and implementation of historic tax credits, planned unit development, community placemaking grants, and Michigan based obsolete property rehabilitation credits to restore and adapt the three story school building into loft apartments while maintaining the historic character and amenities, leaving them restored and as incorporated features.
2. The Lumber Yard project. Securing MSOC grants for public space development tied to historic preservation, using Brownfield and tax abatement strategy and private funded public art and music concepts, this 5 acre site will host markets, events and concerts in its 1917 era, 6,000 sq ft, barn while offering the 1910 supply shed canopy as a family based trailhead to the iconic Paint Creek Trail
3. An expanded historic facade improvement program, bringing state based community redevelopment grants and funding to small retail projects.

III. Promotion of Historic, Heritage, and Cultural Assets

Indicator I

LP

We have been engaged in the scripting and production of video based historic preservation efforts in the District, including extended instructional and narrated videos that speak to the condition, effort, tools, incentives and resources brought to bring the history back to life while creating re-purposed value. The videos are produced with the help of another local official and maintained on our website, and broadcasted on local public television.

Overall Standard Notes

LP: We promote Lake Orion's heritage as a competitive advantage by turning historic assets into active destinations. The Lumber Yard project is positioned as a new public-facing "gateway" experience—markets, gatherings, trailhead activity, and festivals—grounded in authentic historic structures and interpreted history, which strengthens downtown's identity and supports business activity through increased visitation and longer dwell times.

Lake Orion is also advancing preservation-based redevelopment through the rehabilitation of the 1927 Lake Orion High School site, where the project will rehabilitate the original building (the "Lofts") alongside complementary new construction (the "Flats"), reinforcing our community's broader commitment to adaptive reuse as an economic development tool.

Our preservation ethic centers on telling the story of place while keeping structures in productive use. For the Lumber Yard at Paint Creek, our public communications and project materials emphasize the site's historic evolution and its role in community identity, and we actively invite community participation ("share your ideas and thoughts") as part of the planning process.

Standard VI: Demonstrated Impact and Results

Main Street communities are part of a national network with a proven record for generating strong economic activity, strengthening the district's position within a highly competitive marketplace. Standard Six highlights the importance of tracking, packaging, and demonstrating the qualitative and quantitative impact of the program's revitalization efforts. It also provides the opportunity for the local Main Street program to tell their stories and advocate for resources needed for sustainability.

I. Demonstrating The Value of Main Street

Indicator I

LP

Main Street is an active member of the coordinating council for zoning, planning, fire and development, attending meetings and participating in advice and recommendation. As a part of this work;

1. The district has established land use categories for the downtown that reflect a preference for preservation and adaptive reuse, building on use criteria that diversifies the district.
2. Main Street has taken the lead in the process to receive Redevelopment Ready Certification from the state of Michigan.
3. Main Street staff, members and stakeholders are consistently asked to comment and represent the interests of downtown/historic redevelopment at public legislative meetings
4. Presentations are given presenting the success of the district at "state of the community" based events
5. The district, and Main Street, were the primary focus of the Township garnering national recognition from America in Bloom, and was the host of the 2025 national symposium.
6. Main Street prominently applies the Main Street logo, brand and four points in web-based, social, print and other media resources.
6. Main Street is the primary source of information on investing in the district, and the program staff act as the principal liaisons for finding and permitting space for new and redesigned opportunities.
7. Main Street facilitates grant opportunities for district businesses, and regularly updates and informs the district of available resources, how to use them, and advice on writing and application. Recent success include two of the five annual small business grants from the Community Foundation for SE Michigan/Genysis program.

II. Measuring and Packaging Quantitative and Qualitative Outcomes

Indicator I

LP

This data is tracked in detail. Main Street reports core data to its coordinating partner on a quarterly basis and uses AI based resource support to track demographic, sales, value and other economic indicators.

Indicator II

LP

The Board receives an annual report (attached earlier) outlining the successes and numbers achieved in the program.

Examples of data tracked and reported:

- DDA Public Projects/Infrastructure \$ 654,580
- Private Sector Investment \$20, 015,004
- New construction Projects Six (6)
- Building Rehabilitation(s) Eleven (11)
- Square foot of New and Improved Bldgs 71, 240
- Number of New Businesses Fifteen (15)
- Spent on Marketing/Promotion \$ 28,196
- Spent on Events \$ 17,662
- Net Gain of Full & Part time Jobs Seventy-Six (76)
- Volunteers 251
- Hours 626

III. Promoting Progress and Demonstrating Impact and Results

Indicator I

LP

As reported earlier, Main Street submits regular reports of economic activity to its coordinating partner, gives annual reports, and provides monthly public reporting through Board activity and meetings.

Of note is the new effort to publish advertorials in local media that extol the benefits and success of the program. A great example is the published article "The DDA Shines" which set forth the immense effort of the Main Street team.

Overall Standard Notes

LP: At its kick-off training for 2025 the Board focused a significant effort in answering the question "What do you do?" The exercise was not just about the actual nature of what we do, but about how we answer the question in advocacy. The Board, staff, and stakeholders all remain privy to investment data, resource details, and strategic plan priorities so they can act with knowledge about how our funding works, how we attract new partners, and how we measure performance indicators in the plan.



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

TOPIC Transformational Strategy - Committee Structure

BACKGROUND BRIEF:

The DDA follows the Four Point Approach, the nationally successful program of Main street America as coordinated and supported by Oakland County Main Street. Our committees are built on the four points, with a Board Member serving as the Chair.

In 2025, much of the committee work has been very productive; the creation of “Illuminators”, coordination of events, Lumber Yard activity, Budget task force debate, and more. However, attendance and rosters are often strained, and the work of the committees has been project and reactive based instead of rooted in the mission guiding our Transformational Strategy. With the onset of the newly adopted “Lakeshore Economy” and “Community Building” as our core strategy platform, it is recommended that we review and assess out committees in structure, succession planning and purpose.

Our By-Laws require each Board member to actively participate in the work of the committees, but chairing the committee is not required. So, it is our recommendation that we modify the approach in two substantive ways:

1. Adopt a new structure to accommodate succession planning and leadership development.

Using Economic Vitality as an example. The Committee could move its current chair, Matt Shell, to a purpose specific effort (i.e. the non-profit entities we have created) and maintain his involvement in the committee, not as the chair, but as a member providing a more applicable resource to the work. A new chair can come from the volunteer members, and the committee can set a structure of a chair, vice-chair, and emeritus allowing those positions to have long term succession without long term, non-end date, commitment.

2. Adopt a “Written” statement of purpose for the Committee AND all workplans.

As stated in the four committee schedule notices, what these groups do is essential to finding more volunteer base and building a long term leadership strategy. The Attached work plans make a statement of purpose required.

This matter is presented for discussion, adoption of the 2026 Committee Dates, and referral on the question of structural change.

FINANCIAL IMPACT: This is a means of reporting information and gathering performance information as requested by the Board and therefore no financial action is intended at this time.

RECOMMENDED MOTION:

Discussion and input of the Board shall be noted.

It would be a good foundational exercise to adopt, either at this meeting, or after referral to committees and the Executive Director for advice, a policy and procedure for the any change to our current practices. This new policy can incorporate term limit and appointment power form the Board chair etc.

What is the Four Point Approach?

Downtown Lake Orion utilizes the Main Street Four Point approach to revitalization. The "4 Points Approach" engages the public, social and economic forces that affect the "value" of our community as understood and planned through four pillars: Organization, Promotion, Economic Vitality & Design. The success of the Main Street approach is a result of a transformational strategy carefully integrating these four points into a comprehensive downtown plan for sustainability. The strategic plan for Downtown Lake Orion makes a fundamental impact on our economic base, while preserving the community's unique heritage. The goal is to create a sustainable organization that functions as the revitalization leader in the community. This goal is only possible through the talents and time of our partners through volunteerism.

We have four teams that create all that is Downtown, each focused on a Main Street "Point":

The **Economic Vitality Team** is responsible for improving the economic performance of the district. Its responsibilities include helping existing businesses better meet the needs of customers and expand their sales, developing and attracting new businesses, ensuring that adequate capital is available to support business and property development, and creating and managing tools and incentives to encourage and support business and property development. Economic Vitality team members might include people with expertise in business management, entrepreneurship, real estate, finance, data or economic development.



The **Organization team** is responsible for ensuring that the revitalization program has the financial resources, volunteers, and partnerships it needs to accomplish its mission and to successfully implement each Transformation Strategy. This team might be broken into small task forces with targeted focuses like volunteerism. Organization team members might include people with expertise in business, public and/or media relations, fundraising, organizational development, project management, community involvement or leadership.



The **Design Team** is responsible for implementing all aspects of the Transformational Strategy that involve physical and visual aspects of Downtown, including building rehabilitation, new and re-development, public spaces, signs, beautification, lighting and parking. Design team members might include people with expertise in architecture, landscape, horticulture, urban planning, placemaking, graphics, historic preservation, and travel, as well as people with a strong appreciation or unique understanding of the physical characteristics that help make a historic commercial district work well.



