

### City Council Study Session

Monday, September 08, 2025 at 6:00 PM 27400 Southfield Road, Lathrup Village, Michigan 48076

### 1. Call to Order by Mayor Garrett

### 2. Discussion Items

- A. Planning Commission Member Appointments
- B. 27700 Southfield Road PILOT Request
- 3. Public Comments
- 4. Mayor and Council Comments
- 5. Adjourn

### 6. ADDRESSING THE CITY COUNCIL

Your comments shall be made during the times set aside for that purpose.

Stand or raise a hand to indicate that you wish to speak.

When recognized, state your name and direct your comments and/or questions to any City official in attendance.

Each person wishing to address the City Council and/or attending officials shall be afforded one opportunity of up to three (3) minutes during the frist and last occasion for citizen comments and questions and one opportunity of up to three (3) minutes durin geach public hearing

Comments made during public hearings shall be relevant to the subject of the public hearings being held.

In addition to the opportunities described above, a citizen may respond to questions posed to them by the Mayor or members of the Council, provided members have been granted the floor to pose such questions.

No speakers may make personal or impertinent attacks upon any officer, employee, City Council member, or other elected Official that is unrelated to how the officer, employee, or City Council member or other Elected Official performs their duties.

No person shall use abusive or threatening language toward any individual when addressing the City Council.

Attendees are permitted to make video and sound recordings of the pbulic meeting. However, video recording devices shall only be permitted in a designated area, and the device shall remain there through the duration of the meeting.

The Mayor shall direct any person who violates this section to be orderly and silent. If a person addressing the Council refuses to become silent when so directed, such person may be deemed by the Mayor to have committed a "breach of the peace" by distrupting and impeding the orderly conduct of the public meeting of the City Council and may be ordered by the Mayor to leave the meeting. If the person refuses to leave as directed, the Mayor may direct any law enforcement officer who is present to escort the violator from the meeting.



27400 Southfield Road Lathrup Village, MI 48076 www.lathrupvillage.org | (248) 557-2600

TO: Mayor & City Council

FROM: Austin Colson, Director – Community & Economic Development/DDA Director

DATE: September 8, 2025 RE: Study Session

### **Planning Commission Member Appointments**

There are currently two vacant seats on the City of Lathrup Village Planning Commission, due to the expiration of terms and members' decisions not to seek another term. Per ordinance, appointments to the Planning Commission are made by the City Council.

### **Applications Received**

The City has received applications from three qualified residents interested in serving on the Planning Commission. The submitted applications have been reviewed and are included in the meeting packet for Council's consideration.

### **Timing of Appointment**

If the City Council appoints two new members at the Regular Meeting on Monday, September 15<sup>th</sup>, the individuals will be able to be sworn in prior to the next scheduled Planning Commission meeting on Tuesday, September 16<sup>th</sup>. This will allow the new members to participate fully in Planning Commission business without delay. This timing is significant as the Commission is expected to hold election of officers during their next meeting, and the new members would then be eligible to be considered for officer roles as part of that process.

### Attachments:

Planning Commission Applications (3)

August 22, 2025
City Planning Commission
City of Lathrup Village
27400 Southfield Road
Lathrup Village, MI 48076

Dear City Planning Commission Members,

This letter expresses strong interest in serving on the Lathrup Village Planning Commission. I, Beverly Banks, a resident of Lathrup Village at 17586 Sunnybrook, Lathrup Village, Michigan 48076 since 1998, and a Librarian with over 15 years of experience, am confident that my skills and commitment to community service would be a valuable asset to the Commission.

Throughout my career as a Librarian, I have cultivated a range of skills directly applicable to the responsibilities of a Planning Commissioner. Librarians are trained in information organization, critical analysis, and research methodologies. We are adept at gathering, analyzing, and synthesizing complex information, skills crucial for understanding and interpreting planning policies and development proposals. Librarians are inherently community-oriented. We are dedicated to serving the public interest and facilitating access to information for all residents. This aligns perfectly with the Planning Commission's role in engaging diverse segments of the community and ensuring that planning decisions reflect the collective vision for Lathrup Village's future.

My expertise in these areas is offered:

- Research and Analysis: Experience as a Librarian and Teacher has honed my ability to analyze demographic information, interpret relevant data, and assess potential land use impacts.
- Community Engagement: Skills include developing and implementing public engagement strategies, essential for fostering productive dialogues between residents, staff, and the Planning Commission.
- Organization and Attention to Detail: The role of a Librarian requires meticulous attention to detail and a commitment to organization. This translates directly to reviewing proposals and ensuring compliance with zoning ordinances and other regulations.

I have a passion for Lathrup Village and an eagerness to contribute time and skills to its continued growth and success. I am available to attend meetings, review materials thoroughly, and engage in constructive discussions to make informed decisions that benefit the entire community.

Thank you for considering this application. I look forward to discussing how this experience and these skills can support the Lathrup Village Planning Commission.

Sincerely, Beverly Banks 17586 Sunnybrook Lathrup Village, Mi. 48076 248-633-3501

## **Beverly Banks**

Beverlybanks6@gmail.com

248-633-3501

Lathrup, Michigan, 48076

### Contact

Lathrup Village, MI 48076 248-633-3501

Beverlybanks6@gmail.com

### **Education**

Master of Library and Information Science Wayne State University

**Teacher Certifications**University of Detroit Mercy

**BA in Liberal Arts**Wayne State University
Communications Major

### **Key Skills**

Project Management
Budget Management
Microsoft Office
(PowerPoint, Word)
Cataloging
Research
Customer Service
Detailed organization

### **Objective**

Dedicated, experienced Librarian seeking a position in a cutting-edge Information environment, where my work experience as a Librarian and Media Specialist will be applied in helping, creating and maintaining a dynamic enterprise.

### **Professional Experience**

### 2024-present

### **Adjunct Librarian-Macomb Community College**

### Reference desk management including:

- Student research and assistance navigating software
- Catalogue search and retrieval
- Online assistance through Help Chat with a Librarian
- General assistance for patrons navigating library resources

### 2021-present

### Librarian- Baldwin Public Library, Birmingham, Michigan Substitute Adult Librarian

- Answer patron reference questions
- Locate materials for patrons
- Create blook blog monthly
- Monitor Adult desk phone and in person queries.
- Instruct on use of technology

#### Substitute Youth Librarian

- Reference question assistance
- Technology assistance
- Assist patrons locating preferred items
- Register patrons for library programs

### **Circulation Assistant**

- Check in/out library items
- Registration and renewal of patron cards
- Processing fees for lost materials
- Information desk representative for the library

