# AGENDA

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

**Tuesday, August 19, 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 July 15, 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. Strategic Plan 2025-2031 - Final Adoption

B. Presentation - Sponsor/Engagement Program

C. Executive Team Contracts - Review

**9. Reports, Resolutions and Recommendations**

A. Executive Director Report

B. Lumber Yard Progress Report - Presentation

C. Assistant Director's Report

**10. Board Comments and Training Feedback**

**11. Next Regular Meeting - September 16, 2025**

**12. Adjournment**

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

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

# DDA SUMMARY SHEET

**MEETING DATE:** August 19, 2025

**TOPIC:** Approval of DDA Regular Meeting Minutes of July 15, 2025

**RECOMMENDED MOTION:** To approve the Downtown Development Authority Board Regular Meeting Minutes of July 15, 2025.

# MINUTES

**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

The July 15, 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
Secretary Hank Lorant
Board Member Lloyd Coe
Board Member Sally Medina
Board Member Alaina Campbell
Board Member Chris Barnett
President Teresa Rutt

ABSENT
Treasurer Matt Shell

STAFF PRESENT
Executive Director Matthew Gibb
Assistant Director Janet Bloom
Village Manager Darwin McClary
Deputy Clerk/Treasurer Lynsey Blough

## 3. Approval of Minutes

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

**MOTION** made by Board Member Coe, Seconded by Secretary Lorant, to approve the Downtown Development Authority Board Regular Meeting Minutes of June 17, 2025, as presented.
**VOTING YEA:** Burgess, Caruso, Lorant, Coe, Medina, Campbell, Barnett, Rutt
**VOTING NAY:** None
**ABSENT:** Shell
**MOTION:** Carried

## 4. Approval of Agenda

**MOTION** made by Board Member Barnett, Seconded by Secretary Lorant, to approve the Downtown Development Authority Board Agenda of July 15, 2025, as presented.
**VOTING YEA:** Burgess, Caruso, Lorant, Coe, Medina, Campbell, Barnett, Rutt
**VOTING NAY:** None
**ABSENT:** Shell
**MOTION:** Carried

## 5. Call to the Public

None.

## 6. Consent Agenda

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

**MOTION** made by Board Member Barnett, Seconded by President Rutt, to approve the July 15, 2025, Consent Agenda by one vote, as presented.
**VOTING YEA:** Burgess, Caruso, Lorant, Coe, Medina, Campbell, Barnett, Rutt
**VOTING NAY:** None
**ABSENT:** Shell
**MOTION:** Carried

### A. Financial Reports

**MOTION** made by Board Member Barnett, Seconded by President Rutt, to receive and file the financial reports for June 2025.
**VOTING YEA:** Burgess, Caruso, Lorant, Coe, Medina, Campbell, Barnett, Rutt
**VOTING NAY:** None
**ABSENT:** Shell
**MOTION:** Carried

## 7. Financial Matters

### A. Bill Approval

Board Member Coe asked if a discount was possible for the recurring dumpster charges. Executive Director Gibb responded that the vendor cannot offer discounts selectively but has

provided expedited 24-hour service instead of the typical three-day turnaround. He noted that debris removal is nearly complete, with 47 dumpsters used and 101 truckloads hauled away.

**MOTION** made by Board Member Campbell, Seconded by Secretary Lorant, to approve disbursements in the amount of $31,523.46 for June 2025.

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

## 8. New and Old Business

### A. Presentation - Daniel Pavelich - Silversmith/Gantt Chart

Assistant Director Bloom introduced Daniel Pavelich, a Grand Valley State University student who contributed to last year's hanging baskets and recent special projects. This summer, he focused on improving DDA asset maintenance by creating a modular Excel Gantt chart, a PERT chart, and a detailed asset inventory. He also used the Silversmith system to map and assess items like lampposts, benches, and trash cans. Chairperson Burgess and board members praised his work, noting the time and effort involved. Mr. Pavelich shared that some tasks took over 20 hours and that he wrote custom Excel code to enhance functionality. He said he enjoyed the project and was proud of the outcome.

### B. Lumber Yard - Retail Structure Option

The DDA Executive Director updated the board on the lumberyard redevelopment, requesting direction on using DC Structures as a single-source provider for three prefabricated buildings to help finalize the site plan and save $470,000–$480,000. While issuing an RFP remains an option, it could delay the project and increase costs. The board discussed balancing parking, public use, and revenue-generating spaces, with the plan currently allowing for 138 parking spaces and flexibility for events. Potential tenants include a bakery and bike shop. The goal is to complete the site plan and begin earthwork before year-end.

Bonnie Blais thanked the DDA but raised concerns about the boutique hotel conflicting with the village's short-term rental ordinance. She felt the approach was dismissive of public input and called for more transparency.

Carl Cyrowski supported the hotel, arguing it fit the downtown entrance and was exempt from the short-term rental ordinance, emphasizing its potential to support local businesses.

Christine Pervolarakis expressed support for two small buildings and an artist market and suggested repurposing historic cabins for retail. She hadn't received a response to her inquiry about this idea.

George Dandalides voiced concerns about moving forward without a detailed, executable plan, criticizing the lack of engineering details. He urged the DDA to pause spending until approved plans are in place.

Luca Mezzalira suggested incorporating ecological preservation into the parking lot design, using permeable materials to reduce toxic runoff and preserve the environment.

After public comments, Board Member Barnett explained that the cabins were too deteriorated to repurpose and emphasized that the motion was about securing design assistance for the site plan, not purchasing buildings. Executive Director Gibb clarified that the motion would finalize design specifications, allowing flexibility for future changes. Board Member Barnett reassured that the current design aligned with the project's original goals, including increasing parking, addressing access issues, and providing space for retail and potential residential development.

**MOTION** made by Board Member Campbell, Seconded by Secretary Lorant, to authorize the Executive Director to proceed with design specifications for three prefabricated buildings (Stillwater) from DC Structures. The motion does not commit the DDA to final construction or use of DC Structures for future phases.

**VOTING YEA:** Burgess, Caruso, Lorant, Medina, Campbell, Barnett, Rutt
**VOTING NAY:** Coe
**ABSENT:** Shell
**MOTION:** Carried

## 9. Reports, Resolutions and Recommendations

### A. Executive Director Report

Executive Director Gibb highlighted recent community engagement, infrastructure improvements, and upcoming seasonal challenges, including budgeting for winter plowing and planning for holiday lighting. Board Member Coe suggested exploring color-changing lights for year-round use. Executive Director Gibb noted past lighting costs and durability issues, and agreed to look into alternative options, also mentioning that tree growth impacts the longevity of installed lights.

**MOTION** made by Secretary Lorant, Seconded by President Rutt, to receive and file the Executive Director Report.

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

### B. Lumber Yard Progress Report

Executive Director Gibb reported steady progress at the Lumberyard site. A bakery tenant is expected for the front building, siding is complete, and painting is next using historically appropriate colors. The trailhead building is done, and planning has begun for access and site layout. The barn cleanup is nearly finished, and due to structural issues, a glass wall is being considered for the west side to bring in natural light. Funding remains available from bonds and grants, and efforts are underway to secure more grants for public space improvements. Engineering plans will soon guide structural work. Key partners like Madison Electric and a team

connected to Campus Martius are contributing to lighting and site design, helping ensure plans remain affordable and high quality.

**MOTION** made by Board Member Barnett, Seconded by Board Member Medina, to receive and file the Lumber Yard Progress Report.

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

### C. Assistant Director's Report

Assistant Director Bloom provided updates on recent events and activities, project progress, social media metrics, grant developments, new businesses, key upcoming dates, and Lake Orion DDA businesses nominated for WDIV's "Vote 4 the Best" awards.

Chairperson Burgess asked why the July 18 movie night was canceled or rescheduled. Assistant Director Bloom explained that they decided to postpone it to allow for more planning and collaboration, aiming to create a more impactful adult date night event tied to the movie.

**MOTION** made by Secretary Lorant, Seconded by President Rutt, to receive and file the Assistant Director's Report.

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

## 10. Board Comments and Training Feedback

Board Member Coe expressed appreciation for the hard work Executive Director Gibb and Assistant Director Bloom have put into the Lumberyard project.

President Rutt had no comment.

Board Member Campbell thanked Executive Director Gibb for handling trash during the July 4th weekend and highlighted ongoing garbage issues downtown. She supported adding mobile bins during events and praised the reuse of materials at the Lumberyard as both cost-effective and environmentally responsible.

Vice Chairperson Caruso appreciated Executive Director Gibb's help with trash but stressed it's not his role. He praised the Lumberyard project, noted its greater value over past parking proposals, and celebrated the July 4th fireworks and the community's shared vision.

Secretary Lorant called for a clear revenue plan and expressed strong support for the Executive Director's leadership, dismissing local criticism and praising efforts to strengthen the DDA and village.

Board Member Medina voiced strong support for the leadership team, showed excitement about the potential boutique hotel, and appreciated progress on the blue awning issue. She praised Mr. Pavelich's report and jokingly declined participation in the Dragon Boat Weekend due to the physical toll from past experience.

Board Member Barnett stressed the importance of positivity and celebrated the major GM job announcement. He praised Mr. Pavelich's work and shared his upcoming opportunity to present a community case study at Brown University focused on connecting Orion to its recreational assets.

Chairperson Burgess gave heartfelt praise to Mr. Pavelich for his talent and dedication, celebrated the GM jobs announcement, and encouraged local beautification for America in Bloom. She thanked Executive Director Gibb, Assistant Director Bloom, the board, and staff, emphasizing the strength of collaboration in the community.

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

**12. Adjournment**

**MOTION** made by Vice Chairperson Caruso, Seconded by Secretary Lorant, to adjourn the July 15, 2025 Downtown Development Authority Board Regular Meeting.

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

The July 15, 2025 Downtown Development Authority Board Regular meeting adjourned at 8:33PM.

_____
Debbie Burgess
Chairperson

_____
Lynsey Blough
Deputy Clerk/Treasurer

_____
Sonja Stout
Village Clerk/Treasurer

Date Approved: as presented on August 19, 2025.

# DDA ACTION SUMMARY SHEET

**MEETING DATE:** August 19, 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 July 2025.

# REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As Of 07/31/2025
% Fiscal Year Completed: 8.49
*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

| GL Number | Description | 25-26 Amended Budget | YTD Balance 07/31/2025 | Activity For 07/31/2025 | Available Balance 07/31/2025 | % Bdgt Used |
|---|---|---|---|---|---|---|
| **Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND** | | | | | | |
| **Account Category: Revenues** | | | | | | |
| **Department: 000 REVENUE** | | | | | | |
| 248-000-402-000 | Current Real Property Taxes | 1,047,377.00 | 0.00 | 0.00 | 1,047,377.00 | 0.00 |
| 248-000-402-100 | Property Tax - Twp DDA Capture | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-000-405-000 | Property Tax - Personal | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-000-412-000 | Property Tax - DPPT P/Y & C/Y | 3,370.00 | 0.00 | 0.00 | 3,370.00 | 0.00 |
| 248-000-441-000 | Local Community Stabilization Share | 15,000.00 | 0.00 | 0.00 | 15,000.00 | 0.00 |
| 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 | 0.00 | 0.00 | 43,500.00 | 0.00 |
| 248-000-540-000 | COUNTY/FEDERAL PROGRAM GRANTS PUBLIC | 595,823.00 | 0.00 | 0.00 | 595,823.00 | 0.00 |
| 248-000-582-000 | Intergovernment - Police | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-000-664-000 | Interest Earned | 9,708.00 | 0.00 | 0.00 | 9,708.00 | 0.00 |
| 248-000-671-999 | Appropriation from Fund Balanc | 171,128.00 | 0.00 | 0.00 | 171,128.00 | 0.00 |
| 248-000-673-000 | Gain/Loss on Sale of Assets | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-000-676-404 | Transfer From Prop Acq Fund | 169,436.00 | 0.00 | 0.00 | 169,436.00 | 0.00 |
| 248-000-676-592 | Reimbursment -Admin Fee - W&S | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-000-681-000 | Reimburse - Insurance Claims | 17,000.00 | 0.00 | 0.00 | 17,000.00 | 0.00 |
| 248-000-683-000 | Reimbursements-Other | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-000-685-000 | Sponsorships | 35,000.00 | 0.00 | 0.00 | 35,000.00 | 0.00 |
| 248-000-685-100 | Transportaion Sponsorship | 8,500.00 | 0.00 | 0.00 | 8,500.00 | 0.00 |
| 248-000-686-000 | Downtown Events | 8,000.00 | 0.00 | 0.00 | 8,000.00 | 0.00 |
| 248-000-686-002 | Flower Fair Revenue | 2,500.00 | 0.00 | 0.00 | 2,500.00 | 0.00 |
| 248-000-686-003 | New Year Resolution Run Revenue | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-000-686-004 | ST EVENT REVENUE | 3,500.00 | 0.00 | 0.00 | 3,500.00 | 0.00 |
| 248-000-686-005 | ST SPONSOR REVENUE | 5,000.00 | 0.00 | 0.00 | 5,000.00 | 0.00 |
| 248-000-686-006 | EV CHARGING | 4,200.00 | 0.00 | 0.00 | 4,200.00 | 0.00 |
| 248-000-687-000 | Merchandise Sales | 3,500.00 | 0.00 | 0.00 | 3,500.00 | 0.00 |
| 248-000-688-000 | Gift Certificate Sales | 4,000.00 | 0.00 | 0.00 | 4,000.00 | 0.00 |
| 248-000-692-000 | Rent | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-000-694-000 | Miscellaneous | 8,000.00 | 0.00 | 0.00 | 8,000.00 | 0.00 |
| 248-000-696-000 | PROCEEDS FROM THE SALE OF BONDS/NOTE | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Total Dept 000 - REVENUE | | 2,156,542.00 | 0.00 | 0.00 | 2,156,542.00 | 0.00 |
| Revenues | | 2,156,542.00 | 0.00 | 0.00 | 2,156,542.00 | 0.00 |
| **Account Category: Expenditures** | | | | | | |
| **Department: 260 GENERAL ACTIVITIES** | | | | | | |
| 248-260-701-000 | Executive Director Wages | 82,400.00 | 6,153.92 | 6,153.92 | 76,246.08 | 7.47 |
| 248-260-704-000 | Wages - Administrative Coordinator | 32,417.00 | 1,643.50 | 1,643.50 | 30,773.50 | 5.07 |
| 248-260-706-000 | Asst. Executive Director wages | 73,130.00 | 5,461.60 | 5,461.60 | 67,668.40 | 7.47 |
| 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 | 1,771.88 | 1,771.88 | 3,628.12 | 32.81 |
| 248-260-711-013 | OVERTIME | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-715-000 | Social Security | 15,254.00 | 1,149.85 | 1,149.85 | 14,104.15 | 7.54 |
| 248-260-716-000 | Health Insurance- Medical | 14,820.00 | 895.82 | 895.82 | 13,924.18 | 6.04 |
| 248-260-717-000 | Life & Disability Insurance | 1,562.00 | 149.90 | 149.90 | 1,412.10 | 9.60 |
| 248-260-718-000 | Dental Insurance | 1,132.00 | 85.22 | 85.22 | 1,046.78 | 7.53 |
| 248-260-719-000 | Pension | 6,720.00 | 0.00 | 0.00 | 6,720.00 | 0.00 |
| 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 07/31/2025
% Fiscal Year Completed: 8.49
*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