The **Promotion Team** is responsible for marketing the district to area residents, district workers, visitors, investors and others. Its responsibilities include planning and implementing specific types of promotional programming including special events and festivals, business promotional activities, and image-building activities. This team may be broken into smaller groups with targeted focuses like "Halloween Parade Committee". Promotion team members might include people with expertise or interest in marketing, advertising, event planning, website design, graphics, social media, or simply love to talk about Downtown.

"Committee Members take on all forms of time, talent and commitment. Some hold regular leadership roles, some plan events, others create graphics, and all have fun building Michigan's best Downtown. The strength of the organization is finding the right project, time and place for all of the great talents we have in Lake Orion and inviting them in."

– Matthew Gibb, Executive Director



WHERE DOES YOUR TALENT FIT?

Find Out by Reaching Out

STOP IN AT:
118 N Broadway St
Lake Orion, MI 48362

CALL US:
(248) 693-9742

EMAIL OUR DIRECTOR:
gibb@downtown lakeorion.org

MAIN STREET WORK PLAN 2025-2026

PROJECT:	Partnered Marketing		
BRIEF DESCRIPTION:	A plan to assist groups, businesses, and organizations who seek the vibrancy of the downtown to enhance their program, event or sale such that the support builds a more mutually welcoming and collaborative downtown environment		
OBJECTIVE:	To collaboratively promote downtown businesses and attractions, driving increased foot traffic and fostering sustainable economic growth within the district		
SUCCESS:	An increase in foot traffic and participants downtown, who stay and benefit the business and dining district(s)		
MAIN STREET POINT:	Promotion	MAIN STREET POINT OVERLAP:	Economic Vitality
TRANSFORMATION STRATEGY GOAL:	Community Building: Increasing involvement, outreach and shared benefit from promotion and planning of events downtown	TRANSFORMATION STRATEGY GOAL OVERLAP:	Lakeshore Economy: Driving an increase in customers and visibility of storefronts, dining areas, and public spaces to attract people to stay and return to downtown.
COMMITTEE	Promotion		



PROJECTED EXPENSES	\$ 11,000		ACTUAL EXPENSE	\$ -		FUNDED PROJECTS	To be tracked and reported annually
PROJECTED REVENUES	\$ 8,000		ACTUAL Investment	\$ -		CLOSED PROJECTS	
TASK	LEAD	DUE DATE	DATE COMPLETED	PROJECTED COST/REVENUE	ACTUAL COST/REVENUE	POTENTIAL PARTNERS	STATUS / NOTES
Foundational Strategy <ul style="list-style-type: none"> Vision/Goals Target Visitor Budget / Resource 	Committee	Prefer at least 90 days prior to scheduled event	ongoing	\$5400		Include core Main Street objective, and strategic plan goals	
Sponsor Engagement <ul style="list-style-type: none"> Shared Partner Value Prop Engagement Plan 	Exec Dir Staff Committee	As collaborated	ongoing	\$0.00		Based on a predetermined mix, including sharing of resource from the partner	Budget
Marketing Mix <ul style="list-style-type: none"> Value/Location Source/Placement Brand Positioning 	Exec Dir Committee	On-going		Matching funds \$2000-10,000		Social media channels, Orion review, Orion Living, schools, business lists	Dependent on scope of budget
Implementation <ul style="list-style-type: none"> Tools Media/Content Calendar 	ALL	On-going					Coordinate with media sources
Metrics	Committee	On-going					Committee Agenda
Data Tracking	Exec Dir	On-going					Board “minute for mission”
Report	Exec Dir	On-going					
STATEMENT OF GAMS OBJECTIVE	Committee	On adoption work plan		NA			STATEMENT/RESOLUTION ATTACHED (Y/N)?

FOCUS SCHEDULE	Champion	First Planning Date	Adopted Schedule On:	Next Steps	Funding Needs	NOTES	
Initial Vision Mtg							
Content Deadlines							
Media collaboration							
Placement of print media and bannering							
Timing of digital and outside media							
Measuring of participation							
Revenue and shared income							

MAIN STREET WORK PLAN 2025-2026

PROJECT:	Advancing Business Retention & Attraction		
BRIEF DESCRIPTION:	To better be in a state of readiness to provide resources, guidance, support, and lobby for business, both existing and possible, that make up the diversity and strength of the downtown vibe, mix and success.		
OBJECTIVE:	To build a baseline and resource ready inventory of assets, goals, opportunities and knowledge that can be quickly adapted and offered in support of business location, expansion, and issue resolution, growing downtown as a destination.		
SUCCESS:	A shareable, and easily updatable, guide and bank of resources providing training and core knowledge to staff and community		
MAIN STREET POINT:	Economic Vitality	MAIN STREET POINT OVERLAP:	Promotion
TRANSFORMATION STRATEGY GOAL:	Lakeshore Economy: Maintaining a purposeful mix of businesses and dining options to support a tourism based economy in a traditional downtown	TRANSFORMATION STRATEGY GOAL OVERLAP:	Community Building: Providing accessibility, design and message that creates a “you have to be there” moment
COMMITTEE	Economic Vitality		



PROJECTED EXPENSES	\$ 22,000 est		ACTUAL EXPENSE	\$ -		FUNDED PROJECTS	To be tracked and reported annually
PROJECTED REVENUES	\$ New Investment		ACTUAL Investment	\$ -		CLOSED PROJECTS	
TASK	LEAD	DUE DATE	DATE COMPLETED	PROJECTED COST/REVENUE	ACTUAL COST/REVENUE	POTENTIAL PARTNERS	STATUS / NOTES
Business mix analysis	Committee	March 26	ongoing	\$5400		Include core Main Street objective, and strategic plan goals	
Assess current business tools, incentives, and resources	Exec Dir Staff Committee	As collaborated	ongoing	\$0.00		Based on a predetermined mix, including sharing of resource from the partner	Budget
Conduct MSOC and other third party learning exercises	Exec Dir Committee	On-going		Matching funds \$2000-10,000		Social media channels, Orion review, Orion Living, schools, business lists	Dependent on scope of budget
Inform on data identified demands and expansion opportunity	Exec Dir	On-going					Coordinate with media sources
Design events around attraction needs							
Metrics	Committee	On-going					Committee Agenda
Data Tracking	Exec Dir	On-going					Board “minute for mission”
Report	Exec Dir	On-going					
STATEMENT OF GAMS OBJECTIVE	Committee	On adoption work plan		NA			STATEMENT/RESOLUTION ATTACHED (Y/N)?

FOCUS SCHEDULE	Champion	First Planning Date	Adopted Schedule On:	Next Steps	Funding Needs	NOTES	
Initial Planning Mtg							
Establish Deadlines							
Define specific content needs							
Coordinate all resources							
Organize and Prioritize							
Measuring of participation							
Investment metrics							

MAIN STREET WORK PLAN 2025-2026



PROJECT:								Gateway: Lumber Yard– Phase 2									
BRIEF DESCRIPTION:				Moving from cleanup/restoration to public space and market development, defining long term goals and revenue modeling.													
OBJECTIVE:				To complete the public market design, implementation and vendor platforms, aligning with site development for third party revenue models and downtown objectives.													
MEASURE OF SUCCESS:				Final plan approval, MSOC grant closure, market build out, soft use and opening of trail and amenities. Operational plans finalized. Final phase started.													
MAIN STREET POINT:				Economic Vitality				MAIN STREET POINT OVERLAP:				Design					
TRANSFORMATION STRATEGY GOAL:				Lakeshore Economy: Extend needed parking, diversification of downtown businesses, enhance public space, connect trail access, build place				TRANSFORMATION STRATEGY GOAL OVERLAP:				Community Building: Create an open and welcoming mixed use extension of downtown for guests and residents to recreate, hangout, and build a sense of place for all					
COMMITTEE				Economic Vitality													
PROJECTED EXPENSES		\$ 1,600,000		ACTUAL EXPENSE		\$ -		FUNDED PROJECTS				To be tracked and reported annually					
PROJECTED REVENUE		Grant poss.		ACTUAL REVENUE		\$ -		CLOSED PROJECTS									
TASK		LEAD		DUE DATE		DATE COMPLETED		PROJECTED COST/REVENUE		ACTUAL COST/REVENUE		POTENTIAL PARTNERS		STATUS / NOTES			
Preliminary and Final PUD plan approval		Exec Dir		Commence 1/26		ongoing		\$80,000				MDOT, GC, PEA< DTE					
Electric Plan and Service Plan		Exec Dir		Started 11/25				\$40,000						Include funding objectives			
Engineering plan and public area design budgets		Committee/ Exec Dir		On-going				Included with PEA						Grant match dependent on scope			
Lighting and fire access plan		Exec Dir		On-going				\$12,000				Madison DTE		Coordinate with DTE or design support			
MDOT access and storm water sue plan		Exec Dir		On-going				Included						Committee Agenda			
Installation of public walks and gathering areas.		Exec Dir		On-going				\$120,000				Per public bid		Facilitate through planning and building			
Social media pre-launch campaign		Exec Dir Staff		4/25				5000									
Issue pre-vendor application program, coordinate with committee and board for selection criteria		Exec Dir		3/26				3500						Projects must be completed in accord with program guidelines			
Host soft event opening		All		Under review													
Project management		Exec Dir		ongoing				\$140				ONTV/Review		Secure signed contract, marketing placement, photo diary			
STATEMENT OF GAMS OBJECTIVE		Committee		On adoption work plan				NA						STATEMENT/RESOLUTION ATTACHED (Y/N)?			

