



## **AGENDA**

### **REGULAR MEETING OF THE DOWNTOWN DEVELOPMENT AUTHORITY BOARD**

**Tuesday, July 15, 2025**

**6:30 PM**

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

**(248) 693-8391 ext. 102**

**1. Call to Order**

**2. Roll Call and Determination of Quorum**

**3. Approval of Minutes**

A. Approval of DDA Regular Meeting Minutes of June 17, 2025

**4. Approval of Agenda**

**5. Call to the Public**

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

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

**6. Consent Agenda**

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

A. Financial Reports

**7. Financial Matters**

A. Bill Approval

**8. New and Old Business**

**A.** Presentation - Daniel Pavlich - Silversmith/Gantt Chart

**B.** Lumber Yard - Retail Structure Option

**9. Reports, Resolutions and Recommendations**

**A.** Executive Director Report

**B.** Lumber Yard Progress Report

**C.** Assistant Director's Report

**10. Board Comments and Training Feedback**

**11. Next Regular Meeting - August 19, 2025**

**12. Adjournment**

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

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



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## DDA SUMMARY SHEET

**MEETING DATE:** July 15, 2025

**TOPIC:** Approval of DDA Regular Meeting Minutes of June 17, 2025

**RECOMMENDED MOTION:** To approve the Downtown Development Authority Board Regular Meeting Minutes of June 17, 2025.



# MINUTES

## REGULAR MEETING OF THE DOWNTOWN DEVELOPMENT AUTHORITY BOARD

Tuesday, June 17, 2025

6:30 PM

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

(248) 693-8391 ext. 102

### 1. Call to Order

The June 17, 2025 Downtown Development Authority Regular Meeting was called to order at 6:30 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 Alaina Campbell

#### ABSENT

Board Member Sally Medina  
Board Member Chris Barnett  
President Teresa Rutt

#### STAFF PRESENT

Executive Director Matt Gibb  
Assistant Director Janet Bloom  
Village Manager Darwin McClary  
Clerk/Treasurer Sonja Stout

### 3. Approval of Minutes

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

**MOTION** made by Treasurer Shell, Seconded by Secretary Lorant to approve the Downtown Development Authority Board Regular Meeting Minutes of May 20, 2025.

**VOTING YEA:** Burgess, Caruso, Shell, Lorant, Coe, Campbell,

**VOTING NAY:** None

**ABSENT:** Barnett, Medina, Rutt  
**MOTION:** Carried

**4. Approval of Agenda**

**MOTION** made by Treasurer Shell, Seconded by Secretary Lorant to approve the agenda as amended with the addition of item 5A. Presentation by Oakland County.

**VOTING YEA:** Burgess, Caruso, Shell, Lorant, Coe, Campbell,

**VOTING NAY:** None

**ABSENT:** Barnett, Medina, Rutt

**MOTION:** Carried

**5. Call to the Public**

**A. Presentation by Oakland County- Main Street Oakland County**

Erick Phillips from Main Street Oakland County (MSOC) provided a brief overview of the MSOC accreditation process and formally presented the MSOC Accreditation Award. A group photo was taken following the presentation of the award.

**6. Consent Agenda**

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

**MOTION** made by Treasurer Shell, Seconded by Secretary Lorant to approve the June 17, 2025 Consent Agenda by one vote, as presented.

**VOTING YEA:** Burgess, Caruso, Shell, Lorant, Coe, Campbell,

**VOTING NAY:** None

**ABSENT:** Barnett, Medina, Rutt

**MOTION:** Carried

**A. Financial Reports**

**MOTION** made by Treasurer Shell, Seconded by Secretary Lorant to receive and file the financial reports for May 2025.

**VOTING YEA:** Burgess, Caruso, Shell, Lorant, Coe, Campbell,

**VOTING NAY:** None

**ABSENT:** Barnett, Medina, Rutt

**MOTION:** Carried

**7. Financial Matters**

**A. Bill Approval**

**MOTION** made by Treasurer Shell, Seconded by Secretary Lorant to approve the disbursements in the amount of \$199,301.20 for May 2025.

**VOTING YEA:** Burgess, Caruso, Shell, Lorant, Coe, Campbell,

**VOTING NAY:** None

**ABSENT:** Barnett, Medina, Rutt

**MOTION:** Carried

**B. Lumber Yard Reconstruction - Change Orders**

**MOTION** made by Treasurer Shell, Seconded by Secretary Lorant to approve four (4) change orders, as presented, pursuant and under the contract with Mickey’s Construction in the total amount of \$44,816.90, payable from GL 248-726-980-001 Public Spaces Grant – General.

**VOTING YEA:** Burgess, Caruso, Shell, Lorant, Coe, Campbell,

**VOTING NAY:** None

**ABSENT:** Barnett, Medina, Rutt

**MOTION:** Carried

**C. Lumber Yard – Continuing Demolition Cost**

**MOTION** made by Treasurer Shell, Seconded by Board Member Coe to approve three (3) invoices for land improvement, as presented, pursuant and under the ongoing contracts with the identified vendors in the total amount of \$6,765.63 payable from GL 301- 901-950-000 Demolition and Land Improvement.

**VOTING YEA:** Burgess, Caruso, Shell, Lorant, Coe, Campbell,

**VOTING NAY:** None

**ABSENT:** Barnett, Medina, Rutt

**MOTION:** Carried

**8. New and Old Business**

**A. Façade Grant Application – Lake Orion Bike & Adventure Co.**

**MOTION** made by Treasurer Shell, Seconded by Board Member Coe to approve the Façade Grant application received from the Lake Orion Bike & Adventure Co. for a Level 2 Historic Preservation Grant with matching funds up to \$8,000.

**VOTING YEA:** Burgess, Caruso, Shell, Lorant, Coe, Campbell,

**VOTING NAY:** None

**ABSENT:** Barnett, Medina, Rutt

**MOTION:** Carried

**B. Additional Credit Card - Resolution**

**MOTION** made by Treasurer Shell, Seconded by Secretary Lorant to approve and adopt a RESOLUTION TO ISSUE A SECOND CREDIT CARD FOR USE BY ASSISTANT DIRECTOR in the form attached hereto and direct the delivery of the Resolution to the Village for action.

**VOTING YEA:** Burgess, Caruso, Shell, Lorant, Coe, Campbell,

**VOTING NAY:** None

**ABSENT:** Barnett, Medina, Rutt

**MOTION:** Carried

**C. Paving Repair(s) - Tarr lot**

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

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

**D. Strategic Plan 2025-2030- - Final Draft**

**MOTION** made by Treasurer Shell, Seconded by Vice Chairperson Caruso to accept the final draft Strategic Plan 2025-2030 and refer the final draft to the organizational and economic committee for final discussion, comment and supplement, with the Final Strategic Plan being brought back to the Board at its July 20205 meeting for possible adoption.

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

**E. Schedule Annual Review(s) - Executive Staff**

**MOTION** made by Treasurer Shell, Seconded by Secretary Lorant to Schedule separate, annual assessment and review of performance for each of the Executive Director And Assistant Director by the Board’s Executive committee on or before July 31, 2025, to include a recommendation on compensation for fiscal year 25-26.

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

**F. Adoption of Downtown Development Authority 2025-26 Budget**

**MOTION** made by Treasurer Shell, Seconded by Board Member Coe to approve and adopt the 2025-2026 Budget for the Lake Orion Downtown Development Authority, with authority of the Downtown Development director to make clerical changes as presented.

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

**G. Village Budgetary Resolution – PA57 Administrative Fee**

**MOTION** made by Treasurer Shell, Seconded by Secretary Lorant to receive and file A RESOLUTION ASSESSING A REASONABLE PRO RATA SHARE OF THE FUNDS OF THE LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY FOR THE COST OF HANDLING AND AUDITING THE FUNDS OF THE DDA AGAINST THE FUNDS OF THE AUTHORITY PURSUANT TO MCL 125.4228(2).

- VOTING YEA:** Burgess, Caruso, Shell, Lorant, Coe, Campbell,
- VOTING NAY:** None

**ABSENT:** Barnett, Medina, Rutt  
**MOTION:** Carried

**H. Village Budgetary Contract – Public Safety**

**MOTION** made by Treasurer Shell, Seconded by Secretary Lorant to approve the ENHANCED PUBLIC SAFETY AGREEMENT, as presented, authorizing the Executive Director to prepare an executory copy and sign the same on behalf of the DDA.

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

**9. Reports, Resolutions and Recommendations**

**A. Assistant Director’s Report**

Assistant Director Bloom provided a brief overview of her Assistant Director’s Report, which was included in the meeting packet. Her update highlighted upcoming events and activities, social media statistics, and recent grant submissions. Board members engaged in a discussion regarding different strategies for advertising upcoming events and the optimal timing for those promotional efforts.

**MOTION** made by Treasurer Shell, Seconded by Board Member Coe to receive and file Assistant Director’s Report.

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

**B. Executive Directors Report**

Executive Director Gibb provided a brief update on his Executive Director’s Report, noting the repair of the four-wheeler, the issue of dying trees in the downtown area, and malfunctioning GFI circuits. Board members held a discussion regarding the dying trees and shared various ideas for addressing the issue.

**MOTION** made by Treasurer Shell, Seconded by Secretary Lorant to receive and file the Executive Director’s report.

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

**MOTION** made by Chairperson Burgess, Seconded by Vice Chairperson Caruso in the matter of the DDA Mainstreet nonprofit is referred to the DDA Executive Director to work with Treasurer Shell to bring back two alternative names and by-law structures at the July DDA meeting.

**VOTING YEA:** Burgess, Caruso, Shell, Lorant, Coe, Campbell,

**VOTING NAY:** None  
**ABSENT:** Barnett, Medina, Rutt  
**MOTION:** Carried

**C. Lumber Yard Progress Report**

The DDA Executive Director provided an update on the Lumber Yard project, stating that the DDA will begin utilizing more of the bond funds. He also noted that site plan meetings with the Village are scheduled in preparation for upcoming permit approvals, and that a topographical survey will be conducted in the coming weeks.

**MOTION** made by Treasurer Shell, Seconded by Board Member Coe to receive and file the progress report dated June 17, 2025.

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

**10. Board Comments and Training Feedback**

Board Member Lorant declined to provide feedback.

Treasurer Shell commended Janet and Matt for their hard work and offered his expertise with bond and nonprofit matters.

Vice Chairperson Caruso expressed his appreciation to Janet and Matt and shared his satisfaction with the completion of the budget.

Board Member Coe expressed his support for retaining the Jubilee event downtown and commented on the related street closures.

Chairperson Burgess thanked Janet and Matt, acknowledged their assistance with the downtown flowers, and expressed appreciation to the Village Manager for his support on the budget.

Village Manager McClary announced an upcoming Joint Planning Commission meeting to be held at the Township building regarding the public hearing for Eastport Village

**11. Next Regular Meeting - July 15, 2025**

**12. Adjournment**

**MOTION** made by Treasurer Shell, Seconded by Board Member Coe to adjourn the June 17, 2025 Downtown Development Authority Board Regular Meeting.

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

The June 17, 2025 Downtown Development Authority Board Regular meeting adjourned at 8:09 PM.

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Debbie Burgess  
Chairperson

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Sonja Stout  
Clerk/Treasurer

Date Approved: as presented on July 15, 2025.



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## DDA ACTION SUMMARY SHEET

**MEETING DATE:** July 15, 2025

**TOPIC** Financial Reports

**See attached Reports:**

**248 Fund Balance Sheet** (General DDA Fund)

**301 Fund Balance Sheet** (DDA Bond 2023 Fund)

**404 Fund Balance Sheet** (Property Acquisition Fund)

**Revenue and Expenditure Report**

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

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

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

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 06/30/2025

% Fiscal Year Completed: 100.00

Section 6, Item A.

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

GL Number	Description	24-25 Amended Budget	YTD Balance 06/30/2025	Activity For 06/30/2025	Available Balance 06/30/2025	% Bdgt Used
<b>Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND</b>						
<b>Account Category: Revenues</b>						
<b>Department: 000 REVENUE</b>						
248-000-402-000	Current Real Property Taxes	987,129.00	1,016,897.40	35,476.38	(29,768.40)	103.02
248-000-402-100	Property Tax - Twp DDA Capture	0.00	0.00	0.00	0.00	0.00
248-000-405-000	Property Tax - Personal	0.00	0.00	0.00	0.00	0.00
248-000-412-000	Property Tax - DPPT P/Y & C/Y	0.00	3,154.02	0.00	(3,154.02)	100.00
248-000-441-000	Local Community Stabilization Share	15,000.00	14,033.68	0.00	966.32	93.56
248-000-445-000	Penalties & Interest on Taxes	2,000.00	0.00	0.00	2,000.00	0.00
248-000-539-000	State Grants	43,500.00	500.00	0.00	43,000.00	1.15
248-000-540-000	COUNTY/FEDERAL PROGRAM GRANTS PUBLIC	595,823.00	446,867.25	0.00	148,955.75	75.00
248-000-582-000	Intergovernment - Police	0.00	0.00	0.00	0.00	0.00
248-000-664-000	Interest Earned	2,500.00	14,399.73	2.29	(11,899.73)	575.99
248-000-671-999	Appropriation from Fund Balanc	0.00	0.00	0.00	0.00	0.00
248-000-673-000	Gain/Loss on Sale of Assets	0.00	0.00	0.00	0.00	0.00
248-000-676-404	Transfer From Prop Acq Fund	169,436.00	0.00	0.00	169,436.00	0.00
248-000-676-592	Reimbursement -Admin Fee - w&S	0.00	0.00	0.00	0.00	0.00
248-000-681-000	Reimburse - Insurance Claims	0.00	5,406.89	0.00	(5,406.89)	100.00
248-000-683-000	Reimbursements-Other	0.00	0.00	0.00	0.00	0.00
248-000-685-000	Sponsorships	35,000.00	2,515.00	0.00	32,485.00	7.19
248-000-685-100	Transportaion Sponsorship	17,500.00	0.00	0.00	17,500.00	0.00
248-000-686-000	Downtown Events	18,500.00	5,466.19	0.00	13,033.81	29.55
248-000-686-002	Flower Fair Revenue	0.00	0.00	0.00	0.00	0.00
248-000-686-003	New Year Resolution Run Revenue	0.00	0.00	0.00	0.00	0.00
248-000-686-004	ST EVENT REVENUE	1,500.00	0.00	0.00	1,500.00	0.00
248-000-686-005	ST SPONSOR REVENUE	1,500.00	0.00	0.00	1,500.00	0.00
248-000-686-006	EV CHARGING	500.00	1,529.49	0.00	(1,029.49)	305.90
248-000-687-000	Merchandise Sales	1,000.00	0.00	0.00	1,000.00	0.00
248-000-688-000	Gift Certificate Sales	500.00	3,375.00	0.00	(2,875.00)	675.00
248-000-692-000	Rent	0.00	0.00	0.00	0.00	0.00
248-000-694-000	Miscellaneous	2,500.00	9,548.45	0.00	(7,048.45)	381.94
248-000-696-000	PROCEEDS FROM THE SALE OF BONDS/NOTE	0.00	0.00	0.00	0.00	0.00
Total Dept 000 - REVENUE		1,893,888.00	1,523,693.10	35,478.67	370,194.90	80.45
Revenues		1,893,888.00	1,523,693.10	35,478.67	370,194.90	80.45
<b>Account Category: Expenditures</b>						
<b>Department: 260 GENERAL ACTIVITIES</b>						
248-260-701-000	Executive Director Wages	80,000.00	80,000.96	9,230.88	(0.96)	100.00
248-260-704-000	Wages - Administrative Coordinator	37,188.00	18,455.99	2,669.50	18,732.01	49.63
248-260-706-000	Asst. Executive Director wages	71,000.00	71,000.80	8,192.40	(0.80)	100.00
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	5,100.06	1,865.62	299.94	94.45
248-260-711-013	OVERTIME	0.00	0.00	0.00	0.00	0.00
248-260-715-000	Social Security	14,810.00	13,353.67	1,679.81	1,456.33	90.17
248-260-716-000	Health Insurance- Medical	12,000.00	24,269.24	2,955.82	(12,269.24)	202.24
248-260-717-000	Life & Disability Insurance	1,320.00	2,259.12	149.90	(939.12)	171.15
248-260-718-000	Dental Insurance	770.00	598.76	85.22	171.24	77.76
248-260-719-000	Pension	5,632.00	7,612.08	546.16	(1,980.08)	135.16
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 06/30/2025

% Fiscal Year Completed: 100.00

Section 6, Item A.