Walled Lake, MI

Library Media Specialist • Walled Lake Consolidated School District

- Responsible for directing and supervising the essential services as Library Media Specialist and Computer Resource Technician for assigned schools each year of service from elementary to middle schools.
- Managed budget for middle school and two elementary school libraries of 14,000 + collections on an annual basis
- Sourced and curated collection of media for students based on trend analysis, driving high engagement across grade levels
- Managed upkeep of technology purchases for computer lab and library to ensure students had equitable access to latest available machinery and library materials
- Led presentations on technology at district level and building level as info-share with colleagues
- Provided leadership in the planning and management of library programs
- Ensured media resources are available to students, teachers, and parents through various platforms (YouTube, Media Center Webpage, in-person learnings and Zoom sessions)

Berkley, MI

**Practicum** • Berkley High School Library Media Center • Berkley School District

- Assisted in the creation of diverse school summer reading list based on trends analysis and appropriate reading grade levels
- Created presentation to educate students on authoritative websites for academic research, shared with 1,000 students
- Played strategic role in implementing transfer of fiction books into new digital library system

### Leadership

**Teacher of the Year**, 2018 Wixom Elementary, Walled Lake Consolidated Schools

### **Certifications**

Library School Media Specialist endorsement K-12 Elementary Education certification-K-5 All Subjects English certification- grades 6-9, Speech certification- grades 6-9

### **Professional Affiliations**

American Library Association (ALA) Michigan Association for Media in Education (MAME) MAME Board Member and former Newsletter Editor Michigan Reading Council

# THE CHTY OF LATHRUP

### City of Lathrup Village

27400 Southfield Road
Lathrup Village, MI 48076
www.lathrupvillage.org | (248) 557-2600

### RECEIVED

AUG 22 2025

City of Lathrup Village

APPLICATION FOR COMMITTEES, COMMISSIONS, & BOARDS  $\frac{1}{16}$ 

Date of Application: 8-22-25			application Only AE				
Please check the committee for which you	are applying for:		10 Blan				
Board of Review  Building Authority  Downtown Development Authorit (DDA)  Historic District Commission  Inclusion, Diversity, & Accessibility Committee		Lathrup Village Found Planning Commission Parks & Recreation Tree Committee Other:	ndation Board				
Name: <u>Bevery</u> <u>Ba</u> Address: <u>17586</u> <u>Su</u> Phone: <u>248</u> <u>633-3501</u>	reet, City, State, Zip	ook nail: <u>beverlyba</u>	mks bogaiant a				
Are you at least 18 years of age:	YES X	ио 🗌	, J				
Are you a registered voter in Lathrup Villag	ge: YES X	NO					
Have you been a resident of Lathrup Village for 1+ years:	YES	NO					
A resume/CV is required with your appl additional information that clearly states and why you believe you are the best fit	your qualification	ons for serving on the con					
Signature: By Bok	<u>)</u> Da	nte: 8-22-25	)				
Applicants must be in good standing wit appointment. Any outstanding violation individuals' property may result in the su	ns or payments	associated with the ap					
Return completed application to: Lathrup Village – City Clerk, 27400 Southfield Road, Lathrup Village, MI 48076							
Kelly Garrett Bruce Kantor  Mayor Mayor Pro-Tem	Jalen Jennings Council Member	<b>Dalton Barksdale</b> Council Member	Jason Hammond Council Member				

### LATHRUP VILLAGE

### City of Lathrup Village

27400 Southfield Road Lathrup Village, MI 48076

### RECEIVED

AUG 15 2025

www.lathrupvillage.org | (248) 557-2600 City of Lathrup Village

APPLICATION FOR COMMITTEES, COMMISSIONS, & BOARDS

2:07pm

Date of Application: <u>06/15 /2025</u>						
Please check the committee for which you are applying for:						
Board of Revi	iew		Lating we Williams Faces	dation Dagud		
Building Auth	nority	L	Lathrup Village Foun			
Downtown D	Pevelopment Authority	ЩЩ	Planning Commission	1		
(DDA)			Parks & Recreation C	ommittee		
Historic Distri	ict Commission		Tree Committee			
Inclusion, Div Committee	versity, & Accessibility		Other:			
Name: <u>Jenany</u>	ne Clauke					
Address: <u>18130</u>	Wiltshire Bi	vd s Lath	rup Village, V	NI, 48076		
Phone: <u>(313)</u> -	701-3462 Street, C	ity, State, Zip Email: _	·			
Are you at least 18 ye	ears of age:	YES	NO			
Are you a registered v	oter in Lathrup Village:	YES <b>(</b>	NO			
Have you been a resic Village for 1+ years:	lent of Lathrup	YES	NO			
A resume/CV is required with your application. Additionally, please include a letter that covers any additional information that clearly states your qualifications for serving on the committee you selected and why you believe you are the best fit to serve Lathrup Village.						
Signature:	lly)	Date:	08/15/2025	<u>&gt;</u>		
	n good standing with the	-				
appointment. Any outstanding violations or payments associated with the applying individual or individuals' property may result in the submitted application being rejected.						
Lathrup V	Return completed application to: Lathrup Village – City Clerk, 27400 Southfield Road, Lathrup Village, MI 48076					
Kelly Garrett Mayor		Jalen Jennings ouncil Member	<b>Dalton Barksdale</b> Council Member	Jason Hammond Council Member		

Jerianne Clarke 18130 Wiltshire Blvd Lathrup Village, MI 48076 emailofjerianne22@gmail.com August 15, 2025

### City of Lathrup Village

Attn: Planning Commission Selection Committee 27400 Southfield Road Lathrup Village, MI 48076

Dear Members of the Planning Commission Selection Committee,

I am writing to express my interest in serving on the Lathrup Village Planning Commission. Having called Lathrup Village home since 2008, I have a deep appreciation for our city's unique character and a vested interest in ensuring its thoughtful growth and development. My academic background in Political Science and Environmental Studies, combined with hands-on legislative experience and technical collaboration, has equipped me with the skills and perspective necessary to contribute meaningfully to the Commission's work.

During my tenure as a Legislative Intern in the United States Senate, I engaged with policy development processes, analyzed legislation, and observed the interplay between constituent priorities and regulatory frameworks. This experience strengthened my ability to evaluate proposals critically, balance competing interests, and communicate effectively with diverse stakeholders. All of which are skills that are beneficial to the Planning Commission's mission.

Beyond my work in legislative and technical settings, I have engaged directly with communities through grassroots organizing and advocacy with Clean Water Action and Greylock Campaigns, mobilizing residents on various policy issues and raising support for both state and local initiatives. These experiences have strengthened my ability to listen to diverse perspectives, build consensus, and translate community concerns into actionable solutions; an approach I believe is essential in city planning.

I am eager to bring this experience to the Planning Commission while continuing to learn from the dedicated members who serve our community. I look forward to contributing to thoughtful planning decisions that support Lathrup Village's future while deepening my own understanding of municipal processes. It would be an honor to serve in a role that allows me to give back to the place I have proudly called home for over fifteen years.