USE BASED PROJECTS							
	Open Date	Needs Assessment	Next Steps	WHO		NOTES	
Additional Retail.							
Public Market Vendor Onboarding							
Design/Public art							
Pre-programming							
Seasonal Event planning							
Non-Profit details							

MAIN STREET WORK PLAN 2025-2026

PROJECT:	Walk-Able Trail and Lake Access Enhancement		
BRIEF DESCRIPTION:	To enhance and provide improved crossing(s), trailhead access, and other routes of safe and welcoming points of pedestrian and non-motorized access to Downtown.		
OBJECTIVE:	To create great first impressions, provide safe road crossings, trailhead amenities and enhance downtown connections		
MEASURE OF SUCCESS:	Project plans, route markers and implemented concepts for crossing improvements, signage, and route design(s)		
MAIN STREET POINT:	Design	MAIN STREET POINT OVERLAP:	Promotions
TRANSFORMATION STRATEGY GOAL:	Lakeshore Economy: Enhance access to the Downtown and promote connection of people and space	TRANSFORMATION STRATEGY GOAL OVERLAP:	Community Building: Strengthen the relationship between lake front and downtown
COMMITTEE	Design		



PROJECTED EXPENSES	\$ 26,000		ACTUAL EXPENSE	\$ -		FUNDED PROJECTS	To be tracked and reported annually
PROJECTED REVENUE	Capital Projects		ACTUAL REVENUE	\$ -		CLOSED PROJECTS	
TASK	LEAD	DUE DATE	DATE COMPLETED	PROJECTED COST/REVENUE	ACTUAL COST/REVENUE	POTENTIAL PARTNERS	STATUS / NOTES
Review of present conditions/issues/needs	Committee	Commence 2/25	ongoing	\$1000 (any studies)		MDOT, LOLA, Village, SEMCOG	
Preliminary project concepts	Committee	As presented		\$0.00			Include funding objectives
Select Project/Budget	Committee/ Exec Dir	On-going		Identify budget and capital acct.			Grant match dependent on scope
Coordinate CIP planning and annual budget app.	Exec Dir	On-going					Coordinate with MSOC for design support
Define and prepare permit/applications	Exec Dir	On-going					Committee Agenda
Board Authorization	Board	On-going					Facilitate through planning and building
Approve funding	Board	On-going					
Audit plan, permit, bills, invoices. Approve match funds where applic.	Exec Dir	On-going					Projects must be completed in accord with program guidelines
Submit for AP/Check	staff	completion project review					
Project management	Staff/Board	scheduled		\$140		ONTV/Review	Secure signed contract, marketing placement, photo diary
STATEMENT OF GAMSА OBJECTIVE	Committee	On adoption work plan		NA			STATEMENT/RESOLUTION ATTACHED (Y/N)?

CONCEPT PROJECTS							
	Open Date	Needs Assessment	Next Steps	WHO		NOTES	
M24 Crosswalk Enhanc.							
Directional/Interpretive signage							
Amenities needs assessment							
Public Art Installations							
Greens Park access enhancement							
Open trailhead from Paint Creek Trail							

MAIN STREET WORK PLAN 2025-2026

PROJECT:	Illuminators – Volunteer Growth & Training		
BRIEF DESCRIPTION:	To grow a passionate group of volunteers dedicated to keeping our town vibrant, welcoming, and full of life, working together to enhance events, beautify our surroundings, and support local businesses.		
OBJECTIVE:	To build, train and retain a diverse group of volunteers and committee members		
SUCCESS:	A full roster of committee membership, and a 20% increase in participation in downtown programming		
MAIN STREET POINT:	Organization	MAIN STREET POINT OVERLAP:	Promotion
TRANSFORMATION STRATEGY GOAL:	Community Building: Increasing involvement, outreach and partnerships through the talent and time of its residents, agencies and businesses	TRANSFORMATION STRATEGY GOAL OVERLAP:	Lakeshore Economy: Enhance the vibrancy and collective positive attitude of downtown
COMMITTEE	Organization		



PROJECTED EXPENSES	\$ 18,000		ACTUAL EXPENSE	\$ -		FUNDED PROJECTS	To be tracked and reported annually
PROJECTED REVENUES	\$ 15,000		ACTUAL Investment	\$ -		CLOSED PROJECTS	
TASK	LEAD	DUE DATE	DATE COMPLETED	PROJECTED COST/REVENUE	ACTUAL COST/REVENUE	POTENTIAL PARTNERS	STATUS / NOTES
Assessment & Outreach <ul style="list-style-type: none"> Survey Needs list Outreach event 	Committee	Commence 2/25	ongoing	\$5400		Social media channels, Orion review, Orion Living, schools, business lists	
Recruitment <ul style="list-style-type: none"> Social media campaign Monthly events Partner focus 	Exec Dir Staff Committee	As presented	ongoing	\$0.00			Budget & Grant itself
Projects <ul style="list-style-type: none"> Identify Champion Implement 	Exec Dir Committee	On-going		Matching funds \$2000-10,000			Grant match dependent on scope
Recognition	ALL	On-going					Coordinate with MSOC
Metrics	Committee	On-going					Committee Agenda
Data Tracking	Exec Dir	On-going					Board “minute for mission”
Report	Exec Dir	On-going					
STATEMENT OF GAMS OBJECTIVE	Committee	On adoption work plan		NA			STATEMENT/RESOLUTION ATTACHED (Y/N)?

FOCUS PROJECTS	Champion	First Planning Date	Adopted Schedule On:	Next Steps	Funding Needs	NOTES	
Seasonal Beautification							
Volunteer Recognition							
Participant growth							
Event Support <ul style="list-style-type: none"> • Clean up day • Flower Fair • DOL • Witches Night • Halloween Extravaganza • Sing & Stroll 							
Street TEAM							
Photo/Video Library							
Social Media							

MAIN STREET WORK PLAN 2025-2026

PROJECT:	Façade Grant		
BRIEF DESCRIPTION:	To provide financial assistance to business & property owners interested in rehabilitation their street facing elements of their buildings		
OBJECTIVE:	To create great first impressions, revitalize downtown properties and encourage private investment		
MEASURE OF SUCCESS:	increase in rehabbed buildings, decrease in vacancies, increase in usage of existing parking, increase in retail/pedestrian focused businesses		
MAIN STREET POINT:	Design	MAIN STREET POINT OVERLAP:	Economic Vitality
TRANSFORMATION STRATEGY GOAL:	Lakeshore Economy: Increase investment in sense of place, impressions, and historic balance	TRANSFORMATION STRATEGY GOAL OVERLAP:	Community Building: Strengthen the message that Downtown is cool, historic, and open for business and investment
COMMITTEE	Design		



PROJECTED EXPENSES	\$ 24,000		ACTUAL EXPENSE	\$ -		FUNDED PROJECTS	To be tracked and reported annually
PROJECTED Investment	\$48,000-70,000		ACTUAL Investment	\$ -		CLOSED PROJECTS	
TASK	LEAD	DUE DATE	DATE COMPLETED	PROJECTED COST/REVENUE	ACTUAL COST/REVENUE	POTENTIAL PARTNERS	STATUS / NOTES
Promote Program	Asst Dir/Marketing	Commence 2/25	ongoing	\$1200		Social media channels, Orion review, Orion Living	
Preliminary Review Façade Grant Application	Exec Dir	As presented		\$0.00			Budget & Grant itself
Set Project Budget	Exec Dir	On-going		Matching funds \$2000-10,000			Grant match dependent on scope
Make any changes update to grant & application if needed	Exec Dir	On-going					Coordinate with MSOC for design support
Formal Application Review/Consideration	Committee	On-going					Committee Agenda
Work with building owners to implement façade improvement	Exec Dir	On-going					Facilitate through planning and building
Coordinate Local review and permitting	Exec Dir	On-going					
Approve funding	Board	On-going					
Audit plan, permit, bills, invoices. Approve match grant	Exec Dir	On-going		Up to \$10,000/ grant			Projects must be completed in accord with program guidelines
Submit for AP/Check	staff	completion project review					
Present Match Funds	Staff/Board	scheduled		\$140		ONTV/Review	Secure signed contract, marketing placement, photo diary
STATEMENT OF GAMS A OBJECTIVE	Committee	On adoption work plan		NA			STATEMENT/RESOLUTION ATTACHED (Y/N)?