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

GL Number	Description	24-25 Amended Budget	YTD Balance 06/30/2025	Activity For 06/30/2025	Available Balance 06/30/2025	% Bdgt Used
<b>Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND</b>						
<b>Account Category: Expenditures</b>						
<b>Department: 260 GENERAL ACTIVITIES</b>						
248-260-721-000	Vision Care	653.00	682.72	15.38	(29.72)	104.55
248-260-722-000	Worker's Comp. Insurance	0.00	0.00	0.00	0.00	0.00
248-260-801-000	CONTRACTUAL SERVICES- DOWNTOWN	10,000.00	9,972.50	285.00	27.50	99.73
248-260-801-002	CONTRACTUAL SERVICES - PUBLIC SAFETY	60,000.00	60,000.00	0.00	0.00	100.00
248-260-801-003	CONTRACT SERVICES - DPW FEE	30,000.00	30,000.00	0.00	0.00	100.00
248-260-801-004	CONTRACTUAL SERVICES - PA57	70,000.00	70,000.00	0.00	0.00	100.00
248-260-801-005	Contractual Services- Township	2,700.00	0.00	0.00	2,700.00	0.00
248-260-801-012	Contractual Services-Parking Code En	17,440.00	0.00	0.00	17,440.00	0.00
248-260-801-022	SPECIAL SERVICES- EVENTS	20,000.00	461.90	0.00	19,538.10	2.31
248-260-801-023	Contract Services-DPW event support	10,000.00	300.00	0.00	9,700.00	3.00
248-260-801-033	Contract Services-DPW snow removal	17,000.00	17,000.00	0.00	0.00	100.00
248-260-805-000	Audit Fees	4,490.00	3,979.00	0.00	511.00	88.62
248-260-810-000	Legal Services	8,000.00	5,733.25	0.00	2,266.75	71.67
248-260-823-000	Website/Software	6,000.00	3,683.41	996.78	2,316.59	61.39
248-260-823-001	Municipal Software	3,800.00	3,800.00	3,800.00	0.00	100.00
248-260-829-000	Planner Services	3,500.00	0.00	0.00	3,500.00	0.00
248-260-851-000	Telephone	3,500.00	3,489.25	90.37	10.75	99.69
248-260-900-000	Printing and Publication	500.00	0.00	0.00	500.00	0.00
248-260-920-000	Utilities	7,020.00	6,281.66	0.00	738.34	89.48
248-260-921-000	Municipal Street Lighting	13,740.00	13,476.81	20.93	263.19	98.08
248-260-930-000	Repair and Maintenance	0.00	0.00	0.00	0.00	0.00
248-260-930-002	Building Maintenance	1,100.00	306.87	0.00	793.13	27.90
248-260-940-000	Equipment Rental	750.00	102.03	0.00	647.97	13.60
248-260-941-000	Office Rent	16,800.00	16,800.00	0.00	0.00	100.00
248-260-942-000	Office Expenses	5,200.00	4,516.19	655.58	683.81	86.85
248-260-942-019	Covid Office Expenses	0.00	0.00	0.00	0.00	0.00
248-260-946-000	Credit Card Fees	100.00	0.00	0.00	100.00	0.00
248-260-955-001	Credit Card Fees	0.00	0.00	0.00	0.00	0.00
248-260-956-000	Dues & Miscellaneous	1,545.00	1,487.88	0.00	57.12	96.30
248-260-957-000	Education & Training	5,000.00	4,905.41	0.00	94.59	98.11
248-260-958-000	General Activities Misc	350.00	344.31	0.00	5.69	98.37
248-260-961-000	Tax Tribunal Refunds	0.00	0.00	0.00	0.00	0.00
248-260-962-000	Mileage	1,000.00	774.03	105.26	225.97	77.40
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	0.00	0.00	0.00	0.00	0.00
248-260-965-403	TRANSFER TO-DDA PUBLIC INFRASTRUCTUR	142,453.00	142,453.00	142,453.00	0.00	100.00
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	1,046.09	1,046.09	953.91	52.30
Total Dept 260 - GENERAL ACTIVITIES		692,761.00	624,246.99	176,843.70	68,514.01	90.11
<b>Department: 725 ORGANIZATION</b>						
248-725-822-000	Newsletter	1,800.00	130.00	0.00	1,670.00	7.22
248-725-824-000	Volunteer Recognition & Dvp.	1,000.00	675.21	0.00	324.79	67.52
248-725-825-000	Gift Certificate Redemption	5,000.00	5,016.00	550.00	(16.00)	100.32
248-725-826-000	Historic Celebration/Education	1,000.00	290.40	0.00	709.60	29.04
248-725-827-000	Awareness Program	1,500.00	694.16	0.00	805.84	46.28
248-725-864-000	Grant & Scholarship Distribution	0.00	0.00	0.00	0.00	0.00

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As of 06/30/2025

% Fiscal Year Completed: 100.00

Section 6, Item A.

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

GL Number	Description	24-25 Amended Budget	YTD Balance 06/30/2025	Activity For 06/30/2025	Available Balance 06/30/2025	% Bdgt Used
<b>Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND</b>						
<b>Account Category: Expenditures</b>						
<b>Department: 725 ORGANIZATION</b>						
248-725-881-000	Merchandise to Sell	1,000.00	0.00	0.00	1,000.00	0.00
Total Dept 725 - ORGANIZATION		11,300.00	6,805.77	550.00	4,494.23	60.23
<b>Department: 726 DESIGN</b>						
248-726-745-000	Beautification Supplies	2,600.00	1,394.09	0.00	1,205.91	53.62
248-726-746-000	Hanging Baskets	4,000.00	3,248.07	3,248.07	751.93	81.20
248-726-801-000	Contractual Services	5,500.00	3,080.24	0.00	2,419.76	56.00
248-726-843-000	Facade Program	23,680.00	14,273.96	0.00	9,406.04	60.28
248-726-845-000	Public Art Program	2,500.00	390.69	0.00	2,109.31	15.63
248-726-883-000	Banners and Holiday Lighting	10,000.00	6,844.08	0.00	3,155.92	68.44
248-726-975-001	Capital Outlay - Beautification	5,000.00	797.77	0.00	4,202.23	15.96
248-726-975-002	Capital Outlay - Streets	500.00	0.00	0.00	500.00	0.00
248-726-980-001	PUBLIC SPACE GRANT-GENERAL	353,619.00	138,988.67	0.00	214,630.33	39.30
248-726-980-002	PUBLIC SPACE GRANT-DEVELOPMENT & PRO	242,204.00	116,985.00	0.00	125,219.00	48.30
Total Dept 726 - DESIGN		649,603.00	286,002.57	3,248.07	363,600.43	44.03
<b>Department: 728 ECONOMIC DEVELOPMENT</b>						
248-728-801-000	Contractual Services	34,500.00	15,810.63	625.00	18,689.37	45.83
248-728-860-000	Trolley Expense	22,000.00	7,010.04	0.00	14,989.96	31.86
248-728-861-000	DATA AND METRICS	468.00	0.00	0.00	468.00	0.00
248-728-862-000	Training Materials	500.00	57.37	0.00	442.63	11.47
248-728-864-000	Grant & Scholarship Distribution	10,800.00	0.00	0.00	10,800.00	0.00
248-728-886-000	Marketing Materials	2,500.00	10.79	0.00	2,489.21	0.43
248-728-886-001	Blight Reduction	0.00	0.00	0.00	0.00	0.00
248-728-886-002	Social District	750.00	60.00	0.00	690.00	8.00
248-728-888-000	Brand Marketing	50,000.00	21,097.83	1,693.11	28,902.17	42.20
248-728-888-001	Contractual Services Brand Marketing	10,000.00	272.89	0.00	9,727.11	2.73
Total Dept 728 - ECONOMIC DEVELOPMENT		131,518.00	44,319.55	2,318.11	87,198.45	33.70
<b>Department: 729 PROMOTION</b>						
248-729-880-000	Event Promotion	2,000.00	404.71	0.00	1,595.29	20.24
248-729-880-001	Event Promo - Gazebo Series	11,000.00	10,600.00	0.00	400.00	96.36
248-729-880-004	Event Promo - Halloween Parade	2,500.00	1,240.10	0.00	1,259.90	49.60
248-729-880-005	Event Promo - Hmtwn/Holiday Vill	7,500.00	2,832.22	0.00	4,667.78	37.76
248-729-880-006	Event Promo - New Years Res. Run	0.00	0.00	0.00	0.00	0.00
248-729-880-007	Event Promo - Flower Fair	0.00	0.00	0.00	0.00	0.00
248-729-880-008	EVENT PROMO-ICE FEST	250.00	0.00	0.00	250.00	0.00
248-729-880-009	Event Promo-Lake Orion Love Shop to	0.00	0.00	0.00	0.00	0.00
248-729-880-010	PARTNERED EVENTS	1,500.00	0.00	0.00	1,500.00	0.00
248-729-880-011	Restaurant week	2,500.00	0.00	0.00	2,500.00	0.00
248-729-880-012	Sing & Stroll Tree Lighting	12,100.00	3,890.49	0.00	8,209.51	32.15
248-729-880-013	STRONGER TOGETHER-WINTER	2,500.00	384.76	0.00	2,115.24	15.39
248-729-880-014	STRONGER TOGETHER- SUMMER/FALL	1,500.00	128.14	0.00	1,371.86	8.54
248-729-880-015	Winter Activities	12,000.00	5,986.48	0.00	6,013.52	49.89
248-729-880-016	MISC EVENTS-OTHER	2,500.00	0.00	0.00	2,500.00	0.00
248-729-880-017	Movie Night	3,000.00	1,707.69	0.00	1,292.31	56.92
248-729-880-100	Stronger Together- smr fall	5,000.00	0.00	0.00	5,000.00	0.00
248-729-885-000	Port-A-Johns	2,600.00	1,007.50	0.00	1,592.50	

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% Fiscal Year Completed: 100.00

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GL Number	Description	24-25 Amended Budget	YTD Balance 06/30/2025	Activity For 06/30/2025	Available Balance 06/30/2025	% Bdgt Used
<b>Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND</b>						
<b>Account Category: Expenditures</b>						
<b>Department: 729 PROMOTION</b>						
248-729-895-000	Event Promo-Comm. Sponsorships	0.00	0.00	0.00	0.00	0.00
248-729-975-020	Capital Outlay Parks & rec	0.00	0.00	0.00	0.00	0.00
Total Dept 729 - PROMOTION		68,450.00	28,182.09	0.00	40,267.91	41.17
<b>Department: 730</b>						
248-730-253-885	Knox Box Grant Program	0.00	0.00	0.00	0.00	0.00
248-730-885-100	Knox Box Grant Program	2,000.00	0.00	0.00	2,000.00	0.00
248-730-931-000	Repair & Maintenance-Equipment	0.00	0.00	0.00	0.00	0.00
248-730-965-101	Transfer Out - General Fund	0.00	0.00	0.00	0.00	0.00
248-730-965-301	Interfund TRF 2023 DDA Bond Project	419,709.00	419,709.00	0.00	0.00	100.00
248-730-965-404	Transfer Out - DDA Property Acq Fund	0.00	0.00	0.00	0.00	0.00
248-730-965-592	Transfers To Water/Sewer Fund	0.00	0.00	0.00	0.00	0.00
248-730-975-000	Capital Outlay	53,075.00	12,786.68	0.00	40,288.32	24.09
248-730-975-003	DDA Capital Outlay	5,500.00	4,668.94	0.00	831.06	84.89
248-730-975-005	DDA Capital Outlay- wayfinding/Light	0.00	0.00	0.00	0.00	0.00
248-730-975-006	DDA Capital Outlay - Parking	0.00	0.00	0.00	0.00	0.00
248-730-975-009	Capital Outlay - Dumpsters	22,800.00	0.00	0.00	22,800.00	0.00
248-730-975-011	Capital Outlay - Trail Extensi	4,300.00	0.00	0.00	4,300.00	0.00
248-730-975-015	Capital Outlay- Outdoor Sound	0.00	0.00	0.00	0.00	0.00
248-730-975-020	Capital Outlay Parks & rec	0.00	0.00	0.00	0.00	0.00
248-730-992-000	Bond Principal	0.00	0.00	0.00	0.00	0.00
248-730-995-000	Bond Interest	0.00	0.00	0.00	0.00	0.00
Total Dept 730		507,384.00	437,164.62	0.00	70,219.38	86.16
Expenditures		2,061,016.00	1,426,721.59	182,959.88	634,294.41	69.22
<b>Fund 248 - DOWNTOWN DEVELOPMENT AUTHORITY FUND:</b>						
TOTAL REVENUES		1,893,888.00	1,523,693.10	35,478.67	370,194.90	80.45
TOTAL EXPENDITURES		2,061,016.00	1,426,721.59	182,959.88	634,294.41	69.22
NET OF REVENUES & EXPENDITURES:		(167,128.00)	96,971.51	(147,481.21)	(264,099.51)	
BEG. FUND BALANCE		356,811.12	356,811.12			
END FUND BALANCE		189,683.12	453,782.63			

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GL Number	Description	24-25 Amended Budget	YTD Balance 06/30/2025	Activity For 06/30/2025	Available Balance 06/30/2025	% Bdgt Used
<b>Fund: 301 DOWNTOWN DEV BOND PROJECT 2023</b>						
<b>Account Category: Revenues</b>						
<b>Department: 000 REVENUE</b>						
301-000-300-001	2023 Downtown Dev Tax Exempt Bond Pr	0.00	0.00	0.00	0.00	0.00
301-000-300-002	2023 Downtown Dev Tax Exempt Bond Pr	0.00	0.00	0.00	0.00	0.00
301-000-664-000	Interest Earnings	900.00	1,694.54	124.74	(794.54)	188.28
301-000-671-999	Appropriation from Fund Balanc	0.00	0.00	0.00	0.00	0.00
301-000-699-301	TRF in from DDA	419,709.00	419,709.00	0.00	0.00	100.00
Total Dept 000 - REVENUE		420,609.00	421,403.54	124.74	(794.54)	100.19
Revenues		420,609.00	421,403.54	124.74	(794.54)	100.19
<b>Account Category: Expenditures</b>						
<b>Department: 901 CAPITAL OUTLAY</b>						
301-901-805-000	Audit fees	0.00	0.00	0.00	0.00	0.00
301-901-930-000	Repair and Maintenance	0.00	0.00	0.00	0.00	0.00
301-901-950-000	Demolition & Land Improvement	500,000.00	207,734.92	8,008.29	292,265.08	41.55
301-901-956-000	Dues & Miscellaneous	0.00	0.00	0.00	0.00	0.00
301-901-971-000	Capital outlay - Buildings	0.00	0.00	0.00	0.00	0.00
Total Dept 901 - CAPITAL OUTLAY		500,000.00	207,734.92	8,008.29	292,265.08	41.55
<b>Department: 905 Downtown Dev Bond 2023</b>						
301-905-301-000	Bond Issuance Expense	0.00	0.00	0.00	0.00	0.00
301-905-731-000	2023 Bond Taxable Issuance Expenses	0.00	0.00	0.00	0.00	0.00
301-905-731-001	2023 Tax exempt Bond Issuance Expens	0.00	0.00	0.00	0.00	0.00
301-905-745-001	Property taxes-Orion Twp	0.00	0.00	0.00	0.00	0.00
301-905-920-000	utilities	0.00	0.00	0.00	0.00	0.00
301-905-992-003	2023 DDA BONDS TAXABLE PRINCIPAL SER	60,000.00	60,000.00	0.00	0.00	100.00
301-905-992-004	2023 DDA BONDS TAX EXEMPT PRINCIPAL	150,000.00	150,000.00	0.00	0.00	100.00
301-905-993-001	2023 DDA BOND TAXABLE INTEREST SERIE	76,910.00	76,909.00	0.00	1.00	100.00
301-905-993-002	2023 DDA TAX EXEMPT BOND INTEREST A	132,800.00	132,800.00	0.00	0.00	100.00
Total Dept 905 - Downtown Dev Bond 2023		419,710.00	419,709.00	0.00	1.00	100.00
Expenditures		919,710.00	627,443.92	8,008.29	292,266.08	68.22
<b>Fund 301 - DOWNTOWN DEV BOND PROJECT 2023:</b>						
TOTAL REVENUES		420,609.00	421,403.54	124.74	(794.54)	100.19
TOTAL EXPENDITURES		919,710.00	627,443.92	8,008.29	292,266.08	68.22
NET OF REVENUES & EXPENDITURES:		(499,101.00)	(206,040.38)	(7,883.55)	(293,060.62)	
BEG. FUND BALANCE		2,794,812.47	2,794,812.47			
END FUND BALANCE		2,295,711.47	2,588,772.09			

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GL Number	Description	24-25 Amended Budget	YTD Balance 06/30/2025	Activity For 06/30/2025	Available Balance 06/30/2025	% Bdgt Used
<b>Fund: 403 DDA PUBLIC INFRASTRUCTURE FUND</b>						
<b>Account Category: Revenues</b>						
<b>Department: 000 REVENUE</b>						
403-000-664-000	Interest Earnings	0.00	6.99	6.99	(6.99)	100.00
403-000-671-999	Appropriation from Fund Balanc	0.00	0.00	0.00	0.00	0.00
403-000-699-248	Interfund Transfer In - DDA	142,453.00	142,453.00	142,453.00	0.00	100.00
Total Dept 000 - REVENUE		142,453.00	142,459.99	142,459.99	(6.99)	100.00
Revenues		142,453.00	142,459.99	142,459.99	(6.99)	100.00
<b>Account Category: Expenditures</b>						
<b>Department: 901 CAPITAL OUTLAY</b>						
403-901-971-001	SIDEWALK IMPROVEMENT PROGRAM	0.00	0.00	0.00	0.00	0.00
403-901-971-002	PAINT CREEK BANK STABILIZATION PROJE	0.00	0.00	0.00	0.00	0.00
Total Dept 901 - CAPITAL OUTLAY		0.00	0.00	0.00	0.00	0.00
Expenditures		0.00	0.00	0.00	0.00	0.00
Fund 403 - DDA PUBLIC INFRASTRUCTURE FUND:						
TOTAL REVENUES		142,453.00	142,459.99	142,459.99	(6.99)	100.00
TOTAL EXPENDITURES		0.00	0.00	0.00	0.00	0.00
NET OF REVENUES & EXPENDITURES:		142,453.00	142,459.99	142,459.99	(6.99)	
BEG. FUND BALANCE		0.00	0.00			
END FUND BALANCE		142,453.00	142,459.99			

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

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GL Number	Description	24-25 Amended Budget	YTD Balance 06/30/2025	Activity For 06/30/2025	Available Balance 06/30/2025	% Bdgt Used
<b>Fund: 404 DDA PROPERTY ACQUISITION</b>						
<b>Account Category: Revenues</b>						
<b>Department: 000 REVENUE</b>						
404-000-664-000	Interest Earnings	0.00	113.28	8.32	(113.28)	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	113.28	8.32	(113.28)	100.00
Revenues		0.00	113.28	8.32	(113.28)	100.00
<b>Account Category: Expenditures</b>						
<b>Department: 901 CAPITAL OUTLAY</b>						
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
<b>Fund 404 - DDA PROPERTY ACQUISITION:</b>						
TOTAL REVENUES		0.00	113.28	8.32	(113.28)	100.00
TOTAL EXPENDITURES		169,436.00	0.00	0.00	169,436.00	0.00
NET OF REVENUES & EXPENDITURES:		(169,436.00)	113.28	8.32	(169,549.28)	
BEG. FUND BALANCE		169,464.87	169,464.87			
END FUND BALANCE		28.87	169,578.15			
<b>Report Totals:</b>						
TOTAL REVENUES - ALL FUNDS		2,456,950.00	2,087,669.91	178,071.72	369,280.09	84.97
TOTAL EXPENDITURES - ALL FUNDS		3,150,162.00	2,054,165.51	190,968.17	1,095,996.49	65.21
NET OF REVENUES & EXPENDITURES:		(693,212.00)	33,504.40	(12,896.45)	(726,716.40)	

BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION  
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GL Number	Description	YTD Balance 06/30/2024	06/30/2025
<b>Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND</b>			
<b>*** Assets ***</b>			
<b>Account Classification: CASH CHECKING</b>			
248-000-001-000	Cash	(1,871.27)	568.96
248-000-007-000	Payroll-checking	(5,482.17)	(250.00)
	CASH CHECKING	(7,353.44)	318.96
<b>Account Classification: CASH SAVINGS</b>			
248-000-002-000	Cash Savings	(29,110.87)	46,577.84
248-000-010-000	Investment/LGIP County Inv	407,318.87	421,414.22
248-000-011-000	Cash - Payroll Savings	3,426.12	(16,799.51)
	CASH SAVINGS	381,634.12	451,192.55
	<b>Total Assets</b>	374,280.68	451,511.51
<b>*** Liabilities ***</b>			
<b>Account Classification: ACCOUNTS PAYABLE</b>			
248-000-202-000	Accounts Payable	17,069.56	(3,706.32)
	ACCOUNTS PAYABLE	17,069.56	(3,706.32)
<b>Account Classification: ACCRUED AND OTHER LIAB</b>			
248-000-213-000	Accrued Property Tax - Est Chargebacks	400.00	400.00
248-000-228-001	FICA w/H - Medicare	0.00	(21.06)
248-000-228-002	FICA- Social Security withheld	0.00	(90.06)
248-000-232-000	Life Insurance Payable	0.00	149.90
248-000-247-000	Health Insurance	0.00	996.42
	ACCRUED AND OTHER LIAB	400.00	1,435.20
	<b>Total Liabilities</b>	17,469.56	(2,271.12)
<b>*** Fund Equity ***</b>			
<b>Account Classification: FUND BALANCE</b>			
248-000-390-000	Fund Balance - Unassigned	500,759.06	356,811.12
	FUND BALANCE	500,759.06	356,811.12
	<b>Total Fund Equity</b>	500,759.06	356,811.12
<b>Total Fund 248:</b>			
<b>TOTAL ASSETS</b>		374,280.68	451,511.51
<b>BEG. FUND BALANCE</b>		498,200.06	356,811.12
<b>+ NET OF REVENUES &amp; EXPENDITURES</b>		(143,947.94)	96,971.51
<b>+ FUND BALANCE ADJUSTMENTS</b>		2,559.00	0.00
<b>= ENDING FUND BALANCE</b>		356,811.12	453,782.63
<b>+ LIABILITIES</b>		17,469.56	(2,271.12)
<b>= TOTAL LIABILITIES AND FUND BALANCE</b>		374,280.68	451,511.51

BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION  
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GL Number	Description	YTD Balance 06/30/2024	06/30/2025
<b>Fund: 301 DOWNTOWN DEV BOND PROJECT 2023</b>			
<b>*** Assets ***</b>			
<b>Account Classification: CASH CHECKING</b>			
301-000-001-000	Cash	56,386.80	56,386.80
	CASH CHECKING	56,386.80	56,386.80
<b>Account Classification: CASH SAVINGS</b>			
301-000-002-000	CASH	2,756,748.32	2,541,285.23
301-000-011-000	Cash - Payroll Savings	0.00	(6,930.76)
	CASH SAVINGS	2,756,748.32	2,534,354.47
<b>Total Assets</b>		2,813,135.12	2,590,741.27
<b>*** Liabilities ***</b>			
<b>Account Classification: ACCOUNTS PAYABLE</b>			
301-000-202-000	Accounts Payable	17,934.78	0.00
	ACCOUNTS PAYABLE	17,934.78	0.00
<b>Account Classification: DUE TO INTERFUND</b>			
301-000-214-101	Due to General Fund	387.87	1,969.18
	DUE TO INTERFUND	387.87	1,969.18
<b>Total Liabilities</b>		18,322.65	1,969.18
<b>*** Fund Equity ***</b>			
<b>Account Classification: FUND BALANCE</b>			
301-000-390-000	Fund Balance - Unassigned	4,944,949.68	2,794,812.47
	FUND BALANCE	4,944,949.68	2,794,812.47
<b>Total Fund Equity</b>		4,944,949.68	2,794,812.47
<b>Total Fund 301:</b>			
<b>TOTAL ASSETS</b>		2,813,135.12	2,590,741.27
<b>BEG. FUND BALANCE</b>		4,944,949.68	2,794,812.47
<b>+ NET OF REVENUES &amp; EXPENDITURES</b>		(2,150,137.21)	(206,040.38)
<b>= ENDING FUND BALANCE</b>		2,794,812.47	2,588,772.09
<b>+ LIABILITIES</b>		18,322.65	1,969.18
<b>= TOTAL LIABILITIES AND FUND BALANCE</b>		2,813,135.12	2,590,741.27

BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION  
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GL Number	Description	YTD Balance 06/30/2024	06/30/2025
<b>Fund: 403 DDA PUBLIC INFRASTRUCTURE FUND</b>			
*** Assets ***			
<b>Account Classification: CASH SAVINGS</b>			
403-000-002-000	CASH	0.00	142,459.99
CASH SAVINGS		0.00	142,459.99
<b>Total Assets</b>		0.00	142,459.99
<b>Total Fund 403:</b>			
<b>TOTAL ASSETS</b>		0.00	142,459.99
<b>BEG. FUND BALANCE</b>		0.00	0.00
<b>+ NET OF REVENUES &amp; EXPENDITURES</b>		0.00	142,459.99
<b>= ENDING FUND BALANCE</b>		0.00	142,459.99
<b>+ LIABILITIES</b>		0.00	0.00
<b>= TOTAL LIABILITIES AND FUND BALANCE</b>		0.00	142,459.99

BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION  
Balance As of 06/30/2025

Section 6, Item A.

GL Number	Description	YTD Balance 06/30/2024	06/30/2025
<b>Fund: 404 DDA PROPERTY ACQUISITION</b>			
<b>*** Assets ***</b>			
<b>Account Classification: CASH SAVINGS</b>			
404-000-002-000	Cash-Savings-DDA Property Acq.	169,464.87	169,578.15
CASH SAVINGS		169,464.87	169,578.15
<b>Total Assets</b>		169,464.87	169,578.15
<b>*** Fund Equity ***</b>			
<b>Account Classification: FUND BALANCE</b>			
404-000-390-000	Fund Balance - Unassigned	326,840.70	169,464.87
FUND BALANCE		326,840.70	169,464.87
<b>Total Fund Equity</b>		326,840.70	169,464.87
<b>Total Fund 404:</b>			
<b>TOTAL ASSETS</b>		169,464.87	169,578.15
<b>BEG. FUND BALANCE</b>		326,840.70	169,464.87
<b>+ NET OF REVENUES &amp; EXPENDITURES</b>		(157,375.83)	113.28
<b>= ENDING FUND BALANCE</b>		169,464.87	169,578.15
<b>+ LIABILITIES</b>		0.00	0.00
<b>= TOTAL LIABILITIES AND FUND BALANCE</b>		169,464.87	169,578.15



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## DDA ACTION SUMMARY SHEET

**MEETING DATE:** July 15, 2025

**TOPIC** Bill Approval

**ATTACHED:**

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

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

**RECOMMENDED MOTION:** (Roll Call)

To approve disbursements in the amount of \$31,523.46 for June 2025.

**INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION**

EXP CHECK RUN DATES 06/01/2025 - 06/30/2025

POSTED AND UNPOSTED

OPEN AND PAID

Section 7, Item A.

GL Number	Invoice Line Desc	Vendor Name	Invoice Description	Amount	Check Number
<b>Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND</b>					
<b>Department: 000 REVENUE</b>					
248-000-228-000	Remittance	MICHIGAN DEPARTMENT OF TRE	Remittance Check	586.24	34780
248-000-228-000	Remittance	MICHIGAN DEPARTMENT OF TRE	Remittance Check	301.16	34824
248-000-228-001	Remittance	IRS	Remittance Check	104.67	392
248-000-228-001	Remittance	IRS	Remittance Check	104.67	392
248-000-228-001	Remittance	IRS	Remittance Check	105.76	393
248-000-228-001	Remittance	IRS	Remittance Check	105.76	393
248-000-228-001	Remittance	IRS	Remittance Check	107.97	395
248-000-228-001	Remittance	IRS	Remittance Check	107.97	395
248-000-228-002	Remittance	IRS	Remittance Check	447.56	392
248-000-228-002	Remittance	IRS	Remittance Check	447.56	392
248-000-228-002	Remittance	IRS	Remittance Check	452.23	393
248-000-228-002	Remittance	IRS	Remittance Check	452.23	393
248-000-228-002	Remittance	IRS	Remittance Check	461.62	395
248-000-228-002	Remittance	IRS	Remittance Check	461.62	395
248-000-230-000	Remittance	IRS	Remittance Check	457.81	392
248-000-230-000	Remittance	IRS	Remittance Check	440.07	393
248-000-230-000	Remittance	IRS	Remittance Check	455.21	395
248-000-232-000	Remittance	AMERICAN UNITED LIFE INSUR	Remittance Check	149.90	34785
248-000-237-002	Remittance	ALERUS FINANCIAL	Remittance Check	136.54	34721
248-000-237-002	Remittance	ALERUS FINANCIAL	Remittance Check	136.54	34779
248-000-237-002	Remittance	ALERUS FINANCIAL	Remittance Check	136.54	34823
248-000-247-000	Remittance	BLUE CARE NETWORK OF MICHIGAN	Remittance Check	895.82	34783
248-000-247-000	Remittance	PRINCIPAL LIFE INSURANCE COMPANY	Remittance Check	85.22	34786
248-000-247-000	Remittance	PRINCIPAL LIFE INSURANCE COMPANY	Remittance Check	15.38	34788
Total Department 000 REVENUE				7,156.05	
<b>Department: 260 GENERAL ACTIVITIES</b>					
248-260-719-000	DC VILLAGE CONTRIBUTIONS	ALERUS FINANCIAL	DC VILLAGE CONTRIBUTIONS MAY 2025	546.16	34790
248-260-801-000	SPAREBOX STORAGE	COMERICA BANK	MAY CREDIT CARD	285.00	295
248-260-823-000	ANNUAL WEB HOSTING INV 130	BRIGHTWAY MARKETING	YEARLY WEB HOSTING	550.00	34731
248-260-823-000	MOVAVI.COM WILDWOOD MO	COMERICA BANK	MAY CREDIT CARD	15.85	295
248-260-823-000	FLOWCODE	COMERICA BANK	MAY CREDIT CARD	9.95	295
248-260-823-000	GOOGLE ONE	COMERICA BANK	MAY CREDIT CARD	29.99	295
248-260-823-000	SNAPRETAIL	COMERICA BANK	MAY CREDIT CARD	65.00	295
248-260-823-000	CLICKUP	COMERICA BANK	MAY CREDIT CARD	38.00	295
248-260-823-000	IONOS	COMERICA BANK	MAY CREDIT CARD	25.00	295
248-260-823-000	QRFY.COM SANT CUGAT DE UN	COMERICA BANK	MAY CREDIT CARD	241.80	295
248-260-823-000	ADOBE	COMERICA BANK	MAY CREDIT CARD	21.19	295
248-260-851-000	MISWITCH TELEPHONE	COMERICA BANK	MAY CREDIT CARD	90.37	295
248-260-921-000	920009543389 90 S ANDERSON	DTE ENERGY	STREETLIGHTS	20.29	34742
248-260-921-000	910018071993 165 S BROADWAY	DTE ENERGY	STREETLIGHTS	0.64	34742
248-260-942-000	COPIER REPAIR/INSPECTION	THE COPY MAN	COPIER REPAIR	155.00	34772
248-260-942-000	CARPET CLEANINGS MAY 2894	PL CARPET CLEANING	CARPET CLEANING DDA	475.00	34766
248-260-942-000	OFFICE MATS CLEANING 94691	Darwell ENTERPRISES LLC	OFFICE MATS	25.58	34800
248-260-962-000	KROGER FUEL	COMERICA BANK	MAY CREDIT CARD	5.59	295
248-260-962-000	HERTZTOLL	COMERICA BANK	MAY CREDIT CARD	99.67	295
248-260-974-000	CDW GOVT XEROX INK	COMERICA BANK	MAY CREDIT CARD	1,046.09	295
Total Department 260 GENERAL ACTIVITIES				3,746.17	
<b>Department: 725 ORGANIZATION</b>					

**INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION**

EXP CHECK RUN DATES 06/01/2025 - 06/30/2025

POSTED AND UNPOSTED  
OPEN AND PAID

Section 7, Item A.

GL Number	Invoice Line Desc	Vendor Name	Invoice Description	Amount	Check Number
<b>Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND</b>					
<b>Department: 725 ORGANIZATION</b>					
248-725-825-000	GIFT CERT REDEMPTION (3)	WEE BEAN COFFEE CO.	GIFT CERT REDEMPTION	75.00	34777
248-725-825-000	GIFT CERT REDEMPTION (2)	OAT SODA	GIFT CERT REDEMPTION	50.00	34760
248-725-825-000	GIFT CERT REDEMPTION (16)	313 PIZZA BAR	GIFT CERT REDEMPTION	400.00	34725
248-725-825-000	GIFT CERT REDEMPTION	TWICE BLESSED	GIFT CERT REDEMPTION	25.00	34773
Total Department 725 ORGANIZATION				<u>550.00</u>	
<b>Department: 726 DESIGN</b>					
248-726-746-000	FLOWER BASKETS	JOS. KUTCHEY & SONS, LLC		2,707.00	34748
248-726-746-000	PIECHNIK'S GARDEN BASKETS	COMERICA BANK	MAY CREDIT CARD	327.56	295
248-726-746-000	PIECHNIK'S GARDEN	COMERICA BANK	MAY CREDIT CARD	213.51	295
Total Department 726 DESIGN				<u>3,248.07</u>	
<b>Department: 728 ECONOMIC DEVELOPMENT</b>					
248-728-801-000	INSTALL OF BANNERS DT	CHARTER TOWNSHIP OF ORION	BANNER INSTALL	625.00	34732
248-728-888-000	LAKE ORION DDA ADVERT MARK	20 FRONT STREET CONCEPTS,	ADVERT/MARKETING	300.00	34724
248-728-888-000	ORION AREA CHAMBER	COMERICA BANK	MAY CREDIT CARD	645.00	295
248-728-888-000	THE UPS STORE	COMERICA BANK	MAY CREDIT CARD	18.89	295
248-728-888-000	MEIJER	COMERICA BANK	MAY CREDIT CARD	22.54	295
248-728-888-000	MEIJER	COMERICA BANK	MAY CREDIT CARD	69.94	295
248-728-888-000	THE UPS STORE	COMERICA BANK	MAY CREDIT CARD	51.77	295
248-728-888-000	AMAZON	COMERICA BANK	MAY CREDIT CARD	134.97	295
248-728-888-000	MICHIGAN DOWNTOWN NORTH BR	COMERICA BANK	MAY CREDIT CARD	150.00	295
248-728-888-000	LAKE ORION DDA ADVERT/MARK	20 FRONT STREET CONCEPTS,	ADVERT/MARKETING	300.00	34789
Total Department 728 ECONOMIC DEVELOPMENT				<u>2,318.11</u>	
Total Fund 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND				<u>17,018.40</u>	
<b>Fund: 301 DOWNTOWN DEV BOND PROJECT 2023</b>					
<b>Department: 901 CAPITAL OUTLAY</b>					
301-901-950-000	LUMBERYARD FENCING	TBD CONSTRUCTION SERVICES,	LUMBERYARD FENCING	4,500.00	34771
301-901-950-000	GREAT LAKES ACE	COMERICA BANK	MAY CREDIT CARD	7.60	295
301-901-950-000	HOME DEPOT	COMERICA BANK	MAY CREDIT CARD	189.74	295
301-901-950-000	ROLL OFF DUMPSTER	COMERICA BANK	MAY CREDIT CARD	574.00	295
301-901-950-000	ROLL OFF DUMPSTER	COMERICA BANK	MAY CREDIT CARD	574.00	295
301-901-950-000	HOME DEPOT	COMERICA BANK	MAY CREDIT CARD	339.20	295
301-901-950-000	HOME DEPOT	COMERICA BANK	MAY CREDIT CARD	47.70	295
301-901-950-000	HOME DEPOT	COMERICA BANK	MAY CREDIT CARD	38.55	295
301-901-950-000	ROLL OFF DUMPSTER	COMERICA BANK	MAY CREDIT CARD	574.00	295
301-901-950-000	ROFF OFF DUMPSTER	COMERICA BANK	MAY CREDIT CARD	574.00	295
301-901-950-000	HOME DEPOT	COMERICA BANK	MAY CREDIT CARD	232.83	295
301-901-950-000	HOME DEPOT	COMERICA BANK	MAY CREDIT CARD	0.00	295
301-901-950-000	GREAT LAKES ACE	COMERICA BANK	MAY CREDIT CARD	76.67	295
301-901-950-000	PORTABLE RENTAL I25573	TURNER SANITATION	PORTABLE RENTAL	125.00	34817
301-901-950-000	PORTABLE RENTAL I25572	TURNER SANITATION	PORTABLE RENTAL	155.00	34817
Total Department 901 CAPITAL OUTLAY				<u>8,008.29</u>	
Total Fund 301 DOWNTOWN DEV BOND PROJECT 2023				<u>8,008.29</u>	

INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

EXP CHECK RUN DATES 06/01/2025 - 06/30/2025

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	17,018.40	
301			DOWNTOWN DEV BOND PROJECT 2023	8,008.29	
		Total For All Funds:		25,026.69	





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## DDA ACTION SUMMARY SHEET

**MEETING DATE:** July 15, 2025

**TOPIC** Lumber Yard - Retail Structure Option

**BACKGROUND BRIEF:**

Because we are electing to develop the site as an owners represented GC, we do not have the budgetary luxury of completing construction drawings and bidding construction against those drawings. Instead, we are looking to secure compatible prefabricated building products that can then be built and finished to our specifications. This approach will save more than 15% into the total project cost, money that is extremely valuable to the project goals.