Jenanne Clarke

### Jerianne Clarke

<u>jeriannc@umich.edu</u> | (313) 701-3462 <u>www.linkedin.com/in/jerianne-clarke-success</u>

### Education

University of Michigan Ann Arbor, MI

Majors: Political Science & Afro-American and African Studies

Expected May 2026

Minor: Environmental Sciences

### **Professional Experience**

Clean Water Action Ann Arbor, MI

Field Canvasser

June 2025 - July 2025

• Engaged community members on the impact of proposed legislation and clean water initiatives, leading to increased petition signatures mobilizing grassroots support and membership enrollment.

 Secured financial contributions from new and returning donors to fund advocacy efforts, consistently meeting or exceeding daily fundraising targets.

### Office of Senator Gary Peters

Washington, D.C.

Legislative Intern

September 2024 - December 2024

- Attended committee hearings and legislative briefings, preparing detailed summaries to keep senior staff
  informed on policy developments and stakeholder positions specifically on the environmental portfolio.
- Assisted with constituent services by responding to inquiries and managing casework, ensuring timely and effective communication between the Senator's office and the public.

### **Greylock Campaigns**

Ann Arbor, MI

Fundraiser

June 2024 - August 2024

- Conducted in-person canvassing and phone banking to raise awareness and funds for contracted political campaigns, while building a monthly donor base in the state of Michigan.
- Collaborated with team members to refine persuasive communication strategies, achieving daily fundraising

### Bentley Historical Library, University of Michigan

Ann Arbor, MI

Researcher

April 2024- Present

- Utilized historical artifacts to create engaging content for community programming.
- Analyzed primary and secondary sources to uncover the contributions of black individuals to the University's history, resulting in a more inclusive historical narrative

### Campus Leadership

### The University of Michigan's Caribbean Student Association

Ann Arbor, MI

Co-President

August 2022 - Present

- Planned events to build community and promote the organization.
- Developed ideas for maintenance and future expansion of CSA; collaborated with other organizations.
- Composed Instagram posts to engage & inform our community members creatively.

#### **Skills**

- Public Speaking, Data Entry & Record Management, Microsoft 365 & Google Workspace
- Languages: Spanish (intermediate)

Tracey F. Williams Lathrup Village, MI (248) 302-9301 traceywilliams.werkz@gmail.com

September 4, 2025

Lathrup Village Planning Commission 27400 Southfield Road Lathrup Village, MI 48076

Dear Members of the City of Lathrup Village,

As an advocate for small business growth, community engagement, and sustainable development, I am passionate about contributing my skills and experience to support Lathrup Village's vision for thoughtful, inclusive, and balanced growth.

In my role as a Business Forward Consultant with Oakland Thrive, I have worked closely with local entrepreneurs, city officials, and regional partners to drive economic vitality throughout Southfield, Lathrup Village, and surrounding communities. Through these collaborations, I have successfully designed and executed programs that strengthen our local business ecosystem, attract investment, and enhance community participation.

I believe my experience in stakeholder engagement, strategic planning, and economic development uniquely positions me to support the Commission's mission of guiding land use, zoning, and development decisions that reflect the needs of our residents while fostering long-term growth and sustainability. I am committed to bringing a collaborative, data-informed perspective to ensure decisions align with the city's vision and values.

I would welcome the opportunity to contribute my experience, passion, and insights to the Planning Commission and help shape the future of Lathrup Village. Thank you for considering my application. I look forward to the opportunity to discuss how I can best serve our community.

Sincerely,

Tracey F. Williams

### **Tracey F. Williams**

Lathrup Village, MI • (248) 302-9301 • traceywilliams.werkz@gmail.com www.linkedin.com/in/traceyfwilliams

### Community & Economic Development Leader | Candidate for Lathrup Village Planning Commission

### **Professional Summary**

Dynamic community advocate and strategic leader with 10+ years of experience driving small business growth, economic vitality, and cross-sector collaboration. Passionate about supporting Lathrup Village's long-term development through informed decision-making, sustainable land-use strategies, and strong resident engagement. Proven success working alongside city leaders, business owners, chambers of commerce, and regional partners to promote inclusive growth, attract investment, and strengthen neighborhood vibrancy.

### **Core Competencies**

Community & Economic Development Strategy | Urban Planning & Land-Use Collaboration | Stakeholder & Public Engagement | Policy & Zoning Awareness | Small Business Advocacy & Support | Strategic Partnerships & Regional Growth | Project Management & Cross-Functional Leadership | Public Speaking & Community Outreach

### **Professional Experience**

### Oakland Thrive & Oakland County — Pontiac, MI

Business Forward Consultant (2022 - Present)

Lead economic development initiatives supporting 700+ small businesses across Southfield, Lathrup Village, and surrounding communities. Serve as a strategic advisor and liaison between entrepreneurs, chambers of commerce, city officials, and regional partners to drive innovation and community revitalization.

### Key Achievements:

- Partnered with the City of Southfield, Lathrup Village DDA, and Centrepolis Accelerator to advance economic growth initiatives.
- Designed and executed 15+ high-impact programs resulting in record community participation and engagement.
- Guided businesses through digital transformation, marketing strategies, and operational enhancements to improve competitiveness.

### Charles H. Wright Museum — Detroit, MI

Director of Customer Experience & Retail Operations (2015 – 2022)

Directed strategic initiatives to modernize retail operations and improve visitor experiences for one of the nation's largest cultural institutions.

### Key Achievements:

- Tripled retail revenue from <\$100K to nearly \$300K through innovative product development and marketing.
- Launched an e-commerce platform, generating 13% of total retail revenue online within the first year.
- Partnered with local artists to expand community-driven product offerings and strengthen cultural engagement.

### Rabah Consulting — Southfield, MI

Founder & Marketing Consultant (2012 – 2015)

Founded and led a boutique marketing consultancy specializing in strategic planning, branding, and business growth.

### Key Achievements:

- Increased retail presence in 30+ locations through custom marketing strategies and sales enablement.
- Negotiated partnerships with Walgreens and Detroit-area schools, boosting product sales by 30%.

### Hawks & Associates, Inc. — Detroit, MI

Partner / Sales & Marketing Director (2011)

Led business development efforts for an energy consulting firm focused on Fortune 500 clients and financial institutions.

#### **Key Achievements:**

- Generated \$300K in new revenue within six months by targeting high-value corporate clients.
- Secured multiple Fortune 500 contracts through relationship-building and strategic proposals.