KNOWN PROJECTS							
	Contact Date	Application Review	Coordinated Services	Next Steps	WHO	NOTES	
Prime Time Comics							
Elizabeth's Salon							
EXP							
Messy Design							

MAIN STREET WORK PLAN 2025-2026



PROJECT: Refuse Enclosures							
BRIEF DESCRIPTION:		To solve both an aesthetic and property valuation issue caused by the blight effect of unkempt and visible trash areas and unfinished/broken enclosures.					
OBJECTIVE:		Enclose existing areas and implement a unified plan for managing trash					
MEASURE OF SUCCESS:		Consolidation of pickup day, elimination of on street trash, closed and hidden reuse enclosures					
MAIN STREET POINT:		Design		MAIN STREET POINT OVERLAP:		Economic Vitality	
TRANSFORMATION STRATEGY GOAL:		Lakeshore Economy: Protect property valuation and attract more walkable guests and customers.		TRANSFORMATION STRATEGY GOAL OVERLAP:		Community Building: Create a more welcoming atmosphere for residents and guests, add color, art and other attributes to garbage	
COMMITTEE		Design					
PROJECTED EXPENSES		\$ 46,000		ACTUAL EXPENSE	\$ -	FUNDED PROJECTS	To be tracked and reported annually
PROJECTED REVENUE		Capital Projects		ACTUAL REVENUE	\$ -	CLOSED PROJECTS	
TASK	LEAD	DUE DATE	DATE COMPLETED	PROJECTED COST/REVENUE	ACTUAL COST/REVENUE	POTENTIAL PARTNERS	STATUS / NOTES
Review of present conditions/issues/needs	Committee	Commence 2/25	ongoing	\$1000 (any studies)		MDOT, LOLA, Village, SEMCOG	
Preliminary project concepts	Committee	As presented		\$0.00			Include funding objectives
Select Project/Budget	Committee/ Exec Dir	On-going		Identify budget and capital acct.			Grant match dependent on scope
Coordinate CIP planning and annual budget app.	Exec Dir	On-going					Coordinate with MSOC for design support
Define and prepare permit/applications	Exec Dir	On-going					Committee Agenda
Board Authorization	Board	On-going					Facilitate through planning and building
Approve funding	Board	On-going					
Audit plan, permit, bills, invoices. Approve match funds where applic.	Exec Dir	On-going					Projects must be completed in accord with program guidelines
Submit for AP/Check	staff	completion project review					
Project management	Staff/Board	scheduled		\$140		ONTV/Review	Secure signed contract, marketing placement, photo diary
STATEMENT OF GAMSА OBJECTIVE	Committee	On adoption work plan		NA			STATEMENT/RESOLUTION ATTACHED (Y/N)?

CONCEPT PROJECTS							
	Open Date	Needs Assessment	Next Steps	WHO		NOTES	
Paint Doors and add closures at Lapeer/Front							
Build a shared trash enclosure behind 35 Front St							
Coordinate plan for 40 Flint St.							
Work with carrier(s) to unify collection day							
Add alternative garbage containers throughout downtown							
l							



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

TOPIC Committee Meeting Dates – Adopt and Publish

BACKGROUND BRIEF:

The DDA follows the Four Point Approach, the nationally successful program of Main street America as coordinated and supported by Oakland County Main Street. We have maintained a “depends on the schedule” approach to meeting dates and schedule. To make the appointment of serving on a committee, and to make the work more purposeful to our mission, we are recommending the adoption of a permanent schedule and publishing the schedule.

The committees are almost entirely recommending bodies and therefore not exclusively subject to OMA, but this does provide our organization a stronger sense of compliance. Most significantly, this forces the need and ask of staff, committee members and board to actively recruit and maintain awareness of the operational tasks of the committees.

FINANCIAL IMPACT: This is a means of reporting information and gathering performance information as requested by the Board and therefore no financial action is intended at this time.

RECOMMENDED MOTION:

Discussion and input of the Board shall be noted.

Move to adopt the Statement of Purpose and Committee Meeting Dates for Economic Vitality, Design, Promotion and Organization.

Design Committee

Purpose: “Design means getting Main Street into top physical shape. Capitalizing on its best assets - such as historic buildings and pedestrian-oriented streets – is just part of the story. An inviting atmosphere, created through attractive window displays, parking areas, building improvements, street furniture, signs, sidewalks, street lights, and landscaping, conveys a positive visual message about the commercial district and what it has to offer. Design activities also include instilling good maintenance practices in the commercial district, enhancing the physical appearance of the commercial district by rehabilitating historic buildings, encouraging appropriate new construction, developing sensitive design management systems, and long-term planning.” (National Main Street Center definition)

The physical attributes of a property clearly have an impact on the value of that property. How it looks, how well it is maintained and/or preserved, what kinds of changes have been made over the years; all of these things directly influence the property’s value. The Design Committee is commonly tasked with addressing the physical appearance of the structures in the downtown as part of the overall strategy to maintain the physical environment and increase property values. Members of the Design Committee work with the local design review board to preserve the historic architecture, they offer incentives to property owners to help offset rehabilitation costs, they work with planners and landscape architects to design pedestrian-friendly streetscapes that welcome shoppers and visitors and generally make the downtown a more attractive, pleasant place to spend time.

2026 COMMITTEE MEETING DATES

The Second Tuesday of every month at 1:00pm @ the DDA Office

118 N Broadway St., Lake Orion MI 48362

January 13

February 10

March 10

April 14

May 12

June 9

July 14

August 11

September 8

October 13

November 10

December 8

Promotions Committee

Purpose: “Promotion sells a positive image of the commercial district and encourages consumers and investors to live, work, shop, play and invest in the Main Street district. By marketing a district’s unique characteristics to residents, investors, business owners, and visitors, an effective promotional strategy forges a positive image through advertising, retail promotional activity, special events, and marketing campaigns carried out by local volunteers. These activities improve consumer and investor confidence in the district and encourage commercial activity and investment in the area.” (National Main Street Center definition)

Though commonly called the “party people”, this committee serves a vital, yet often misunderstood function in the revitalization movement. Downtowns were once the social and cultural epicenter for communities. Shopping was not just a chore, it was a social event. Though that era has passed and our way of life is different now, that social aspect of the downtown cannot be forsaken. Festivals, special events, and retail events all serve to bring people back into the downtown to have fun. They associate this positive experience with the physical environment. Children build memories of going to the ice cream shop with their grandparents, just as their grandparents did fifty or more years ago, and while intangible, that indelible link is crucial to the downtown revitalization movement. Promotions in the downtown bring back the sense of community that many people are craving in today’s society.

2026 COMMITTEE MEETING DATES

The First Thursday of every month at 10:00am @ the DDA Office
118 N Broadway St., Lake Orion MI 48362

January No Mtg

February 5

March 5

April 2

May 7

June 4

July 2

August 6

September 3

October 1

November 5

December 3

Economic Vitality Committee

Purpose: “Economic Restructuring strengthens a community’s existing economic assets while expanding and diversifying its economic base. The Main Street program helps sharpen the competitiveness of existing business owners and recruits compatible new businesses and new economic uses to build a commercial district that responds to today’s consumers’ needs. Converting unused or under-used commercial space into economically productive property also helps boost the profitability of the district.” (National Main Street Center definition)

Economic factors affecting properties include things like interest rates, since the cost of borrowing money directly influences the overall value of the property. The Economic Vitality (EV) Committee is typically involved in creating an economic atmosphere that helps current and prospective property owners purchase, improve and maintain their properties. Members of the ER Committee continually monitor market and demographic information so businesses can better position themselves to increase sales, keeping abreast of financing tools and incentives to help building owners maximize their investment, essentially restructuring the economic environment to stabilize and increase property values. In addition to retaining existing businesses, the EV committee is responsible for recruiting new businesses to meet the needs identified by the community in the market analysis

2026 COMMITTEE MEETING DATES

The Fourth Thursday of every month at 11:30am @ the DDA Office
118 N Broadway St., Lake Orion MI 48362

January 22
February 26
March 26
April 23
May 28
June 25
July 23
August 27
September 24
October 22
November 19
December No Mtg

Organization Committee

Purpose: Organization involves getting everyone working toward the same goal and assembling the appropriate human and financial resources to implement a Main Street revitalization program. A governing board and standing committees make up the fundamental organizational structure of the volunteer-driven program. Volunteers are coordinated and supported by a paid program director as well. This structure not only divides the workload and clearly delineates responsibilities but also builds consensus and cooperation among the various stakeholders.” (National Main Street Center definition)

Organization Committee members promote the downtown organization’s message of revitalization, and they typically are the front-line ambassadors that keep the critical public-private partnerships in good health with regular conversation and coordination. Members of this committee are charged with organizing and maintaining a regular volunteer corps to implement the vision established by the community for downtown revitalization efforts. They are also charged with raising funds and building a budget to accomplish the organization’s tasks, as well as coordinating with local political leadership to regularly share information about the Downtown so that both public and private sectors can work together to advance priorities for the Downtown.

2026 COMMITTEE MEETING DATES

The Second Wednesday of every month at 10:00am @ the DDA Office
118 N Broadway St., Lake Orion MI 48362

January 14

February 11

March 11

April 8

May 13

June 10

July 8

August 12

September 9

October 14

November 17

December 9



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20 2025

TOPIC Executive Directors Report

BACKGROUND BRIEF:

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

FINANCIAL IMPACT:

None

RECOMMENDED MOTION

Receive and file the Executive Directors Report for January 2026.