| GL Number | Description | 25-26 Amended Budget | YTD Balance 07/31/2025 | Activity For 07/31/2025 | Available Balance 07/31/2025 | % Bdgt Used |
|---|---|---|---|---|---|---|
| **Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND** | | | | | | |
| **Account Category: Expenditures** | | | | | | |
| **Department: 260 GENERAL ACTIVITIES** | | | | | | |
| 248-260-721-000 | Vision Care | 720.00 | 15.38 | 15.38 | 704.62 | 2.14 |
| 248-260-722-000 | Worker's Comp. Insurance | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-801-000 | CONTRACTUAL SERVICES- DOWNTOWN | 20,000.00 | 0.00 | 0.00 | 20,000.00 | 0.00 |
| 248-260-801-002 | CONTRACTUAL SERVICS - PUBLIC SAFETY | 103,000.00 | 8,583.33 | 8,583.33 | 94,416.67 | 8.33 |
| 248-260-801-003 | CONTRACT SERVICES - DPW FEE | 27,211.00 | 6,802.58 | 6,802.58 | 20,408.42 | 25.00 |
| 248-260-801-004 | CONTRACTUAL SERVICES - PA57 | 62,643.00 | 62,643.00 | 62,643.00 | 0.00 | 100.00 |
| 248-260-801-005 | Contractual Services- Township | 6,700.00 | 9,296.57 | 9,296.57 | (2,596.57) | 138.75 |
| 248-260-801-012 | Contractual Services-Parking Code En | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-801-022 | SPECIAL SERVICES- EVENTS | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-801-023 | Contract Services-DPW event support | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-801-033 | Contract Services-DPW snow removal | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-805-000 | Audit Fees | 5,900.00 | 0.00 | 0.00 | 5,900.00 | 0.00 |
| 248-260-810-000 | Legal Services | 3,500.00 | 0.00 | 0.00 | 3,500.00 | 0.00 |
| 248-260-823-000 | Website/Software | 4,200.00 | 0.00 | 0.00 | 4,200.00 | 0.00 |
| 248-260-823-001 | Municipal Software | 5,000.00 | 0.00 | 0.00 | 5,000.00 | 0.00 |
| 248-260-829-000 | Planner Services | 1,000.00 | 0.00 | 0.00 | 1,000.00 | 0.00 |
| 248-260-851-000 | Telephone | 3,500.00 | 196.97 | 196.97 | 3,303.03 | 5.63 |
| 248-260-900-000 | Printing and Publication | 500.00 | 0.00 | 0.00 | 500.00 | 0.00 |
| 248-260-920-000 | Utilities | 7,800.00 | 558.83 | 558.83 | 7,241.17 | 7.16 |
| 248-260-921-000 | Municipal Street Lighting | 13,780.00 | 430.83 | 430.83 | 13,349.17 | 3.13 |
| 248-260-930-000 | Repair and Maintenance | 1,870.00 | 0.00 | 0.00 | 1,870.00 | 0.00 |
| 248-260-930-002 | Building Maintenance | 1,200.00 | 0.00 | 0.00 | 1,200.00 | 0.00 |
| 248-260-940-000 | Equipment Rental | 1,500.00 | 0.00 | 0.00 | 1,500.00 | 0.00 |
| 248-260-941-000 | Office Rent | 16,800.00 | 4,620.00 | 4,620.00 | 12,180.00 | 27.50 |
| 248-260-942-000 | Office Expenses | 4,000.00 | 1,000.58 | 1,000.58 | 2,999.42 | 25.01 |
| 248-260-942-019 | Covid Office Expenses | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-946-000 | Credit Card Fees | 175.00 | 0.00 | 0.00 | 175.00 | 0.00 |
| 248-260-955-001 | Credit Card Fees | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-956-000 | Dues & Miscellaneous | 1,900.00 | 0.00 | 0.00 | 1,900.00 | 0.00 |
| 248-260-957-000 | Education & Training | 8,000.00 | 0.00 | 0.00 | 8,000.00 | 0.00 |
| 248-260-958-000 | General Activities Misc | 7,500.00 | 0.00 | 0.00 | 7,500.00 | 0.00 |
| 248-260-961-000 | Tax Tribunal Refunds | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-962-000 | Mileage | 500.00 | 0.00 | 0.00 | 500.00 | 0.00 |
| 248-260-965-101 | Transfer Out - General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-965-401 | Transfer to Capital Imp Fund | 112,993.00 | 0.00 | 0.00 | 112,993.00 | 0.00 |
| 248-260-965-403 | TRANSFER TO-DDA PUBLIC INFRASTRUCTUR | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-965-404 | Transfer Out - DDA Property Acq Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-260-974-000 | Capital Outlay - Equipment | 2,000.00 | 0.00 | 0.00 | 2,000.00 | 0.00 |
| Total Dept 260 - GENERAL ACTIVITIES | | 656,727.00 | 111,459.76 | 111,459.76 | 545,267.24 | 16.97 |
| **Department: 725 ORGANIZATION** | | | | | | |
| 248-725-822-000 | Newsletter | 1,800.00 | 0.00 | 0.00 | 1,800.00 | 0.00 |
| 248-725-824-000 | Volunteer Recognition & Dvp. | 1,700.00 | 0.00 | 0.00 | 1,700.00 | 0.00 |
| 248-725-825-000 | Gift Certificate Redemption | 5,000.00 | 25.00 | 25.00 | 4,975.00 | 0.50 |
| 248-725-826-000 | Historic Celebration/Education | 2,500.00 | 0.00 | 0.00 | 2,500.00 | 0.00 |
| 248-725-827-000 | Awareness Program | 1,500.00 | 0.00 | 0.00 | 1,500.00 | 0.00 |
| 248-725-864-000 | Grant & Scholorship Distriubution | 500.00 | 0.00 | 0.00 | 500.00 | 0.00 |

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

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| GL Number | Description | 25-26 Amended Budget | YTD Balance 07/31/2025 | Activity For 07/31/2025 | Available Balance 07/31/2025 | % Bdgt Used |
|---|---|---|---|---|---|---|
| **Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND** | | | | | | |
| **Account Category: Expenditures** | | | | | | |
| **Department: 725 ORGANIZATION** | | | | | | |
| 248-725-881-000 | Merchandise to Sell | 1,200.00 | 0.00 | 0.00 | 1,200.00 | 0.00 |
| | Total Dept 725 - ORGANIZATION | 14,200.00 | 25.00 | 25.00 | 14,175.00 | 0.18 |
| **Department: 726 DESIGN** | | | | | | |
| 248-726-745-000 | Beautification Supplies | 7,620.00 | 0.00 | 0.00 | 7,620.00 | 0.00 |
| 248-726-746-000 | Hanging Baskets | 4,120.00 | 0.00 | 0.00 | 4,120.00 | 0.00 |
| 248-726-801-000 | Contractual Services | 5,780.00 | 0.00 | 0.00 | 5,780.00 | 0.00 |
| 248-726-843-000 | Facade Program | 25,480.00 | 0.00 | 0.00 | 25,480.00 | 0.00 |
| 248-726-845-000 | Public Art Program | 2,100.00 | 0.00 | 0.00 | 2,100.00 | 0.00 |
| 248-726-883-000 | Banners and Holiday Lighting | 8,100.00 | 0.00 | 0.00 | 8,100.00 | 0.00 |
| 248-726-975-001 | Capital Outlay - Beautification | 2,300.00 | 280.00 | 280.00 | 2,020.00 | 12.17 |
| 248-726-975-002 | Capital Outlay - Streets | 2,790.00 | 0.00 | 0.00 | 2,790.00 | 0.00 |
| 248-726-980-001 | PUBLIC SPACE GRANT-GENERAL | 323,000.00 | 21,419.14 | 21,419.14 | 301,580.86 | 6.63 |
| 248-726-980-002 | PUBLIC SPACE GRANT-DEVELOPMENT & PRO | 212,000.00 | 13,815.59 | 13,815.59 | 198,184.41 | 6.52 |
| | Total Dept 726 - DESIGN | 593,290.00 | 35,514.73 | 35,514.73 | 557,775.27 | 5.99 |
| **Department: 728 ECONOMIC DEVELOPMENT** | | | | | | |
| 248-728-801-000 | Contractual Services | 17,800.00 | 881.25 | 881.25 | 16,918.75 | 4.95 |
| 248-728-860-000 | Trolley Expense | 18,900.00 | 888.64 | 888.64 | 18,011.36 | 4.70 |
| 248-728-861-000 | DATA AND METRICS | 1,460.00 | 0.00 | 0.00 | 1,460.00 | 0.00 |
| 248-728-862-000 | Training Materials | 500.00 | 0.00 | 0.00 | 500.00 | 0.00 |
| 248-728-864-000 | Grant & Scholorship Distriubution | 1,000.00 | 0.00 | 0.00 | 1,000.00 | 0.00 |
| 248-728-886-000 | Marketing Materials | 2,500.00 | 0.00 | 0.00 | 2,500.00 | 0.00 |
| 248-728-886-001 | Blight Reduction | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-728-886-002 | Social District | 2,350.00 | 0.00 | 0.00 | 2,350.00 | 0.00 |
| 248-728-888-000 | Brand Marketing | 23,700.00 | 3,075.00 | 3,075.00 | 20,625.00 | 12.97 |
| 248-728-888-001 | Contractual Services Brand Marketing | 12,000.00 | 0.00 | 0.00 | 12,000.00 | 0.00 |
| | Total Dept 728 - ECONOMIC DEVELOPMENT | 80,210.00 | 4,844.89 | 4,844.89 | 75,365.11 | 6.04 |
| **Department: 729 PROMOTION** | | | | | | |
| 248-729-880-000 | Event Promotion | 2,500.00 | 0.00 | 0.00 | 2,500.00 | 0.00 |
| 248-729-880-001 | Event Promo - Gazebo Series | 14,500.00 | 13,000.00 | 13,000.00 | 1,500.00 | 89.66 |
| 248-729-880-004 | Event Promo - Halloween Parade | 2,500.00 | 0.00 | 0.00 | 2,500.00 | 0.00 |
| 248-729-880-005 | Event Promo - Hmtwn/Holiday Vill | 3,000.00 | 0.00 | 0.00 | 3,000.00 | 0.00 |
| 248-729-880-006 | Event Promo - New Years Res. Run | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-729-880-007 | Event Promo - Flower Fair | 1,500.00 | 0.00 | 0.00 | 1,500.00 | 0.00 |
| 248-729-880-008 | EVENT PROMO-ICE FEST | 3,500.00 | 0.00 | 0.00 | 3,500.00 | 0.00 |
| 248-729-880-009 | Event Promo-Lake Orion Love Shop to | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-729-880-010 | PARTNERED EVENTS | 1,500.00 | 0.00 | 0.00 | 1,500.00 | 0.00 |
| 248-729-880-011 | Restaurant week | 1,000.00 | 0.00 | 0.00 | 1,000.00 | 0.00 |
| 248-729-880-012 | Sing & Stroll Tree Lighting | 7,000.00 | 0.00 | 0.00 | 7,000.00 | 0.00 |
| 248-729-880-013 | STRONGER TOGETHER-WINTER | 2,500.00 | 0.00 | 0.00 | 2,500.00 | 0.00 |
| 248-729-880-014 | STRONGER TOGETHER- SUMMER/FALL | 1,500.00 | 0.00 | 0.00 | 1,500.00 | 0.00 |
| 248-729-880-015 | Winter Activities | 4,500.00 | 0.00 | 0.00 | 4,500.00 | 0.00 |
| 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 | 3,500.00 | 0.00 | 0.00 | 3,500.00 | 0.00 |
| 248-729-880-100 | Stronger Together- smr fall | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-729-885-000 | Port-A-Johns | 1,600.00 | 155.00 | 155.00 | 1,445.00 | |

# REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As Of 07/31/2025
% Fiscal Year Completed: 8.49
*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

| GL Number | Description | 25-26 Amended Budget | YTD Balance 07/31/2025 | Activity For 07/31/2025 | Available Balance 07/31/2025 | % Bdgt Used |
|---|---|---|---|---|---|---|
| **Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND** | | | | | | |
| **Account Category: Expenditures** | | | | | | |
| **Department: 729 PROMOTION** | | | | | | |
| 248-729-895-000 | Event Promo-Comm. Sponsorships | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-729-975-020 | Capital Outlay Parks & rec | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Total Dept 729 - PROMOTION | | 53,100.00 | 13,155.00 | 13,155.00 | 39,945.00 | 24.77 |
| **Department: 730** | | | | | | |
| 248-730-253-885 | Knox Box Grant Program | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-730-885-100 | Knox Box Grant Program | 2,000.00 | 0.00 | 0.00 | 2,000.00 | 0.00 |
| 248-730-931-000 | Repair & Maintenance-Equipment | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-730-965-101 | Transfer Out - General Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-730-965-301 | Interfund TRF 2023 DDA Bond Project | 420,721.00 | 0.00 | 0.00 | 420,721.00 | 0.00 |
| 248-730-965-404 | Transfer Out - DDA Property Acq Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-730-965-592 | Transfers To Water/Sewer Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-730-975-000 | Capital Outlay | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-730-975-003 | DDA Capital Outlay | 2,500.00 | 0.00 | 0.00 | 2,500.00 | 0.00 |
| 248-730-975-005 | DDA Capital Outlay- Wayfinding/Light | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-730-975-006 | DDA Capital Outlay - Parking | 10,000.00 | 0.00 | 0.00 | 10,000.00 | 0.00 |
| 248-730-975-009 | Capital Outlay - Dumpsters | 5,000.00 | 0.00 | 0.00 | 5,000.00 | 0.00 |
| 248-730-975-011 | Capital Outlay - Trail Extensi | 4,300.00 | 0.00 | 0.00 | 4,300.00 | 0.00 |
| 248-730-975-015 | Captial Outlay- Outdoor Sound | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-730-975-020 | Capital Outlay Parks & rec | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-730-992-000 | Bond Principal | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 248-730-995-000 | Bond Interest | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Total Dept 730 | | 444,521.00 | 0.00 | 0.00 | 444,521.00 | 0.00 |
| Expenditures | | 1,842,048.00 | 164,999.38 | 164,999.38 | 1,677,048.62 | 8.96 |
| Fund 248 - DOWNTOWN DEVELOPMENT AUTHORITY FUND: | | | | | | |
| TOTAL REVENUES | | 2,156,542.00 | 0.00 | 0.00 | 2,156,542.00 | 0.00 |
| TOTAL EXPENDITURES | | 1,842,048.00 | 164,999.38 | 164,999.38 | 1,677,048.62 | 8.96 |
| NET OF REVENUES & EXPENDITURES: | | 314,494.00 | (164,999.38) | (164,999.38) | 479,493.38 | |
| BEG. FUND BALANCE | | 356,811.12 | 356,811.12 | | | |
| NET OF REVENUES/EXPENDITURES - 24-25 | | 29,499.15 | 29,499.15 | | | |
| END FUND BALANCE | | 700,804.27 | 221,310.89 | | | |

# REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As Of 07/31/2025
% Fiscal Year Completed: 8.49
*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

| GL Number | Description | 25-26 Amended Budget | YTD Balance 07/31/2025 | Activity For 07/31/2025 | Available Balance 07/31/2025 | % Bdgt Used |
|---|---|---|---|---|---|---|
| **Fund: 301 DOWNTOWN DEV BOND PROJECT 2023** | | | | | | |
| **Account Category: Revenues** | | | | | | |
| **Department: 000 REVENUE** | | | | | | |
| 301-000-300-001 | 2023 Downtown Dev Tax Exempt Bond Pr | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 301-000-300-002 | 2023 Downtown Dev Tax Exempt Bond Pr | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 301-000-664-000 | Interest Earnings | 900.00 | 0.00 | 0.00 | 900.00 | 0.00 |
| 301-000-671-999 | Appropriation from Fund Balanc | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 301-000-699-301 | TRF in from DDA | 420,721.00 | 0.00 | 0.00 | 420,721.00 | 0.00 |
| Total Dept 000 - REVENUE | | 421,621.00 | 0.00 | 0.00 | 421,621.00 | 0.00 |
| Revenues | | 421,621.00 | 0.00 | 0.00 | 421,621.00 | 0.00 |
| **Account Category: Expenditures** | | | | | | |
| **Department: 901 CAPITAL OUTLAY** | | | | | | |
| 301-901-805-000 | Audit fees | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 301-901-930-000 | Repair and Maintenance | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 301-901-950-000 | Demolition & Land Improvement | 174,500.00 | 46,659.38 | 46,659.38 | 127,840.62 | 26.74 |
| 301-901-956-000 | Dues & Miscellaneous | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 301-901-971-000 | Capital Outlay - Buildings | 672,520.00 | 27,674.08 | 27,674.08 | 644,845.92 | 4.11 |
| Total Dept 901 - CAPITAL OUTLAY | | 847,020.00 | 74,333.46 | 74,333.46 | 772,686.54 | 8.78 |
| **Department: 905 Downtown Dev Bond 2023** | | | | | | |
| 301-905-301-000 | Bond Issuance Expense | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 301-905-731-000 | 2023 Bond Taxable Issuance Expenses | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 301-905-731-001 | 2023 Tax exempt Bond Issuance Expens | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 301-905-745-001 | Property taxes-Orion Twp | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 301-905-920-000 | Utilities | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 301-905-992-003 | 2023 DDA BONDS TAXABLE PRINCIPAL SER | 60,000.00 | 0.00 | 0.00 | 60,000.00 | 0.00 |
| 301-905-992-004 | 2023 DDA BONDS TAX EXEMPT PRINCIPAL | 160,000.00 | 0.00 | 0.00 | 160,000.00 | 0.00 |
| 301-905-993-001 | 2023 DDA BOND TAXABLE INTEREST SERIE | 73,921.00 | 0.00 | 0.00 | 73,921.00 | 0.00 |
| 301-905-993-002 | 2023 DDA TAX EXEMPT BOND INTEREST A | 126,800.00 | 0.00 | 0.00 | 126,800.00 | 0.00 |
| Total Dept 905 - Downtown Dev Bond 2023 | | 420,721.00 | 0.00 | 0.00 | 420,721.00 | 0.00 |
| Expenditures | | 1,267,741.00 | 74,333.46 | 74,333.46 | 1,193,407.54 | 5.86 |
| Fund 301 - DOWNTOWN DEV BOND PROJECT 2023: | | | | | | |
| TOTAL REVENUES | | 421,621.00 | 0.00 | 0.00 | 421,621.00 | 0.00 |
| TOTAL EXPENDITURES | | 1,267,741.00 | 74,333.46 | 74,333.46 | 1,193,407.54 | 5.86 |
| NET OF REVENUES & EXPENDITURES: | | (846,120.00) | (74,333.46) | (74,333.46) | (771,786.54) | |
| BEG. FUND BALANCE | | 2,794,812.47 | 2,794,812.47 | | | |
| NET OF REVENUES/EXPENDITURES - 24-25 | | (213,923.66) | (213,923.66) | | | |
| END FUND BALANCE | | 1,734,768.81 | 2,506,555.35 | | | |

# REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As Of 07/31/2025
% Fiscal Year Completed: 8.49
*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

| GL Number | Description | 25-26 Amended Budget | YTD Balance 07/31/2025 | Activity For 07/31/2025 | Available Balance 07/31/2025 | % Bdgt Used |
|---|---|---|---|---|---|---|
| **Fund: 403 DDA PUBLIC INFRASTRUCTURE FUND** | | | | | | |
| **Account Category: Revenues** | | | | | | |
| **Department: 000 REVENUE** | | | | | | |
| 403-000-664-000 | Interest Earnings | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 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 | 112,993.00 | 0.00 | 0.00 | 112,993.00 | 0.00 |
| | Total Dept 000 - REVENUE | 112,993.00 | 0.00 | 0.00 | 112,993.00 | 0.00 |
| | Revenues | 112,993.00 | 0.00 | 0.00 | 112,993.00 | 0.00 |
| **Account Category: Expenditures** | | | | | | |
| **Department: 901 CAPITAL OUTLAY** | | | | | | |
| 403-901-971-001 | SIDEWALK IMPROVEMENT PROGRAM | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 403-901-971-002 | PAINT CREEK BANK STABILIZATION PROJE | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | Total Dept 901 - CAPITAL OUTLAY | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | Expenditures | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Fund 403 - DDA PUBLIC INFRASTRUCTURE FUND: | | | | | | |
| TOTAL REVENUES | | 112,993.00 | 0.00 | 0.00 | 112,993.00 | 0.00 |
| TOTAL EXPENDITURES | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| NET OF REVENUES & EXPENDITURES: | | 112,993.00 | 0.00 | 0.00 | 112,993.00 | |
| BEG. FUND BALANCE | | 0.00 | 0.00 | | | |
| NET OF REVENUES/EXPENDITURES - 24-25 | | 142,459.99 | 142,459.99 | | | |
| END FUND BALANCE | | 255,452.99 | 142,459.99 | | | |

# REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION

Balance As Of 07/31/2025
% Fiscal Year Completed: 8.49
*NOTE: Available Balance / Pct Budget does not reflect amounts encumbered.

| GL Number | Description | 25-26 Amended Budget | YTD Balance 07/31/2025 | Activity For 07/31/2025 | Available Balance 07/31/2025 | % Bdgt Used |
|---|---|---|---|---|---|---|
| **Fund: 404 DDA PROPERTY ACQUISITION** | | | | | | |
| **Account Category: Revenues** | | | | | | |
| **Department: 000 REVENUE** | | | | | | |
| 404-000-664-000 | Interest Earnings | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 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 | 0.00 | 0.00 | 0.00 | 0.00 |
| | Revenues | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Account Category: Expenditures** | | | | | | |
| **Department: 901 CAPITAL OUTLAY** | | | | | | |
| 404-901-805-000 | Audit Fees | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 404-901-901-000 | Debt Service- Parking Deck | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 404-901-930-000 | Repair & Maintenance - Bldg | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 404-901-950-000 | Demolition & Land Improvement | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 404-901-956-000 | Miscellaneous | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 404-901-971-000 | Capital Outlay - Building | 169,436.00 | 0.00 | 0.00 | 169,436.00 | 0.00 |
| 404-901-980-248 | Prop Acq Transfer to DDA | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 404-901-992-000 | Bond Principal | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| 404-901-995-000 | Bond Interest | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| | Total Dept 901 - CAPITAL OUTLAY | 169,436.00 | 0.00 | 0.00 | 169,436.00 | 0.00 |
| | Expenditures | 169,436.00 | 0.00 | 0.00 | 169,436.00 | 0.00 |
| Fund 404 - DDA PROPERTY ACQUISITION: | | | | | | |
| TOTAL REVENUES | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| TOTAL EXPENDITURES | | 169,436.00 | 0.00 | 0.00 | 169,436.00 | 0.00 |
| NET OF REVENUES & EXPENDITURES: | | (169,436.00) | 0.00 | 0.00 | (169,436.00) | |
| BEG. FUND BALANCE | | 169,464.87 | 169,464.87 | | | |
| NET OF REVENUES/EXPENDITURES - 24-25 | | 113.28 | 113.28 | | | |
| END FUND BALANCE | | 142.15 | 169,578.15 | | | |
| Report Totals: | | | | | | |
| TOTAL REVENUES - ALL FUNDS | | 2,691,156.00 | 0.00 | 0.00 | 2,691,156.00 | 0.00 |
| TOTAL EXPENDITURES - ALL FUNDS | | 3,279,225.00 | 239,332.84 | 239,332.84 | 3,039,892.16 | 7.30 |
| NET OF REVENUES & EXPENDITURES: | | (588,069.00) | (239,332.84) | (239,332.84) | (348,736.16) | |

# BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION

Balance As Of 07/31/2025

| GL Number | Description | YTD Balance 07/31/2024 | YTD Balance 07/31/2025 |
|---|---|---|---|
| **Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND** | | | |
| ***** Assets ***** | | | |
| **Account Classification: CASH CHECKING** | | | |
| 248-000-001-000 | Cash | 568.96 | 568.96 |
| 248-000-007-000 | Payroll-checking | (250.00) | (250.00) |
| | CASH CHECKING | 318.96 | 318.96 |
| **Account Classification: CASH SAVINGS** | | | |
| 248-000-002-000 | Cash Savings | (77,168.85) | (192,264.37) |
| 248-000-010-000 | Investment/LGIP County Inv | 408,258.85 | 422,820.92 |
| 248-000-011-000 | Cash - Payroll Savings | 7,000.66 | (11,835.74) |
| | CASH SAVINGS | 338,090.66 | 218,720.81 |
| | **Total Assets** | 338,409.62 | 219,039.77 |
| ***** Liabilities ***** | | | |
| **Account Classification: ACCOUNTS PAYABLE** | | | |
| 248-000-202-000 | Accounts Payable | (1,187.21) | (2,560.00) |
| | ACCOUNTS PAYABLE | (1,187.21) | (2,560.00) |
| **Account Classification: ACCRUED AND OTHER LIAB** | | | |
| 248-000-213-000 | Accrued Property Tax - Est Chargebacks | 400.00 | 400.00 |
| 248-000-228-001 | FICA W/H - Medicare | 0.00 | (21.06) |
| 248-000-228-002 | FICA- Social Security Withheld | 0.00 | (90.06) |
| | ACCRUED AND OTHER LIAB | 400.00 | 288.88 |
| | **Total Liabilities** | (787.21) | (2,271.12) |
| ***** Fund Equity ***** | | | |
| **Account Classification: FUND BALANCE** | | | |
| 248-000-390-000 | Fund Balance - Unassigned | 356,811.12 | 356,811.12 |
| | FUND BALANCE | 356,811.12 | 356,811.12 |
| | **Total Fund Equity** | 356,811.12 | 356,811.12 |
| **Total Fund 248:** | | | |
| **TOTAL ASSETS** | | 338,409.62 | 219,039.77 |
| **BEG. FUND BALANCE - 24-25** | | 356,811.12 | 356,811.12 |
| **+ NET OF REVENUES/EXPENDITURES - 24-25** | | 0.00 | 29,499.15 |
| **+ NET OF REVENUES & EXPENDITURES** | | (17,614.29) | (164,999.38) |
| **= ENDING FUND BALANCE** | | 339,196.83 | 221,310.89 |
| **+ LIABILITIES** | | (787.21) | (2,271.12) |
| **= TOTAL LIABILITIES AND FUND BALANCE** | | 338,409.62 | 219,039.77 |

# BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION

Balance As Of 07/31/2025

| GL Number | Description | YTD Balance 07/31/2024 | YTD Balance 07/31/2025 |
|---|---|---|---|
| **Fund: 301 DOWNTOWN DEV BOND PROJECT 2023** | | | |
| ***** Assets ***** | | | |
| **Account Classification: CASH CHECKING** | | | |
| 301-000-001-000 | Cash | 56,386.80 | 56,386.80 |
| | CASH CHECKING | 56,386.80 | 56,386.80 |
| **Account Classification: CASH SAVINGS** | | | |
| 301-000-002-000 | CASH | 2,739,220.83 | 2,465,481.83 |
| 301-000-011-000 | Cash - Payroll Savings | 0.00 | (13,344.10) |
| | CASH SAVINGS | 2,739,220.83 | 2,452,137.73 |
| | **Total Assets** | 2,795,607.63 | 2,508,524.53 |
| ***** Liabilities ***** | | | |
| **Account Classification: DUE TO INTERFUND** | | | |
| 301-000-214-101 | Due to General Fund | 634.65 | 1,969.18 |
| | DUE TO INTERFUND | 634.65 | 1,969.18 |
| | **Total Liabilities** | 634.65 | 1,969.18 |
| ***** Fund Equity ***** | | | |
| **Account Classification: FUND BALANCE** | | | |
| 301-000-390-000 | Fund Balance - Unassigned | 2,794,812.47 | 2,794,812.47 |
| | FUND BALANCE | 2,794,812.47 | 2,794,812.47 |
| | **Total Fund Equity** | 2,794,812.47 | 2,794,812.47 |
| **Total Fund 301:** | | | |
| **TOTAL ASSETS** | | 2,795,607.63 | 2,508,524.53 |
| **BEG. FUND BALANCE - 24-25** | | 2,794,812.47 | 2,794,812.47 |
| **+ NET OF REVENUES/EXPENDITURES - 24-25** | | 0.00 | (213,923.66) |
| **+ NET OF REVENUES & EXPENDITURES** | | 160.51 | (74,333.46) |
| **= ENDING FUND BALANCE** | | 2,794,972.98 | 2,506,555.35 |
| **+ LIABILITIES** | | 634.65 | 1,969.18 |
| **= TOTAL LIABILITIES AND FUND BALANCE** | | 2,795,607.63 | 2,508,524.53 |

# BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION

Balance As Of 07/31/2025

| GL Number | Description | YTD Balance 07/31/2024 | YTD Balance 07/31/2025 |
|---|---|---|---|
| **Fund: 403 DDA PUBLIC INFRASTRUCTURE FUND** | | | |
| ***** Assets ***** | | | |
| **Account Classification: CASH SAVINGS** | | | |
| 403-000-002-000 | CASH | 0.00 | 142,459.99 |
| | CASH SAVINGS | 0.00 | 142,459.99 |
| | **Total Assets** | 0.00 | 142,459.99 |
| **Total Fund 403:** | | | |
| **TOTAL ASSETS** | | 0.00 | 142,459.99 |
| **BEG. FUND BALANCE - 24-25** | | 0.00 | 0.00 |
| **+ NET OF REVENUES/EXPENDITURES - 24-25** | | 0.00 | 142,459.99 |
| **+ NET OF REVENUES & EXPENDITURES** | | 0.00 | 0.00 |
| **= ENDING FUND BALANCE** | | 0.00 | 142,459.99 |
| **+ LIABILITIES** | | 0.00 | 0.00 |
| **= TOTAL LIABILITIES AND FUND BALANCE** | | 0.00 | 142,459.99 |

# BALANCE SHEET REPORT FOR VILLAGE OF LAKE ORION

Balance As Of 07/31/2025

| GL Number | Description | YTD Balance 07/31/2024 | YTD Balance 07/31/2025 |
|---|---|---|---|
| **Fund: 404 DDA PROPERTY ACQUISITION** | | | |
| ***** Assets ***** | | | |
| **Account Classification: CASH SAVINGS** | | | |
| 404-000-002-000 | Cash-Savings-DDA Property Acq. | 169,474.80 | 169,578.15 |
| | CASH SAVINGS | 169,474.80 | 169,578.15 |
| | **Total Assets** | 169,474.80 | 169,578.15 |
| ***** Fund Equity ***** | | | |
| **Account Classification: FUND BALANCE** | | | |
| 404-000-390-000 | Fund Balance - Unassigned | 169,464.87 | 169,464.87 |
| | FUND BALANCE | 169,464.87 | 169,464.87 |
| | **Total Fund Equity** | 169,464.87 | 169,464.87 |
| **Total Fund 404:** | | | |
| **TOTAL ASSETS** | | 169,474.80 | 169,578.15 |
| **BEG. FUND BALANCE - 24-25** | | 169,464.87 | 169,464.87 |
| **+ NET OF REVENUES/EXPENDITURES - 24-25** | | 0.00 | 113.28 |
| **+ NET OF REVENUES & EXPENDITURES** | | 9.93 | 0.00 |
| **= ENDING FUND BALANCE** | | 169,474.80 | 169,578.15 |
| **+ LIABILITIES** | | 0.00 | 0.00 |
| **= TOTAL LIABILITIES AND FUND BALANCE** | | 169,474.80 | 169,578.15 |

# DDA ACTION SUMMARY SHEET

**MEETING DATE:** August 19, 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 $313,733.35 for July 2025.

# INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

EXP CHECK RUN DATES 07/01/2025 - 07/31/2025
POSTED AND UNPOSTED
OPEN AND PAID

| GL Number | Invoice Line Desc | Vendor Name | Invoice Description | Amount | Check Number |
|---|---|---|---|---|---|
| **Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND** | | | | | |
| **Department: 000 REVENUE** | | | | | |
| 248-000-228-000 | Remittance | MICHIGAN DEPARTMENT OF TRE | Remittance Check | 608.25 | 34908 |
| 248-000-228-001 | Remittance | IRS | Remittance Check | 111.69 | 396 |
| 248-000-228-001 | Remittance | IRS | Remittance Check | 111.69 | 396 |
| 248-000-228-001 | Remittance | IRS | Remittance Check | 106.25 | 397 |
| 248-000-228-001 | Remittance | IRS | Remittance Check | 106.25 | 397 |
| 248-000-228-002 | Remittance | IRS | Remittance Check | 477.62 | 396 |
| 248-000-228-002 | Remittance | IRS | Remittance Check | 477.62 | 396 |
| 248-000-228-002 | Remittance | IRS | Remittance Check | 454.29 | 397 |
| 248-000-228-002 | Remittance | IRS | Remittance Check | 454.29 | 397 |
| 248-000-230-000 | Remittance | IRS | Remittance Check | 481.04 | 396 |
| 248-000-230-000 | Remittance | IRS | Remittance Check | 443.38 | 397 |
| 248-000-232-000 | Remittance | AMERICAN UNITED LIFE INSUR | Remittance Check | 149.90 | 34906 |
| 248-000-237-002 | Remittance | ALERUS FINANCIAL | Remittance Check | 136.54 | 34828 |
| 248-000-237-002 | Remittance | ALERUS FINANCIAL | Remittance Check | 136.54 | 34905 |
| 248-000-247-000 | Remittance | BLUE CARE NETWORK OF MICHI | Remittance Check | 895.82 | 34829 |
| 248-000-247-000 | Remittance | PRINCIPAL LIFE INSURANCE C | Remittance Check | 85.22 | 34911 |
| 248-000-247-000 | Remittance | PRINCIPAL LIFE INSURANCE C | Remittance Check | 15.38 | 34913 |
| | | | Total Department 000 REVENUE | 5,251.77 | |
| **Department: 260 GENERAL ACTIVITIES** | | | | | |
| 248-260-801-002 | POLICE - PAYMENT 1 | VILLAGE OF LAKE ORION | PUBLIC SAFETY CONTRACT | 8,583.33 | 34957 |
| 248-260-801-003 | SPW ANNUAL SERVICE CONTRAC | VILLAGE OF LAKE ORION | DPW - ANNUAL SERVICE CONTRACT | 6,802.58 | 34957 |
| 248-260-801-004 | ANNUAL PA 57 FEE | VILLAGE OF LAKE ORION | GENERAL ADMIN FEE | 62,643.00 | 34957 |
| 248-260-801-005 | DDA PORTION 35.7% | CHARTER TOWNSHIP OF ORION | ORION TOWNSHIP TAX COLLECTION | 9,296.57 | 34847 |
| 248-260-823-000 | FLOWCODE | COMERICA BANK | JUNE CC | 9.95 | 300 |
| 248-260-823-000 | SNAPRETAIL | COMERICA BANK | JUNE CC | 65.00 | 300 |
| 248-260-823-000 | CLICKUP | COMERICA BANK | JUNE CC | 38.00 | 300 |
| 248-260-823-000 | IONOS | COMERICA BANK | JUNE CC | 25.00 | 300 |
| 248-260-823-000 | ADOBE | COMERICA BANK | JUNE CC | 21.19 | 300 |
| 248-260-851-000 | 8529101420028897 | COMCAST | INTERNET/ TELEPHONE | 196.97 | 34923 |
| 248-260-920-000 | MISWITCH | COMERICA BANK | JUNE CC | 90.37 | 300 |
| 248-260-920-000 | CONSUMER ENERGY | COMERICA BANK | JUNE CC | 86.83 | 300 |
| 248-260-920-000 | 165 S BROADWAY | VILLAGE OF LAKE ORION | WATER BILL | 99.98 | 34899 |
| 248-260-920-000 | 215 S BROADWAY | VILLAGE OF LAKE ORION | WATER BILL | 183.67 | 34899 |
| 248-260-920-000 | 118 N BROADWAY | VILLAGE OF LAKE ORION | WATER BILL | 275.18 | 34899 |
| 248-260-921-000 | 165 S BROADWAY 91001807199 | DTE ENERGY | STREET LIGHTS | 24.65 | 34857 |
| 248-260-921-000 | 380 S BROADWAY | DTE ENERGY | STREET LIGHTS | 22.64 | 34929 |
| 248-260-921-000 | 38 S WASHINGTON | DTE ENERGY | STREET LIGHTS | 30.72 | 34929 |
| 248-260-921-000 | 38 E FLINT | DTE ENERGY | STREET LIGHTS | 288.78 | 34929 |
| 248-260-921-000 | 491 S BROADWAY | DTE ENERGY | STREET LIGHTS | 66.78 | 34929 |
| 248-260-921-000 | 24 FRONT ST | DTE ENERGY | STREET LIGHTS | 21.91 | 34929 |
| 248-260-930-002 | 118 N BROADWAY 91001807161 | DTE ENERGY | STREET LIGHTS | 81.60 | 34857 |
| 248-260-941-000 | JUL - SEPTEMBER 2025 ($1,5 | NICK SCHILLACE | RENT - OFFICE | 4,620.00 | 34942 |
| 248-260-942-000 | ACE HARDWARE | COMERICA BANK | JUNE CC | 153.66 | 300 |
| 248-260-942-000 | GREAT LAKES ACE | COMERICA BANK | JUNE CC | 12.69 | 300 |
| 248-260-942-000 | SPAREBOX STORAGE | COMERICA BANK | JUNE CC | 285.00 | 300 |
| 248-260-942-000 | AMAZON | COMERICA BANK | JUNE CC | 79.99 | 300 |
| 248-260-942-000 | WATER TANK POST TO 6/30/25 | CRYSTAL WATER COMPANY | WATER TANK POST TO 6/30/25 | 25.00 | 34852 |
| 248-260-942-000 | OFFICE SUPPLIES | AMAZON CAPITAL SERVICES | OFFICE SUPPLIES | 42.84 | 34836 |
| 248-260-942-000 | CLEANING UP GARBAGE DOWNTO | MATTHEW GIBB | REIMBURSEMENTS | 21.19 | 34873 |

# INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

EXP CHECK RUN DATES 07/01/2025 - 07/31/2025
POSTED AND UNPOSTED
OPEN AND PAID

| GL Number | Invoice Line Desc | Vendor Name | Invoice Description | Amount | Check Number |
|---|---|---|---|---|---|
| **Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND** | | | | | |
| **Department: 260 GENERAL ACTIVITIES** | | | | | |
| 248-260-942-000 | GARBAGE BIN LINERS | MATTHEW GIBB | REIMBURSEMENTS | 29.66 | 34873 |
| 248-260-942-000 | CARPETS STATEMENT NO. 1044 | CARPET SHINE | CARPET CLEANING | 975.00 | 34920 |
| 248-260-942-000 | 94970 INV MATS | DarWel ENTERPRISES LLC | OFFICE MAT | 25.58 | 34926 |
| | | | Total Department 260 GENERAL ACTIVITIES | 95,225.31 | |
| **Department: 725 ORGANIZATION** | | | | | |
| 248-725-825-000 | GREEN HIPPO 4630 DD$ REIMB | GREEN HIPPO GIFTS | DOWNTOWN $ REIMB | 25.00 | 34935 |
| 248-725-826-000 | MAIN EVENT | COMERICA BANK | JUNE CC | 35.00 | 300 |
| 248-725-826-000 | MAIN EVENT | COMERICA BANK | JUNE CC | 105.00 | 300 |
| 248-725-826-000 | MAIN EVENT | COMERICA BANK | JUNE CC | 35.00 | 300 |
| 248-725-826-000 | MAIN EVENT | COMERICA BANK | JUNE CC | 35.00 | 300 |
| | | | Total Department 725 ORGANIZATION | 235.00 | |
| **Department: 726 DESIGN** | | | | | |
| 248-726-746-000 | EXXON | COMERICA BANK | JUNE CC | 7.13 | 300 |
| 248-726-746-000 | EXXON | COMERICA BANK | JUNE CC | 8.26 | 300 |
| 248-726-746-000 | AMAZON | COMERICA BANK | JUNE CC | 67.96 | 300 |
| 248-726-843-000 | FACADE GRANT | LAKE ORION BIKE & ADVENTUR | FACADE GRANT | 8,000.00 | 34938 |
| 248-726-883-000 | THE HOME DEPOT | COMERICA BANK | JUNE CC | 133.00 | 300 |
| 248-726-975-001 | AMAZON | COMERICA BANK | JUNE CC | 298.99 | 300 |
| 248-726-975-001 | TAX STATEMENT OL-09-02-484 | CHARTER TOWNSHIP OF ORION | 2025 TAX STATEMENT SIDEWALK | 280.00 | 34921 |
| 248-726-975-002 | AMAZON | COMERICA BANK | JUNE CC | 239.96 | 300 |
| 248-726-975-002 | LAKES MOTORSPORTS | COMERICA BANK | JUNE CC | 200.00 | 300 |
| 248-726-980-001 | INV (7/7/25) | STARRS ROOFING | ROOFING REPAIR | 9,612.50 | 34894 |
| 248-726-980-001 | LUMBER - INV 616233 | DILLMAN & UPTON LUMBER | CONSTRUCTION MATERIALS | 1,849.09 | 34856 |
| 248-726-980-001 | SIDING INV 614044 | DILLMAN & UPTON LUMBER | CONSTRUCTION MATERIALS | 9,957.55 | 34856 |
| 248-726-980-002 | DEMO FENCE & REM DEBRIS | MICKEY'S CONSTRUCTION LLC | DEMO MICKEYS CONSTRUCTION POST 6/30/2 | 4,000.00 | 34875 |
| 248-726-980-002 | DEMO 2X4 AND SHELVING AND | MICKEY'S CONSTRUCTION LLC | DEMO MICKEYS CONSTRUCTION POST 6/30/2 | 26,354.00 | 34875 |
| 248-726-980-002 | LABOR TO DEMO FLOOR & CLEA | MICKEY'S CONSTRUCTION LLC | DEMO MICKEYS CONSTRUCTION POST 6/30/2 | 9,600.00 | 34875 |
| 248-726-980-002 | MATERIALS FOR TREATED WOOD | MICKEY'S CONSTRUCTION LLC | DEMO MICKEYS CONSTRUCTION POST 6/30/2 | 4,862.90 | 34875 |
| 248-726-980-002 | REPAIR ROOFING AND INTERIO | MICKEY'S CONSTRUCTION LLC | DEMO - STRUCTURE REPAIR | 9,455.00 | 34941 |
| 248-726-980-002 | WALL REBUILD INSIDE | MICKEY'S CONSTRUCTION LLC | DEMO - STRUCTURE REPAIR | 4,360.59 | 34941 |
| | | | Total Department 726 DESIGN | 89,286.93 | |
| **Department: 728 ECONOMIC DEVELOPMENT** | | | | | |
| 248-728-801-000 | DANIEL 47 X 18.75 HOUR | Pavelich, Daniel T. | PAY FOR WORK 7/1/25-7/23/25 | 881.25 | 34952 |
| 248-728-801-000 | DANIEL 76.5 X 18.75 HOUR | Pavelich, Daniel T. | PAY FOR WORK 6/4/25-6/30/25 | 1,434.38 | 34952 |
| 248-728-860-000 | REIMB BRIAN BIRNEY POST ON | BRIAN BIRNEY | REIMB BRIAN TROLLEY EXP POST ON 6/30/ | 493.20 | 34842 |
| 248-728-860-000 | INV 246 | NOTA | TROLLEY INVOICE | 888.64 | 34877 |
| 248-728-888-000 | RIGHT HOOK BS19002886A | COMERICA BANK | JUNE CC | 60.42 | 300 |
| 248-728-888-000 | RIGHT HOOK BS19002709A | COMERICA BANK | JUNE CC | 153.17 | 300 |
| 248-728-888-000 | RIGHT HOOK INV 101784 | COMERICA BANK | JUNE CC | 44.52 | 300 |
| 248-728-888-000 | CHAMBER TICKET | COMERICA BANK | JUNE CC | 45.00 | 300 |
| 248-728-888-000 | CHAMBER TICKET | COMERICA BANK | JUNE CC | 45.00 | 300 |
| 248-728-888-000 | MICHAELS | COMERICA BANK | JUNE CC | 47.68 | 300 |
| 248-728-888-000 | THE UPS STORE | COMERICA BANK | JUNE CC | 38.73 | 300 |
| 248-728-888-000 | MEIJER | COMERICA BANK | JUNE CC | 52.20 | 300 |
| 248-728-888-000 | THE UPS STORE | COMERICA BANK | JUNE CC | 415.52 | 300 |
| 248-728-888-000 | DOLLAR TREE | COMERICA BANK | JUNE CC | 17.23 | 300 |
| 248-728-888-000 | DOLLAR TREE | COMERICA BANK | JUNE CC | 8.48 | 300 |

# INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

EXP CHECK RUN DATES 07/01/2025 - 07/31/2025
POSTED AND UNPOSTED
OPEN AND PAID

| GL Number | Invoice Line Desc | Vendor Name | Invoice Description | Amount | Check Number |
|---|---|---|---|---|---|
| **Fund: 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND** | | | | | |
| **Department: 728 ECONOMIC DEVELOPMENT** | | | | | |
| 248-728-888-000 | LO DDA ADVERTISING INV 175 | 20 FRONT STREET CONCEPTS, | ADVERT/MARKETING | 300.00 | 34832 |
| 248-728-888-000 | LOLIVE BANNERS 9X3 INV 283 | EPRINT SOLUTION LLC | LO LIVE BANNERS | 138.00 | 34860 |
| 248-728-888-000 | COROPLAST BOARDS INV 10193 | RIGHT HOOK BRANDED MERCHAN | KIOSK DOWNTOWN LO & CORO BOARDS | 148.40 | 34890 |
| 248-728-888-000 | KIOSK VINYL GRAPHICS/INSTA | RIGHT HOOK BRANDED MERCHAN | KIOSK DOWNTOWN LO & CORO BOARDS | 636.00 | 34890 |
| 248-728-888-000 | LO KIOSK MAP UPDATE INV 26 | CANOE CIRCLE GRAPHICS | MAP UPDATES | 180.00 | 34844 |
| 248-728-888-000 | VIEW NEWS PG 382279 | VIEW NEWSPAPER GROUP | ADVERTISING | 1,092.00 | 34898 |
| 248-728-888-000 | 2025 EVENT SPONSORSHIP | LAKE ORION FIREWORKS FOUND | SPONSORSHIP | 1,000.00 | 34871 |
| 248-728-888-000 | ORION LIVING MAG POST ON 6 | CHARTER TOWNSHIP OF ORION | ORION LIVING MAG POST ON 6/30/25 | 1,496.48 | 34847 |
| 248-728-888-000 | INV 2845 | EPRINT SOLUTION LLC | A FRAME SIGNS | 27.00 | 34931 |
| 248-728-888-000 | INV 124 LUMBER YARD MERCH | DEBRA NOVARA | DEBRA NOVARA OF NOVARA DESIGN, LLC | 448.00 | 34928 |
| 248-728-888-000 | INV 125 LUMBER YARD MERCH | DEBRA NOVARA | DEBRA NOVARA OF NOVARA DESIGN, LLC | 448.00 | 34928 |
| 248-728-888-000 | INV 2622 KIOSK & SHOPPING | CANOE CIRCLE GRAPHICS | KIOSK UPDATES | 60.00 | 34919 |
| | | | Total Department 728 ECONOMIC DEVELOPMENT | 10,599.30 | |
| **Department: 729 PROMOTION** | | | | | |
| 248-729-880-001 | INV 104 - GAZEBO SERIES | 20 FRONT STREET CONCEPTS, | LO LIVE CONCERT SERIES | 13,000.00 | 34914 |
| 248-729-880-010 | MATT REIMB JANET NMS, MDA | MATTHEW GIBB | REIMBURSEMENTS | 410.70 | 34873 |
| 248-729-880-010 | MATT REIMN JANET MILEAGE | MATTHEW GIBB | REIMBURSEMENTS | 396.30 | 34873 |
| 248-729-880-016 | AMAZING PETALS | MATTHEW GIBB | REIMBURSEMENTS | 53.00 | 34873 |
| 248-729-885-000 | I26049 201 S BROADWAY | TURNER SANITATION | PORTABLES | 155.00 | 34953 |
| | | | Total Department 729 PROMOTION | 14,015.00 | |
| **Department: 730** | | | | | |
| 248-730-975-000 | R&R JOB#2025-392 POST ON 6 | BSI PAVING | R&R POST ON 6/30/25 | 7,189.83 | 34843 |
| | | | Total Department 730 | 7,189.83 | |
| | | | Total Fund 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND | 221,803.14 | |
| **Fund: 301 DOWNTOWN DEV BOND PROJECT 2023** | | | | | |
| **Department: 901 CAPITAL OUTLAY** | | | | | |
| 301-901-950-000 | HOME DEPOT | COMERICA BANK | JUNE CREDIT CARD REFUND | (339.20) | 300 |
| 301-901-950-000 | ROLL OFF DUMPSTER | COMERICA BANK | JUNE CC | 100.00 | 300 |
| 301-901-950-000 | ROLL OFF DUMPSTER | COMERICA BANK | JUNE CC | 100.00 | 300 |
| 301-901-950-000 | ROLL OFF DUMPSTER | COMERICA BANK | JUNE CC | 574.00 | 300 |
| 301-901-950-000 | ROLL OFF DUMPSTER | COMERICA BANK | JUNE CC | 574.00 | 300 |
| 301-901-950-000 | TRACTOR SUPPLY | COMERICA BANK | JUNE CC | 107.91 | 300 |
| 301-901-950-000 | ROLL OFF DUMPSTER | COMERICA BANK | JUNE CC | 566.48 | 300 |
| 301-901-950-000 | ROLL OFF DUMPSTER | COMERICA BANK | JUNE CC | 100.00 | 300 |
| 301-901-950-000 | ROLL OFF DUMPSTER | COMERICA BANK | JUNE CC | 574.00 | 300 |
| 301-901-950-000 | ROLL OFF DUMPSTER | COMERICA BANK | JUNE CC | 574.00 | 300 |
| 301-901-950-000 | ROLL OFF DUMPSTER | COMERICA BANK | JUNE CC | 574.00 | 300 |
| 301-901-950-000 | ROLL OFF DUMPSTER | COMERICA BANK | JUNE CC | 290.40 | 300 |
| 301-901-950-000 | ROLL OFF DUMPSTER | COMERICA BANK | JUNE CC | 574.00 | 300 |
| 301-901-950-000 | TIMBER BEAST | COMERICA BANK | JUNE CC | 1,950.00 | 300 |
| 301-901-950-000 | THE HOME DEPOT | COMERICA BANK | JUNE CC | 93.75 | 300 |
| 301-901-950-000 | TAX BILL POST ON 6/30/25 | OAKLAND COUNTY-- TREASURER | TAX BILL POST ON 6/30/25 | 6.31 | 34882 |
| 301-901-950-000 | DEMO & SOIL ERROSION PLAN | PEA GROUP | PEA DEMO POST ON 6/30/25 | 315.63 | 34886 |
| 301-901-950-000 | TOPO - INV 114223 | PEA GROUP | TOPOGRAPHICAL SURVEY | 13,815.63 | 34886 |
| 301-901-950-000 | ROLL OFF DUMPSTER | MATTHEW GIBB | REIMBURSEMENTS | 574.00 | 34873 |
| 301-901-950-000 | ROLL OFF DUMPSTER | MATTHEW GIBB | REIMBURSEMENTS | 574.00 | 34873 |
| 301-901-950-000 | I26050 215 S BROADWAY | TURNER SANITATION | PORTABLES | 125.00 | 34953 |

# INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

EXP CHECK RUN DATES 07/01/2025 - 07/31/2025
POSTED AND UNPOSTED
OPEN AND PAID

| GL Number | Invoice Line Desc | Vendor Name | Invoice Description | Amount | Check Number |
|---|---|---|---|---|---|
| **Fund: 301 DOWNTOWN DEV BOND PROJECT 2023** | | | | | |
| **Department: 901 CAPITAL OUTLAY** | | | | | |
| 301-901-950-000 | 000230-2025-CO | OAKLAND COUNTY WATER RESOU | SOIL EROSION INV 00230-2025-CO | 218.75 | 34948 |
| 301-901-950-000 | FINAL ROOF DEMOLITION AND | MICKEY'S CONSTRUCTION LLC | DEMO - STRUCTURE REPAIR | 32,500.00 | 34941 |
| 301-901-971-000 | QUOTE 463306 - PAINTING 21 | WOW 1 DAY PAINTING | PAIBT LUMBER YARD RENOVATION | 4,850.08 | 34960 |
| 301-901-971-000 | STILLWATER - UNIT 1 | DC STRUCTURES | DESIGN SPECIFICATIONS PKG | 11,412.00 | 34927 |
| 301-901-971-000 | STILLWATER - UNIT 2 | DC STRUCTURES | DESIGN SPECIFICATIONS PKG | 11,412.00 | 34927 |
| | | | Total Department 901 CAPITAL OUTLAY | 82,216.74 | |
| | | | Total Fund 301 DOWNTOWN DEV BOND PROJECT 2023 | 82,216.74 | |

# INVOICE DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION

EXP CHECK RUN DATES 07/01/2025 - 07/31/2025
POSTED AND UNPOSTED
OPEN AND PAID

| GL Number | Invoice Line Desc | Vendor Name | Invoice Description | Amount | Check Number |
|---|---|---|---|---|---|
| --- TOTALS BY FUND --- | | | | | |
| | | 248 | DOWNTOWN DEVELOPMENT AUTHORITY FUND | 221,803.14 | |
| | | 301 | DOWNTOWN DEV BOND PROJECT 2023 | 82,216.74 | |
| | | Total For All Funds: | | 304,019.88 | |

| July 2025 (June Transactions) Credit Card Report - | | | | |
|---|---|---|---|---|
| **Trans Date** | **Merchant** | **GL#** | **Explanation** | **Amount** |
| 5/30/2025 | Right Hook | 248-728-888-000 | BS19002886A | $ 60.42 |
| 5/30/2025 | Right Hook | 248-728-888-000 | BS19002709A | $ 153.17 |
| 5/30/2025 | Right Hook | 248-728-888-000 | INV 101784 | $ 44.52 |
| 6/1/2025 | MiSwitch | 248-260-920-000 | Telephone | $ 90.37 |
| 6/3/2025 | Orion Area Chamber | 248-728-888-000 | Chamber Event Ticket | $ 45.00 |
| 6/3/2025 | Orion Area Chamber | 248-728-888-000 | Chamber Event Ticket | $ 45.00 |
| 6/3/2025 | Roll Off Dumpster | 301-901-950-000 | Lumberyard | $ 100.00 |
| 6/3/2025 | Roll Off Dumpster | 301-901-950-000 | Lumberyard | $ 100.00 |
| 6/3/2025 | Roll Off Dumpster | 301-901-950-000 | Lumberyard | $ 574.00 |
| 6/3/2025 | Roll Off Dumpster | 301-901-950-000 | Lumberyard | $ 574.00 |
| 6/3/2025 | EB Main Event | 248-725-826-000 | Main Event Tickets | $ 35.00 |
| 6/3/2025 | EB Main Event | 248-725-826-000 | Main Event Tickets | $ 105.00 |
| 6/3/2025 | EB Main Event | 248-725-826-000 | Main Event Tickets | $ 35.00 |
| 6/3/2025 | EB Main Event | 248-725-826-000 | Main Event Tickets | $ 35.00 |
| 6/3/2025 | Tractor Supply | 301-901-950-000 | Lumberyard | $ 107.91 |
| 6/5/2025 | Amazon | 248-726-975-002 | Tires | $ 239.96 |
| 6/5/2025 | Great Lakes Ace | 248-260-942-000 | Fencing | $ 153.66 |
| 6/5/2025 | Exxon | 248-726-746-000 | Gas for ATV | $ 7.13 |
| 6/6/2025 | Roll Off Dumpster | 301-901-950-000 | Lumberyard | $ 566.48 |
| 6/6/2025 | Roll Off Dumpster | 301-901-950-000 | Lumberyard | $ 100.00 |
| 6/6/2025 | Great Lakes Ace | 248-260-942-000 | Key Set | $ 12.69 |
| 6/7/2025 | Flowcode | 248-260-823-000 | Software | $ 9.95 |
| 6/9/2025 | Roll Off Dumpster | 301-901-950-000 | Lumberyard | $ 574.00 |
| 6/12/2025 | SnapRetail | 248-260-823-000 | Software | $ 65.00 |
| 6/13/2025 | ClickUp | 248-260-823-000 | Software | $ 38.00 |
| 6/13/2025 | Lakes Motorsports | 248-726-975-002 | ATV Repair | $ 200.00 |
| 6/16/2025 | Roll Off Dumpster | 301-901-950-000 | Lumberyard | $ 574.00 |
| 6/16/2025 | Roll Off Dumpster | 301-901-950-000 | Lumberyard | $ 574.00 |
| 6/16/2025 | SpareBox Storage | 248-260-942-000 | Storage Unit Rent | $ 285.00 |
| 6/17/2025 | Michaels | 248-728-888-000 | Boards | $ 47.68 |
| 6/17/2025 | The UPS Store | 248-728-888-001 | Printing | $ 38.73 |
| 6/18/2025 | Timber Beast | 301-901-950-000 | Lumberyard | $ 1,950.00 |
| 6/18/2025 | Consumer Energy | 248-260-920-000 | Utilities | $ 86.83 |
| 6/18/2025 | Ionos | 248-260-823-000 | Software | $ 25.00 |
| 6/18/2025 | Exxon | 248-726-746-000 | Gas for ATV | $ 8.26 |
| 6/19/2025 | Amazon | 248-726-975-001 | Utility Trailer | $ 298.99 |
| 6/19/2025 | Roll Off Dumpster | 301-901-950-000 | Lumberyard | $ 290.40 |
| 6/19/2025 | Roll Off Dumpster | 301-901-950-000 | Lumberyard | $ 574.00 |
| 6/20/2025 | Amazon | 248-260-942-000 | Hard Drive | $ 79.99 |
| 6/22/2025 | Adobe | 248-260-823-000 | Software | $ 21.19 |
| 6/23/2025 | The Home Depot | 301-901-950-000 | Lumberyard | $ 93.75 |
| 6/25/2025 | Meijer | 248-728-888-000 | Cupcakes | $ 52.20 |
| 6/25/2025 | The UPS Store | 248-728-888-000 | Printing | $ 415.52 |
| 6/25/2025 | Dollar Tree | 248-728-888-000 | Decorations | $ 17.23 |
| 6/25/2025 | Dollar Tree | 248-728-888-000 | Decorations | $ 8.48 |
| 6/25/2025 | The Home Depot | 248-726-883-000 | Spring Link/ Weed Killer | $ 133.00 |
| 6/27/2025 | Amazon | 248-726-746-000 | Basket Chains | $ 67.96 |
| | | | | |
| | | | **Total:** | **$ 9,713.47** |

# DDA ACTION SUMMARY SHEET

**MEETING DATE:** August 19, 2025

**TOPIC** Strategic Plan 2025-2030 – Final Draft

**BACKGROUND BRIEF:**

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

At the Nune Meeting of the board, the Strategic Plan was referred to a joint committee of the Main Street Program groups and subjected to a final review and comment. Those comments, being focused on implementation, are incorporated in the project planning of the Executive Team.

Staff is recommending that the Plan is adopted as Presented

**FINANCIAL IMPACT:**

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

**RECOMMENDED MOTION:**

Move to approve and adopt the Lake Orion Downtown Development Authority Strategic Plan 2025-2030 as presented

# Strategic Plan

## 2025-2030

## Lake Orion Downtown Development Authority

### An Accredited Main Street America Program

Approved by DDA: _____

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

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

| | |
|---|---|
| _____ | _____ |
| Debbie Burgess, Chair | Sam Caruso, Vice-Chair |
| _____ | _____ |
| Matthew Shell, Treasurer | Hank Lorant, Secretary |
| _____ | _____ |
| Teresa Rutt, Council President | Darwin McClary, Village Manager |
| _____ | _____ |
| Chris Barnett, Orion Supervisor | Alaina Campbell, Board Member |
| _____ | _____L |
| Sally Medina, Board Member | Lloyd Coe, Board Member |
| _____ | _____ |
| Matthew Gibb, Executive Director | Janet Bloom, Assistant Director |

## Purpose

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

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

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

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

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



## Mission

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

## Vision

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

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

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

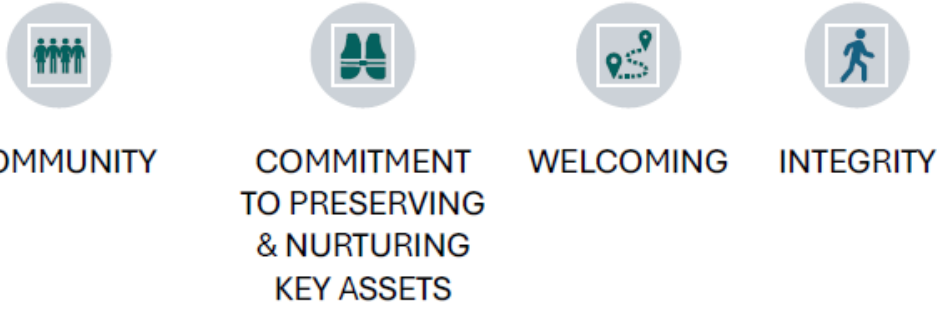
The benchmarks of this plan will be met through new and ongoing DDA efforts, including,

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

## Values

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

The Board Values are:



## SWOT Analysis

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

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

## Needs Assessment

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

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

## Measuring Success

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

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

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

## Stakeholders

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

Stakeholders include but are not limited to:

Property Owners
Downtown Businesses
Village and Orion Residents
Developers and Investors
Nonprofit Organizations
Village and Township Government
Oakland County Government
MainStreet Oakland County
Orion Area Chamber of Comm.
Regional Partnership(s)
University/Community College(s)
Southeast Michigan Council of Gov.
Mich. Department of Transportation
Lake Orion Lake Association
Orion Township Library
Lake Orion Community Schools
Neighborhood Organizations

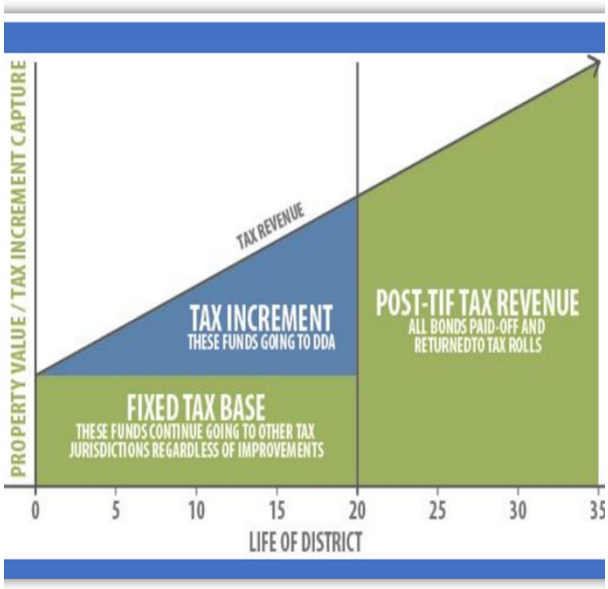
## How is the DDA Funded?

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

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

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

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



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

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

## Transformational Strategies

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

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



**LAKESHORE ECONOMY**



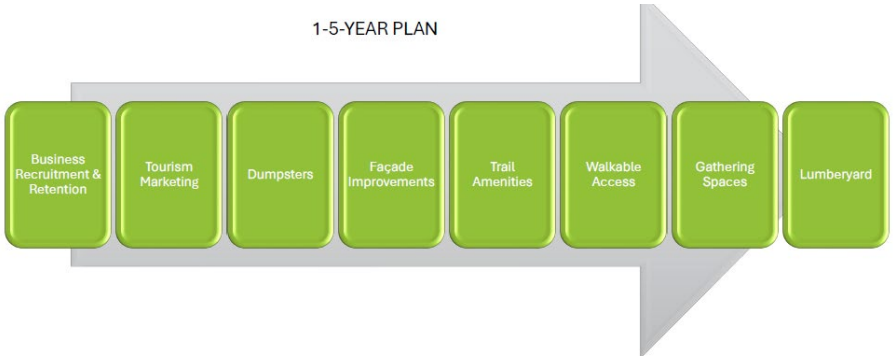
**COMMUNITY BUILDING**

## Areas of Focus

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

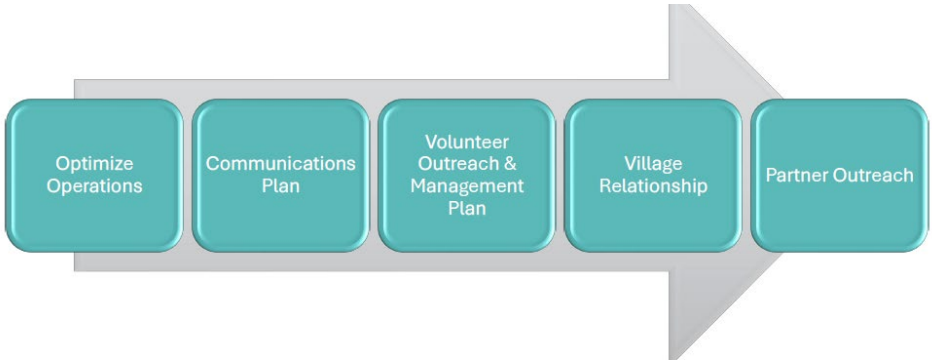
### LAKESHORE ECONOMY

| FOCUS AREA | GOALS |
|---|---|
| 1. Enhance Downtown Connections | • Gateway Project – Lumberyard<br>• Trail Access & Amenities<br>• Walkable Lake Access<br>• Community Gathering & Green Spaces for All Ages (Public & Private) |
| 2. Grow Local Tourism Business | • Business Mix Analysis and Recruitment Strategy<br>• Small Business Support Tools/Growth<br>• Lakeshore-centric and Trail-based Events & Promotions - Signature Events, Recreational Activities for Families & All Ages<br>• Tourism Marketing –Co-op & Coordinated Business Opportunities |
| 3. Create Great First Impressions | • Façade Improvements<br>• Dumpster Enclosures |



# COMMUNITY BUILDING

| FOCUS AREA | GOALS |
|---|---|
| 1.Strengthen Local Partnerships | • Optimize Operations – Contracts & Accounts<br>• Improve Village Partnership<br>• Expand Other Organizational Partnerships for Volunteer Resources & Project Alignment<br>• Grants/Foundations/Resources |
| 2. Increase Community Involvement & Understanding | • Refreshed Communications & Brand Messaging Plan<br>• Volunteer Outreach & Management Plan |




The Action Plans attached hereto are incorporated into this Strategic Plan

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | **MISSION:** | ***We are a community of innovative economic stewards focused on preserving and enhancing the Lake Orion DDA District to drive prosperity and a strong sense of connection for all.*** | | | | | | | | | | | | | | | | |
| 2 | **DOWNTOWN VISION:** | ***A lively lakeside downtown, where all ages come together for endless fun, connection, and unforgettable experiences in unique businesses, community spaces, and historic and natural treasures.*** | | | | | | | | | | | | | | | | |
| 3 | **ORGANIZATION VISION:** | ***To be a Catalyst, Connectors, Leaders, Innovative, and assure Integrity.*** | | | | | | | | | | | | | | | | |
| 4 | **METRICS OF SUCCESS:** | Broad-based Community Support/Buy-in, Large Volunteer Force, Financial Strength & Support to Meet Goals, Projects & Deliver on Program Needs, Target Market Grows, A Community for All Ages , Diversity & Retention | | | | | | | | | | | | | | | | |
| 5 | **STRATEGY** | **OBJECTIVE** | **PRIORITY** | **TASKS** | **TIMELINE** | **COMMITTEE** | **ACTION ITEMS** | **PROJECT CHAMPIONS (Individual(s))** | **PARTNERS** | **RESOURCES NEEDED** | **FUNDS NEEDED** | **STATUS** | **COMMUNITY** | **PRESERVE & NUTURE KEY ASSETS** | **WELCOMING** | **INTEGRITY** | | |
| 6 | **Lakeshore Economy** | | | | | | | | | | | | | | | | | |
| 7 | | Enhance Downtown Connections | 1 | | | | | | | | | | | | | | | |
| 8 | | | | Gateway Project – Lumberyard | 2025-28 | All Committees | Activation & Business Plan | | | | | | x | x | x | x | | |
| 9 | | | | | | | Fundraising Plan | | | | | | | | | | | |
| 10 | | | | | | | Communications & Storytelling | | | | | | | | | | | |
| 11 | | | | Trail Access & Amenities | 2026-27 | Design Committee | Amenities Needs Assessment | | | | | | x | x | x | | | |
| 12 | | | | | | | Installation of Amenities & Art | | | | | | | | | | | |
| 13 | | | | | | | Directional & Interpretive Signage | | | | | | | | | | | |
| 14 | | | | Walkable Lake Access | 2025-27 | Design & Promotions Committee | Crosswalk Improvements | | | | | | x | x | x | x | | |
| 15 | | | | | | | Greens Park Activation | | | | | | | | | | | |
| 16 | | | | New Community Gathering & Green Spaces for All Ages (Public & Private) | 2027 | Design & Organization Committee | Identify Locations | | | | | | x | | x | | | |
| 17 | | | | | | | Concept Designs & Budgets | | | | | | | | | | | |
| 18 | | | | | | | Grant Research & Applications | | | | | | | | | | | |
| 19 | | | | | | | | | | | | | | | | | | |
| 20 | | Grow Local Community & Tourism Business | 2 | Business Recruitment | 2025 | EV Committee | Business Mix Analysis | | | | | | x | x | x | | | |
| 21 | | | | | | | Recruitment Strategy & Market Profile Summary | | | | | | | | | | | |
| 22 | | | | | | | Business Location Incentive | | | | | | | | | | | |
| 23 | | | | Business Retention | 2026 | EV Committee | Assess & Provide Small Business Support Tools | | | | | | x | x | x | x | | |
| 24 | | | | | | | Business Assistance Team/Retention Visits | | | | | | | | | | | |
| 25 | | | | | | | Identify Business or Product Expansion Opportunities | | | | | | | | | | | |



Template Provided by Pl... Inc.