### **Education**

Master of Science, Internet Marketing — Full Sail University

Bachelor of Arts, Marketing — Michigan State University

### **Community Leadership & Volunteer Engagement**

- Ambassador Fine Art Collection Lifetime Achievement Award | 2024
- Detroit City Council Special Recognition | 2024
- Torch of Wisdom Foundation Event Committee Lead | 2023
- Christian Tabernacle Church Media & Communications Coordinator | 2005–Present



Kelly Garrett

Mayor

**Bruce Kantor** 

Mayor Pro-Tem

### **City of Lathrup Village**

27400 Southfield Road Lathrup Village, MI 48076 www.lathrupvillage.org | (248) 557-2600

### **APPLICATION FOR COMMITTEES, COMMISSIONS, & BOARDS**

	,
Date of Application: 9/4/2025	
Please check the committee for which you are	applying for:
Board of Review  Building Authority  Downtown Development Authority (DDA)  Historic District Commission  Inclusion, Diversity, & Accessibility Committee  Name: Tracey F. Williams  Address: 18625 Bungalow Drive, Lathrup	
	City, State, Zip Email: traceywilliams.werkz@gmail.com
Are you at least 18 years of age:  Are you a registered voter in Lathrup Village:  Have you been a resident of Lathrup  Village for 1+ years:	YES NO NO YES NO NO NO
additional information that clearly states your and why you believe you are the best fit to se Signature:   Tracey William's Verified by pdfFiller O9/04/2025  Applicants must be in good standing with the	Date: 9/4/2025  e City to be eligible for committee, commission, or board r payments associated with the applying individual or

Return completed application to: Lathrup Village – City Clerk, 27400 Southfield Road, Lathrup Village, MI 48076

Jalen Jennings

Council Member

Jason Hammond

Council Member

Maria Mannarino

Council Member



27400 Southfield Road Lathrup Village, MI 48076 www.lathrupvillage.org | (248) 557-2600

TO: Mayor & City Council

FROM: Mike Greene – City Administrator

Austin Colson – Community & Economic Development Director

DATE: September 9, 2025

RE: 27700 Southfield Road – PILOT Resolution

**Background Brief:** Over this past year, the City Council has considered and then adopted a Payment in Lieu of Taxes (PILOT) Ordinance. A PILOT ordinance establishes the framework for the City to enter into an agreement with a developer, where the developer pays a specified amount instead of traditional property taxes, primarily used to incentivize affordable housing projects.

The property owner of 27700 Southfield Road (Annie Lathrup School) has submitted a PILOT application for the Council to consider.

#### **Previous Action:**

7/21/25 – City Council Adoption of PILOT Ordinance 9/8/25 – Study Session Discussion 9/25/25 – Study Session Discussion

**Economic Impact:** Utilizing assumptions of 3% year-over-year Taxable Value growth and estimates for total annual rent, on the following page, are estimated payments the City could receive under the PILOT program for this project. This includes what the property currently pays in taxes and what the estimated taxable value payments would be IF the project (as approved) were constructed with no need for PILOT assistance. REMINDER – Each year shows the TOTAL estimated tax bill paid; this bill is then split among the taxing jurisdictions. ~48% stays with the City to cover expenses (operating/library/refuse/street bond).

If approved at 4.5% the City would ~6X the yearly revenue received by this property.

The developer has elected to provide voluntary Community Benefits, including improvements to the walking path and park behind the property, which exceed the requirements of the PILOT ordinance.

Additionally, if the project proceeds, the City will receive one-time revenues associated with trade (building/plumbing/mechanical/electrical) reviews/permits. Formal estimates for that are unknown without seeing formal building plans. Example: 27777 Southfield Road (Panera) paid a \$20,004 building permit fee based on the job evaluation being \$1.5 million.

Recommendation: "I recommend approving the PILOT agreement for 27700 Southfield Road."

Recomm	nended Motion:					
Moved b	oy Council Member		seconded by Council Me	mber	to app	prove
	on #2025-18, a resolu cated at 27700 Southf		exemption and a paymer	nt in lieu of taxes fo	or a workforce housing pr	oject
-	Kelly Garrett	Bruce Kantor	Jalen Jennings	Jason Hammond	Maria Mannarino	
	Mayor	Mayor Pro-Tem	Council Member	Council Member	Council Member	



### 27400 Southfield Road Lathrup Village, MI 48076

www.lathrupvillage.org | (248) 557-2600

~Total Annual Rent	\$3,378,240																	
~3% Growth Per Year																		
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15	TOTAL Payment	~City/I	DDA Revenue
Current Taxes	\$ 23,000	\$ 23,690	\$ 24,401	\$ 25,133	\$ 25,887	\$ 26,663	\$ 27,463	\$ 28,287	\$ 29,136	\$ 30,010	\$ 30,910	\$ 31,837	\$ 32,793	\$ 33,776	\$ 34,790	\$ 427,775	\$	205,332.01
4% - PILOT	\$ 135,130	\$139,183	\$143,359	\$147,660	\$152,090	\$156,652	\$161,352	\$166,192	\$171,178	\$176,313	\$181,603	\$187,051	\$192,662	\$198,442	\$ 204,396	\$ 2,513,264	\$ 1	1,206,366.62
5% - PILOT	\$ 168,912	\$173,979	\$179,199	\$184,575	\$190,112	\$195,815	\$201,690	\$207,740	\$213,973	\$220,392	\$227,004	\$233,814	\$ 240,828	\$ 248,053	\$ 255,495	\$ 3,141,580	\$ 1	1,507,958.28
6% - PILOT	\$ 202,694	\$208,775	\$215,038	\$221,490	\$228,134	\$234,978	\$242,028	\$249,289	\$256,767	\$264,470	\$272,404	\$ 280,576	\$ 288,994	\$297,664	\$ 306,593	\$ 3,769,896	\$ 1	1,809,549.93
7% - PILOT	\$ 236,477	\$243,571	\$250,878	\$258,405	\$266,157	\$274,141	\$282,366	\$ 290,837	\$299,562	\$308,549	\$317,805	\$327,339	\$337,159	\$347,274	\$ 357,692	\$ 4,398,212	\$ 2	2,111,141.59
8% - PILOT	\$ 270,259	\$278,367	\$286,718	\$295,320	\$304,179	\$313,304	\$322,704	\$332,385	\$342,356	\$352,627	\$363,206	\$374,102	\$385,325	\$396,885	\$ 408,791	\$ 5,026,528	\$ 2	2,412,733.24
9% - PILOT	\$ 304,042	\$313,163	\$322,558	\$332,234	\$342,201	\$352,468	\$363,042	\$373,933	\$385,151	\$396,705	\$408,606	\$420,865	\$433,491	\$446,495	\$ 459,890	\$ 5,654,844	\$ 2	2,714,324.90
10% - PILOT	\$ 337,824	\$347,959	\$358,397	\$369,149	\$380,224	\$391,631	\$403,380	\$415,481	\$427,945	\$440,784	\$454,007	\$467,627	\$481,656	\$496,106	\$ 510,989	\$ 6,283,159	\$ 3	3,015,916.55
Minimum Payment	\$ 120,000	\$126,000	\$129,780	\$133,673	\$137,684	\$141,814	\$146,069	\$150,451	\$154,964	\$159,613	\$164,401	\$169,333	\$174,413	\$179,646	\$ 185,035	\$ 2,272,877	\$ 1	1,090,980.89
·																		
~Taxable Value Payment	t \$ 670,000	\$690,100	\$710,803	\$732,127	\$754,091	\$776,714	\$800,015	\$824,015	\$848,736	\$874,198	\$900,424	\$927,437	\$955,260	\$983,918	\$1,013,435	\$ 12,461,272	\$ 5	5,981,410.71

<sup>\*</sup>The applicant and the City have agreed to a 4.5% annual fee, as reflected in the payment and revenue projections outlined in the attached spreadsheet.