Annual Report on Status of Tax Increment Financing Plan

<p>Send completed form to: Treas-StateSharePropTaxes@michigan.gov</p>	<p>Village of Lake Orion</p>	<p>TIF Plan Name</p>	<p>For Fiscal Years ending in</p>
<p>Issued pursuant to 2018 PA 57, MCL 125.4911 Filing is required within 180 days of end of authority's fiscal year ending in 2024. MCL 125.4911(2)</p>	<p>Downtown Development Authority</p>	<p>Amendment 4</p>	<p>2025</p>
<p>Year AUTHORITY (not TIF plan) was created:</p>		<p>1985</p>	
<p>Year TIF plan was created or last amended to extend its duration:</p>		<p>2020</p>	
<p>Current TIF plan scheduled expiration date:</p>		<p>2039</p>	
<p>Did TIF plan expire in FY24?</p>		<p>no</p>	
<p>Year of first tax increment revenue capture:</p>		<p>1986</p>	
<p>Does the authority capture taxes from local or intermediate school districts, or capture the state education tax? Yes or no?</p>		<p>no</p>	
<p>If yes, authorization for capturing school tax:</p>		<p></p>	
<p>Year school tax capture is scheduled to expire:</p>		<p></p>	

Revenue:	Tax Increment Revenue	\$	-
	Property taxes - from DDA millage only	\$	-
	Interest	\$	15,806
	State reimbursement for PPT loss (Forms 5176 and 4650)	\$	14,034
	Other income (grants, fees, donations, etc.)	\$	476,362
	Total	\$	506,202

Tax Increment Revenues Received

		Revenue Captured	Millage Rate Captured
From counties		\$ 197,171	
From cities		\$ -	
From townships		\$ 212,639	
From villages		\$ 544,247	
From libraries (if levied separately)		\$ -	
From community colleges		\$ 63,538	
From regional authorities (type name in next cell)	oakland transit	\$ 40,530	
From regional authorities (type name in next cell)	huron clint metro arks	\$ 8,830	
From regional authorities (type name in next cell)			
From local school districts-operating		\$ -	
From local school districts-debt		\$ -	
From intermediate school districts		\$ -	
From State Education Tax (SET)		\$ -	
From state share of IFT and other specific taxes (school taxes)		\$ -	
Total		\$ 1,066,955	

Expenditures

Administration - Personnel	\$	224,274
Administration - Non Personnel	\$	63,548
Organization	\$	7,016
Promotion	\$	29,042
Economic Development	\$	59,072
Design	\$	38,980
Capital Outlay	\$	27,229
Public Space Grant	\$	300,789
Debt Service (Bond)	\$	421,000
	\$	-
	\$	-
Transfers to other municipal fund (list fund name)	\$	60,000

Transfers to other municipal fund (list fund name)	Public Infrastructure		\$	142,453
	Transfers to General Fund		\$	131,534
		Total	\$	1,504,937
Total outstanding non-bonded Indebtedness	Principal		\$	-
	Interest		\$	-
Total outstanding bonded Indebtedness	Principal		\$	4,535,000
	Interest		\$	1,787,750
		Total	\$	6,322,750
Bond Reserve Fund Balance			\$	-
Unencumbered Fund Balance			\$	-
Encumbered Fund Balance			\$	-

CAPTURED VALUES

PROPERTY CATEGORY	Current Taxable Value	Initial (base year) Assessed Value	Captured Value	Overall Tax rates captured by TIF plan	
				Overall Tax rates captured by TIF plan	TIF Revenue
Ad valorem PRE Real	\$ 21,615,490	\$ 3,293,360	\$ 18,322,130	24.8423000	\$455,163.85
Ad valorem non-PRE Real	\$ 28,897,380	\$ 6,011,240	\$ 22,886,140	24.8423000	\$568,544.36
Ad valorem industrial personal	\$ -	\$ -	\$ -	0.0000000	\$0.00
Ad valorem commercial personal	\$ 1,484,450	\$ 926,100	\$ 558,350	24.8323000	\$13,865.11
Ad valorem utility personal	\$ -	\$ -	\$ -	0.0000000	\$0.00
Ad valorem other personal	\$ 1,185,920	\$ 2,700	\$ 1,183,220	24.8323000	\$29,382.07
IFT New Facility real property, 0% SET exemption	\$ -	\$ -	\$ -	0.0000000	\$0.00
IFT New Facility real property, 50% SET exemption	\$ -	\$ -	\$ -	0.0000000	\$0.00
IFT New Facility real property, 100% SET exemption	\$ -	\$ -	\$ -	0.0000000	\$0.00
IFT New Facility personal property on industrial class land	\$ -	\$ -	\$ -	0.0000000	\$0.00
IFT New Facility personal property on commercial class land	\$ -	\$ -	\$ -	0.0000000	\$0.00
IFT New Facility personal property, all other	\$ -	\$ -	\$ -	0.0000000	\$0.00
Commercial Facility Tax New Facility	\$ -	\$ -	\$ -	0.0000000	\$0.00
IFT Replacement Facility (frozen values)	\$ -	\$ -	\$ -	0.0000000	\$0.00
Commercial Facility Tax Restored Facility (frozen values)	\$ -	\$ -	\$ -	0.0000000	\$0.00
Commercial Rehabilitation Act	\$ -	\$ -	\$ -	0.0000000	\$0.00
Neighborhood Enterprise Zone Act	\$ -	\$ -	\$ -	0.0000000	\$0.00
Obsolete Property Rehabilitation Act	\$ -	\$ -	\$ -	0.0000000	\$0.00
Eligible Tax Reverted Property (Land Bank Sale)	\$ -	\$ -	\$ -	0.0000000	\$0.00
Exempt (from all property tax) Real Property	\$ -	\$ -	\$ -	0.0000000	\$0.00
Total Captured Value		\$ 10,233,400	\$ 42,949,840	Total TIF Revenue	\$1,066,955.39

EXECUTIVE DIRECTOR REPORT

Matthew Gibb – Executive Director

January 20, 2026



I. NEWS AND UPDATES

a. PA 57 ANNUAL REPORT TO TREASURY

This annual report was compiled from the assessing and treasurer’s office information gathered at both the county and township level. It reflects the actual dollars captured, the allocation of millage against pre and post valuations, and dividing the tax source into categories. It’s important to note that both the DDA and the Village exceeded expectations in taxation (if your interested in that sort of thing). Attached and posted on our website.

b. LUMBER YARD @ PAINT CREEK GRANT ACCOUNTING

A detailed report has been given to Oakland County. I am attaching the accounting portion of the report as the binder is hundreds of pages long with all invoicing and other publicly kept record of PO and accounts payable. The entire binder will be present at the meeting and is reviewable in the office.

c. ACCREDITATION

As detailed elsewhere in January’s agenda, a detailed self assessment and multiple records were prepared and submitted for national review. Copies are included in the packet and a binder used during the review will be at the meeting and made available in the office.

d. THINGS WE GOT DONE

All contracts for the third party tenants/users are done and out for review
Final concept site plan for the Lumber Yard is done
Reports for Trip Generation, Fire Suppression, Load Capacity and other details are completed for lumber yard.
New salt boxes were built, filled and put out.
I gave up on trying to keep the GFI plugs working, but did address that on multiple occasions.
Incomplete, but approved and contracted work was coordinated and scheduled amongst the contractors at the lumber yard, including the final interior cement so we can hold 2025 pricing.