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 26 | **STRATEGY** | **OBJECTIVE** | **PRIORITY** | **TASKS** | **TIMELINE** | **COMMITTEE** | **ACTION ITEMS** | **PROJECT CHAMPIONS (Individual(s))** | **PARTNERS** | **RESOURCES NEEDED** | **FUNDS NEEDED** | **STATUS** | **COMMUNITY** | **PRESERVE & NUTURE KEY ASSETS** | **WELCOMING** | **INTEGRITY** | | |
| 27 | Lakeshore Economy (cont.) | Grow Local Community & Tourism Business (cont.) | | Lakeshore-centric and Trail-based Events & Promotions - Signature Events, Recreational Activities for Families & All Ages | 2025-27 | Promotions Committee | Annual Assessment of Events | | | | | | x | x | x | x | | |
| 28 | | | | | | | Focus on Unique Signature Events | | | | | | | | | | | |
| 29 | | | | | | | Enhance promotions with cross-marketing | | | | | | | | | | | |
| 30 | | | | | | | Create Collaborations amongst Destinations | | | | | | | | | | | |
| 31 | | | | | | | Make it easy for businesses to promote | | | | | | | | | | | |
| 32 | | | | | | | Support or Create Activity Events – ie: bike rides, runs, swims (start & stop downtown), boat parade tie-in; businesses open later, work with high school events | | | | | | | | | | | |
| 33 | | | | | | | | | | | | | | | | | | |
| 34 | | | | Tourism Marketing – Co-op & Coordinated Business Opportunities | 2025-26 | Promotions Committee | Enhance Online Presence & Searchability | | | | | | x | | x | x | | |
| 35 | | | | | | | Leverage Partnerships with Local & Regional Tourism & Recreation-based Organizations & Businesses | | | | | | | | | | | |
| 36 | | | | | | | | | | | | | | | | | | |
| 37 | | Create Great First Impressions | 3 | Façade Improvements | 2025 | Design Committee | Target Priority Buildings | | | | | | | x | | x | | |
| 38 | | | | | | | Budget Accordingly | | | | | | | | | | | |
| 39 | | | | Dumpster Enclosures | 2026 | Design & EV Committee | Develop Plan for Consolidated Locations & Public Areas of Improvement | | | | | | | | x | x | | |
| 40 | | | | | | | Fund/Installation of Public Improvements & Consolidated Locations | | | | | | | | | | | |
| 41 | | | | | | | Update Code of Ordinance for Private Dumpsters (if needed) | | | | | | | | | | | |



Template Provided by P… Inc.

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



Template Provided by P… Inc.

# DDA ACTION SUMMARY SHEET

**MEETING DATE:** August 19, 2025

**TOPIC** Presentation – New Sponsor/Engagement Program

**BACKGROUND BRIEF:**

The Executive Director was able to research and find a new program/platform to assist the Executive Team in preparing and focusing our efforts in re-building a sponsor and program engagement network and roster. The DDA has long relied on sponsors to support its programming and effort beyond the base TIF capital and staffing requirements. In the past three years sponsorships, and the means by which they are sought, have changed dramatically.

The SeeMyLegacy program is a very successful and recommended platform for the creation of campaign based sponsor, volunteer and engagement opportunities. The Executive Director will detail the platform, and its benefits in a short presentation.

It is recommended the DDA secure an initial subscription contract with See My Legacy in the annual amount of $2,499.00 and set an immediate goal of building and launching campaigns for sponsorship of all scheduled events for the remaining calendar year.

**FINANCIAL IMPACT:**

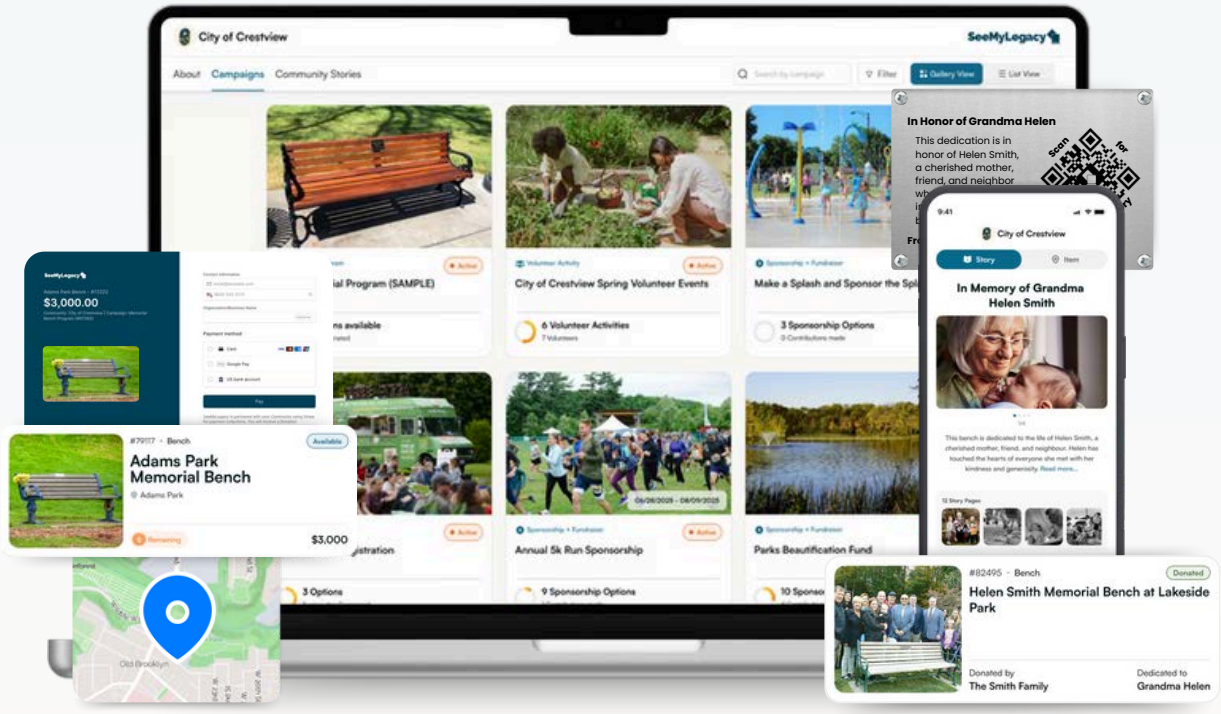
The Annual Subscription may be funded from Contracted Services 248-728-801-000 without budget impact.

**RECOMMENDED MOTION:**

Move to approve an annual contract with See My Legacy in the amount of $2,499 with funding from GL 248-728-801-000, further authorizing the transaction by credit card.

SeeMyLegacy

# The **Engagement** & **Fundraising** Platform




## All-in-One Platform for **You** and **Your Community**

**Creative Fundraising**

**Community Engagement**

**Lasting Recognition**

# Creative Fundraising + Engagement

## Exclusively with SeeMyLegacy

Your community can now offer new and creative ways for community members to give back, make an impact, and stay connected.

**These are the initiatives your community members care about most, but they're often left out of the digital tools that communities rely on.**



### Sponsorships

- Events + Festivals
- Programs + Teams



### Event Registration

- Farmer + Vendor Markets
- Community Programs



### Fundraisers

- New Amenities
- Beautification Funds



### Memorials Items

- Memorial Bench + Trees
- Hometown Hero Banners



### Interactive Tours

- History + Art Walk
- Local Business Spotlight



### Volunteer Events

- Clean Up Projects
- Festivals + Programs

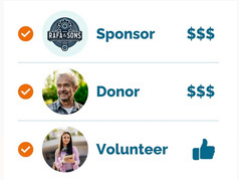
## Simple + Powerful Features



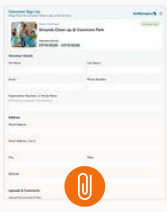

### Online Payments + Tax Receipts



### Built-in Donor Recognition




### Easy Management + Reporting



### Customizable Forms

## Provide Lasting Recognition

# Community Stories

## QR Plaques

### Story Tag $49




### Story Board $199




### Story Dedication $89




## Connect to the Digital Story

# Digital Stories

An interactive Story filled with photos, captions, and links - sharing memories, history, legacy, and so much more.




Scan QR to View Story

### Share the Stories of:

- Community Heroes
- Public Art
- Sponsor Recognition
- Memorial Dedications
- Veterans Stories
- Educational Content
- Historical Landmarks
- Points of Interest

# Pricing

## Annual Subscription

Billed Annually

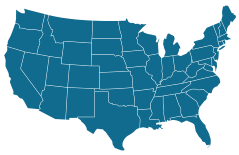
# $2,499

## Support for Your Community

- **Simple Setup** – We do the set up for you to help you get instant success.
- **Ongoing Support** – We help build and promote new campaigns.
- **Proven Strategies** – Resources and best practices to increase community engagement + donor participation.

✔ Custom Community Webpage ✔ Create Unlimited Initiatives ✔ Dedicated Support Rep

SeeMyLegacy



# SeeMyLegacy
## Featured Customers

Duncanville
City of Champions

CITY OF Pullman WASHINGTON

FIFE
WASHINGTON

CITY OF BELTON, TEXAS
FOUNDED 1850

BIRMINGHAM
A WALKABLE CITY

VILLAGE OF ROUND LAKE BEACH
CORPORATE SEAL

CITY OF SEBASTIAN
HOME OF PELICAN ISLAND

BASTROPTX
Heart of the Lost Pines / Est. 1832

CITY OF PRIOR LAKE
MINNESOTA

DOWNTOWN DEVELOPMENT
Bellows Falls
VERMONT
ALLIANCE

SMITHVILLE
TEXAS

ATOKA & TENNESSEE
Established in 1876

OXFORD
PARK COMMISSION

Laramie
WYOMING

VESTAVIA HILLS

# Get In Touch With Us!

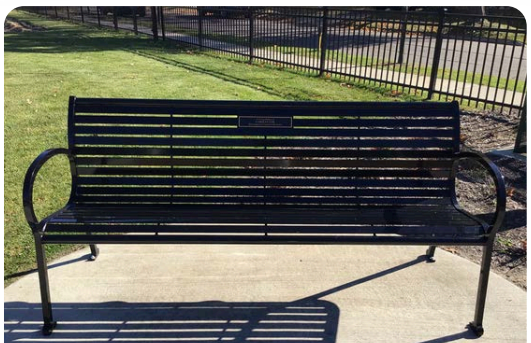
sales@seemylegacy.com

216-435-7878

www.seemylegacy.com

Scan to Visit Website







# DDA ACTION SUMMARY SHEET

**MEETING DATE:** August 19, 2025

**TOPIC** Executive Team Contracts - Review

**BACKGROUND BRIEF:**

The Executive Director and Assistant Director are both serving under contracts made effective more than 16 months ago. There have been material changes to the anticipated budgetary impact included in the contract with each executive, including but not limited to;

1. The Associate Director is now enrolled in the insurance plans of the Village.
2. There is a need to re-outsource platform and content development for programming.
3. The Village Managers strict directive that Village staff only perform work that is contracted and paid for by the DDA has left substantial general municipal work to the DDA, which has been substantially absorbed by the Executive Director and the Executive Team management of part time staff.
4. The effort of Village Council Members to dissolve, or otherwise defund the DDA, including coordinated use of FOIA and other tactics through third parties, has caused a substantial, and intentional, disruption in the anticipated work load of the Executive Director.
5. The lack of daily economic development staffing and support from the Village directly impacts the time and method of district support.
6. The contracts for public safety, compelled by budgetary demands of the Village, now require the Executive Director to act as a direct liaison to the community and district for code and ordinance issues, impacted additionally by the lack of supportive resources for the district from the Village.

These, and other factors, set a much clearer picture of the status quo of the position(s) contemplated in the re-structured executive leadership plan of the Board in 2024.

**FINANCIAL IMPACT:**

The Board included a 3% increase across all line items of the compensation packages(s) of the Executive Team. Budget, however, does not mean plan, so there is a need for the Board to determine whether any change or adjustment to either contract is warranted and the budget impacts.

**RECOMMENDED MOTION:**

To schedule an independent review of the annual performance and status of work load/product for each Executive Team member before the Board's Executive Committee, with each Executive presenting a self assessment of the prior year and a plan for professional development.

Executive Assessment and PDP materials submitted for pre-review by:_____

Independent Review Meetings Held By: _____

# DDA ACTION SUMMARY SHEET

**MEETING DATE:** August 19, 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 August 2025.

# EXECUTIVE DIRECTOR REPORT

Matthew Gibb – Executive Director

August 19, 2025

## I. NEWS AND UPDATES

**a. <u>NEW OFFICER and CODE ENFORCEMENT</u>.** Several meetings have been held to try and implement the provisions of the public safety contract with the Village. We were able to reach a pretty good consensus with the new Chief of police, who then had his staff provide notices to 21 business in the District regarding signs. Follow up, communication and other partnered pathways were moving forward until something happened internally in the village and council members are now seeking a new direction. This office uis working daily to respond to needs of the Chief to adequately staff and perform code enforcement, and the needs of the business and resident members of the district to properly respond to permit and compliance issues. This is complicated by the fact that the Village is now using an online system that is not easily understood by the user and there is no daily staff at the Village that is permitted to assist beyond introduction. Visits to the Village have resulted in the staff simply turning a computer screen towards the business owner and offering for them to complete a "portal". Stay tuned.

**b. <u>INFRASTRUCTURE MAINTENANCE.</u>**

i. This office has been working to address broken EV arms and charging at Children's Park
ii. There have been several new platers placed over dead tree locations. The Director corrected the plantings and added areas such as the sidewalk marking the Slater Lot.
iii. Processing of claim information on damaged light poles
iv. Reviewing parking contracts
v. Assisting in the compliance issues of the grease traps
vi. In the vacation time for the part time staff, doing all watering, fertilizing and landscape maintenance.
vii. Working on cement repair quotes for public parking lots, particularly at Front and Anderson
viii. Rented a new lift and helped the part time staff repair and replace banner locations.
ix. Met with electrical contractors regarding the power issues along Broadway.

**c.** **MAIN STREET GRANT REPORTING**. The initial report auditing all expenses to 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

i. Assisting Ed's Broadway Gifts in attracting a major event from New York to Downtown.
ii. Working with the new group seeking to take over Anita's Kitchen
iii. Discussions on grant applications for awnings on Flint/Broadway
iv. Offering free legal support for business trying to understand Row and use of their exterior properties for business purposes in downtown
v. Met with more contractors about the failing wall in the Children's Park Lot
vi. Contacted owners/developers at 44 Flint, 20 Front, and 160 S Broadway regarding delays and problems in the started and stalled development on those locations.