Office of the City Clerk

City Hall 27400 Southfield Road Lathrup Village, MI 48076 (248) 557-2600 aemanuel@lathrupvillage.org



### City of Lathrup Village Payment in Lieu of Taxes (PILOT)

### Municipal Review of <u>Payment in Lieu of Tax (PILOT)</u> (LATHRUP VILLAGE ORDINANCE CHAPTER 77-50)

Dear PILOT Applicant:

Please read the following information carefully for an overview of the City's Payment in Lieu of Tax (PILOT) application process.

After you complete and submit a Payment in Lieu of Tax (PILOT) application to the City Clerk's Office, the city's review process begins. Our office will forward your application for review to various departments.

The following departments may contact you:

- City Manager
- City Civil Engineering Consultant
- City Planning Consultant
- City Clerk
- Community and Economic Development Director

Upon concurrence from all necessary departments- applications will be placed on the appropriate City Council agenda for final approval; applicants will be notified of this meeting.

Application Fee - All fees are to be paid in full upon submission. Applications received without payment will not be reviewed.

Applications for new or renewal applications Payment in Lieu of Tax (PILOT). \$2,300

We recognize the importance of providing you with a response as quickly as possible – the City of Lathrup Village is committed to working with you diligently. Should you have any questions, please feel free to contact me.

Best wishes in your entrepreneurial endeavors, and thank you for choosing Lathrup Village

Sincerely,

Alisa Emanuel City Clerk

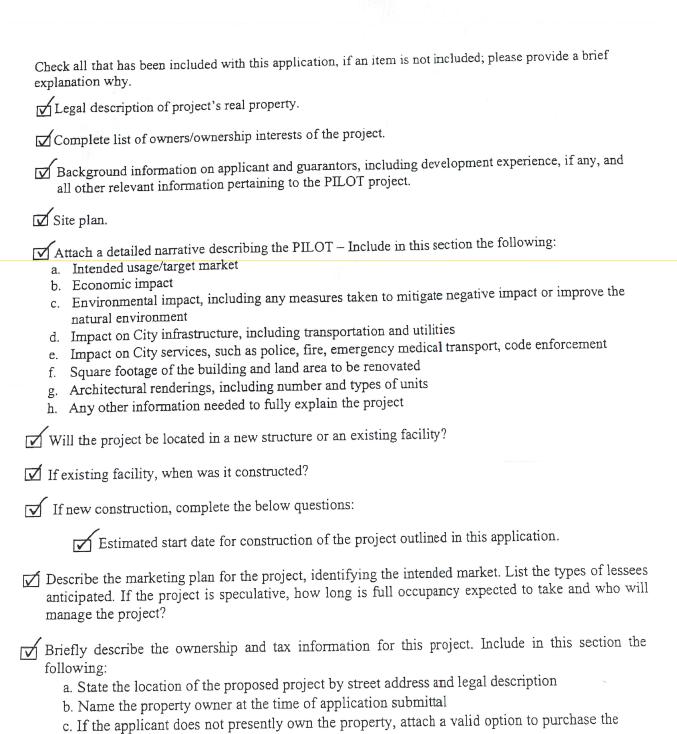
### City of Lathrup Village Application for PILOT – Payment in Lieu of Tax (Please submit 90 days prior)



<u>Please complete the following information even if preliminary. This will help to expedite the process.</u> We will schedule a meeting with pertinent departments and the applicant as soon as possible.

application process.  Please indicate the type of applica	tion being filed (check all t	hat apply):	
New Renewal			
Transfer of Ownership			
Other			
Applicant: THE SURN	OW COMPANY	\	
Developer, if different than above:	_		
Name of Organization, if any:			
Owners of Organization: 500	SURNOW		
Address: Street	City	State	Zip
Authorized Applicant Representativ	re: TORDAN SH	ERMAN	
Phone No:	E-Mail:		
(Must include - name, address, e-mail will own the project, if different from guarantors of the project, and name of	n the applying entity. Nan	ne of applying entity's	representatives, financial
Type of ownership of project:			
Partnership S	ubchapter S corporation	□ Ind	ividual proprietorship
A	ooperative		nited liability company
Federal Identification No. or Social	Security No		
If a corporation, specify the state and	d date of incorporation:	MICHIGAN	, 1999

Name and title of individual to contact: JORDAN SHERMAN
Email address:
Mailing address: 320 martin Street, Suik 100
Mailing address: 320 Martin Street, Suik 100  City, State, Zip BIRMIN EHAM, MI Phone No.
Indicate the tax incentives applied for and terms:  Property Tax Exemption Payments In Lieu of Taxes:
30   Number of years 2026   Beginning year 305 L   Ending year 4%   Percent of shelter rents
For Transfer of Ownership Only:
TRANSFEROR: CORPORATION, INDIVIDUAL, OR PARTNERSHIP NAME: [not applicable]
(First, Middle, Last Name of Officers and/or Directors) (Phone)
(Address) (Email)
(First, Middle, Last Name of Officers and/or Directors) (Phone)
(Address) (Email)
Have you submitted an application for a similar request to the City of Lathrup Village? Yes No
Do you owe city funds for delinquent taxes or utilities bills? Yes No
Did you include names of <u>all</u> officers and/or directors as it relates to this application? Yes No



d. Describe any and all existing financing, options, and liens on the property

Page 4 of 6

- e. State the tax parcel number for all property involved with the project and the current assessed value of the property
- f. Are any assessments presently under appeal? If so, describe the status of the appeal(s)
- g. Will the Project result in the subdivision of any present tax parcel?
- Provide a detailed development pro forma outlining proposed hard, soft, and financing costs associated with proposed development. Pro forma must also identify all sources of financing and terms, including Applicant equity, construction and permanent financing and any government assistance. Proposals will contain detailed cost breakdowns.
- Provide a detailed operating pro forma that will include all anticipated major revenues and expenses for the full term of the requested PILOT.
- Are changes proposed to the public space around the project (Example; sidewalks, lighting, and planting)? If yes, describe.
- State proposed time schedule for the project including anticipated dates for the following:
  - a. Closing of the loan or contributing financing availability
  - b. First expenditure of funds with regard to the project
  - c. Anticipated date construction will begin
  - d. Anticipated completion date
- Financial Background:
  - a. Attach current audited financial statements of the applicant and guarantors. If audited financial statements are unavailable, please submit non-audited statements
  - b. State the relationship any applicant or grantor has had with any accounting firm over the last five years and reason for change, if any
  - c. Give three credit references for the applicant
- Development Team: Name any of the following that will be involved with the Project (with mailing addresses, e-mail addresses, and phone numbers):
  - a. Applicant Primary Point of Contact
  - b. Architects and engineers.
  - c. Construction Project Manager
  - d. General Contractor for project
  - e. Other professionals
- Please describe any potential conflicts of interest the applicant or any guarantor may have with any City Personnel or City Council members.
- Describe the following as to any applicant, guarantor, or other person involved with this project:
  - a. Any pending civil litigation involving this property or other business holdings
  - b. Any pending criminal proceedings involving this property or other business holdings
  - c. Any conviction, or other pending criminal matter, that is for any felony offense or any theft-related misdemeanor, involving this property or other business holdings