II. TO DO'S AND MORE

**Staffing considerations
Committee Recruitment
Lumber Yard Site PUD
Electrical Service RFP**

Respectfully Submitted,
Matthew Gibb
gibb@downtownlakeorion.org
(248) 464-0307

06/05/2025	ENC	PO	FENCING	25-4703		(4,500.00)
06/05/2025	AP	INV	COMERICA BANK		3,228.29	(3,228.29)
06/05/2025	AP	INV	SUMMARY AP 06/05/2025		4,500.00	(4,500.00)
06/18/2025	AP	INV	SUMMARY AP 06/18/2025	25-4735	280.00	(280.00)
06/30/2025	ENC	PO	JUNE CREDIT CARD REFUND	25-4829		(339.20)
06/30/2025	ENC	PO	PEA DEMO POST ON 6/30/25	25-4835		(315.63)
06/30/2025	ENC	PO	TAX BILL POST ON 6/30/25	25-4840		(6.31)
06/30/2025	ENC	PO	JUNE CC windows and materials	25-4865		(6,752.54)
06/30/2025	ENC	PO	REIMBURSEMENTS	25-4887		(1,148.00)
06/30/2025	ENC	LIQ	MAY CREDIT CARD	25-4659		(339.20)
06/30/2025	AP	INV	COMERICA BANK	JUNE 2025	(339.20)	339.20
07/02/2025	ENC	PO	JUNE CREDIT CARD REFUND	25-4819		(339.20)
07/02/2025	ENC	CANC	JUNE CREDIT CARD REFUND	25-4819		339.20
07/02/2025	ENC	PO	JUNE CREDIT CARD REFUND	25-4820		(339.20)
07/02/2025	ENC	CANC	JUNE CREDIT CARD REFUND	25-4820		339.20
07/09/2025	ENC	PO	SIGNS	25-4870		148.40
07/09/2025	ENC	CANC	SIGNS	25-4870		(148.40)
07/09/2025	ENC	PO	SUMMARY AP 07/10/2025 TOPOGRAPHICAL SURV	25-4871	13,815.63	(13,815.63)
07/18/2025	ENC	PO	SOIL EROSION INV 00230-2025-CO	25-4922		(218.75)
07/18/2025	ENC	PO	PORTABLES	25-4924		(125.00)
07/23/2025	ENC	PO	DEMO - STRUCTURE REPAIR	25-4949		(32,500.00)
08/06/2025	ENC	PO	MATT CC	25-5017		(3,401.25)
08/07/2025	ENC	PO	PORTABLES	25-5021		(125.00)
09/03/2025	ENC	PO	REIMB MATT GIBB	25-5101		(59.89)
09/03/2025	ENC	PO	Equioment/Materials	25-5099		(1,511.39)
09/04/2025	ENC	PO	PORTABLES	25-5117		(125.00)
09/15/2025	ENC	PO	PROPOSAL (HOLD CHECK FOR PICKUP PLE	25-5140		(24,500.00)
09/17/2025	ENC	PO	EQUIPMENT	25-5169		(120.15)
09/17/2025	ENC	PO	INVASIVE SPECIES CONTROL	25-5173		(750.00)
09/17/2025	ENC	PO	VARIOUS DEMO, REPAIR CHANGE ORDER(S	25-5174		(36,196.84)
09/24/2025	ENC	PO	SHIPPING CONTAINERS FOR STORAGE ON	25-5188		(3,255.00)
10/02/2025	ENC	PO	PORTABLES	25-5231		(125.00)
10/06/2025	ENC	PO	PERMIT NO. 000230-2025-CO	25-5248		(218.75)
10/07/2025	ENC	PO	MATT CC SEPTEMBER	25-5273		(3,386.28)
10/09/2025	ENC	PO	WATER BILL 215 S BROADWAY	25-5277		(292.88)
10/29/2025	ENC	PO	INV 167664	25-5347		(120.15)
10/30/2025	ENC	PO	Comerica	25-5356		(125.00)
11/05/2025	ENC	PO	CC NOV	25-5384		(1,368.00)
11/17/2025	ENC	PO	INV 25-0193	25-5408		(4,500.00)
11/20/2025	ENC	PO	FINAL - PHASE 1 RESTORATION	25-5451		(11,691.98)
12/03/2025	ENC	PO	PORTABLES	25-5506		(125.00)
12/31/2025				END BALANCE		-427634.37
05/01/2024			301-901-971-000 Capital Outlay - Buildings	BEG. BALANCE		
07/01/2024			24-25 Fiscal Year Begin			0.00
07/01/2025			25-26 Fiscal Year Begin			0.00
07/23/2025	ENC	PO	PAIBT LUMBER YARD RENOVATION	25-4950		(4,850.08)
07/23/2025	ENC	PO	DESIGN SPECIFICATIONS PKG	25-4948		(22,824.00)
08/06/2025	ENC	PO	Comerica	25-5017		(3,392.35)
11/20/2025	ENC	PO	BOARD APPROVED - CONCRETE (LY)	25-5448		(36,260.00)
11/20/2025	ENC	PO	FINAL - PHASE 1 RESTORATION	25-5451		(135,236.54)
12/31/2025				END BALANCE		-202562.97

BOND FUNDS USED **\$630,197.34**



DDA ACTION SUMMARY SHEET

MEETING DATE: January 20, 2026

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

January 20, 2026



Completed Events/Activities:

Dec. – Feb. - **Storybook Stroll** – Partnership with Orion Township Public Library. Winter story was launched in December. Around 13 businesses are hosting the children's book pages.

Dec. 13 – **Polar Express Trolley Experience**, 11 am - 3 pm. The event was a sell-out. We had to rent a trolley due to the usual trolley being out for repairs. We have a list to say thank you to:

Wee Bean Coffee Co. for being at check in with hot cocoa, Epique Realty was this year's "North Pole", Lake Orion Bike and Adventure Co for providing the cookies this year at the North Pole, Fire Chief Ryan Allen for being the Conductor, Keri N. for being Mrs. Claus, and a special thank you to our 25 volunteers, many from our Lake Orion Community Schools.

Jan. 1 – **Resolution Run** in Downtown Lake Orion. They average 250 runners per year. The opportunity was offered to DDA merchants to include items in the runners' packets at no cost. Wayne Haney Farm Bureau Insurance stepped forward to take advantage and connect with the runners. Thank you!

Upcoming Events:

Feb. 7 – **Ice Fest** – 10am – 4pm. Chilly Chili Cook-Off Competition, 12- 3:30 pm, award announcement at 4 pm. See workplan.

ShopOCMainStreets.com

Now – June 2026 – ShopOCMainStreets.com \$100K challenge. Even online, you can still support local. Shop at ShopOCMainStreets.com and stores, DDAs and shoppers all get a chance to win money based on top shopping amounts during Challenge dates.

We encourage businesses to get listed on the site, if only to direct them to their website. It is another marketing tool for them to use. Contact the Lake Orion DDA office for more information.

E-Newsletters

Via SnapRetail!: 5 e-newsletters created (Business/Consumer) Avg. open rate: 27.6%

Social Media Stats

Downtown Lake Orion Facebook:

Followers: 11,415 (added 223)

Visits: 1.4K (The number of times our page or profile was visited.)

Engagement/Interactions: Previous: 2.7K; Current: 504 (The number of likes or reactions,

saves, comments, shares and replies on our content, including ads. Content can include formats such as posts, stories, reels and more.)

Views: Previous: 239.8K; Current: 61.2K (The number of times our content was played or displayed. Content includes videos, posts, stories and ads.)

Downtown Lake Orion Business Group on Facebook:

141 members (no change)

Illuminators Private Volunteer Facebook Page:

17 members

Illuminators Public Page:

58 members

Instagram:

4,419 (added 9); Views: 1.6K; Reach: 471; Interactions: 14

X (formerly Twitter):

1,538 (dropped 3). Since we do not pay for this site, it doesn't provide us analytics.

Save the Dates:

Downtown LOdown: Monday, January 26, 2026, 4-5:30 pm, Rise Lounge

Light Up Lake Orion – A Night to Shine! Volunteer awards and a sneak peek of upcoming events. January 28, 2026, 6 – 8 pm, Sick Town Hall

Bagels & Brews Morning Mixer– Chamber Members only. Feb. 3, 8 – 9am at Messy Designs, 12 N. Broadway St., Lake Orion, MI 48362

Wine by the Bottle Ribbon Cutting and Networking event by Orion Area Chamber of Commerce on Feb. 12, 4 – 6 pm, Ribbon Cutting at 4:30 pm. Location: 146 S. Broadway, Lake Orion, MI 48362

Main Street Open House: Learn about the Main Street program. March 26, 4 pm – 8 pm, Lake Orion DDA office.

Respectfully Submitted,

Janet Bloom

bloom@downtownlakeorion.org

cell (248) 320-7599

Downtown LOdown **January 26 at 4pm**



 **Monday, Jan. 26**

 **4 - 5:30 PM**



Rise Lounge
45 W. Flint St.
Lake Orion, MI 48362



Business and property owners are encouraged to "Stay in the Know" and tap into "Peer to Peer" help at our monthly Downtown LOdown meetings!

Downtown LOdowns are held the 4th Monday of the month.

Each meeting will feature current topics to help your business along with updates and information from the DDA Staff.

Our ask:

**This month, invite your business neighbor to join you!
The more participation, the better!**

RSVP at 248-693-9742 or office@downtownlakeorion.org www.DowntownLakeOrion.org   

You're Invited!

Light-Up Lake Orion

A Night to Shine

All Lake Orion Neighbors
are Welcome!

Appetizers, Pizza, Pop, and Cash Bar

Wednesday, January 28th, 2026

6pm - 8pm

Sick Town Hall

Join us for an evening of awards and celebration of downtown Lake Orion and the Illuminators, who power-up our community through their time and talents.

Plus, get a sneak peek of upcoming Lake Orion events!



RSVP: office@downtownlakeorion.org, or call 248.693.9742 downtownlakeorion.org



Downtown Lake Orion is your Winter fun destination!

- Ice Carvings
- Ice Carving Demonstrations
- Chilly Chili Cook-Off Competition (12-4 pm) Tickets release this week!
- Jack Frost Scavenger Hunt for Kids
- Ice Fest Business Bingo
- Selfie Station
- Flint St. Alley Warming Hub

Enjoy viewing ice sculptures and watching ice carving demonstrations!
 Watch for ways to win prizes and Downtown Dollars with our shopping activities!
 New this year is the Chilly Chili Cook-Off Competition with participating restaurants!
 Vote for the People's Choice award winner!

BE PART of Ice Fest! Sponsorships are still available! See link in post.

www.downtownlakeorion.org



SPONSORSHIP OPPORTUNITIES

Ice Fest is back, and we're inviting local businesses to be part of the magic

WHY PARTICIPATE?