So, this means we need to decide on the options for this process and how we want to handle procurement policies. I am attaching a concept developed after extensive research, that would allow us to market space in line with the objective of the site, but also allow for this office to negotiate tenant improvement contribution.

Questions for the Board

1. Do you approve the concept elevation and purpose of the buildings being proposed?
2. Do you want this office to secure additional options and pricing from separate firms, or present a recommendation based on best evidence and knowledge?

**FINANCIAL IMPACT:**

To be discussed at the meeting. However, it should be noted that this office is budgeting \$826,000 from the bond fund reserves to accomplish the taxable or built side o this project. We have a total of \$2,570,000

**RECOMMENDED MOTION**

**Depends on the answers above, to be discussed at the meeting.**



# Lake Orion AirBnB Project

## Oakridge 72



**Prepared For:**

**Lake Orion Downtown Development Authority**

Matthew Gibb    Owner's Representative

118 N. Broadway Street

Lake Orion, Michigan 48362

**P:** +12484640307

**E:** gibb@downtownlakeorion.org

**Property Address:**

215 S Broadway Street

Lake Orion, Michigan

48362

**Prepared By:**

Scott Desbiens

**P:** 503.793.8895

**E:** scott@dcbuilding.com

DC Structures

11251 SE 232nd Ave.

Damascus, OR 97089

**Document Date:** July 11, 2025

The base package price expires after 180 days of the document date listed above, upon expiration current market pricing will be applied and a new signature required.

**Drawings Included in the Design Development:****Schematic Design Package:**

- Floor Plans
- Elevations
- Sections View
- Exterior 3D Views
- Interior Views
- Window and Door Schedule
- Exterior Finish Specifications (Siding, Roofing, Stone, etc.)
- Mechanical & Plumbing (Equipment location)
- (Up to 5 revisions, upon the 6th request for revision design fees will apply at **\$130/hr**)

**Structural Design Package:**

- State Specific Structurally Stamped Engineered Plans
- Framing Plans (Foundation, Floor, Shear Walls, & Roof(s))
- Structural Details

(Any customer changes made after engineering is complete, additional fees will apply)

**The following items are additional services, DC Structures can provide but are NOT included in the following proposal (unless otherwise specified) and may be required by your local permitting authority. Please discuss these things with your project coordinator, additional fees will apply.**

**Additional services available by DC Structures, ADDITIONAL FEES WILL APPLY:**

- Lighting Plan (Equipment location, fixtures, switches, outlets, and basic wiring)
- Interior Finish Schedule (Flooring, Wall & Ceiling Coverings, Fixture Types, and/or Fireplace Finishes)
- Site Plan (Basic Utility Locations & Building Placement)
- Exterior Color Renderings & Animation Package
- Interior Color Renderings & Animation Package
- Architectural Stamped Plans (Building Code, Energy Code, Fire & Life Safety Code, Accessibility Code, Additional review of submittal package)

**Additional 3rd Party Services That May Be Required, ADDITIONAL FEES WILL APPLY:**

*DC Structures may be able to help facilitate these things based on the project and its location*

- Title 24 Report and/or Energy Requirements
- REScheck

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- MEP Engineering
- Civil/Drainage Plan
- Topography/Grading Plan
- Soils/Compaction Testing
- Solar Consulting
- Fire Sprinkler Design, Fire Alarm, Fire Egress, Fire Access & Water Storage

**Prefabrication Included:**

**Flat square foundation required (shim plates are provided for a minimal variance). Any changes made to the foundation need to be communicated prior to procurement to adjust post lengths.**

- All posts are cut to length, slotted for knife plates, drilled for bolt connections, relief cut to allow welds on column caps to sit flush
- All beams cut to length, drilled for bolt connection where applicable, valley beams cut to length with proper angles.
- All rafters cut to length with proper seat cuts and plumb cuts. Cut to allow wall sheathing and continuous ridge blocking.
- Deck beams cut to length, deck rail posts cut to length and slotted for connection.
- Floor trusses fabricated to final plan spec.
- Wall components are cut, labeled, and wrapped individually. Ready for field assembly with minimal cutting required. Layout binder provided for assembly.

**Note: Prefabrication scope does not include interior framing, siding, exterior trim, sheathing, hardware installation, Arena exterior walls.**

Material Package Items	Price	Quantity	Subtotal
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<p><b>Bradley Custom Oakridge 72' x 44' (Based on Copperhead Creek Ranch Project with 12' Extension)</b></p> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>• 28' - 9 1/16" Ridge Height</li> <li>• (2) Widows Peaks</li> <li>• 2/12, 4/12 &amp; 9/12 Roof Pitch</li> <li>• Style Shed Dormers Per Plan. 1 Faux Nantucket and Gable Pop-Out at Stairs</li> <li>• Second Level w/ IRC Rated Open Web Floor Joists &amp; 1-1/8" T&amp;G Edge Gold Floor Sheathing</li> <li>• Deck w/ Select Tight Knot 2" x 6" Cedar Decking, 2" x 8" Cedar Top Cap, 2" x 2" Cedar Balusters, 6" x 6" Douglas Fir Columns &amp; Handrail Posts, 6" x 12" Klear Gard Beams, 4" x 10" Klear Gard Joists, &amp; Woodtone Trim</li> <li>• Exterior Stairs w/6x6 Douglas Fir Posts, 6x12 Klear Gard Beams &amp; 4x10 Klear Gard Joists</li> <li>• 6x8 Select Grade FOHC Douglas Fir Heavy Timber Center Aisle Columns</li> <li>• 6x6 Select Grade FOHC Douglas Fir Heavy Timber Exterior Columns at Deck and Entry</li> <li>• 4x6 Select Grade FOHC Douglas Fir Faux Timbers on Main Level Ceiling</li> <li>• 5.5x24 Glulam Floor Beams</li> <li>• 5.5x15 Glulam Rafter Beams</li> <li>• 5.5x12 Glulam Collar Ties and Ridge Beams</li> <li>• 2" x 12" Rafters @ 24" OC at Main Roof and Entry</li> <li>• Flat Bottom Roof Trusses at Stair Bump Out</li> <li>• 4x10 Select Grade FOHC Douglas Fir Heavy Timber Deck Cover Rafter</li> <li>• 2x6 Douglas Fir T&amp;G Over Shed Rafters</li> <li>• 1x6 Douglas Fir T&amp;G Upper Level Ceiling Cover</li> <li>• All Interior Wall Framing (per plan)</li> <li>• 4' Wide Interior Stair Framing (Excludes Finish Railing)</li> <li>• 2" x 6" Wall Framing Throughout All Exterior Walls</li> <li>• CDX Roof Sheathing</li> <li>• Exterior Wall Protection System w/ Vapor Barrier Throughout Exterior</li> <li>• Woodtone Rustic Board &amp; Batten Siding Throughout Exterior</li> <li>• Woodtone Color Select Exterior Door &amp; Window Trim</li> <li>• Woodtone Color Select Belly Band &amp; Fascia</li> <li>• WUI Rated Soffit. 15/32 Fire Rated Plywood Covered By 1x6 DF T&amp;G</li> <li>• WUI Rated Soffit Vents</li> <li>• Custom Concealed Structural Knife Plates w/ Anchor Bolts</li> <li>• Black Powder Coated Finish on Exposed Post &amp; Beam Hardware (Excluding Nuts &amp; Bolts)</li> <li>• (4) Custom Handcrafted Douglas Fir Heavy Timber Corbels</li> </ul>	<p>\$391,525.25</p>	<p>1</p>	<p>\$391,525.25</p>
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<ul style="list-style-type: none"> <li>• (1) Mortise &amp; Tenon Heavy Timber Truss at Entry</li> <li>• (2) Sets of Blueprints Based on Standard Engineering (County-specific engineering &amp; engineering wet stamp available)</li> <li>• Digital Set of Completed Blueprints w/ Standard Structural Details</li> <li>• Builder Support Throughout Construction From Our Licensed Builder Team</li> <li>• Live 3D walk-through of the final design (Upon Request)</li> </ul> <p><b>Standard Engineering</b></p> <ul style="list-style-type: none"> <li>• Roof Snow Load: 35 lbs. Per Sq. Ft.</li> <li>• Wind Load: 115 mph</li> <li>• Seismic Zone: D</li> <li>• Exposure Category: C</li> <li>• Loft Load: 40 lbs. Per Sq. Ft.</li> </ul>			
<p><b>Lighting Plan</b></p> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>• Rough layout of fixtures</li> <li>• Switch location</li> <li>• Outlet location</li> <li>• Basic wiring</li> <li>• Fixture legend (showing symbols)</li> <li>• Smoke alarm location</li> <li>• Electrical panel location</li> <li>• Fixture schedule (Type mark, count, type, comments including height)</li> <li>• Exhaust fans</li> <li>• Ceiling fans</li> </ul> <p><b>Note:</b> This is a rough layout and does not include engineering.</p>	\$1,000.00	1	\$1,000.00

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<p><b>Commercial Design Review Cost is based on Overall Square Footage</b></p> <p><b>Commercial Design Review</b></p> <p><u>Building Code -</u></p> <p><b>International Building Code (IBC)</b></p> <p><b>California Building Code (CBC)</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Use</li> <li>• Occupant load</li> <li>• Allowable area</li> <li>• Allowable height</li> <li>• Executed by DC</li> </ul> <p><u>Electrical Code -</u></p> <p><b>National Fire Protection Agency (NFPA) IBC</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Identify relevant edition</li> <li>• Executed by MEP consultant</li> </ul> <p><b>International Plumbing Code (IPC)</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Water closets required</li> <li>• Sinks required</li> <li>• Mop sinks required</li> <li>• Drinking fountains required</li> <li>• Execution of design and routing of systems is the responsibility of the MEP consultant</li> </ul> <p><u>Energy Code-</u></p> <p><b>Calgreen</b></p> <p><b>Breem</b></p> <p><b>Living Future</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Identify relevant edition</li> <li>• Executed by MEP consultant</li> </ul> <p><u>Fire Code-</u></p> <p><b>International Fire Code (IFC)</b></p> <p><b>NFPA</b></p> <ul style="list-style-type: none"> <li>• Located on Life Safety Plan</li> <li>• Sprinklers required or not required</li> <li>• Rated wall requirements</li> <li>• Fire extinguisher cabinet locations</li> <li>• Smoke alarm locations</li> <li>• Rated wall assembly</li> <li>• Separation distance</li> <li>• Execution of all items above by DC</li> <li>• Execution of sprinkler design by MEP consultant</li> </ul> <p><u>Life Safety-</u></p> <p><b>NFPA</b></p> <p><b>IBC</b></p>	<p>\$2.85</p>	<p>6065</p>	<p>\$17,285.25</p>
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<p><b>ANSI</b></p> <ul style="list-style-type: none"> <li>• Located on Life Safety Plan</li> <li>• Exits required</li> <li>• Exit widths required</li> <li>• Exit distances required</li> <li>• Dead-end corridors</li> <li>• Executed by DC</li> </ul> <p><b>ADA + ANSI -</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan and relevant floor plan + enlarged plan</li> <li>• Enlarged compliant bathroom plan</li> <li>• Fixture + Accessory mounting heights</li> <li>• Executed by DC</li> </ul> <p><b>County Specific Requirements-</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Identify location-specific restrictions</li> <li>• Executed by DC</li> </ul> <p><b>Homeowner's Association Requirements (HOA)</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Identify location-specific restrictions</li> <li>• Executed by DC</li> </ul> <p><b>Architectural Site Plan</b></p> <p>Includes:</p> <ul style="list-style-type: none"> <li>• Existing and proposed lot lines</li> <li>• Building Placement</li> <li>• Basic new utility layout (septic, well, power)</li> <li>• Setbacks</li> <li>• Existing and proposed driveways</li> <li>• Existing natural features (slope, contours)</li> </ul> <p><i>*Disclaimer: Based on jurisdiction, DC will provide the above items. For anything else, the client will give the markups on existing utilities, wetlands, drainage ways, rivers, streams, trees, etc. In addition, DC will include the on-site plan.</i></p> <p><b>Note:</b> This compliance review must be completed for all commercial projects to ensure the design and floor plan meet the proper design criteria and meet any local and federal codes.</p>			
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<p><b>Architectural Stamped Plans Included in Commercial Design Review Above</b></p> <p>Commercial projects (some residential) require a Design Professional of Record (typically a licensed architect). In those cases, DC Structures works with clients in coordinating Architectural Services with collaborating licensed architects when the need arises as an Additional Service fee.</p> <p>The architect coordinates with civil, mechanical, and electrical consultants designated to the project to combine a plan set ready for building department submittal. During the process, we work closely with the architect in designing the project to ensure the project meets the commercial building code. Some components include verifying egress widths, exit distances, fire extinguisher cabinet locations, and total building occupancy, among other essential requirements to help determine fire code specifications and an overview of code compliance for fire and life safety for your project. In addition, this process helps streamline the submittal review process with state and local jurisdictions.</p> <p>This service does not include fire sprinkler plans, but we can coordinate them for an additional fee.</p> <p>Note: This compliance review is required to be completed for all commercial projects to ensure the design and floor plan meet the proper design criteria and will meet any local and federal code.</p> <p>Pricing is based on the total square footage of the structure.</p>	<p>\$0.00</p>	<p>1</p>	<p>\$0.00</p>
<p><b>Michigan Structural Engineering Stamp Included</b></p>	<p>\$0.00</p>	<p>1</p>	<p>\$0.00</p>

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<p><b>Project Notes</b></p> <ul style="list-style-type: none"> <li>• Parcel # and/or Coordinates (if needed):</li> <li>• Jurisdiction (city or county, please clarify): Oakland</li> <li>• HOA: No</li> <li>• Elevation: 991'</li> <li>• Roof Snow Load: 35 lbs</li> <li>• Wind Speed: mph</li> <li>• WUI Requirements Apply? No</li> <li>• Proximity to coast? Stainless steel hardware (exterior) required within (2) miles</li> </ul> <p><b>Provided by:</b></p> <ul style="list-style-type: none"> <li>• Doors:</li> <li>• Windows:</li> <li>• Railings:</li> <li>• Siding:</li> <li>• Chair Rail:</li> </ul>	\$0.00	1	\$0.00
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Material Package      **\$409,810.50**

Window, Door and Equine Items	Price	Quantity	Subtotal
Windows and Doors TBD in Schematic Design	\$0.00	1	\$0.00

Window, Door and Equine Package      **\$0.00**

<b>Material Package Items</b>	<b>\$409,810.50</b>
<b>Window, Door and Equine Items</b>	<b>\$0.00</b>
<b>Total</b>	<b>\$409,810.50</b>

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*\*Pending final engineering calculations.*

*\*All engineering questions should be requested from DC Structures not directly requested from the Engineering Firm*

*\*Every project is unique therefore there are factors that can affect procurement time as well as engineering and costs associated to your project*

## Payment Schedule

Description	Price
<b>10% Payment</b> <b>Schematic Design Package:</b> <ul style="list-style-type: none"> <li>• Elevations</li> <li>• Sections View</li> <li>• Exterior 3D Views</li> <li>• Interior Views</li> <li>• Window and Door Schedule(s)</li> <li>• Exterior Finish Specifications (Siding, Roofing, Stone, Etc.)</li> <li>• Mechanical and Plumbing (Equipment Location ONLY)</li> <li>• <u>Up to five (5) Revisions, Upon sixth (6th) Revision, Additional Charges Will Apply.</u></li> </ul>	\$40,981.00
<b>30% Payment</b> <b>Structural Design Package:</b> <ul style="list-style-type: none"> <li>• Structurally Stamped Engineered Plans</li> <li>• Foundation Plans</li> <li>• Framing Plans</li> <li>• Shear Wall Plans with Hold-down(s)</li> <li>• Roof Plans</li> <li>• Structural Details</li> <li>• <u>Any Client Changes Made After Completion of Engineering, Additional Charges Will Apply.</u></li> </ul>	\$122,943.00
<b>60% Final Payment</b> <ul style="list-style-type: none"> <li>• Procurement of All Material Package Components</li> <li>• Manufacturing of Prefabricated Components</li> <li>• Assembly Drawings and 3d Model</li> <li>• Project Binder with Instructions</li> <li>• Master Ship List</li> <li>• <u>Upon Procurement Payment, Material Package Must Ship within 180 days or Material Package Price is Subject to Current Market Conditions</u></li> </ul>	\$245,886.50
<b>Window, Door and Equine Payment</b> <ul style="list-style-type: none"> <li>• Collected at Time of Procurement and Final 60% Payment</li> </ul>	\$0.00
<b>Total</b>	<b>\$409,810.50</b>

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**Shipping Information: All shipments will be made via FOB origin from the DC Structures Inc. warehouse located at 11251 SE 232nd Ave, Damascus, OR 97089. Please note that shipping costs are not included in the sale price and will be contracted directly with the shipping broker.**

**Tax Responsibilities: The Owner is responsible for all applicable taxes stemming from this sale, including but not limited to sales tax, use tax, and custom duties. The Owner agrees to comply with all tax regulations and is responsible for filing and paying any taxes due from this purchase.**

# Approval

<i>Scott Desbiens</i>	07 / 11 / 2025
Scott Desbiens	
Matthew Gibb	

**This Proposal is Valid for 14 days.**

## Terms & Conditions

Owner (i.e., the person(s) accepting the foregoing Proposal from DC Structures (“DCS”)) and DCS agree that the following terms are included in and supplement the foregoing Proposal. All references to Owner or DCS include such parties’ officers, agents, employees, heirs, successors, legal representatives, and assigns.