**e.** **EHMAN CENTER**. Involved heavily in trying to figure out how to help West Construction start the Ehman Center historic re-purposing project. After 18 months of delay in the Village signing the PUD agreement, they are now approaching a 1 year delay as a result of a conflict of opinion between the village planner and engineer. They have been held up by the outsourced Village Engineering firm insisting on information not within their responsibility. The Village manager insists I step aside and not remain involved as the village attorney is uncomfortable discussing this while I am on the phone or in meetings and has proclaimed that I have a conflict in that I formerly represented the project (prior to my engagement with the DDA). A government would only try to exclude those with the most knowledge and history with a project if the government was trying to prevent it from happening. A hard spot to be in.

.

**f.** **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.

**g.** **VILLAGE MTGS.** Several meetings, although the direct tactics of this office to assert and advocate for reasonable and knowledgeable governance are not being received well.

## 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 – LAST MONTHS REPORT: "There needs to be an offering memorandum which is not done. This will be completed for review and approval by the August meeting"
    - A NEW SYSTEM IS PROPOSED ON THIS AGENDA.
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). ON THIS AGENDA

Respectfully Submitted,

Matthew Gibb

gibb@downtownlakeorion.org

(248) 464-0307

# DDA ACTION SUMMARY SHEET

**MEETING DATE:** August 19, 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.

DUE TO THE FACT THAT MANY PEOPLE HAVE QUESTIONS ABOUT THE PROJECT, BUT DO NOT EVER CONTACT THE DDA TO ASK THEM, THE EXECUTIVE DIRECTOR HAS DECIDED TO INVITE THEM TO THE MEETINGS OF THE BOARD TO HEAR AND SEE THE PROGRESS REPORT AND RESOLVE THEIR CONCERNS IN PERSON

THEREFORE – A REPORT WILL BE PRESENTED AT THE MEETING AND IF RECEIVED AND FILED BY THE BOARD POSTED ON THE DDA WEBSITE THEREAFTER

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

**RECOMMENDED MOTION**

Move to Receive and File the Progress Report dated August 19, 2025.

# DDA ACTION SUMMARY SHEET

**MEETING DATE:** August 19, 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

August 19, 2025

**Completed Events/Activities:**

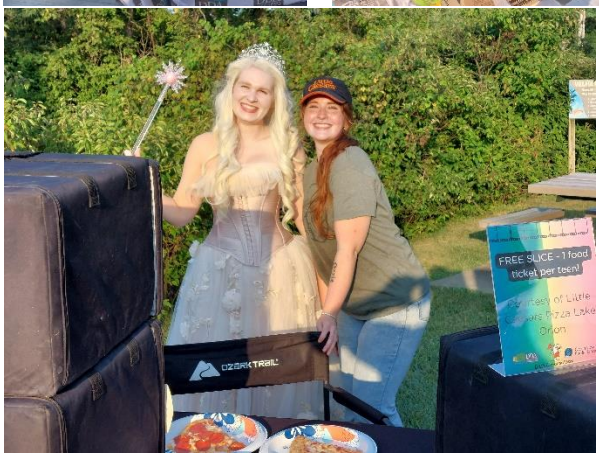
**LOLive!** : Recents concerts we had were July 16 (The Rebel Eves), July 23 (Tae and the Neighborly), July 30 (Buffalo Rose), August 6 (Low Gap), and August 13 (Sarah Darling). It has been a rainy concert season and are thankful we are able to move concerts inside to 20 Front St. when weather is not cooperating. We wish to the thank FlipSpot Gymnastics, 20 Front Street, and ONTV for supporting this music series. (Flyer attached.)

**Outdoor Movie Night for Teens:** The movie was Wicked. It was well received by those that attended. And it was great to hear teens within earshot say, “this is cool”. We want to thank Stan and Rosemary Ford and Rebecca Fecteau for volunteering for set up and beyond. Additional onsite help was our DDA crew of Emily (helping with setup/teardown and Glinda), plus Daniel and Zeke. Thanks to Little Caesars Pizza for supplying a slice of pizza to the kids and teens. The Orion Township Public Library was onsite giving out color changing cup with candy. We had a selfie station, free popcorn, onscreen trivia, Wicked trinkets, and a photo contest. (Flyer attached.)








**Upcoming Events:**

August 18 – Joint Lake Orion and Oxford DDA training on Business Taxes. (Flyer attached.)

August 21 – National Senior Citizens Day. Hosted by Lake Orion and Oxford Parks and Recreation Departments, and supported by the Lake Orion and Oxford DDAs. 11am – 3 pm.

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!), kids activities, and the launch of the new rebranded volunteer group, DDA event information, plus voting on the Outdoor kids movie happening Sept. 19. Businesses were sent event details and street/parking lot closures last week, provided by the Orion Art Center.

- We still need more paddlers for the Dragon Boat – 4 more! Help us fill the boat!

See attached the **Downtown Lake Orion Calendar** to see **more upcoming** events.

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

**Project Status:**

1) Kiosk Signs: Install moved to before Dragon on the Lake. Two at Broadway and Flint, and one at Front St. and Anderson. See attached.

2) Façade Grant - we will be scheduling the check presentation with Lake Orion Bike & Adventure Shop within the next week or two.

**Social Media Stats**

**Downtown Lake Orion Facebook**:

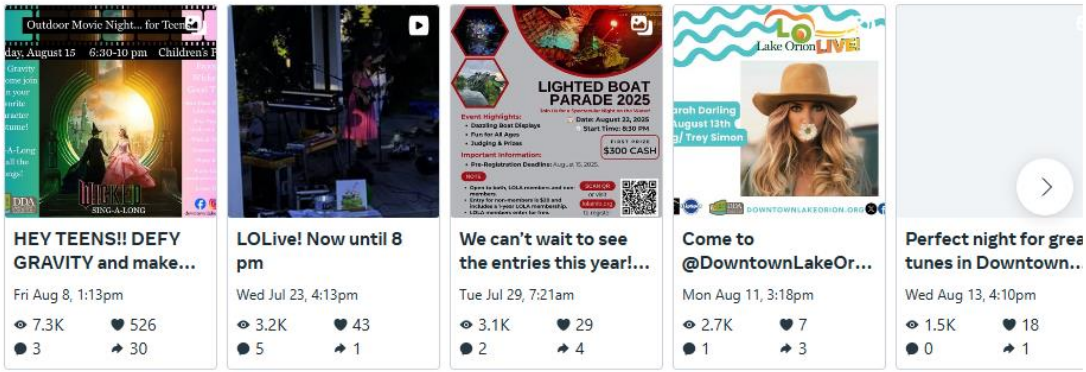
**Followers:** 10,834 (added 45)

**Estimated Reach:** Previous: 62,300; Current: 16,000 (# of people who saw content at least once)

**Engagement:** Previous: 1,728; Current: 931 (reactions, comments, shares, or clicks on our posts)

**Views:** Previous 202,477; Current 56,804 (# of times our content was played or displayed.

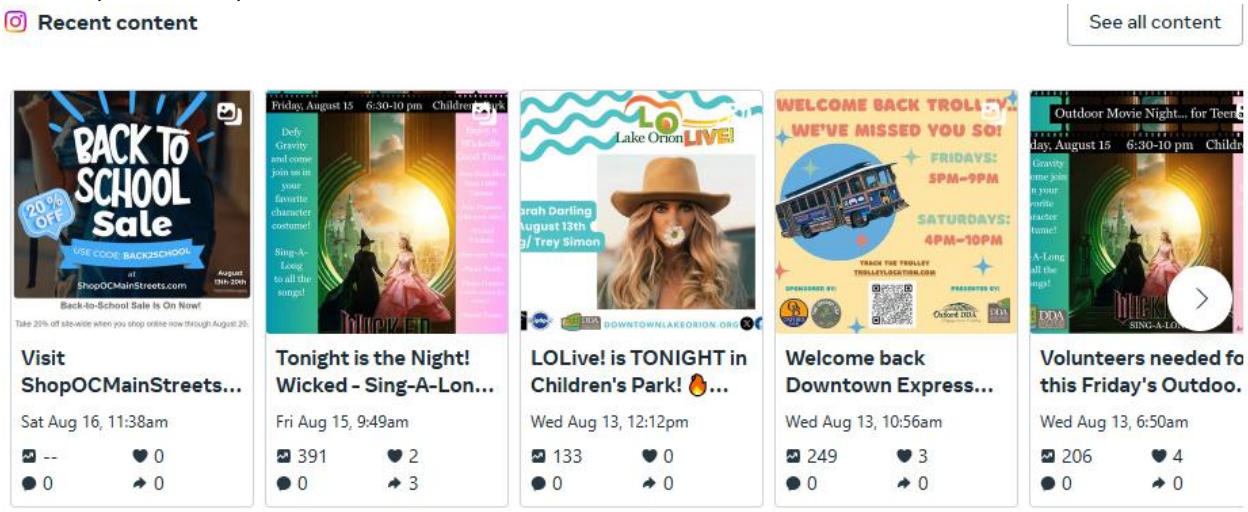
Includes reels, videos, posts, stories, and ads.)




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

142 members (added 3); 34 posts in the last 28 days.

**Instagram**:
4,299 (added 43); Views: 23.2K




**X** (formerly Twitter):
1,546 (added 2)

## E-Newsletters

Via SnapRetail!: 12 e-newsletters created (Business/Consumer)

## Grants:

**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"** opened 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 – July 16, 2025 (Notes from meeting attached.) Next meeting 8/20-11:30am.
Promotions Committee – August 5, 2025 (Notes from meeting attached.) Next meeting 9/2 - 11am.
Design Committee – canceled. Next meeting 8/18-3pm.
Economic Vitality Committee – canceled, TBD - Lacking members.
All Committee Meeting (Strategic Planning meeting) – July 24, 2025

**Trolley Update:**
Trolley had broken down June 21. The trolley was repaired about two weeks ago. Oxford DDA had negotiate the insurance with NOTA which was just approved. The trolley started service August 15.

**Add to Your Calendar:**
**Downtown LOdown:** Monday, August 25, 4:00-5:30 pm at Rio on Main. (These are held the 4th Monday of the month.) (Flyer attached.)

**MSOC Legal Workshop (Zoom or In-Person):** Thursday, August 28, 8am-11:30am, County Executive Building. Free to attend but is ticketed. (Flyer attached.)

Other upcoming events further into the calendar year from the Orion Area Chamber of Commerce were sent via calendar invite (ie ribbon cuttings, etc.)

**New Business:**
313 Pizza Bar is now Sick Town Hall. We welcome Scott Taylor and his crew in bringing his energy and flavor to our downtown.
Three other new businesses are slated to come into town. We hope to have more to share soon.

**Other:**
We want to thank Attorney Marc Vezina for allowing us to use the grass space between Great Lakes Insurance and Orser Photography/Abeantogo for our upcoming Outdoor Movie Night – Date Night on September 12. He has also given permission for the use of the space as a temporary pocket park until plans come together for further development of the site.

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

# Outdoor Movie Night... for Teens!

## Friday, August 15 6:30-10 pm Children's Park

Defy Gravity and come join us in your favorite character costume!

Sing-A-Long to all the songs!




Enjoy a Wickedly Good Time:

~Free Pizza Slice from Little Caesars

~Free Popcorn (pick your side!)

~Wicked Trinkets

~Onscreen Trivia

~Photo Booth

~Photo Contest (watch screen for entry!)

~Sweet Treats

DDA LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY

downtownlakeorion.org

# BUSINESS TAXES WORKSHOP

## MONDAY, AUGUST 18

**10:00 AM - 11:00 AM**
**Oxford Village Community Room**
**22 West Burdick**

Presented by:

HUNTER CPA TAX & ACCOUNTING



## Workshop Highlights

- Understanding Business Finances
- Business Structures
- Accounting Records
- Tax Rules & Regulations for Businesses
- One Big Beautiful Bill – *How will This Affect Business in 2025 and Beyond*
- Q & A session

RSVP by August 13 to jdickieson@thevillageofoxford.com

# Oxford Township Parks & Recreation
# National Senior Citizens Day
# August 21,2025 11:00am- 3:00pm
# Set up: 10:30am | Breakdown 3:00pm

Applicant Name:_____Date:_____

Business Name: _____ Phone: _____/_____
Work Fax

Business Address:_____Phone: _____
Street City Zip Other

Business Email: _____

Business Website:_____

-Will you set up a Pop-Up Tent or a Table: Yes | No
-Will you provide trinkets or materials: Yes | No (Please drop off at Oxford Parks & Rec. if not setting up in Centennial Park)
-Will you provide bags: Yes | No (Please drop off at Oxford Parks & Rec. if not setting up in Centennial Park)

Notes:

_____
_____
_____
_____
_____
_____

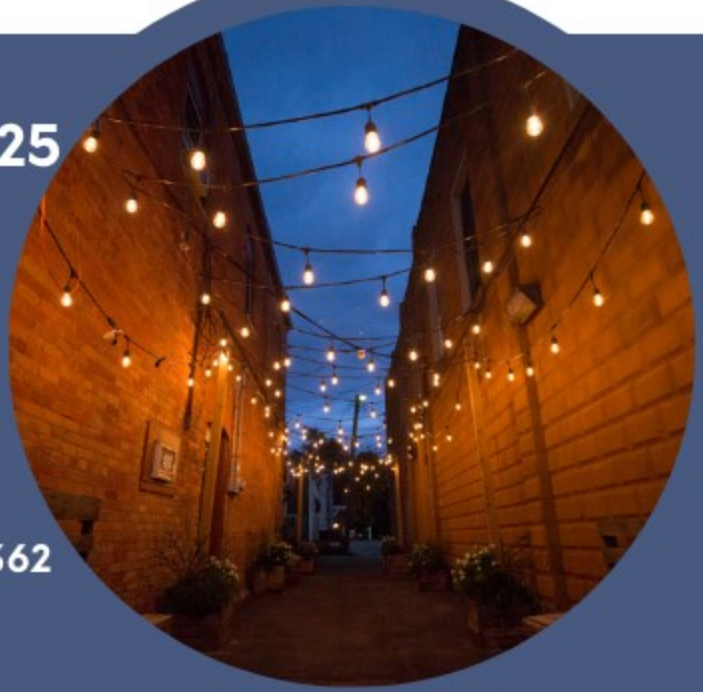
_____
Signature Date

**Additional information will be communicated via email approximately two weeks prior to the event.**
**CALL DAWN AT 248-628-1720 x 101 | dawnmedici@oxparkrec.org WITH ANY QUESTIONS.**
**2795 Seymour Lake Rd. Oxford, MI 48371**

# Downtown LOdown

# August 25 at 4pm

DDA
LAKE ORION DOWNTOWN
DEVELOPMENT AUTHORITY



**Monday, Aug. 25**

**4 - 5:30 PM**

RIO ON MAIN SOUTHWEST CANTINA

Rio on Main
305 S. Broadway
Lake Orion, MI 48362

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

They are held the 4th Monday of the month.

## August Topics:

~ Fall & Winter Events
~ Snow Removal Protocols this Winter
~ New Volunteer Group
~ Fall Decor
~ Upcoming Trainings

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

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

www.DowntownLakeOrion.org

Main Street OAKLAND COUNTY MICHIGAN | 25 YEAR ANNIVERSARY

ORGANIZATION SERIES

*In-Person Workshop*

# Powers and Financing of Downtown Development Authorities



**AUGUST 28 2025**

**9:30-10 AM**

**OAKLAND COUNTY EXECUTIVE OFFICE BUILDING**
**CONFERENCE CENTER | 2100 PONTIAC LAKE ROAD – BUILDING 41W | WATERFORD**

## Gain a practical and legal understanding of DDA functions to help you govern and operate more effectively within your community.*

### TOPICS INCLUDE:

- Overview of the Downtown Development Authority division of the Recodified Tax Increment Financing Act
- Sources and authorized uses of funds
- Interaction and oversight with governing bodies of the organizing municipalities
- Open Meetings Act/Freedom of Information Act issues

**Always check with your own attorney when needing legal advice.*

### SPEAKER



**Ronald C. Liscombe**
*Principal*
*Miller-Canfield*

**Register Today at**
**AdvantageOakland.Eventbrite.com**
*Cost: Free | Advance registration required for Zoom link*

**QUESTIONS? Contact**
Tim Colbeck, *Oakland County*
colbeckt@oakgov.com | (248) 858-7935

## SPEAKER BIO

**Ronald C. Liscombe** *Principal, Miller-Canfield*
*(313) 496-7906 | liscombe@millercanfield.com*

Liscombe is a Chambers USA Tier 1 public finance attorney who assists public sector clients with a range of issues, including public finance and governance matters. He has a deep knowledge of state and local government, having worked in a variety of policy and program management roles prior to joining the firm.

He counsels and provides direction to public entities to develop innovative and effective strategies in response to challenging policy issues. His experience includes advising and counseling public entities in all general legal matters, including the development of policies and procedures, contracts, and providing advice on Open Meetings Act and Freedom of Information Act issues. He has advised clients on the operational impact of proposed legislation and assisted them with developing strategies to eliminate or reduce potentially adverse effects.