	Include a copy of the completed MSHDA application thirty (30) days of submittal to MSHDA.	for Low	Income Ho	ousing Ta	x Cre	dits within
	plicant or applicant's representatives must execute the	<b>P</b>	LIHTC statement a	nd provio	_ de it a	as part of the
App	olicant or applicant's representatives must execute the	.OHO w me	Similaria	1		•

The person(s) completing this application hereby declares that:

- 1. They will not violate any of the laws of the State of Michigan or of the United States or any ordinance of the City.
- 2. Should any of the information provided in this application or any attachment thereto change during the term of the license or any renewal thereof, they will notify the City Clerk in writing within thirty (30) days of such change.
- 3. They have contacted the Michigan State Housing Development Authority (MSHDA) to ensure eligibility.

The applicant acknowledges that the City may be required from time to time to release records in its possession. The applicant hereby gives permission to the City to release any records or materials received by the City from the applicant as it may be requested to do so as permitted by the Freedom of Information Act, MCL 15.231 et seq.

Date: August 8, 2025

application.

Authorized Applicant Representative: (Please print)

(Signature)

Alisa Emanuel City Clerk (248) 663-6037 Aemanuel@lathrupvillage.org www.Lathrupvillage.org

### CITY OF LATHRUP VILLAGE OAKLAND COUNTY, MICHIGAN

## RESOLUTION NO. 2025A RESOLUTION TO APPROVE TAX EXEMPTION AND A PAYMENT IN LIEU OF TAXES FOR A WORKFORCE HOUSING PROJECT TO BE LOCATED AT 27700 SOUTHFIELD ROAD

**WHEREAS**, the City of Lathrup Village ("City"), City Council enacted Ordinance No. 2025-01 (the "Workforce Housing Ordinance") pursuant to Section 15a of the State Housing Development Authority Act, Act 346 of the Public Acts of 1966, MCL 125.1401 *et seq* (the "Act");

WHEREAS The Surnow Company (the "Sponsor"), a Michigan limited liability company, whose address is 320 Martin Street, Suite 100, Birmingham, MI 48009, intends to construct on the property located at 27700 Southfield Road, Lathrup Village, Michigan (tax parcel identification no. 40-24-13-303-021) (the "Housing Project") and to operate the Housing Project as "workforce housing," as defined in the Workforce Housing Ordinance and the Act;

WHEREAS, the Sponsor has applied to the City for tax exemption and a service charge or payment in lieu of taxes ("PILOT") as provided by the Workforce Housing Ordinance and the Act and has agreed to subject the Housing Project to a covenant running with the land that will restrict the occupancy of the Housing Project for a period of not less than fifteen (15) years, or other period of time that may be required by the Michigan State Housing Development Authority("MSHDA"), or the Michigan Economic Development Corporation ("MEDC") or any other state, federal or any conventional lending institution, to individuals and families whose household income is not greater than 120% of area median income, as published by the U.S. Department of Housing and Urban Development, adjusted for family size, and at rents that are reasonably affordable to such persons (the "Restrictive Covenant");

WHEREAS, the Housing Project will increase the supply of safe, decent and affordable housing in the City, will encourage the growth of the population of the City, and will facilitate the provision of attractive, viable housing units in locations consistent with the goals and objectives of the City's Master Plan;

**WHEREAS**, the City Council hereby finds that the Housing Project qualifies for an exemption from all *ad valorem* property taxes and a PILOT as contemplated by the Act and the Workforce Housing Ordinance because the Project will:

- increase the number of available workforce housing units in the City;
- encourage expansion of the population of the City;
- facilitate the addition of attractive, viable housing units in locations consistent with the goals and objectives of the City's Master Plan;
- protect and improve the health, safety, and general welfare of the City's residents, business owners, property owners, and the community as a whole;

WHEREAS, those terms not otherwise defined herein shall have the meaning set forth in the Ordinance and/or the Act;

THEREFORE, IT IS RESOLVED, that a PILOT for the Housing Project is hereby approved such that the Housing Project shall be exempt from all *ad valorem* property taxes after December 31 of the year in which the construction of the Housing Project begins. Further, the Sponsor shall pay under the PILOT a service charge equal to an amount that is the greater of the minimum annual service charge (\$120,000 increased annually 5% or the rate of inflation, whichever is less,) or 4.5% of the Annual Shelter Rents (as defined in the Workforce Housing Ordinance), subject to the terms of the Act and the Workforce Housing Ordinance; provided, however, that the PILOT service charge paid each year in lieu of taxes for that part of the Housing Project that is tax exempt under this resolution and the Ordinance but not used for workforce housing must be equal to the full amount of the taxes that would be paid on that portion of the project as if the Housing Project were not tax exempt;

**RESOLVED**, that the Term of the PILOT for the Housing Project shall be for a period of fifteen (15) years, commencing twelve months after both (i) the construction of the Housing Project has been completed and (ii) the Housing Project has received a certificate of occupancy, in order to allow for an appropriate lease-up time for the residential units. Notwithstanding the foregoing, the minimum annual service charge shall commence after December 31<sup>st</sup> of the year in which the construction of the Housing project begins. In the event that the Housing Project continues to provide workforce housing, as defined in Workforce Housing Ordinance, after expiration of the initial fifteen (15) years, the parties may exercise up to three (3), five (5) year options to extend the PILOT Resolution or for as long as required by MSHDA, MEDC or any other state, federal, or conventional lending institution.

**RESOLVED**, that units in the Housing Project will continue to qualify as workforce housing units hereunder despite a temporary noncompliance with this resolution, if the noncompliance is caused by increases in the incomes of existing tenants and if actions satisfactory to the City are being taken to ensure that all vacancies are otherwise filled in accordance with this this resolution until the noncompliance is corrected.