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1. **Pricing.** The base package price in this proposal will be locked for 180 days of the document date listed on this proposal. ***In the event of any changes to the project detailed in this proposal (including without limitation any design or engineering alterations, material type or quantity changes, shipment date changes) or in the event of changes in market conditions outside of DC Structures control which impact cost. DC Structures will update all material pricing in this proposal to current pricing based on the new document date and will require a new signature of approval.***
2. **Payment.** Unless otherwise stated in the Proposal, an initial payment of 10% of the total Proposal price is due upon Owner's acceptance of the Proposal, this payment is nonrefundable upon the design beginning and owner will be provided with the design materials that have been created up to that point should they choose to cancel. Payment of 30% of the total Proposal price is due prior to the CD and engineering phase, this payment is nonrefundable upon construction details being completed or plans being stamped by the engineer of record. The remaining 60% is due prior to procuring, manufacturing, and creating assembly drawings/instructions, this payment is nonrefundable upon the procurement of materials beginning. Separate from and in addition to these payments, Owner agrees to a pricing adjustment based on current company pricing and agrees to subsequent payment that may occur if owner elects to change ship date from the mutually agreed upon date in the DCS shipping agreement.
3. **Shipment Pickup; Title; Risk of Loss; Transit Waiver & Release; Offloading;** The Owner agrees that their site can accommodate the material package delivery by an 80' truck and trailer and will have a 6,000 lb. reach forklift onsite to offload the material package. Unless otherwise stated in the Proposal, DCS material packages will arrive to Owner via FOB from DCS' headquarters or other originating location(s) of the materials ("Shipment"), and title to and risk of loss of the materials will pass to Owner upon leaving DCS headquarters. The date of pickup agreed to is not the date of arrival or delivery to owner's location. DCS shall not be liable for, and Owner waives and releases DCS from any and all losses, damages, penalties, or expenses arising after the Shipment that relate in any way to the transit and delivery of materials, including without limitation delays in transit. The third-party logistics company assumes liability during delivery. The Owner will be provided with a DCS shipping document providing more detail. Owner shall inspect and make an inventory of materials delivered to Owner's location and report to DCS, within 72 hours of the materials' arrival at Owner's location, any claim or issue relating to the quantity, quality, or suitability of materials in the Shipment(s). Owner must submit time-stamped photographs and a copy of the bill of lading with any missing or damaged

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materials clearly marked. DCS will ship any replacement material direct to site in a timely manner.

4. **Limitation of Actions.** No action arising out of or relating to this agreement may be commenced against DCS more than 12 months after the date of delivery of materials to Owner's location.
5. **Security Interest.** Owner hereby grants to DCS a security interest in the materials sold to Owner under this agreement and any proceeds therefrom (including accounts receivable), until DCS has received payment in full for the materials. Upon DCS' reasonable request, Owner shall sign and deliver to DCS any document necessary or appropriate to evidence, perfect, or enforce this security interest.
6. **Taxes.** Owner shall pay all taxes directly to the appropriate taxing authority and pay any third-party expenses imposed on, in connection with, or measured by, the transaction arising from or relating to the proposal.
7. **Force Majeure.** DCS will not be liable for delays in performance or for non-performance due to unforeseen circumstances or causes beyond DCS's reasonable control.
8. **Assignment; Delegation.** Owner may not assign any of Owner's rights under this agreement or delegate any performance or obligation under this agreement, except with the prior written consent of DCS. Any purported assignment of rights or delegation of performance in violation of this section is void.
9. **Governing Law; Waiver of Jury Trial Right; Designation of Forum; Attorney Fees.** The laws of the state of Oregon shall govern this agreement, without regarding to choice-of-law principles. Any claim or dispute arising from or relating to this Agreement shall be subject to binding arbitration, and judgment on the arbitration award, if any, may be entered in accordance with applicable law. The parties to this agreement acknowledge and hereby waive right to jury trial with regard to this agreement. The parties agree that the forum for arbitration proceedings will be in Oregon. At any time, Owner and DC may collaborate in reaching a resolution of a claim or dispute by negotiation or mediation. In any arbitration or litigation arising from or relating to the Project or this Agreement, the prevailing party shall be entitled to recover from the other all reasonable expenses including reasonable attorney fees, in addition to all other sums provided by law.
10. **Entire Agreement; No Amendments.** This agreement constitutes the entire agreement between the parties with respect to the subject matter of this agreement and supersedes all other agreements, whether written or oral, between the parties. No amendment or modification to this agreement will be effective unless it is in writing and signed by both parties.

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11. **Counterparts; Electronic Signatures.** This agreement may be signed in one or more counterparts, which together will form a single agreement. This agreement may be signed electronically.
12. **CAD Release (\$1,000).** Files are offered in “DWG” format and are provided from the “A” sheet files of Floor Plans, Roof Plans and Elevations only. Not available: 3D views, cross sections, structural plans. No exceptions.
13. **Residential Lighting Plan (\$1,500).** Files are offered in “PDF” format and are provided only to show the rough layout of fixtures, switches, outlets, and basic wiring design. Plan contents will show “placeholders.” Only licensed electricians will be able to comply with county electrical plan requirements. Change to “DWG” files add \$200 for set.
14. **Structural Changes (\$1,500).** Non-building department changes. Builder or Architect requests (changing foundation, adding details not required by the county). Soils/Geo Tech reports arriving after engineering is complete and plans are completed. Engineering to be charged separately.
15. **Expiry of Proposal.** The pricing on an accepted proposal will remain valid for 180 days of date listed on this proposal, upon commencement of that 180 days DC Structures reserves the right to reprice the material package with current market pricing unless otherwise agreed upon in writing by DCS and the client.
16. **Cancellations, Returns, Refunds.** DCS purchases are non-refundable. The client will be provided with the services or materials they have paid for regardless of if they decide to cancel at any point. If the client chooses to resume the same project in the future the payments made will be applied, but the overall price is subject to change. If the client chooses to cancel the project and has made a future milestone payment(s) (whether those services were for design or procurement) and have not begun, a refund will be provided in the amount of that future milestone payment, minus 20% for company overhead and operating costs. If the owner chooses to change the delivery date within 90 days of the ship date after making the final payment, DCS reserves the right to charge a stocking fee of \$175.00 a day. DCS will only accept returns for exchange or refund, for items damaged in transit within 72 hours of delivery.
17. **Applicable Codes, Laws, and Regulations:** All construction documents, details, plans, and calculations identified in the Proposal shall be designed and produced in conformance with or exceeding all applicable codes, laws, and regulations within the authority having jurisdiction within the identified project's locale. The Owner shall not be held responsible for identifying the applicable codes, laws, and regulations to which the structure shall be designed to, nor liable for any nonconformance of the final construction

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- documents, details, plans, and calculations to any applicable codes, laws, and regulations.
18. **Right to Refuse Service.** DC Structures Inc reserves the right to refuse service or performance of contract milestones laid out in the payment schedule of this agreement to any person or entity, for any reason not excluded by law, in its sole discretion. DC Structures Inc will provide a refund upon cancellation for any contract milestone paid for and not provided.
  19. **Missed Ship Dates.** If the Client selects a pickup date and elects to change that date, the client may be subject to a current market pricing adjustment and subsequent payment, DCS warehouse calendar availability and a stocking fee.
  20. **Weather.** In severe weather, we may determine it is not safe to load or allow pickup at the DCS warehouse and cancel that day's pickup. When this occurs, we will reschedule the pickup as soon as weather permits. Please help assist us with the rescheduling.
  21. **Storage.** The owner and/or owner's representative are responsible for storing materials to insure the preservation of their quality and fitness for construction. DC recommends they be placed on wooden platforms or other hard clean surfaces not directly on the ground and should be placed under covered storage when available. We do not recommend storing your materials for longer than three months outside of a dry covered storage building due to potential weather damage. DC is not responsible for replacing materials damaged due to inclement weather and new materials will need to be purchased via change order.
  22. **Provided by Others Items.** The Owner acknowledges and agrees that any materials provided by them for the purpose of manufacturing shall be free from defects and compliant with all relevant regulations and standards. DC shall not be held liable for any loss, damage, injury, or expense arising from the use of the materials provided by the Owner, including but not limited to, any defects, non-compliance issues, design issues, size issues, or inherent risks associated with said materials. The Owner agrees to indemnify and hold harmless the DC, its employees, agents, and affiliates from any claims, demands, or liabilities arising out of or related to the materials provided by the Owner. This release of liability shall survive the termination or expiration of the manufacturing contract.
  23. **Wall Panels:** If DC and the client choose to incorporate wall panels they shall be designed and manufactured in accordance with the specifications in the plan set associated with this project and approved via DocuSign by the owner. The panels shall

be constructed using high-quality materials that meet industry standards for durability and aesthetics. The design shall incorporate all specified items as agreed upon by both parties in this agreement and on the approved plan set. The manufacturing process shall adhere to strict quality control measures to ensure consistency and precision in the fabrication of each panel. All panels shall be inspected prior to delivery to ensure they meet the agreed-upon specifications and are free from defects.

Installation of the wall panels is not included in this contract and shall be the responsibility of the owner or a third-party contractor hired by the owner. DC shall provide detailed installation guidelines and support to assist the owner or their chosen contractor in the proper installation of the panels. Any damages incurred during transportation or installation shall be the responsibility of the owner or their appointed contractor. DC shall not be liable for any issues arising from improper installation or handling of the panels by parties other than themselves.

24.

### **Client & Contractor Expectations**

- A 6k rated forklift is the minimum required to unload materials.
- There will need to be access to the job site for a semi-truck and trailer or a sufficient alternative staging area to receive material.
- Any and all secondary delivery to the job site will be the client's responsibility to be available to receive.
- DC Structures will provide the builder with a master construction binder printed on 11" x 17" paper. Layout for all the timbers, rafters, and wall components. Window and door cut sheets if provided by DC Structures. Cut sheets for all specialty equipment provided by DC Structures.
- DC requires that upon delivery everything be inspected for damage as well as take an inventory of all items to ensure all items have been delivered
- Upon receiving delivery, if any units are damaged before being unloaded, please note on the BOL (driver will have) the possibility of damage on a specific package number. Also take pictures of any damage before unloading and forward to support@dcbuilding.com. This will ensure a quick replacement of any damaged item.
- The owner and/or owner's representative are responsible for the preservation of the quality and fitness of materials for construction.

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## From DC Structures Warehouse

### Pre-Fabricated Items

- Post and Beam
- Rafters
- Wall Framing
- Corbels
- Timber Trusses if applicable

### Misc. Framing Items

- Stair components
- Floor sheathing
- Temporary Bracing
- Sub Fascia
- Connection Hardware
- Sill Seal
- Pressure Treated Sill Plate
- Interior Framing

### Siding and Exterior Trim

- Exterior siding
- House Wrap
- Window, door, and corner trim
- Finish Fascia
- Decking
- Railing

### Vendor Direct Shipping

Sheet goods will arrive the same week as the items mentioned above. A forklift may be required to unload these items as well.

- Roof and wall sheathing will be delivered locally
- Floor or roof trusses
- Windows
- Doors
- Specialty items such as Breezeway Doors, Dutch Doors, and Stall Equipment (Forklift Required)

### Job-site Recommendations and Expectations

If there is currently no access to the job site, we would require a gravel access road as well as gravel surrounding the jobsite for adequate area to turn around a semi-truck. This will also help during construction to keep the working area from becoming too muddy to work in. Also staging material in a gravel area vs dirt will give better access and less cleanup during construction. Bails of straw during the wet season can also help keep the area drier and cleaner.

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We would recommend there be adequate power on the job site within 100 ft of the building. Portable toilets for any workers on site. Also, a dumpster or designated area for waste to keep the job site clean during construction as well as being able to separate specific material for building purposes away from any item that may be misused

DC Structures will provide shim plates for the knife plates in the case that the slab is not perfectly level. However, we would recommend that the framers purchase composite shims to ensure the walls are level and at the right height in the case the slab is not perfectly flat as all the wall components are precut before delivery.

If there are any questions or concerns please reach out to your project coordinator or call 888-975-2057.

I have read the client and contractor expectations

I agree to the **Terms and Conditions**       I have read the **Limited Warranty**

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**STRUCTURES**

Section 8, Item B.

# Lake Orion Retail Building

## Stillwater 24' x 48'



**Prepared For:**

**Lake Orion Downtown Development Authority**

Matthew Gibb Owner's Representative

118 N. Broadway Street

Lake Orion, Michigan 48362

**P:** +12484640307

**E:** gibb@downtownlakeorion.org

**Property Address:**

215 S. Broadway Street

Lake Orion, Michigan

48362

**Prepared By:**

Scott Desbiens

**P:** 503.793.8895

**E:** scott@dcbuilding.com

DC Structures

11251 SE 232nd Ave.

Damascus, OR 97089

**Document Date:** July 11, 2025

**The base package price expires after 180 days of the document date listed above, upon expiration current market pricing will be applied and a new signature required.**

**Drawings Included in the Design Development:****Schematic Design Package:**

- Floor Plans
- Elevations
- Sections View
- Exterior 3D Views
- Interior Views
- Window and Door Schedule
- Exterior Finish Specifications (Siding, Roofing, Stone, etc.)
- Mechanical & Plumbing (Equipment location)
- (Up to 5 revisions, upon the 6th request for revision design fees will apply at **\$130/hr**)

**Structural Design Package:**

- State Specific Structurally Stamped Engineered Plans
- Framing Plans (Foundation, Floor, Shear Walls, & Roof(s))
- Structural Details

(Any customer changes made after engineering is complete, additional fees will apply)

**The following items are additional services, DC Structures can provide but are NOT included in the following proposal (unless otherwise specified) and may be required by your local permitting authority. Please discuss these things with your project coordinator, additional fees will apply.**

**Additional services available by DC Structures, ADDITIONAL FEES WILL APPLY:**

- Lighting Plan (Equipment location, fixtures, switches, outlets, and basic wiring)
- Interior Finish Schedule (Flooring, Wall & Ceiling Coverings, Fixture Types, and/or Fireplace Finishes)
- Site Plan (Basic Utility Locations & Building Placement)
- Exterior Color Renderings & Animation Package
- Interior Color Renderings & Animation Package
- Architectural Stamped Plans (Building Code, Energy Code, Fire & Life Safety Code, Accessibility Code, Additional review of submittal package)

**Additional 3rd Party Services That May Be Required, ADDITIONAL FEES WILL APPLY:**

*DC Structures may be able to help facilitate these things based on the project and its location*

- Title 24 Report and/or Energy Requirements
- REScheck

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- MEP Engineering
- Civil/Drainage Plan
- Topography/Grading Plan
- Soils/Compaction Testing
- Solar Consulting
- Fire Sprinkler Design, Fire Alarm, Fire Egress, Fire Access & Water Storage

**Prefabrication Included:**

**Flat square foundation required (shim plates are provided for a minimal variance). Any changes made to the foundation need to be communicated prior to procurement to adjust post lengths.**

- All posts are cut to length, slotted for knife plates, drilled for bolt connections, relief cut to allow welds on column caps to sit flush
- All beams cut to length, drilled for bolt connection where applicable, valley beams cut to length with proper angles.
- All rafters cut to length with proper seat cuts and plumb cuts. Cut to allow wall sheathing and continuous ridge blocking.
- Deck beams cut to length, deck rail posts cut to length and slotted for connection.
- Floor trusses fabricated to final plan spec.
- Wall components are cut, labeled, and wrapped individually. Ready for field assembly with minimal cutting required. Layout binder provided for assembly.

**Note: Prefabrication scope does not include interior framing, siding, exterior trim, sheathing, hardware installation, Arena exterior walls.**

Material Package Items	Price	Quantity	Subtotal
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<p><b>The Stillwater Material Package</b></p> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>• 24' x 36' First Floor Footprint</li> <li>• 1,101 Sq. Ft. Home</li> <li>• Open Concept Floor Plan w/ Vaulted Ceilings Throughout</li> <li>• 26' 9" Ridge height</li> <li>• 9/12 Pitch</li> <li>• Pre-Manufactured Parallel Chord Roof Truss System</li> <li>• Appearance-Grade Glulam Loft Beams</li> <li>• 237 Sq. Ft. Open Loft w/ 14" Open Webbed Floor Truss System &amp; T&amp;G Floor Sheathing</li> <li>• Insulation-Ready 2" x 8" Exterior Wall Construction</li> <li>• CDX Roof Sheathing</li> <li>• Exterior Wall Protection System w/ Vapor Barrier Throughout Exterior</li> <li>• Interior Wall Framing (per Plan)</li> <li>• 4' Wide Interior Stair Framing (Excludes Finish Railing)</li> <li>• Select Tight Knot Cedar Board &amp; Batten Siding Throughout the Exterior</li> <li>• Select Tight Knot Cedar Belly Band &amp; Fascia</li> <li>• 2" x Select Tight Knot Cedar Exterior Door &amp; Window Trim</li> <li>• (2) Detailed Blueprints w/ Engineering (County-specific engineering upgrades available)</li> <li>• Detailed Digital Blueprints w/ Standard Structural Engineering</li> <li>• Builder support throughout construction from our licensed builder team</li> <li>• Live 3D walk-through of the final design (Upon Request)</li> </ul> <p><b>Standard Engineering Included</b></p> <ul style="list-style-type: none"> <li>• Snow Load: 35 lbs. per Sq. Ft.</li> <li>• Wind Load: 115 mph (3-sec gust)</li> <li>• Exposure Class: C</li> <li>• Seismic Zone: D</li> <li>• Loft Load: 60 lbs. per Sq. Ft.</li> </ul> <div style="display: flex; flex-wrap: wrap;">     </div>	<p>\$105,582.00</p>	<p>1</p>	<p>\$105,582.00</p>
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<p><b>The Stillwater 12' Extension</b></p> <p>Includes the additional material as follows:</p> <ul style="list-style-type: none"> <li>• Pre-Manufactured Parallel Chord Roof Truss System</li> <li>• Appearance-Grade Glulam Loft Beams</li> <li>• Insulation-Ready 2" x 8" Exterior Wall Construction</li> <li>• CDX Roof Sheathing w/ Vapor Barrier</li> <li>• Select Tight Knot Cedar Board &amp; Batten Siding</li> <li>• 2"x Select Tight Knot Cedar Window Trim</li> <li>• (high side wall) to match existing clerestory windows every 12'.</li> </ul> <p><b>Note:</b> This extension is for the open living area. Does not include any loft area.</p>	\$12,762.00	1	\$12,762.00
<p><b>CREDIT - Select Tight Knot Cedar Board &amp; Batten Siding</b></p> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>• 1" x 10" Select Tight Knot Western Red Cedar Boards</li> <li>• 1" x 3" Select Tight Knot Western Red Cedar Battens</li> </ul> <p><b>Note:</b> Calculated by the square foot.</p>	-\$13.60	2160	-\$29,376.00
<p><b>Woodtone Rustic Board &amp; Batten - Replace All Cedar Board and Batten Siding</b></p> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>• 4' x 10' Hardie Traditional Fiber Cement Board Treated with Woodtone Rustic Series Color of choice.</li> <li>• 4/4" x 3" Hardie Traditional Fiber Cement Trim Treated with Woodtone Rustic Series Color of choice.</li> <li>• Color Select Trim &amp; Fascia</li> <li>• 30-Year Color Coating Warranty.</li> <li>• <b>ESTIMATED PRICING ON TODAY'S MARKET</b></li> <li>• <b>PRICING WILL BE VERIFIED UPON PROCUREMENT PAYMENT</b></li> </ul> <p><b>Note:</b> Priced by the square foot. There are 18 colors to choose from at <a href="http://www.woodtone.com">www.woodtone.com</a>. Ask your project coordinator for samples. Does not cover damage to the siding. Trim is not available in these colors and comes primed for paint or Woodtone solid Color Select.</p> <div data-bbox="154 1680 454 1837"> <p>COLOR:</p>  <p><small>*The colors represented here may vary from actual product. Learn more.</small></p> </div>	\$12.80	2160	\$27,648.00