- **Showcase Your Business:** Be seen by the community
- **Celebrate Winter Fun:** Support a beloved seasonal tradition
- **Strengthen Community:** Bring families together downtown
- **Support Local:** Help boost our downtown businesses

Click the link in the caption to Sponsor today!



MAIN STREET WORK PLAN 2025-2026

PROJECT:	Ice Fest 2026		
BRIEF DESCRIPTION:	An event in the winter to help increase downtown attendance, visibility, and sales for our downtown merchants and dining establishments.		
OBJECTIVE:	To collaboratively promote downtown businesses and attractions, driving increased foot traffic and fostering sustainable economic growth within the district.		
SUCCESS:	An increase in foot traffic and participants downtown, who stay and benefit the business and dining district(s)		
MAIN STREET POINT:	Promotion	MAIN STREET POINT OVERLAP:	Economic Vitality
TRANSFORMATION STRATEGY GOAL:	Community Building: Increasing involvement, outreach and shared benefit from promotion and planning of events downtown. Partnered with Sunrise Rotary for Ice Golf Cup Challenge for cross-promotion.	TRANSFORMATION STRATEGY GOAL OVERLAP:	Lakeshore Economy: Driving an increase in customers and visibility of storefronts, dining establishments, and public spaces to attract people to stay and return to downtown.
COMMITTEE	Promotion		



PROJECTED EXPENSES	\$5645		ACTUAL EXPENSE	\$ -		FUNDED PROJECTS	To be tracked and reported annually
PROJECTED REVENUES	\$9,825		ACTUAL Investment	\$ -		CLOSED PROJECTS	
TASK	LEAD	DUE DATE	DATE COMPLETED				STATUS / NOTES
Foundational Strategy <ul style="list-style-type: none"> Vision/Goals Target Visitor Budget / Resource 	Promotions Committee/Staff Org. Committee on volunteer resources	Prefer at least 90 days prior to scheduled event					Include core Main Street objective, and strategic plan goals
Sponsor Engagement <ul style="list-style-type: none"> Shared Partner Value Prop Engagement Plan 	Promotions Committee/Staff	1/22/2026					Budget/Sponsor Benefits
Marketing Mix <ul style="list-style-type: none"> Value/Location Source/Placement Brand Positioning 	Promotions Committee/Staff	2/10/2026					Dependent on budget
Implementation <ul style="list-style-type: none"> Tools Media/Content Calendar 	Staff	2/10/2026					Coordinate with media sources
Metrics	Staff	2/10/2026					Social media, ONTV, WDIV, and website
Data Tracking	Staff	2/10/2026					Input from businesses, restaurants and MSOC Placer.ai
Report	Staff	2/17/2026					Assistant Director's Event Report
Contracts	Staff	Prefer 60 days out from service					

STATEMENT OF GAMSA OBJECTIVE	Promotions Committee	On adoption work plan					STATEMENT/RESOLUTION ATTACHED (Y/N)?
REPORT VERSION:	1/17/2026						
FOCUS SCHEDULE	Champion	First Planning Date	Adopted Schedule On:	Next Steps	Deadline	STATUS	NOTES
SEEMYLEGACY SPONSOR SOFTWARE							
SeeMyLegacy Sponsor input for Event	Janet	11/2/2025	12/16/2025	Distribute link through socials, emails, e-newsletters, and website.	12/18/25	COMPLETE	
SeeMyLegacy Sponsor Link Distribution: X, IG, FB, FB Bus. Owners Page, Website, email contacts, e-newsletters	Janet	1/9/2026	1/9/2026	Continue sponsorship push.	Based on sponsorship, latest 2/5/2026	ONGOING	Sponsorship deadlines based on benefit production schedules.
Sponsor calls, emails, meetings, follow-up to link distribution	Janet	1/9/2026	1/9/2026	Continue sponsorship push.	Based on sponsorship, latest 2/5/2026	ONGOING	Previous sponsors for 2024 and 2025 were contacted, board, committees,
Sponsor Benefits Spreadsheet	Janet	12/16/2026	1/9/2026	n/a	1/9/2026	COMPLETE	Execute sponsor benefits as outlined in spreadsheet.
Sponsor thank you's	Janet	1/16/2026	1/16/2026	Create and schedule	2/9/2026	TO DO	Schedule thank you emails to event sponsors
Create invoices/sponsor contract and obtain logos/designs from those not using SeeMyLegacy	Janet/Matt G.	1/9/2026	1/9/2026	n/a	As needed	ONGOING	Currently: Lake Orion Review (design/logo rec'd).
Sponsor Fulfillment packages	Janet	1/9/2026	1/9/2026	Collect sponsor benefit items per sponsor	2/13/2026	TO DO	Provide proof of performance for event sponsor benefits and event wrap up details and metrics.
SOCIAL MEDIA							
Facebook – create event page	Janet	1/8/2026	1/8/2026		1/8/2026	COMPLETE	
Facebook – create event cover	Janet	1/9/2026	1/9/2026		1/9/2026	COMPLETE	
Facebook – create graphics	Janet	1/9/2026	1/9/2026		2/7/2026	ONGOING	As sponsors, businesses, and restaurants add in, more graphics to be created.
Facebook – create posts	Janet	1/9/2026	1/9/2026		2/7/2026	ONGOING	As graphics are created, more posts to be created.
IG – create graphics	Janet	1/9/2026	1/9/2026		2/7/2026	ONGOING	As sponsors, businesses, and restaurants add in, more graphics to be created.
IG – create posts	Janet	1/9/2026	1/9/2026		2/7/2026	ONGOING	As graphics are created, more posts to be created.
X – create event cover	Janet	1/15/2026	1/15/2026		1/15/2026	COMPLETE	
X-create posts	Janet	1/9/2026	1/9/2026		2/7/2026	ONGOING	As sponsors, businesses, and restaurants add in, more graphics to be created.

Facebook Bus. Owners Group Page – create posts	Janet	1/9/2026	1/9/2026		2/7/2026	ONGOING	As sponsors, businesses, and restaurants add in, more graphics to be created.
Reach out to other social media sites that market events	Janet	1/19/2026	1/15/2026		1/19/2026	TO DO	
WEBSITE							
Add Graphic on homepage	Matt G.	1/8/2026	1/8/2026		1/8/2026	COMPLETED	Linked to Facebook event page
Create event page	Matt G.	1/19/2026	1/19/2026		1/19/2026	TO DO	A comprehensive list of activities and instructions for participation.
E-NEWSLETTERS							
Business e-newsletters-save the date	Janet	11/8/2026	11/8/2026		1/9/2026	COMPLETE	Began 11/8/2026 and were included in issues after until 1/9/2026.
Consumer e-newsletters – save the date	Janet	11/8/2026	11/8/2026		1/13/2026	COMPLETE	Began 11/8/2026 and were included in issues after until 1/13/2026.
Business e-newsletters – event information	Janet	1/9/2026	1/9/2026		2/7/2026	ONGOING	Weekly distribution of information and a reminder issue day before event.
Consumer e-newsletters – event information	Janet	1/13/2026	1/13/2026		2/7/2026	ONGOING	Weekly distribution of information and a reminder issue day before event.
MEDIA							
Ad-Rite M-24 billboard-create graphic	Janet	1/12/2026	1/12/2026		1/14/2026	COMPLETE	Board launched 1/14/2026. Obtained photo of board and posted on Facebook.
Lake Orion Review ads	Janet/LOR	1/15/2026	1/15/2026		2/5/2026	ONGOING	Insertion dates: 1/15,1/22, 1/29, and 2/5
WDIV	Janet	1/8/2026	1/8/2026	Confirm restaurant/set date	2/6/2026	Confirmed for in-studio cooking demo for Chilly Chili Cook-Off Competition.	DDA/Chilly Chili Restaurant Participant to be in studio.
Press Release	Janet	1/19/2026	1/19/2026		1/19/2026	TO DO	Sending to over 35 media/social media outlets
Orion Living Magazine	Janet	10/1/2025	10/1/2025		Oct. 2025	COMPLETE	Event was listed in the DDA two pages in the OLM winter magazine (distributed end of Nov. 2025)
Orion Chamber of Commerce Calendar	Janet	1/19/2026	1/19/2026		1/19/2026	TO DO	Add event to Chamber Calendar
ONTV – on-air event interview	Janet/ONTV	1/9/2026	1/9/2026		1/20/2026	TO DO	Booked with ONTV to do segment on Ice Fest - interview
ONTV – pre-event video promo	Janet/ONTV	1/9/2026	1/9/2026		1/14/2026	ONGOING	Distribution began on socials on 1/14/2026
Peachjar (ads via email to parents of LOCS students)	Janet	1/9/2026	1/9/2026			REVIEW	Review current pricing before booking
ADVERTISING/MARKETING							
Posters – create and distribute	Janet	1/22/2026	1/22/2026		1/22/2026	TO DO	Close sponsors, then create.Deliver to downtown businesses, library, Village Hall, and Township Hall
Banners (qty 2)	Janet	1/22/2026	1/22/2026		1/22/2026	TO DO	Locations: Lumberyard property and by Autozone along M24; sponsors close 1/21 – then send graphic for production.
A-frames	Janet	1/22/2026	1/22/2026		1/22/2026	TO DO	For main intersection
Map of ice blocks, demos, and all activities, restrooms	Janet	1/22/2026	1/22/2026		1/22/2026	TO DO	Create and distribute to businesses and socials and website