**RESOLVED**, that no later than December 1 of each year after the December 31 on which tax exemption first becomes effective and every year thereafter so long as the Housing Project is tax exempt, the Sponsor shall provide the City Assessor and the City Administrator with a copy of the Sponsor's operating budget showing the projected Annual Shelter Rent for the next calendar year; and no later than April 30 of each year beginning in the calendar year following the first calendar year during which the tax exemption is effective and every year thereafter, including the year after the exemption terminates, a copy of the Sponsor's financial statements for the preceding calendar year, which may consist of: (i) audited financial statements prepared in accordance with generally accepted auditing standards, if available, or (ii) in the absence of audited financial statements, compiled financial statements prepared in accordance with generally accepted accounting principles and certified by the Sponsor's CPA as correct and complete.

**RESOLVED**, the PILOT payment for each calendar year shall be due no later than April 15th of the following year;

**RESOLVED**, that all portions of the Workforce Housing Ordinance are hereby incorporated by reference;

**RESOLVED,** that the effectiveness of the tax exemption approved by this resolution is subject to the following:

- a. The Sponsor shall provide documentation to the City substantiating its ownership of the Housing Project.
- b. Construction of the Housing Project must commence no later than twenty-four (24) months from the date of this resolution, or this resolution shall be void and of no effect.
- c. 100% of the dwelling units in the Housing Project must be restricted to use as Workforce Housing and will be reasonably affordable to, and occupied by, individuals and families whose total household income is not greater than 120% of area median income, as published by the U.S. Department of Housing and Urban Development, adjusted for family size.
- d. The Sponsor shall submit an affidavit to the Michigan State Housing Development Authority in the form required by MSHDA, MEDC or any other state, federal or any conventional lending institution for certification that the Housing Project is eligible for the workforce housing exemption.
- e. Upon receipt of notification from MSHDA, MEDC or any other state, federal or any conventional lending institution that the Housing Project is eligible for a workforce housing exemption, the Sponsor or MSHDA shall file the certified notification of exemption with the City Assessor before November 1 of the year preceding the first tax year for which the exemption is to be effective.
- f. The Sponsor shall record a Restrictive Covenant in a form acceptable to the City Attorney. The Restrictive Covenant must be recorded with the Oakland County Register of Deeds.

<b>RESOLVED</b> , that the City Administrator is authorized to implement this resolution.	to take necessary administrative actions
The above resolution was offered by	and supported by
AYES, Council Members:	
NAYS, Council Members:	
ABSTAIN, Council Members:	

RESOLUTION DECLARED ADOPTED.

### **CERTIFICATE**

I hereby certify that the foregoing is a true and complete copy of a Resolution adopted by the City Council of the City of Lathrup Village, Oakland County, Michigan at a regular meeting duly called and held on the 15th day of September, 2025, the original of which resolution is on file in my office, and that notice of said meeting was given, the meeting was held and the minutes filed in accordance with the Open Meetings Act, Act No. 267, Public Acts of Michigan, 1976, as amended.

ALISA EMANUAL, CLERK

### WORKFORCE HOUSING RESTRICTIVE COVENANT

(27700 Southfield Road, Lathrup Village, MI)

This Workforce Housing Restrictive Covenant ("Restrictive Covenant") is made as of \_\_\_\_\_\_\_, 2025 by and between the City of Lathrup Village ("Municipality"), a Michigan municipal corporation, whose address is 27400 Southfield Road, Lathrup Village, MI 48076, and The Surnow Company. ("Sponsor") a Michigan limited liability company, whose address is 320 Martin Street, Suite 100, Birmingham, MI 48009.

### RECITALS:

- A. Sponsor is the owner of certain real property in the City of Lathrup Village, County of Oakland, Michigan, as more particularly described in the attached Exhibit A (the "Property"), which is incorporated by reference into this Restrictive Covenant.
- B. Sponsor has offered to construct one or more buildings located on the Property to provide one hundred forty-five (145) units of workforce housing (the "Project") and has applied to Municipality for a workforce housing exemption from *ad valorem* property taxes under Section 15a of the State Housing Development Authority Act, being Public Act 346 of 1966, as amended (the "Act").
- C. In consideration of Sponsor's offer to undertake the Project, Municipality has agreed to exempt the Project from all *ad valorem* property taxes imposed by any taxing jurisdiction and to accept in lieu thereof payment of an annual service charge for a period of fifteen (15) years as provided by Workforce Housing PILOT Ordinance, Ordinance No. 2025-01 and Workforce Housing PILOT Resolution No. \_\_\_\_\_ (the "PILOT Resolution").
- D. The annual service charge paid in lieu of all *ad valorem* property taxes for the Property is equal to the greater of the minimum annual service charge (\$120,000 increased annually 5% or the rate of inflation, whichever is less,) or 4.5% of the Annual Shelter Rents collected from the Project and must be paid as provided in the PILOT Resolution.
- E. Sponsor and Municipality agree that the economic feasibility of the Project depends upon the continuing effect of the annual service charge in lieu of all *ad valorem* taxes approved by Municipality for the 15-year exemption period.
- F. Accordingly, upon recording with the Oakland County Register of Deeds, this Restrictive Covenant will restrict use of the Project to workforce housing for the 15-year exemption period.
- NOW, THEREFORE, in consideration of Municipality's acceptance of payment of the annual service charge in lieu of all *ad valorem* property taxes and Sponsor's commitment to construct the Project, Sponsor and Municipality hereby covenant as follows:

- 1. **Definitions**. All words and phrases used in this Restrictive Covenant have the same meaning as defined in the Act and/or the PILOT Resolution.
- 2. **Workforce Housing Covenant**. The Project will, upon completion of the proposed construction, constitute workforce housing with rents reasonably affordable to households consisting of persons and families whose household income is not greater than 120% of the area median income, as published by the U.S. Department of Housing and Urban Development, adjusted for family size. All of the housing units in the Project will be rented, or available for rental, on a continuous basis to members of the general public throughout the term of this Restrictive Covenant.
- 3. **Term of Exemption**. The exemption from *ad valorem* property taxes approved by Municipality shall remain in effect in accordance with this Restrictive Covenant restricting use of the Project to workforce housing for a period of fifteen (15) years, the Term of the PILOT shall commence twelve months after both (i) the construction of the Housing Project has been completed and (ii) the Housing Project has received a certificate of occupancy, in order to allow for an appropriate lease-up time for the residential units. \_, or so long as the Project is used as workforce housing, whichever is less, and subject to any extension(s) as further outlined herein. Notwithstanding the foregoing, the minimum annual service charge shall commence after December 31<sup>st</sup> of the year in which the construction of the Housing project begins. The exemption shall automatically terminate upon the foreclosure or the giving of a deed in lieu of foreclosure for the Property.
- 4. **No Violation**. Sponsor agrees that it will not knowingly take or permit any action that would result in a violation of the requirements of this Restrictive Covenant, the PILOT Ordinance or the PILOT Resolution which are each incorporated herein as if a part of this Restrictive Covenant. Further, Sponsor agrees to take any required action, including the amendment of this Restrictive Covenant, as may be necessary, in the determination of the Municipality or of the Michigan State Housing Development Authority (the "Authority"), to comply with the PILOT Ordinance and PILOT Resolution.
- 5. **No Violation for Increase in Income**. Units in the Project will continue to qualify as workforce housing units hereunder despite a temporary noncompliance with this Restrictive Covenant, if the noncompliance is caused by increases in the incomes of existing tenants and if actions satisfactory to the Municipality are being taken to ensure that all vacancies are otherwise filled in accordance with the PILOT Resolution until the noncompliance is corrected.
- 6. **Sponsor to Demonstrate Compliance**. Sponsor will provide Municipality with such certifications, reports, and other information as required by the PILOT Resolution to demonstrate compliance with the PILOT Ordinance and PILOT Resolution. Sponsor will provide Municipality and Authority with an annual verification of compliance with this Restrictive Covenant, in a form specified by the Authority.
- 7. **Transfer of Ownership**. Sponsor will, prior to a sale or other voluntary transfer of ownership of the Project or any part thereof, notify Municipality in writing, and will enter into any agreements with the purchaser or transferee as may be reasonably prescribed by Municipality to ensure such purchaser's or transferee's compliance with this Restrictive Covenant and Michigan law.
- 8. **Enforceability**. This Restrictive Covenant is enforceable by Municipality in any court in the State of Michigan having jurisdiction thereof.