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<p><b>CREDIT - Loft</b></p> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>• 2" x 12" Douglas Fir Loft &amp; Rim Joists</li> <li>• 1-1/8" T&amp;G Edge Gold Floor Sheathing</li> <li>• Select Grade 6" x Douglas Fir Beams and Appearance Grade Glulam Beams</li> <li>• All Required Structural Connection Hardware</li> </ul> <p><b>Note:</b> Loft Space is priced by the square foot. The scope is based on 12' beam spans, a 60 lb. per Sq. Ft. load, and a finished height of 11'. If these criteria change, we may need to update the cost depending on the requirements</p>	-\$21.30	237	-\$5,048.10
<p><b>CREDIT - Standard Staircase</b></p> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>• 2" x 12" Douglas Fir Stringers &amp; Treads</li> <li>• 4' x 4' Landing with 1 1/8" Edge Gold T&amp;G Plywood</li> <li>• 6" x 6" Douglas Fir Railing Posts</li> </ul> <p><b>Note:</b> Price is based on an 11' 2nd-floor height and will be impacted if that height varies. <b>Railing not included</b></p>	-\$1,730.90	1	-\$1,730.90
<p><b>Lighting Plan</b></p> <p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>• Rough layout of fixtures</li> <li>• Switch location</li> <li>• Outlet location</li> <li>• Basic wiring</li> <li>• Fixture legend (showing symbols)</li> <li>• Smoke alarm location</li> <li>• Electrical panel location</li> <li>• Fixture schedule (Type mark, count, type, comments including height)</li> <li>• Exhaust fans</li> <li>• Ceiling fans</li> </ul> <p><b>Note:</b> This is a rough layout and does not include engineering.</p>	\$1,000.00	1	\$1,000.00

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<p><b>Commercial Design Review Cost is based on Overall Square Footage</b></p> <p><b>Commercial Design Review</b></p> <p><u>Building Code -</u></p> <p><b>International Building Code (IBC)</b></p> <p><b>California Building Code (CBC)</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Use</li> <li>• Occupant load</li> <li>• Allowable area</li> <li>• Allowable height</li> <li>• Executed by DC</li> </ul> <p><u>Electrical Code -</u></p> <p><b>National Fire Protection Agency (NFPA) IBC</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Identify relevant edition</li> <li>• Executed by MEP consultant</li> </ul> <p><b>International Plumbing Code (IPC)</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Water closets required</li> <li>• Sinks required</li> <li>• Mop sinks required</li> <li>• Drinking fountains required</li> <li>• Execution of design and routing of systems is the responsibility of the MEP consultant</li> </ul> <p><u>Energy Code-</u></p> <p><b>Calgreen</b></p> <p><b>Breem</b></p> <p><b>Living Future</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Identify relevant edition</li> <li>• Executed by MEP consultant</li> </ul> <p><u>Fire Code-</u></p> <p><b>International Fire Code (IFC)</b></p> <p><b>NFPA</b></p> <ul style="list-style-type: none"> <li>• Located on Life Safety Plan</li> <li>• Sprinklers required or not required</li> <li>• Rated wall requirements</li> <li>• Fire extinguisher cabinet locations</li> <li>• Smoke alarm locations</li> <li>• Rated wall assembly</li> <li>• Separation distance</li> <li>• Execution of all items above by DC</li> <li>• Execution of sprinkler design by MEP consultant</li> </ul> <p><u>Life Safety-</u></p> <p><b>NFPA</b></p> <p><b>IBC</b></p>	<p>\$2.85</p>	<p>1152</p>	<p>\$3,283.20</p>
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<p><b>ANSI</b></p> <ul style="list-style-type: none"> <li>• Located on Life Safety Plan</li> <li>• Exits required</li> <li>• Exit widths required</li> <li>• Exit distances required</li> <li>• Dead-end corridors</li> <li>• Executed by DC</li> </ul> <p><b>ADA + ANSI -</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan and relevant floor plan + enlarged plan</li> <li>• Enlarged compliant bathroom plan</li> <li>• Fixture + Accessory mounting heights</li> <li>• Executed by DC</li> </ul> <p><b>County Specific Requirements-</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Identify location-specific restrictions</li> <li>• Executed by DC</li> </ul> <p><b>Homeowner's Association Requirements (HOA)</b></p> <ul style="list-style-type: none"> <li>• Located on Code Review Plan</li> <li>• Identify location-specific restrictions</li> <li>• Executed by DC</li> </ul> <p><b>Architectural Site Plan</b></p> <p>Includes:</p> <ul style="list-style-type: none"> <li>• Existing and proposed lot lines</li> <li>• Building Placement</li> <li>• Basic new utility layout (septic, well, power)</li> <li>• Setbacks</li> <li>• Existing and proposed driveways</li> <li>• Existing natural features (slope, contours)</li> </ul> <p><i>*Disclaimer: Based on jurisdiction, DC will provide the above items. For anything else, the client will give the markups on existing utilities, wetlands, drainage ways, rivers, streams, trees, etc. In addition, DC will include the on-site plan.</i></p> <p><b>Note:</b> This compliance review must be completed for all commercial projects to ensure the design and floor plan meet the proper design criteria and meet any local and federal codes.</p>			
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<p><b>Architectural Stamped Plans Included in Commercial Design Review Above</b></p> <p>Commercial projects (some residential) require a Design Professional of Record (typically a licensed architect). In those cases, DC Structures works with clients in coordinating Architectural Services with collaborating licensed architects when the need arises as an Additional Service fee.</p> <p>The architect coordinates with civil, mechanical, and electrical consultants designated to the project to combine a plan set ready for building department submittal. During the process, we work closely with the architect in designing the project to ensure the project meets the commercial building code. Some components include verifying egress widths, exit distances, fire extinguisher cabinet locations, and total building occupancy, among other essential requirements to help determine fire code specifications and an overview of code compliance for fire and life safety for your project. In addition, this process helps streamline the submittal review process with state and local jurisdictions.</p> <p>This service does not include fire sprinkler plans, but we can coordinate them for an additional fee.</p> <p>Note: This compliance review is required to be completed for all commercial projects to ensure the design and floor plan meet the proper design criteria and will meet any local and federal code.</p> <p>Pricing is based on the total square footage of the structure.</p>	\$0.00	1	\$0.00
<p><b>Michigan Structural Engineering Stamp Included</b></p>	\$0.00	1	\$0.00

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<p><b>Project Notes</b></p> <ul style="list-style-type: none"> <li>Parcel # and/or Coordinates (if needed):</li> <li>Jurisdiction (city or county, please clarify): Oakland</li> <li>HOA: No</li> <li>Elevation: 991'</li> <li>Roof Snow Load: 35 lbs</li> <li>Wind Speed: mph</li> <li>WUI Requirements Apply? No</li> <li>Proximity to coast? Stainless steel hardware (exterior) required within (2) miles</li> </ul> <p><b>Provided by:</b></p> <ul style="list-style-type: none"> <li>Doors:</li> <li>Windows:</li> <li>Railings:</li> <li>Siding:</li> <li>Chair Rail:</li> </ul>	\$0.00	1	\$0.00
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Material Package      **\$114,120.20**

Window, Door and Equine Items	Price	Quantity	Subtotal
Windows and Doors TBD in Schematic Design	\$0.00	1	\$0.00

Window, Door and Equine Package      **\$0.00**

<b>Material Package Items</b>	<b>\$114,120.20</b>
<b>Window, Door and Equine Items</b>	<b>\$0.00</b>
<b>Total</b>	<b>\$114,120.20</b>

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*\*Pending final engineering calculations.*

*\*All engineering questions should be requested from DC Structures not directly requested from the Engineering Firm*

*\*Every project is unique therefore there are factors that can affect procurement time as well as engineering and costs associated to your project*

## Payment Schedule

Description	Price
<b>10% Payment</b> <b>Schematic Design Package:</b> <ul style="list-style-type: none"> <li>• Elevations</li> <li>• Sections View</li> <li>• Exterior 3D Views</li> <li>• Interior Views</li> <li>• Window and Door Schedule(s)</li> <li>• Exterior Finish Specifications (Siding, Roofing, Stone, Etc.)</li> <li>• Mechanical and Plumbing (Equipment Location ONLY)</li> <li>• <u>Up to five (5) Revisions, Upon sixth (6th) Revision, Additional Charges Will Apply.</u></li> </ul>	\$11,412.00
<b>30% Payment</b> <b>Structural Design Package:</b> <ul style="list-style-type: none"> <li>• Structurally Stamped Engineered Plans</li> <li>• Foundation Plans</li> <li>• Framing Plans</li> <li>• Shear Wall Plans with Hold-down(s)</li> <li>• Roof Plans</li> <li>• Structural Details</li> <li>• <u>Any Client Changes Made After Completion of Engineering, Additional Charges Will Apply.</u></li> </ul>	\$34,236.00
<b>60% Final Payment</b> <ul style="list-style-type: none"> <li>• Procurement of All Material Package Components</li> <li>• Manufacturing of Prefabricated Components</li> <li>• Assembly Drawings and 3d Model</li> <li>• Project Binder with Instructions</li> <li>• Master Ship List</li> <li>• <u>Upon Procurement Payment, Material Package Must Ship within 180 days or Material Package Price is Subject to Current Market Conditions</u></li> </ul>	\$68,472.20
<b>Window, Door and Equine Payment</b> <ul style="list-style-type: none"> <li>• Collected at Time of Procurement and Final 60% Payment</li> </ul>	\$0.00
<b>Total</b>	<b>\$114,120.20</b>

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**Shipping Information: All shipments will be made via FOB origin from the DC Structures Inc. warehouse located at 11251 SE 232nd Ave, Damascus, OR 97089. Please note that shipping costs are not included in the sale price and will be contracted directly with the shipping broker.**

**Tax Responsibilities: The Owner is responsible for all applicable taxes stemming from this sale, including but not limited to sales tax, use tax, and custom duties. The Owner agrees to comply with all tax regulations and is responsible for filing and paying any taxes due from this purchase.**

# Approval

<i>Scott Desbiens</i>	07 / 11 / 2025
Scott Desbiens	
Matthew Gibb	

**This Proposal is Valid for 14 days.**

# Terms & Conditions

Owner (i.e., the person(s) accepting the foregoing Proposal from DC Structures (“DCS”)) and DCS agree that the following terms are included in and supplement the foregoing Proposal. All references to Owner or DCS include such parties’ officers, agents, employees, heirs, successors, legal representatives, and assigns.

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1. **Pricing.** The base package price in this proposal will be locked for 180 days of the document date listed on this proposal. ***In the event of any changes to the project detailed in this proposal (including without limitation any design or engineering alterations, material type or quantity changes, shipment date changes) or in the event of changes in market conditions outside of DC Structures control which impact cost. DC Structures will update all material pricing in this proposal to current pricing based on the new document date and will require a new signature of approval.***
2. **Payment.** Unless otherwise stated in the Proposal, an initial payment of 10% of the total Proposal price is due upon Owner's acceptance of the Proposal, this payment is nonrefundable upon the design beginning and owner will be provided with the design materials that have been created up to that point should they choose to cancel. Payment of 30% of the total Proposal price is due prior to the CD and engineering phase, this payment is nonrefundable upon construction details being completed or plans being stamped by the engineer of record. The remaining 60% is due prior to procuring, manufacturing, and creating assembly drawings/instructions, this payment is nonrefundable upon the procurement of materials beginning. Separate from and in addition to these payments, Owner agrees to a pricing adjustment based on current company pricing and agrees to subsequent payment that may occur if owner elects to change ship date from the mutually agreed upon date in the DCS shipping agreement.
3. **Shipment Pickup; Title; Risk of Loss; Transit Waiver & Release; Offloading;** The Owner agrees that their site can accommodate the material package delivery by an 80' truck and trailer and will have a 6,000 lb. reach forklift onsite to offload the material package. Unless otherwise stated in the Proposal, DCS material packages will arrive to Owner via FOB from DCS' headquarters or other originating location(s) of the materials ("Shipment"), and title to and risk of loss of the materials will pass to Owner upon leaving DCS headquarters. The date of pickup agreed to is not the date of arrival or delivery to owner's location. DCS shall not be liable for, and Owner waives and releases DCS from any and all losses, damages, penalties, or expenses arising after the Shipment that relate in any way to the transit and delivery of materials, including without limitation delays in transit. The third-party logistics company assumes liability during delivery. The Owner will be provided with a DCS shipping document providing more detail. Owner shall inspect and make an inventory of materials delivered to Owner's location and report to DCS, within 72 hours of the materials' arrival at Owner's location, any claim or issue relating to the quantity, quality, or suitability of materials in the Shipment(s). Owner must submit time-stamped photographs and a copy of the bill of lading with any missing or damaged

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materials clearly marked. DCS will ship any replacement material direct to site in a timely manner.

4. **Limitation of Actions.** No action arising out of or relating to this agreement may be commenced against DCS more than 12 months after the date of delivery of materials to Owner's location.
5. **Security Interest.** Owner hereby grants to DCS a security interest in the materials sold to Owner under this agreement and any proceeds therefrom (including accounts receivable), until DCS has received payment in full for the materials. Upon DCS' reasonable request, Owner shall sign and deliver to DCS any document necessary or appropriate to evidence, perfect, or enforce this security interest.
6. **Taxes.** Owner shall pay all taxes directly to the appropriate taxing authority and pay any third-party expenses imposed on, in connection with, or measured by, the transaction arising from or relating to the proposal.
7. **Force Majeure.** DCS will not be liable for delays in performance or for non-performance due to unforeseen circumstances or causes beyond DCS's reasonable control.
8. **Assignment; Delegation.** Owner may not assign any of Owner's rights under this agreement or delegate any performance or obligation under this agreement, except with the prior written consent of DCS. Any purported assignment of rights or delegation of performance in violation of this section is void.
9. **Governing Law; Waiver of Jury Trial Right; Designation of Forum; Attorney Fees.** The laws of the state of Oregon shall govern this agreement, without regarding to choice-of-law principles. Any claim or dispute arising from or relating to this Agreement shall be subject to binding arbitration, and judgment on the arbitration award, if any, may be entered in accordance with applicable law. The parties to this agreement acknowledge and hereby waive right to jury trial with regard to this agreement. The parties agree that the forum for arbitration proceedings will be in Oregon. At any time, Owner and DC may collaborate in reaching a resolution of a claim or dispute by negotiation or mediation. In any arbitration or litigation arising from or relating to the Project or this Agreement, the prevailing party shall be entitled to recover from the other all reasonable expenses including reasonable attorney fees, in addition to all other sums provided by law.
10. **Entire Agreement; No Amendments.** This agreement constitutes the entire agreement between the parties with respect to the subject matter of this agreement and supersedes all other agreements, whether written or oral, between the parties. No amendment or modification to this agreement will be effective unless it is in writing and signed by both parties.