OPERATIONS							
Special Event Application (along with accompanying documents)	Emily	1/8/2026	1/8/2026		1/8/2026	COMPLETE	Emily sent to Village Hall for processing.
Budget	Janet	1/9/2026	1/9/2026		1/17/2026	COMPLETE	
EQUIPMENT							
Restrooms	Janet/Fire Station	1/16/2026	1/16/2026	Add to map	1/22/2026	TO DO	Patrons will be directed via map to utilize the public restrooms at the Fire Station. Check for "restroom" signage in storage unit. Hours of facilities: 6:30 am – 8 pm.
Cinderblock placement (DPW)	Janet/DPW/Matt G.	1/8/2026	1/8/2026		Morning of 2/6	TO DO	DPW to place cinderblocks for ice carvings per map (Matt G. to request) Janet to cover cinderblocks with cloth and attach signage
Additional trash boxes	Janet	1/14/2026	1/14/2026		2/6/2026	TO DO	Priority Waste providing; map out location needs based on Chilly Chili participant locations.
Electric/Power	Janet/Matt G./DPW	1/23/2026	1/23/2026		2/5/2026	TO DO	Anticipated need would be Flint St. Alley (verify light bulbs are all working – replace as needed). Illuminating ice blocks – confirm available power.
Cones for carving demos	Janet/Chief Amundson	1/23/2026	1/23/2026		2/6/2026	TO DO	Ice Carver sets up safety perimeter, along with our pre-event placed cones. Have them placed morning of event for live carving areas.
Music/Lights	Janet/Matt G.	1/23/2026	1/23/2026		2/6/2026	TO DO	Activate Flint St. Alley with music/lights along with Ice Golf Cup Challenge hole set up
ICE CARVER							
Clear Cut Ice - orders	Janet/Clinton	1/15/2026	1/15/2026		1/22/2026	ONGOING	Submit orders as they arrive. First batch sent 1/15. Next order sent 1/16.
Clear Cut Ice – drop off/demos	Janet/Clinton	1/15/2026	1/15/2026		2/6/2026	TO DO	Anticipated drop off to be 2/6/2026 (based on weather conditions). Demos – will schedule time based on # of live carving orders. Review safety areas and plans for live demos.
VOLUNTEERS							
Sign Up Genius (SUG) - schools	Janet	1/16/2026	1/16/2026		1/19/2026	TO DO	Send to volunteer contact at LO High School to help fill shifts.
Sign Up Genius (SUG) – general	Janet	1/16/2026	1/16/2026		1/19/2026	TO DO	Send SUG links to: X, IG, FB DLO, FB Bus. Owners, and FB Illuminators
Illuminators/Org. Comm.	Janet/Org. Committee	1/16/2026	1/16/2026		1/19/2026	TO DO/ONGOING UNTIL FILLED	Work with Org. Committee to work to fill volunteer spots, both pre-event, event, and post-event. Include onsite photography at event (create shot list – ie sponsor banners, etc.)
Volunteer Coordinator at Event	Janet/Org. Committee	1/16/2026	1/16/2026		1/30/2026	TO DO	Manage sign in/sign out of volunteers, answer questions, etc.
Volunteer Nametags	Janet	1/16/2026	1/16/2026		2/6/2026	TO DO	Have available for Volunteer Coordinator, include blank ones for last minute help.

Volunteer Thank you's	Janet/Org. Committee	1/16/2026	1/16/2026		2/10/2026	TO DO	Send thank you's to those who helped via email through SUG and any outside of SUG.
ICE GOLF CUP CHALLENGE							
Golf Gear Pick Up at Sick Town Hall	Janet	12/1/2025	12/1/2025		1/22/2026	TO DO	RSVP'd attendance.
Plan Golf Hole Set Up	Janet/Matt G.	1/19/2026	1/19/2026		1/19/2026	TO DO	Warming hub with fire pits, patio heaters, treats.
EVENT SUPPLIES							
Flint St. Alley Warming Hub/Golf Hole	Janet/Matt G.	1/16/2026	1/16/2026		1/30/2026	TO DO	Fire pits, wood, fat wood, lighters, patio heaters, tent plus weights, tables, chairs, volunteer supplies, (s'mores/hot cocoa); DDA event calendars, OLM, Illuminators info., and March Main Street Open House flyers.
Laminate pre-carved ice block signs – hole/punch/match with pins	Volunteer/Org. Committee	1/16/2026	1/16/2026		1/30/2026	TO DO	SUG volunteer task
Signage for Live Carving Demos	Janet	1/16/2026	1/16/2026		1/29/2026	TO DO	Type will be based on design/size. Work with Clinton on options.
JACK FROST KIDS SCAVENGER HUNT							
Partner with downtown business to place Jack Frost item	Janet	1/16/2026	1/16/2026		1/22/2026	TO DO	
Create signage/instructions on how to participate	Janet	1/16/2026	1/16/2026		1/23/2026	TO DO	
Winter Fun Packets	Janet/Volunteers	1/16/2026	1/16/2026		1/23/2026	TO DO	Grab left over Ice Fest kids items from last year and package in gift bags for kids who find Jack Frost (must show photo at DDA booth at Flint St. Alley) to obtain prize. While supplies last.
ICE FEST BUSINESS BINGO							
Sign up businesses to be placed on bingo card	Janet	1/16/2026	1/16/2026		1/23/2026	TO DO	
Create a FAQ/instruction page per participating business (so it runs smooth day of)	Janet	1/16/2026	1/16/2026		1/19/2026	TO DO	Provide stampers per business to use to mark cards.
Create bingo card and bingo card graphic	Janet	1/16/2026	1/16/2026		1/19/2026	TO DO	
Completed cards from patrons	Janet/DDA booth onsite	n/a	n/a		2/7/2026	n/a	Patrons turn in completed bingo cards to the DDA tent at Flint St. Alley for a chance to win Downtown Dollars. Winner to be announced 2/10/2026 – get photo of winner for socials.
SELFIE STATION							
DDA Ice Block/Selfie Station	Janet/Clear Cut Ice	1/9/2026	1/9/2026		1/19/2026	TO DO	DDA ice block will be created in a "Welcome to Downtown Lake Orion" style for selfies. A QR code will be at the Selfie Station to have photo takers

							submit their photos for a chance to win Downtown Dollars.
CHILLY CHILI COOK-OFF COMPETITION							
Sign up restaurants (restaurants provide 300, 2 oz servings)	Janet	1/9/2026	1/9/2026		1/17/2026	TO DO	Signed up: Bitter Tom's, Irish Tavern, Rise Lounge, Sick Town Hall, and The Mess Hall (American Legion) Still working to book: Johnny Black's, Leo's, Waterside Social/Wine Social, Valentino's, Sagebrush, Rio on Main, and Wendy's
Tickets	Janet/Emily	1/9/2026	1/9/2026		1/19/2026	TO DO	Tickets are already loaded in ShopOCMainStreets.com – release once restaurants confirmed. \$20 each.
Create voting cards	Janet	1/9/2026	1/9/2026		1/19/2026	TO DO	1 per person with ticket – they will judge each chili until 3:30 pm then volunteers at the restaurants will collect all judging forms and deliver to DDA tent at Flint St. Alley. Janet will tabulate winner, gather rest. Reps and announce winner and present award at Flint St. Alley. (Coordinate with Rotary for possibly at Wine Social)
Create award	Janet	1/9/2026	1/9/2026		1/23/2026	TO DO	Use award as social media story at each restaurant leading up to event
Graphics for restaurants	Janet	1/9/2026	1/9/2026		1/20/2026	TO DO	Each restaurant is asked to help market out this event and their participation utilizing our created graphic to send via email lists and their social media sites and, if possible, their websites.
Social media campaign	Janet	1/9/2026	1/9/2026		1/20/2026	TO DO	Build interest through a campaign of visiting the restaurants – get a few words from chefs – make it a true battle for the best.
WDIV	Janet	1/9/2026	1/9/2026			TO DO	SEE MEDIA
Supplies	Janet	1/9/2026	1/9/2026		1/23/2026	TO DO	Create list and order/purchase (2 oz cups, spoons)
METRICS/MEASUREMENTS							
Track attendance/participation	Janet/Volunteers	1/9/2026	1/9/2026		2/7/2026	TO DO	Track turned in bingo cards, track QR family photo submittals, track chili ticket sales, track Flint St. Alley attendance,
MSOC – Placer.ai	Janet/Erick	1/9/2026	1/9/206	Contact Erick to plan for reports of prior years and this year's #s	2/10/2026	TO DO	Get Placer.ai data from previous years and ask for report for this year (track attendance and locations customers are coming from)
EVENT WRAP UP REPORT							
Create report for DDA board packet	Janet	1/9/2026	1/9/2026		2/17/2026	TO DO	Tally metrics and measurements along with revenue and expense information.