Liscombe has worked on the bond counsel teams for a variety of complex financings in recent years, including multiple financings involving the State of Michigan and its financing-related authorities, every City of Detroit bond issue since its bankruptcy, and the Wayne County jail financing.

He has diverse experience counseling public entities, ranging from highly rated, sophisticated issuers to financially distressed issuers with "headline risk." His total transaction volume in the past five years exceeds $6 billion.

**His relevant experience includes serving as:**
Special economic development counsel to the City of Highland Park in connection with the establishment of the City's brownfield redevelopment authority and adoption of its development plan related to the Means Logistics Center. This representation included the review of the Act 381 Plan, and the negotiation of the related reimbursement agreement with the developer.

Bond counsel to the City of Lansing Brownfield Redevelopment Authority in connection with the Red Cedar Development. This included the review of the Act 381 Plan and Development and Tax Increment Financing Plan and the related reimbursement agreement with the developer.

Bond counsel to the City of East Lansing Brownfield Redevelopment Authority in connection with the City Center development project. This representation included the review of the Act 381 Plan and Development and Tax Increment Financing Plan and the related reimbursement agreement with the developer.

MAIN STREET AMERICA™

OAKLAND COUNTY MICHIGAN
ECONOMIC DEVELOPMENT
DAVID COULTER
OAKLAND COUNTY EXECUTIVE

# 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



**Goldpine**
August 27
wsg/ Izzy Joy



**Sarah Darling**
August 13
wsg/ Trey Simon




**Brother Maven**
August 20
wsg/ Jessey Adams



DOWNTOWNLAKEORION.ORG

# Downtown Lake Orion 2025 Events



***All the LOLive! Music concerts are from 6:30pm – 8:00pm in Children's Park***
***(Rain location is 20 Front St. Doors open at 6pm, food and beverage allowed, seating limited.).***
***Storybook Stroll – watch for seasonal maps of book pages in retailers' windows.***
***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



| | |
|---|---|
| **June** | |
| June/July/August | Launch of Pedal Boat Pub Tours |
| June/July/August | Launch of Tour on Orion Boat Tours |
| Thru Oct. | DIA Inside/Out Art Installation – 10 locations (DDA) |
| 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 75th 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** | |
| Thru Oct. | DIA Inside/Out Art Installation – 10 locations (DDA) |
| 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, 6:30-8pm (DDA) |
| 18 | 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 at Johnny Black's) 8am – 1pm (LOPA/Golling Buick GMC) |
| **August** | |
| Thru Oct. | DIA Inside/Out Art Installation – 10 locations (DDA) |
| 2 | Seafood Boil Fundraiser, ticketed event, 12 – 4 pm (Sunrise Rotary) |
| 6, 13, 20, 27 | Lake Orion LOLive! Music Concerts, 6:30-8pm (DDA) |
| 15 | Outdoor Movie Night at Children's Park (for teens), 6:30-10pm (DDA) |
| 21-24 | Lake Orion Dragon on the Lake (Orion Art Center) |
| 22 | Lighted Boat Parade, 8:30 pm start (Lake Orion Lake Association) |

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

# Downtown Lake Orion 2025 Events



| | |
|---|---|
| **September** | |
| Thru Oct. | DIA Inside/Out Art Installation – 10 locations (DDA) |
| 6 | The Art of Storytelling Opening – thru 9/27, 6 pm (Orion Art Center) |
| 12 | Outdoor Movie Night (Adult Date Night), 6-9:30pm, Location: grass area between Orser Photography and Great Lakes Independent Insurance Agency (DDA) |
| 19 | Outdoor Movie Night at Children's Park (for kids), 6-9:30pm (DDA) |
| 20 | Zombie Walk & Poker Run, 6pm makeup at Ed's, 8pm start (Ed's Broadway Gift and Costume/Lighted Parade Fundraiser) |
| 25-27 | America in Bloom (Orion Twp./Orion Parks/Village/DDA) In downtown on 9/26, 4 pm – 10 pm |
| 27 | Michigan Downtown Day, Shop Hours (DDA) |
| 27 | Classic Car Show for Orion Veterans Memorial Fundraiser, 8am-1pm (Golling Buick GMC) |
| **October** | |
| Thru Oct. | DIA Inside/Out Art Installation – 10 locations (DDA) |
| 4 | The Midnight Gallery: A Haunting Exhibition Opening – thru 10/25, 6 pm (Orion Art Center) |
| 4-5 | Here Lies Lake Orion Cemetery Tours, 4pm, 5pm, 6 pm (ticketed) (Orion Historical Society) |
| 15 | Lake Orion Halloween Extravaganza & Costume Parade, 5pm-8pm, (5:30 pm parade lineup, step off at 6pm) (DDA) |
| 24 | Witches Night Lake Orion & Oxford #StrongerTogether, 5-10pm (DDA) |
| **November** | |
| 1 | Janet Almstadt Davison Solo Exhibition Opening, 6pm (Orion Art Center) |
| 1-30 | Oakland County Shop Small "Local Gems" Sweepstakes" |
| 20 | Lake Orion Sing & Stroll Tree Lighting and Hometown Holiday Horse & Carriage Rides 5pm-7pm (DDA) |
| 29 | Artists Holiday Art Market Opens (Orion Art Center) |
| 29 | Shop Small Saturday and Hometown Holiday Horse & Carriage Rides 10am – 2pm (DDA) |
| **December** | |
| 1-31 | Artists Holiday Art Market (Orion Art Center) |
| 4 | Impact Awards (Orion Area Chamber) |
| 5 | Holly Jolly Folly Lighted Parade Fundraiser, 6-11pm (Golling Buick GMC/Orion Area Parade Group) |
| 6 | Orion Lighted Christmas Parade, 6 pm (Orion Area Parade Group) |
| 13 | Polar Express Trolley Rides, Ticketed event,1 – 5 pm (DDA) |
| 13 | Winter Workshop, 11 am – 1 pm (Orion Twp. Public Library) |

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

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

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

**Promotion:** Creates a positive image of the downtown to instill community pride and encourage commercial activity and investment in the area. Promotions such as advertising, retail and special events, marketing and social media campaigns can be used to communicate the unique characteristics of a downtown to residents and visitors — sparking interest in shopping, dining, living or investing and creating a business in the community.

# Promotions Committee Minutes

**August 5, 2025**

**11 am – 12 pm**

**Teams Meeting**

Committee Members: Chair Sally Medina, Garrett Hoffman, Sandra Wood, Holly Nicosia, Kristin Berry, Anthony Medina, John Mannion, and Sindy Klonke.

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

**Attendees: Sally Medina, Garrett Hoffman, Sandra Wood, Kristin Berry, Anthony Medina, Matt Gibb, and Janet Bloom**

## I. Upcoming Events

- **Late Morning Live Concerts:** Continuing through August. Mostly held at 20 Front Street due to weather. Improved media outreach using updated media list from multiple local partners.
- **Outdoor Movie Night (Teen Night):** August 15 at Children's Park, 6:30–10 PM.
  - Movie: *Wicked*
  - Activities include costume contest, karaoke, and pizza provided by Little Caesars
  - Volunteers needed; sign-up genius to be shared
  - Coordination ongoing with Oxford Professional Theatre for themed activities
- **Dragon on the Lake (Aug 21–24):**
  - Arts & crafts now Saturday–Sunday only
  - Dragon Pub opens Thursday at 5 PM
  - Full music lineup reviewed (Audrey Ray, Louie Lee, SpaceC, Middle Aged Kids, Sunset Boulevard, etc.)
  - Dragon Boat Races: DDA boat participation needed. Actively recruiting paddlers and a drummer
- **Adult Date Night:** Rescheduled to Sept 12, 6–9:30 PM. Locations under consideration include grassy space near Great Lakes Insurance and Avinigo or DIA terrace

- **Outdoor Movie Night (Kids):** Sept 19, 6–9:30 PM at Children's Park. Craft-heavy and volunteer-intensive
- **Zombie Walk & Run:** Sept 20
- **America in Bloom Visit:** Sept 26
  - ~200 participants, staying in Rochester
  - Tours through downtown LO from 5–10 PM
  - Volunteers needed to guide 20-minute walking tours
- **Michigan Downtown Day:** Exploring sidewalk sales and local music. Business outreach in progress
- **Here Lies Lake Orion (Oct):** Hosted by Orion Historical Society at Evergreen Cemetery
- **Halloween Extravaganza:** Costume parade (Oct 30), 5–8 PM. Volunteer support needed
- **Witches Night:** Oct 24. Event planning and sponsorship opportunities underway

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## II. Volunteer Recruitment

- Volunteer initiative launching at **Dragon on the Lake** in **Flint Street Alley**
- New branded volunteer program: inclusive, engaging, and community-centered
- Shirts and new logo in progress
- Organization Committee whiteboarding all tasks, skills, and time estimates for subcommittees and one-time tasks

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## III. Economic Development Focus Items

- **New Businesses:**
  - **Thrive Therapy** now in former HeartSpace Play Space location
  - **Adamo Construction/Design** moving into space next to Robotic Rehab
  - **313 Pizza → Six Town Hall:** Rooftop now open; plans for additional back patio improvements
- **Lumber Yard:** Main barn reconstruction nearly complete. Grading started this week
- **A-Frame Sign Enforcement:**
  - 17 businesses received notices to remove signs or apply for a temporary permit ($175)
  - Concerns over enforcement process, permit cost, placement restrictions
  - DDA meeting with Police Chief and Council President scheduled
  - Potential for temporary hold and ordinance review
  - Exploring unified design approach for signs as part of downtown branding effort

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## IV. Façade Grant Program

- New fiscal year opened July 1
- Internal discussion about offering smaller grants to more businesses to maximize visual impact
- More details and outreach coming soon

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## V. Downtown LOdown Meetings

- Held 4th Monday of each month, 4–5:30 PM
- Peer-to-peer info sharing + updates from DDA and resource speakers (e.g., SBA, Police Chief)
- Attendance ranges from 5–14 people
- Exploring virtual attendance option for better accessibility

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## VI. Website Refresh

- In planning phase for design and user experience improvements
- Goal: easier navigation, clearer volunteer and program info
- Plans to revive real estate/rental availability section
- Seeking photo and property info support from volunteers or stakeholders

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## VII. New Business

- **Business Trainings & Workshops**
  - August 18: Business Taxes workshop in Oxford
  - AI Workshop Part 2 with Oakland Thrive in development
  - September training forthcoming
- **Genesis Grant:** Opens August 11; DDA available to assist with applications
- **Property Vacancy Page:** Volunteers needed to help gather photos and contact info for vacant spaces downtown
- **Meeting Space with Screens/IT (for groups ~30):**
  - Lake Orion United Methodist Church
  - Sick Town Hall
  - Upstairs above Sagebrush (check usability)
  - 20 Front Street
  - School Administration Building

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## VIII. Next Meeting Date

I. **September 2, 2025**

**DDA Org Committee – offline version JT**

**June 18, 2025**

**Meeting Notes**

**Volunteer Core: The Illuminators**

Aligning with: The Dragon's Light (proposed nonprofit name by the DDA)

**<u>Brand Direction</u>**

- Volunteer Group Name:
  - Finalized name: The Illuminators
  - Variations to explore for logo:
    - The Illuminators
    - Lake Orion Illuminators
    - Illuminators

- Brand Positioning:
  - Dovetails with nonprofit name The Dragon's Light
  - Emphasizes light, positivity, and community impact
  - Tagline Idea: "We're here to brighten things up."

- Design:
  - Debra will develop logo options based on the three name variations above.

**Inspirational & Uplifting**

- Shining Light, Building Community

- Brightening Downtown, One Act at a Time

- Together, We Light the Way

- The Power of Light. The Strength of Community.

- Where Light Leads, Community Follows

**Community-Centered**

- Lighting Up Lake Orion, Together

- Illuminating What Makes Lake Orion Shine

- Hands-On. Hearts Bright.

- Be the Light in Your Downtown

- Building Better, Brighter Blocks

**Beautification & Positivity Focus**

- Shining a Light on What's Good

- Beautifying the Block. Brightening the Spirit.

- From Litter to Light—We Make It Better

- Creating Clean, Welcoming, Wonderful Spaces

- Where Service Meets Shine

**Simple & Catchy**

- Bright People. Brighter Town.

- This Is How We Shine.

- Do Good. Shine Bright.

- Make Downtown Dazzle.

- Keep LO Glowing.

**Group Identity**

**Who We Are**

We shine light on everything that is good around here!
The Illuminators are the bright side of Lake Orion's downtown—a passionate group of volunteers dedicated to keeping our town vibrant, welcoming, and full of life. Inspired by the strength and spirit of being the light for downtown Lake Orion, we work together to enhance events, beautify our surroundings, and support local businesses.

**Our Mission**

To brighten the community, protect the legacy of downtown Lake Orion, and keep the energy alive through volunteerism and service.

**What We Do**

- Event Champions – Assist in organizing and running downtown events like concerts, festivals, and holiday celebrations.
- Community Builders – Support beautification projects, clean-ups, and initiatives that make downtown shine.
- Business Boosters – Help with promotions and activities that drive engagement and economic growth. (Name may be updated to "Local Connectors.")
- Hospitality Heroes – Welcome visitors and ensure a fun, friendly experience at community gatherings.

**Why Join?**

- Be part of a legendary team that makes a real difference
- Connect with neighbors and local businesses
- Earn rewards, recognition, and exclusive Illuminator perks
- Celebrate Lake Orion's "Where Living is a Vacation" lifestyle by giving back!

**How to Get Involved**

Joining is easy! Whether you can give an hour or commit regularly, there's a way to help.
Sign up today and become a light in Lake Orion's vibrant community.
Sign up at [DDA website or link]

**Launch Plan**

**1. Finalize Brand Elements**

- Approve name, logo, tagline, and visuals (t-shirts, stickers, signage). Debra: leading logo design

DECISIONS & ACTIONS ON 7/16/25 MEETING

- Debra presented two logo options, the group decision aligned on #2 – Jen to insert into notes

1)

2)

- Matt to pursue trademark of the logo and LO Pride

Next event to unveil the logo – Dragon on the Lake

Purpose: Create new identity for the group and connect with the cool volunteer team, have them come back to businesses

What to do:

Simplfy: Special coupon, participating venues

Volunteer area group: IDEAS

- Get tshirts with logo for volunteers – Debra
- Create logo cups for us – 1,000 cups - Debra
- CreateI Illuminators logo coupons or money off for businesses and hand them out
    - Need to courtesy talk to Dragon team – Janet
    - Make sure we track the coupons to see if people are coming back – How do that?
    - Send in enewsletter, FB and ask them if they want to participate – Janet
    - Create coupons and order dragon things – Janet
- Alleyway area selfies you all get a prize - Janet
- Walk around crowd and gathering family movie data and telling them about it and ask – get the toys – Janet

- Create interesting signs - maybe later – HOLD
- Decorate alley – Janet and Matt
- Sign up genius for us volunteers to be in the alley at certain times – next meeting or Janet
- Make next meeting earlier – August 6th – Janet send that out

- Create branded sign-up form (online & print)

- Develop a simple welcome packet – LATER NOT RIGHT NOW

- Create welcome video: Alaina & Jen to film

- Set up FB page; feature new members on downtown Facebook page

- Logo on volunteer t-shirts

**2. Identify Volunteer Roles & Structure**

- Break down "What We Do" into specific event-related tasks

- Assign captains for each volunteer team: Event Champions, Community Builders, Business Boosters / Local Connectors, Hospitality Heroes

- Create role descriptions with flexible commitment levels (e.g., One-Time, Monthly, On-Call)

**3. Plan Soft Launch**

- Complete logo and shirts before welcome video

- Wear shirts at LOLive Music! Wednesday night
  Engage with the crowd—start conversations, gather interest

- Identify 10–15 founding members

- Host Founders Meet-Up: Light refreshments, Swag, Short rally-style presentation

- Ask Founders to: Bring a friend to the public launch, Share involvement on social media with branded hashtags

**4. Public Launch Campaign**

- Host kickoff event (e.g., "Dragon Day of Service" or "Ignite the Downtown")

- Include hands-on volunteer tasks and celebration

- Launch digital campaign: Email through DDA & partners, Social media countdown, Volunteer spotlights ("Meet an Illuminator"), Posters/window clings for businesses: "Proudly Supported by an Illuminator"

- Add visual flair: Lanterns for dusk events

**5. Set Up Ongoing Engagement Systems**

- Add sign-up form with role choices to DDA website

- Use platforms like SignUpGenius or Trello for volunteer task tracking

- Launch a private Facebook group or email newsletter for updates

- Offer perks: Stickers, Early access to events, Discounts at participating local businesses

**6. Build Community Recognition Loop**

- Monthly shoutouts (e.g., “Illuminator of the Month”)

- Share action photos—encourage social tags

- Invite Illuminators to DDA board meetings for recognition and feedback

- Annual tradition: Illuminator Appreciation Bash (Live music, awards, community celebration)