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11. **Counterparts; Electronic Signatures.** This agreement may be signed in one or more counterparts, which together will form a single agreement. This agreement may be signed electronically.
12. **CAD Release (\$1,000).** Files are offered in “DWG” format and are provided from the “A” sheet files of Floor Plans, Roof Plans and Elevations only. Not available: 3D views, cross sections, structural plans. No exceptions.
13. **Residential Lighting Plan (\$1,500).** Files are offered in “PDF” format and are provided only to show the rough layout of fixtures, switches, outlets, and basic wiring design. Plan contents will show “placeholders.” Only licensed electricians will be able to comply with county electrical plan requirements. Change to “DWG” files add \$200 for set.
14. **Structural Changes (\$1,500).** Non-building department changes. Builder or Architect requests (changing foundation, adding details not required by the county). Soils/Geo Tech reports arriving after engineering is complete and plans are completed. Engineering to be charged separately.
15. **Expiry of Proposal.** The pricing on an accepted proposal will remain valid for 180 days of date listed on this proposal, upon commencement of that 180 days DC Structures reserves the right to reprice the material package with current market pricing unless otherwise agreed upon in writing by DCS and the client.
16. **Cancellations, Returns, Refunds.** DCS purchases are non-refundable. The client will be provided with the services or materials they have paid for regardless of if they decide to cancel at any point. If the client chooses to resume the same project in the future the payments made will be applied, but the overall price is subject to change. If the client chooses to cancel the project and has made a future milestone payment(s) (whether those services were for design or procurement) and have not begun, a refund will be provided in the amount of that future milestone payment, minus 20% for company overhead and operating costs. If the owner chooses to change the delivery date within 90 days of the ship date after making the final payment, DCS reserves the right to charge a stocking fee of \$175.00 a day. DCS will only accept returns for exchange or refund, for items damaged in transit within 72 hours of delivery.
17. **Applicable Codes, Laws, and Regulations:** All construction documents, details, plans, and calculations identified in the Proposal shall be designed and produced in conformance with or exceeding all applicable codes, laws, and regulations within the authority having jurisdiction within the identified project's locale. The Owner shall not be held responsible for identifying the applicable codes, laws, and regulations to which the structure shall be designed to, nor liable for any nonconformance of the final construction

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- documents, details, plans, and calculations to any applicable codes, laws, and regulations.
18. **Right to Refuse Service.** DC Structures Inc reserves the right to refuse service or performance of contract milestones laid out in the payment schedule of this agreement to any person or entity, for any reason not excluded by law, in its sole discretion. DC Structures Inc will provide a refund upon cancellation for any contract milestone paid for and not provided.
  19. **Missed Ship Dates.** If the Client selects a pickup date and elects to change that date, the client may be subject to a current market pricing adjustment and subsequent payment, DCS warehouse calendar availability and a stocking fee.
  20. **Weather.** In severe weather, we may determine it is not safe to load or allow pickup at the DCS warehouse and cancel that day's pickup. When this occurs, we will reschedule the pickup as soon as weather permits. Please help assist us with the rescheduling.
  21. **Storage.** The owner and/or owner's representative are responsible for storing materials to insure the preservation of their quality and fitness for construction. DC recommends they be placed on wooden platforms or other hard clean surfaces not directly on the ground and should be placed under covered storage when available. We do not recommend storing your materials for longer than three months outside of a dry covered storage building due to potential weather damage. DC is not responsible for replacing materials damaged due to inclement weather and new materials will need to be purchased via change order.
  22. **Provided by Others Items.** The Owner acknowledges and agrees that any materials provided by them for the purpose of manufacturing shall be free from defects and compliant with all relevant regulations and standards. DC shall not be held liable for any loss, damage, injury, or expense arising from the use of the materials provided by the Owner, including but not limited to, any defects, non-compliance issues, design issues, size issues, or inherent risks associated with said materials. The Owner agrees to indemnify and hold harmless the DC, its employees, agents, and affiliates from any claims, demands, or liabilities arising out of or related to the materials provided by the Owner. This release of liability shall survive the termination or expiration of the manufacturing contract.
  23. **Wall Panels:** If DC and the client choose to incorporate wall panels they shall be designed and manufactured in accordance with the specifications in the plan set associated with this project and approved via DocuSign by the owner. The panels shall

be constructed using high-quality materials that meet industry standards for durability and aesthetics. The design shall incorporate all specified items as agreed upon by both parties in this agreement and on the approved plan set. The manufacturing process shall adhere to strict quality control measures to ensure consistency and precision in the fabrication of each panel. All panels shall be inspected prior to delivery to ensure they meet the agreed-upon specifications and are free from defects.

Installation of the wall panels is not included in this contract and shall be the responsibility of the owner or a third-party contractor hired by the owner. DC shall provide detailed installation guidelines and support to assist the owner or their chosen contractor in the proper installation of the panels. Any damages incurred during transportation or installation shall be the responsibility of the owner or their appointed contractor. DC shall not be liable for any issues arising from improper installation or handling of the panels by parties other than themselves.

24.

### **Client & Contractor Expectations**

- A 6k rated forklift is the minimum required to unload materials.
- There will need to be access to the job site for a semi-truck and trailer or a sufficient alternative staging area to receive material.
- Any and all secondary delivery to the job site will be the client's responsibility to be available to receive.
- DC Structures will provide the builder with a master construction binder printed on 11" x 17" paper. Layout for all the timbers, rafters, and wall components. Window and door cut sheets if provided by DC Structures. Cut sheets for all specialty equipment provided by DC Structures.
- DC requires that upon delivery everything be inspected for damage as well as take an inventory of all items to ensure all items have been delivered
- Upon receiving delivery, if any units are damaged before being unloaded, please note on the BOL (driver will have) the possibility of damage on a specific package number. Also take pictures of any damage before unloading and forward to support@dcbuilding.com. This will ensure a quick replacement of any damaged item.
- The owner and/or owner's representative are responsible for the preservation of the quality and fitness of materials for construction.

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## From DC Structures Warehouse

### Pre-Fabricated Items

- Post and Beam
- Rafters
- Wall Framing
- Corbels
- Timber Trusses if applicable

### Misc. Framing Items

- Stair components
- Floor sheathing
- Temporary Bracing
- Sub Fascia
- Connection Hardware
- Sill Seal
- Pressure Treated Sill Plate
- Interior Framing

### Siding and Exterior Trim

- Exterior siding
- House Wrap
- Window, door, and corner trim
- Finish Fascia
- Decking
- Railing

### Vendor Direct Shipping

Sheet goods will arrive the same week as the items mentioned above. A forklift may be required to unload these items as well.

- Roof and wall sheathing will be delivered locally
- Floor or roof trusses
- Windows
- Doors
- Specialty items such as Breezeway Doors, Dutch Doors, and Stall Equipment (Forklift Required)

### Job-site Recommendations and Expectations

If there is currently no access to the job site, we would require a gravel access road as well as gravel surrounding the jobsite for adequate area to turn around a semi-truck. This will also help during construction to keep the working area from becoming too muddy to work in. Also staging material in a gravel area vs dirt will give better access and less cleanup during construction. Bails of straw during the wet season can also help keep the area drier and cleaner.

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We would recommend there be adequate power on the job site within 100 ft of the building. Portable toilets for any workers on site. Also, a dumpster or designated area for waste to keep the job site clean during construction as well as being able to separate specific material for building purposes away from any item that may be misused

DC Structures will provide shim plates for the knife plates in the case that the slab is not perfectly level. However, we would recommend that the framers purchase composite shims to ensure the walls are level and at the right height in the case the slab is not perfectly flat as all the wall components are precut before delivery.

If there are any questions or concerns please reach out to your project coordinator or call 888-975-2057.

I have read the client and contractor expectations

I agree to the **Terms and Conditions**       I have read the **Limited Warranty**

*This proposal and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. This proposal contains confidential information and is intended only for the individual named. If you are not the named addressee you should not disseminate, distribute, or copy this proposal.*



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## DDA ACTION SUMMARY SHEET

**MEETING DATE:** July 15, 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 April 2025.

# EXECUTIVE DIRECTOR REPORT

Matthew Gibb – Executive Director

July 15, 2025



## I. NEWS AND UPDATES

- a. **VOLUNTEER OF THE YEAR.** We coordinated the presentment of our Annual Volunteer of the Year Award to Rene’ Samet. She was out of the country at our regular awards night, but this moment made it even more special and should be considered for an annual program. This office was able to gather the ward, flowers and a very good attendance.
- b. **INFRASTRUCTURE MAINTENANCE.**
  - i. The parking area known as the Tarr Lot was repaired, and partially re-paved. Mulch was ordered and it is being spread in those area where the DPW has elected to exclude and defer to us through our prior agreement to provide funding for the development of the parking areas.
  - ii. The flowers are being supported so well, they out grew the capacity of the hanging system in the main intersection. New support chains and clamps were obtained and everything was reinstalled.
  - iii. We procured new planter boxes to be placed over those grates and areas where there has long been either a board or an open hole. The concept is to cover those areas with a uniform look and maintain the boxes for use where needed on an annual basis.
  - iv. The director emptied garbage cans over the holiday weekend as scheduling of the DPW, under our contract, did not take into account the use of the canisters in the abundance that we saw crowds come in to downtown.
  - v. The director cleaned up two blocks with of broken bottles and debris following “flare night”. This also included re-planting to large pots in the intersection as the flowers were torn and thrown in the street.
  - vi. The director coordinated with owners of Johnny Blacks and Sagebrush to address the grease trap issues. It an ongoing problem.
  - vii. The director had signs made for the parking area at the lumber yard directing people to the sue of cross walks. Staff put in posts and the director hand made a sign bracket and installed the signs.
  - viii. To remove the blight of bent green metal poles in downtown for banners, the director installed two new permanent post and equipped the post with brackets for better installation of promotional bannering.
  - ix. Quotes have been obtained for the maintenance o the Slater St parking rea.
  - x. Quotes have been obtained for the repair of the parking wall in the children park parking area.

- c. **MAIN STREET GRANT REPORTING.** The initial report auditing all expenses o date for the lumber yard public space grant is drafted and financials being reviewed for submission and final invoicing on the second draw.
- d. **DOWNTOWN LODOWN.** Held another great meeting to advance the concepts of business development, discussions around closing downtown for events.
- e. **STRATEGIC PLAN.** Working to finish the updated DDA Transformational Strategy Plan. This will be presented for adoption in August 2025, following a final review by the joint meeting of all four Main Street Committees in July.
- f. **VILLAGE MTGS.** Several meetings regarding the status of the police pass through.

## II. TO DO'S AND MORE

1. FINANCIAL – The Director will be taking back the core financial processing until it can be assured that all matters will be timely and properly appropriated.
2. SPONSORSHIPS – There needs to be an offering memorandum which is not done. This will be completed for review and approval by the August meeting.
3. MECHANDISE – Lumber Yard merchandise is being created or offering at Dragon on the Lake. Core DDA gear for staff and volunteers is likewise being developed. We have engaged a new Org Committee Member Debra Novara, to complete graphic design work and it is going very well.
4. INSURANCE CLAIMS - Several attempts have been made to secure a dialogue with our carrier to have a direct ability to process claims, but all contact has gone unanswered
5. NON-PROFIT – Coordination has started between the director and a board member to draft out the articles and structure.
6. STAFF ANNUAL REVIEW(S). This is in progress and reports are required.
7. BANNERS – We are seeking a better install solution.

Respectfully Submitted,

Matthew Gibb

[gibb@downtownlakeorion.org](mailto:gibb@downtownlakeorion.org)

(248) 464-0307



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## DDA ACTION SUMMARY SHEET

**MEETING DATE:** July 15, 2025

**TOPIC** Lumber Yard Progress Report

**BACKGROUND BRIEF:**

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

**FINANCIAL IMPACT:**  
**As outlined in the Report**

**RECOMMENDED MOTION**

Move to Receive and File the Progress Report dated July 15, 2025.



## LUMBER YARD at PAINT CREEK

### PROGRESS REPORT

#### PHASE 2 – CONCEPT

### Report to the Board

For the Period 6/15/25 – 7/15/25

July 15, 2025 @ 6:30pm

By: Matthew Gibb, Executive Director



The project is nearing completion of the initial re-construction and repair work necessary to support the roofing and foundational repairs being coordinated with inspection and oversight. The structural repair work is focused on the south and west walls of the main barn, awaiting delivery of steel for roofing. This report outlines what has been done in the immediately prior work period and concludes with next steps. **FIND MORE PHOTOS AND INFORMATION ON THE DDA WEBSITE**

#### **MAIN BARN**

The best way to explain the progress on the main barn is to simply itemize it in general terms as even the day to day decisions would be a significant report. So, here's the summary line items:

- The main barn is now principally empty of debris. We filled seven (7) more 30 yard dumpsters, and likely could fill one final load to complete the debris removal.
- The north facing roof has been re-paired and re-structured with new joist and truss work. It is sheeted and ready for metal roofing. The north wall was repaired to handle the new load, and the interior wall between the annex and the main room has been repaired with beam and bracing as recommended by the building official.
- Footing repairs are ongoing and there are new 42" poured footing supports on multiple corner and post locations. This is identical to what was decided for the north annex wall.
- The base plate on the south wall is replaced, and splicing against original material is being used to re-build the framing of the interior walls to allow for the use of original material on the exterior siding.

- The south roof, outside of the balloon truss system is being rebuilt in the same fashion as the north. Expect a material change order for the additional lumber, which was anticipated.
- There are three garage door openings being framed as part of the south wall repairs, this allows for the rationing of exterior/salvage siding material and enhances the structural integrity of the wall to accept the standing seam roof. All re-framing is being done as repair work er historic code.



**SALVAGE MATERIAL**

Materials Salvaged throughout the site are being re-applied as appropriate to the historic preservation and the design plan of the public space grant from Oakland County. In the case of the Supply Shed, which will be the trail head main feature, salvaged 1" wood was patched as the ceiling and support for the final repairs of the structure.



**ORIGINAL OFFICE**

The roofing repairs are completed and awaiting the siding installation to finish the coping and cap. Primed siding was chosen to expedite getting the exterior repairs done. Siding is going on as this report is being written.



## **SITE PLAN DEVELOPMENT**

The long-awaited topographical survey is almost done. This will allow us to move towards site engineering and placement of public space amenities and structure development.

A version of the preliminary plan is on the DDA website

<https://downtownlakeorion.org/wp-content/uploads/2025/07/TOPOBASE-200164-TOPO-2025-07-08.pdf>

### Board Decision Points

- Sourcing and process for taxable retail structure development
- Concept and sourcing for concession, storage and restroom facilities
- Public space design and landscaping
- Access

## **NEXT STEPS FOR THE NEXT MONTH**

1. Complete the exterior repairs and siding of the front retail building. Get this under letter of intent for possible user and move into tenant improvement discussion.
2. Decide and start design and plan development for prefabricated retail use(s)
3. Electricity and Water. Need to define taps, power drops, transformer needs, and fixture design/quantities.
4. Procurement of walkway and rail elements of public space amenities and surface preparation.
5. Finish preliminary site plan, based on floor plan design decisions.
6. Complete all change orders necessary for the structural repairs under the initial first phase of approvals for the main barn. Get the roof on the barn. Start interior design work and needed architectural effort, including load calculations and power.
7. Start the fixture procurement process, using the experts brought in by the director from Madison Electric.
8. Deal with the invasive species problem in site design and contract for remediation.
9. DTE, CONSUMERS, VILLAGE DPW



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## DDA ACTION SUMMARY SHEET

**MEETING DATE:** July 15, 2025

**TOPIC** Assistant Director's Report

Assistant Director's Report

**RECOMMENDED MOTION:**

To Receive and File the Assistant Director's Report



# MEMORANDUM

Janet Bloom – Assistant Director

July 15, 2025

**Completed Events/Activities:**

Downtown Lake Orion Restaurants participated in the LOAS Restaurant Week (June 23-29) and the LOAS Pub Crawl (June 27). LOAS is presenting a \$1000 check to the Lake Orion and Oxford DDAs within a week.

Downtown Celebration – June 25: To celebrate our Volunteer of the Year, Rene Samet, who was out of town for the Volunteer Party earlier in the year, and recognize the DDA’s MSA Accreditation for another year, and to welcome one of our newest businesses, Lake Orion Bike & Adventure Co.

Kickoff of LOLive! on July 9 at 6:30 pm – 8 pm. It was heavy rain so concerts were moved inside 20 Front St. We wish to thank FlipSpot Gymnastics, 20 Front Street, and ONTV for supporting this free music series.



**Upcoming DDA Events:**

- July 16, 23, 30 – LOLive! Music Concerts 6:30- 8 pm (DDA). See attached.
- July 18 – Outdoor Movie Night – Date Night – dusk (DDA) – TO BE RESCHEDULED
- August 15 – Outdoor Movie Night – Teen Night – Brian from Little Caesar’s is supporting by providing a free slice of pizza per teen.
- August 21-24 - Dragon on the Lake – Lake Orion and Oxford DDA Dragon Boat along with other Oakland County Main Street DDAs, activate the Flint St. Alley with decorations, a dragon wing mural from last year’s artist (still a Lake Orion HS student!), and kids activities.

See attached **Summer Calendar** to see Downtown Lake Orion annual events and those weekly activities that happen in our downtown (i.e. cornhole, trivia, fiber arts, live music, etc.)

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

**Project Status:**

- 1) Kiosk Signs: Install should be early week of July 14. Two at Broadway and Flint, and one at Front St. and Anderson. See attached.
- 2) Shopping & Dining Guides: last set of updates sent July 11. Expect final version back July 14 for print production.
- 3) Orion Living Magazine: DDA does two-page spread in this quarterly magazine. Summer issue pages:



- 4) Façade Grant window cling sign: designed and ordered for Lake Orion Bike & Adventure Shop.



5) Media List: The file has been updated and also includes 20 Front Street, Orion Art Center, and Main Street Oakland County media lists so all data is in one file.

6) Trash Pick Up: Priority Waste picks up dumpsters on Monday/Wednesday/Fridays. General trash pick up is Monday. There is another pick up day on Thursday/Friday. We are working to consolidate the # of days the trash haulers are going through downtown.

7) Ten black galvanized steel planters have been purchased. We will work next week on filling them with dirt and plant materials then disperse them onto grates missing trees.



8) Oakland County has digitized the Mason's building blueprints. We hope to have more information on the awnings and removal of cladding on building soon. This will provide the feasibility of making these updates. Building tenants will be kept up to date on this project, if the Mason's move forward once they get information from Oakland County.

9) Parking lot across from DDA office was repaired on Friday. A portion of asphalt was removed, gravel was added and then fresh asphalt laid down. Lot to reopen on Monday morning.



**Social Media Stats**

**Downtown Lake Orion Facebook:**

**Followers:** 10,789 (added 105)

**Estimated Reach:** Previous: 23,300; Current: 62,300 (# of people who saw content at least once)

**Engagement:** Previous: 24,000; Current: 1,728 (reactions, comments, shares, or clicks on our posts)

**Views:** Previous 64,314; Current 202,477 (# of times our content was played or displayed. Includes reels, videos, posts, stories, and ads.)

Top content by views

Boost content

See all content



**A few hundred folks came out to celebrat...**

Fri Jun 27, 2:19pm

60.2K 206  
130 11



**The pansies were beautiful but we can'...**

Fri Jun 27, 9:42am

22.2K 174  
6 3



**The Lake Orion DDA had many reasons to...**

Thu Jun 26, 11:02am

9.6K 137  
22 6



**Even in the rain Wee Bean Coffee is a...**

Thu Jun 19, 1:43pm

6.1K 67  
1 2



**Downtown Lake Orion is your Summe...**

Sun Jun 22, 9:59am

6K 20  
1 2

**Downtown Lake Orion Business Group on Facebook:**

139 members (added 2); 45 posts in the last 28 days.

**Instagram:**

4,256 (added 33); Views: 5.8K

Top content by views

Boost content

See all content



**The pansies were a hit but we are excited...**

Fri Jun 27, 10:49am

1.3K 30  
1 2



**The Trolley is in for repairs. We will have no service this weekend. We apologize for any inconvenience.**

Wed Jul 2, 4:15pm

712 2  
0 0



**Congratulations to Downtown Lake...**

Wed Jul 2, 4:35pm

436 3  
0 0



**Kickoff of 2025 Lake Orion Live! Concert...**

Wed Jul 2, 4:16pm

429 0  
0 1



**Kickoff of 2025 Lake Orion Live! Concert...**

Wed Jul 9, 3:44pm

392 20  
1 0

**X (formerly Twitter):**

1,544 (down 3)

**Activities**

6/17: DDA Regular Board Meeting

6/23: Downtown LOdown at 20 Front Street, hosted by Cookies & Cream (too hot for outside)

6/24: DDA Executive team and Village Manager monthly meeting

6/26: Ribbon Cutting at Mystic Cove, hosted by the Orion Area Chamber of Commerce.

7/1: Lake Orion DDA and Orion Area Chamber of Commerce monthly meeting

**Grants:**

**DDA - Quadratec Cares Energize The Environment Grant**– Applied June 30, 2025. \$3,500. Responses to winners only due back around July 20, 2025.

**DDA - T-Mobile Grant** (up to \$50,000) – New submission deadline of September 30. Selected project must be shovel ready along with five letters of support. Response within 60 days of close date. Cassandra and Luca, new residents and volunteers, have been very helpful in the grant process.

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

**Businesses – Genisys Credit Union grant “Spirit of Main Street”** will open August 11. Deadline to apply is September 1. Contact the DDA office if you are a Downtown Lake Orion DDA business who is interested in applying.

**Committee Meetings:**

Organization Committee – June 18, 2025

Promotions Committee – July 1, 2025

Design Committee - canceled

Economic Vitality Committee – canceled

**Trolley Update:**

Parts are ordered but have not arrived to vendor repairing the trolley. Messaging has been going out since the trolley broke down June 21. We are awaiting repair estimates.

**Add to Your Calendar:**

**JULY 14: The Future of AI is Now!** Oakland Thrive/Lake Orion DDA/Oxford DDA Joint Training. Presenter: Princess Castleberry; 9:30-10:30 am; Oxford Village Community. This is hands-on so bring a charged laptop and sign up for a free ChatGPT account prior to the event.

**Ribbon Cutting:** For Lake Orion Bike & Adventure Co., July 17, 4:30 pm-5:30 pm. Hosted by the Orion Area Chamber of Commerce. Address is 47 N. Broadway.

**All Committee Meeting:** July 24, 8 am – 9:30 am at the Lake Orion Community Schools Administration Building, School Board meeting room.

**Downtown LDown:** Monday, July 28, 4:00-5:30 pm at Irish Tavern. (These are held the 4<sup>th</sup> Monday of the month.)

**New Business:**

Thrive Therapy – Pediatric speech therapy services. Moving into former Heart Space Playroom. Received Change of Use approval. Expects to be open beginning of August. Owner is Calissa Smith, MA, CCC-SLP.

**WDIV Vote 4 the Best:** Seven Downtown Lake Orion businesses in the running. Voting is open until July 21.



**Lake Orion DDA Businesses  
in the Running for  
Vote 4 the Best Awards!**

**Voting is open from now  
until July 21!**

**Vote at:**

**<https://vote4thebest.clickondetroit.com>**

**Lake Orion DDA Finalists Below:**

**Coffee**

- ABeanToGo Coffee in Lake Orion.

**Concert Venue**

- 20 Front Street in Lake Orion.

**Margarita**

- Sagebrush Cantina in Lake Orion.

**Wine Bar**

- Wine Social in Lake Orion.

**Cannabis Dispensary**

- LIV Cannabis

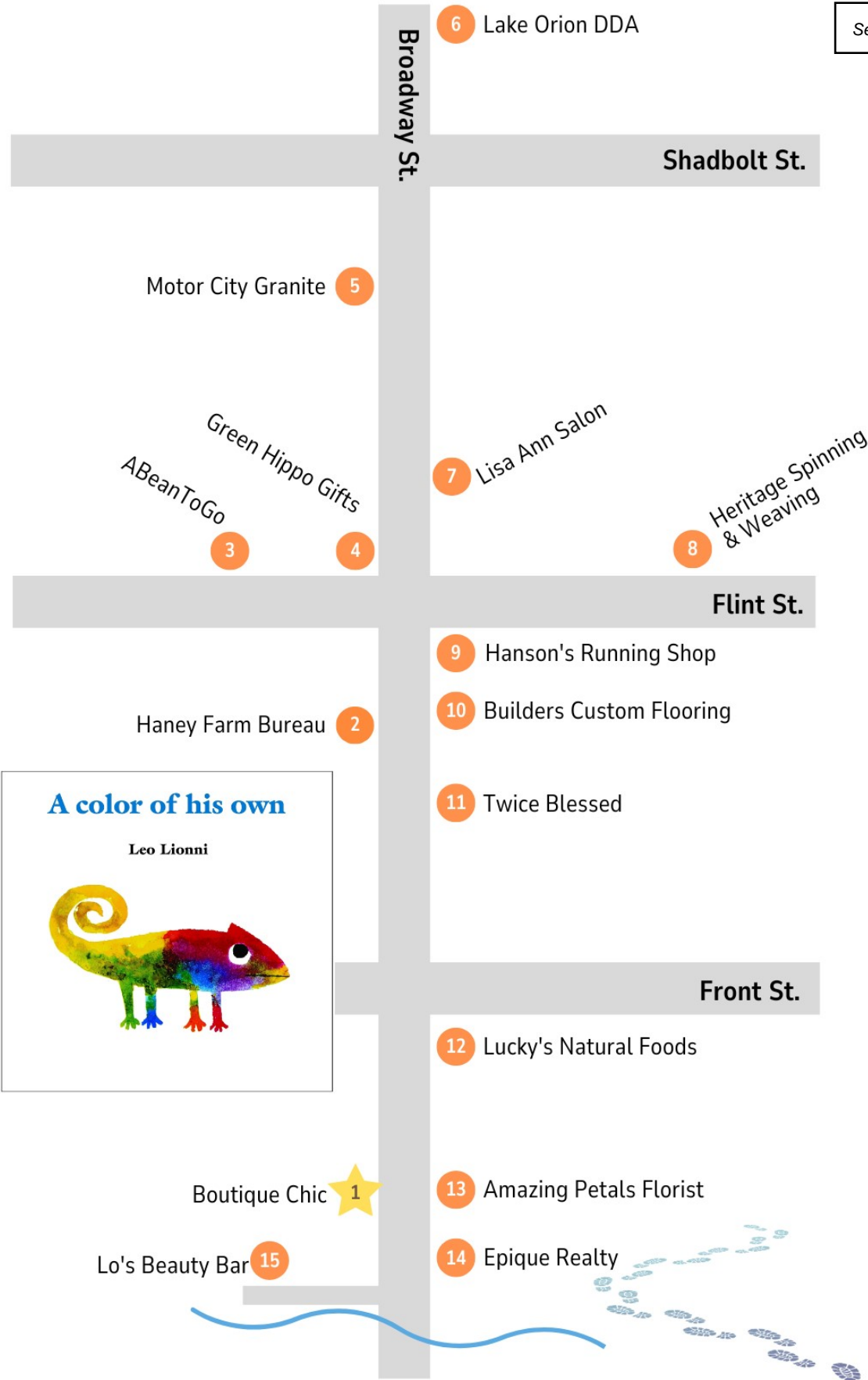
**Middle Eastern**

- Anita’s Kitchen

**Coney Island**

- Leo’s Coney Island

Respectfully Submitted,  
Janet Bloom  
[bloom@downtownlakeorion.org](mailto:bloom@downtownlakeorion.org)  
cell (248) 320-7599



Read and act out a story as you follow the path and explore downtown throughout July! Featuring *A Color of His Own* by Leo Lionni.

# LO Lake Orion LIVE!

Wednesdays  
6:30–8pm  
Children's Park



Patty PerShayla  
July 9  
wsg/ Brett Lucas



The Rebel Eves  
July 16  
wsg/ Jason Waggoner



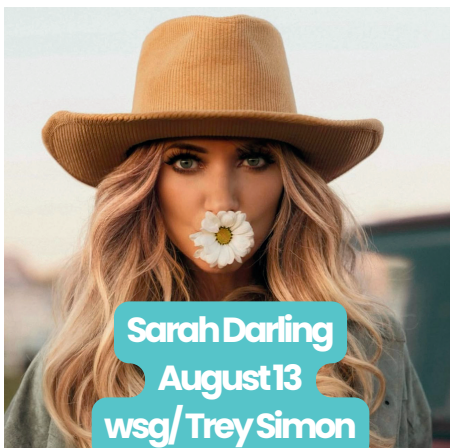
Low Gap  
August 6  
wsg/ Rebecca Cameron



Tae and the Neighborly  
July 23  
wsg/ Tom Butwin



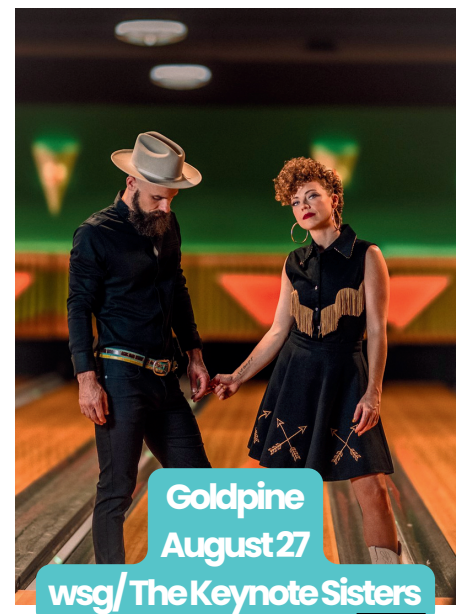
Buffalo Rose  
July 30  
wsg/ Ella Rose Goetz



Sarah Darling  
August 13  
wsg/ Trey Simon



Brother Maven  
August 20  
wsg/ Jessey Adams



Goldpine  
August 27  
wsg/ The Keynote Sisters



# The Future of AI is Now

## To Do

- Bring fully charged smart device or laptop.
- Register for a free ChatGPT account at <https://chatgpt.com/>

**Presented by:  
Princess  
Castleberry**



Join Global Keynote Speaker and Leadership Strategist Princess Castleberry for an immersive workshop that unveils the generative power of AI for businesses. This hands-on experience was designed to introduce entrepreneurs to AI's productivity, generative, and advisory capabilities for personal and professional use.

**Monday,  
July 14**

**9:30 AM - 10:30 AM**

Oxford Village Community  
22 West Burdick Room 22,  
Oxford MI

**RSVP by July 11 to**

**[rrobertson@thevillageofoxford.org](mailto:rrobertson@thevillageofoxford.org)**

# E-Newsletter Distribution Schedule

Every Monday, at 9:30am, alternating Business and Consumer versions.

<b>JULY</b>	
7/14/25	Consumer
7/21/25	Business
7/28/25	Consumer

<b>AUGUST</b>	
8/4/25	Business
8/11/25	Consumer
8/18/25	Business
8/25/25	Consumer

<b>SEPTEMBER</b>	
9/1/25	Business
9/8/25	Consumer
9/15/25	Business
9/22/25	Consumer
9/29/25	Business

<b>OCTOBER</b>	
10/6/25	Consumer
10/13/25	Business
10/20/25	Consumer
10/27/25	Business

<b>NOVEMBER</b>	
11/3/25	Consumer
11/10/25	Business
11/17/25	Consumer
11/24/25	Business

<b>DECEMBER</b>	
12/1/25	Consumer
12/8/25	Business
12/15/25	Consumer
12/22/25	Business
12/29/25	Consumer



## Downtown Lake Orion 2025 Events

Page 1 of 2

***All the LOLive! Music concerts are from 6:30pm – 8:00pm in Children’s Park  
(Rain location is 20 Front St.).***

***The Social District is open during restaurant business hours until midnight every day.***

### January

- 1 Lake Orion Resolution Run (Hanson’s)
- 4 Chroma Opening – thru 1/25 (Orion Art Center)

### February

- 1 Lake Orion Ice Golf Cup Challenge (Sunrise Rotary)
- 1 Lake Orion Ice Fest (DDA)
- 8 Heartlines Opening – thru 3/1 (Orion Art Center)
- 21-March 1 Lake Orion & Oxford #StrongerTogether Restaurant Week (DDA)

### March

- 13 Ribbon Cutting at Irish Tavern (Orion Area Chamber)
- 13 Lake Orion Middle School Show Opening – thru 3/29 (Orion Art Center)
- 15 Lake Orion & Oxford St. Paddy’s Day Pre-Game Pub Crawl (DDA)

### April

- 5 Joan Brace Scholarship Show Opening – thru 4/26 (Orion Art Center)
- 5 Boater Safety Class (Lake Orion Lake Association)
- 9 Library Celebration (Roaring 20’s) 7 pm (Orion Twp. Public Library)
- 19 Easter Egg Hunt in Children’s Park (SAL/American Legion)
- 26 Oxford to Orion Ruck Walk 10am – 2 pm (OORuckWalk.org)

### May

- May-Oct. DIA Inside/Out Art Installation – 10 locations (DDA)
- 3 Blooming Opening – thru 5/31 (Orion Art Center)
- 10 LOvely Lake Orion - Spring Clean Up in Downtown Lake Orion (DDA)
- 17-18 Art & Flower Fair (Orion Art Center)
- 26 Memorial Day Services & Parade (Village/American Legion)
- 26 Orion Veterans Memorial Day Race (Twp./Orion Veterans Memorial)
- 26 Navy Memorial at Children’s Park 10 am (Village/American Legion)
- 29 Wildwood Fundraiser for Fireworks 6:30-9 pm (Wildwood)

***The events listed here could change unexpectedly due to unforeseen circumstances.***



## Downtown Lake Orion 2025 Events

Page 2 of 2

### June

- June/July/August Launch of Pedal Boat Pub Tours
- June/July/August Launch of Tour on Orion Boat Tours
- 5 Cornhole Starts (Every Thurs. through Sept.7) (SAL/Am. Legion)
- 7 National Trails Day (DDA/Orion Twp.)
- 7 Warp and Weft Opening – thru 6/28 (Orion Art Center)
- 7 Youth Fishing Derby at Green’s Park (Lake Orion Lake Assoc.)
- 7 Summer Reading Kickoff (Orion Twp. Public Library)
- 17 Orion Area Chamber 75<sup>th</sup> Year Celebration at Paint Creek CC (Orion Chamber)
- 19-22 Lake Orion Jubilee Carnival (Lions Club)
- 21 Boater Safety Class (Lake Orion Lake Association)
- 23-29 Lake Orion American Summer Restaurant Week (LOAS) (Lake Orion & Oxford)
- 26 Ribbon Cutting/Mixer – Mystic Cove (Orion Chamber)
- 27 Lake Orion American Summer Pub Crawl (LO/Oxford) (LOAS)

### July

- 4 Flare Night on Lake Orion (Lions Club)
- 5 Exposures Opening – thru 7/26 (Orion Art Center)
- 5 Lake Orion Fireworks (LO Fireworks Foundation)
- 9, 16, 23, 30 Lake Orion LOLive! Music Concerts (DDA)
- TBD LOHS All Classes Reunion Pre-Party (American Legion)
- TBD LOHS All Classes Reunion at Camp Agawam
- 27 Lake Orion Kids & Kops Car Show (and Pancakes) 8am – 1pm (LOPD)

### August

- 2 Seafood Boil-ticketed event (Sunrise Rotary)
- 6, 13, 20, 27 Lake Orion LOLive! Music Concerts (DDA)
- 15 Outdoor Movie Night at Children’s Park (for teens) (DDA)
- 20-24 Lake Orion Dragon on the Lake (Orion Art Center)
- 22 Lighted Boat Parade (Lake Orion Lake Association)

### September

- 6 The Art of Storytelling Opening – thru 9/27 (Orion Art Center)
- 19 Outdoor Movie Night at Children’s Park (for kids) (DDA)
- 20 Lake Orion Zombie Walk & Poker Run (Ed’s Broadway Gift and Costume/Lighted Parade Fundraiser)
- 25-27 America in Bloom (Orion Twp./Orion Parks/Village/DDA)

*The events listed here could change unexpectedly due to unforeseen circumstances.*



## Downtown Lake Orion 2025 Events

Page 3 of 2

- 27 Michigan Downtown Day (DDA)
- 27 Classic Car Show for Veteran’s Memorial Fundraiser (Golling)
- October**
- 4 Grayscale Opening – thru 10/25 (Orion Art Center)
- 4-5 Here Lies Lake Orion Cemetery Tours (Orion Historical Society)
- 15 Lake Orion Halloween Extravaganza 5pm-7pm (DDA)
- 24 Witches Night Lake Orion & Oxford #StrongerTogether (DDA)
- November**
- 1-30 Oakland County Shop Small “Local Gems” Sweepstakes”
- 1-30 Holiday Art Market (Orion Art Center)
- 20 Lake Orion Sing & Stroll Tree Lighting and Hometown Holiday Horse & Carriage Rides 5pm-7pm (DDA)
- 29 Shop Small Saturday and Hometown Holiday Horse & Carriage Rides 10am – 2pm (DDA)
- December**
- 1-31 Holiday Art Market (Orion Art Center)
- 4 Impact Awards (Orion Area Chamber)
- 5 Holly Jolly Fundraiser 6-11pm (Golling/Orion Area Parade Group)
- 6 Orion Lighted Christmas Parade 6 pm (Orion Area Parade Group)
- 13 Polar Express Trolley Rides (DDA)
- 13 Winter Workshop 11 am – 1 pm (Orion Twp. Public Library)

*The events listed here could change unexpectedly due to unforeseen circumstances.*