- 9. **Covenant Running with the Land; Binding Effect**. This Restrictive Covenant shall encumber the Property and constitute and be enforced as a covenant running with the land under Michigan law and shall be binding on all successors or assigns of Sponsor or Municipality and any future owner or operator of the Project for the full fifteen (15)-year exemption period.
- 10. **Extension**. In the event that the Housing Project continues to provide, workforce housing, as defined in Workforce Housing Ordinance, after expiration of the initial fifteen (15) years, the parties may exercise up to three (3), five (5), year options or for as long as required by MSHDA, MEDC or any other state, federal or conventional lending institution, to extend the PILOT Resolution and shall record a new restrictive covenant for each such extension in a form acceptable to the Municipality's attorney and as executed by the Municipality. Any such new restrictive covenant must be recorded with the Oakland County Register of Deeds.
- 11. **Miscellaneous**. In the event of any conflict between the terms of this Restrictive Covenant and the requirements of the PILOT Resolution, the requirements of the PILOT Resolution shall prevail. This Restrictive Covenant may only be amended or terminated by a writing signed by both Sponsor and Municipality or by operation of law. The invalidity of any clause or provision of this Restrictive Covenant shall not affect the validity of the remaining portions thereof.

IN WITNESS WHEREOF, is this Restrictive Covenant is effective as of , 2025.

[Signature Pages Follow]

### [SIGNATURE PAGE TO WORKFORCE HOUSING RESTRICTIVE COVENANT]

### CITY OF LATHRUP VILLAGE,

a Michigan municipal corporation

	D.	
	By: Mykale Garrett	, Mayor
STATE OF MICHIGAN ) ss		
COUNTY OF)		
	acknowledged before me this day ofCity of Lathrup Village, a municipal of y.	
	Notary Public,	County, MI
	My Commission Expires:	
	Acting in	County MI

### [SIGNATURE PAGE TO WORKFORCE HOUSING RESTRICTIVE COVENANT]

### 

Acting in \_\_\_\_\_County, MI

### DRAFTED BY:

Scott Baker ,Esq, Lathrup Village City Attorney 27400 Southfield Road Lathrup Village, MI 48076

WHEN RECORDED RETURN TO: Lathrup Village Clerk 27400 Southfield Road Lathrup Village, MI 48076

### **EXHIBIT A**

### LEGAL DESCRIPTION OF PROPERTY

LAND SITUATED IN THE CITY OF LATHRUP VILLAGE, COUNTY OF OAKLAND, STATE OF MICHIGAN, DESCRIBED AS FOLLOWS:

LOT 1677 AND VACATED SOUTHFIELD SQUARE, FORMERLY KNOWN AS MONTEREY STREET LYING EASTERLY OF LOT 1677 AND WESTERLY OF LOTS 1665 TO 1689, EXCEPT THAT PART OF VACATED SOUTHFIELD SQUARE LYING SOUTH OF A LINE DRAWN BETWEEN THE NORTHWEST CORNER OF OF LOT 1680 AND A POINT 150 FEET FROM THE SOUTHEAST CORNER OF LOT 1677, ALONG THE EASTERLY BOUNDARY OF SAID LOT 1677, LOUISE LATHRUP'S CALIFORNIA BUNGALOW SUBDIVISION NO. 3, AS RECORDED IN LIBER 32 OF PLATS, PAGE 26, OAKLAND COUNTY RECORDS.

TAX ID NUMBER: 40-24-13-303-021

ADDRESS: 27700 SOUTHFIELD ROAD, LATHRUP VILLAGE, MI 48076

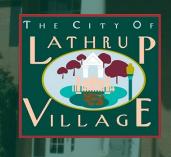
MJ\_DMS 36659451v5



# CITY HALL STUDY SESSION

ANNIE LATHRUP SCHOOL MIXED USE PROJECT SITE PLAN

September 8, 2025





CONFIDENTIAL

#### "Build Baby Build"

Governor Whitmer announces new investment to expand affordable housing across Michigan



#### State-Wide Affordable Housing Criss



by Courtney Bennett | Fri, February 28th 2025 at 12:08 AM



Michigan agency wants developers to ask for help getting housing projects off the ground

Michigan Public | By Tracy Samilton Published August 22, 2025 at 8:58 PM EDT







Crain's Content Studio

#### Unlocking Michigan's potential starts with housing

Michigan is scaling housing solutions to meet urgent statewide demand

Reprints



### **Why These Programs Exist**



Amy Hovey, CEO and Executive Director, Michigan State Housing Development Authority (MSHDA)

"We definitely have a housing crisis still happening. MSHDA estimates the state is short by 140,000 housing units, a significant hurdle in addressing the crisis. The cost of building and rentals continues to rise. The difference between what Michigan families make and the cost of housing remains a significant gap." - May 26, 2025

#### Progress is Being Made ... Quickly

# 'We are moving fast': Whitmer gives update on 5-year housing goal

Published: Aug. 27, 2025, 8:55 a.m.

LOCAL NEWS

#### Whitmer awards \$4 million for 171unit apartment complex in Grand Rapids

Gov. Whitmer Announces 96 New Jobs in Shelby Township, 56 Residential Units in Downtown Clawson

February 25, 2025

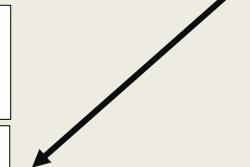
Gov. Whitmer Announces 140 New Housing Units in Hastings, Coldwater Redevelopment Projects

June 18, 2025

Gov. Whitmer Announces Funding for New Housing in U.P., Adding 22 Homes

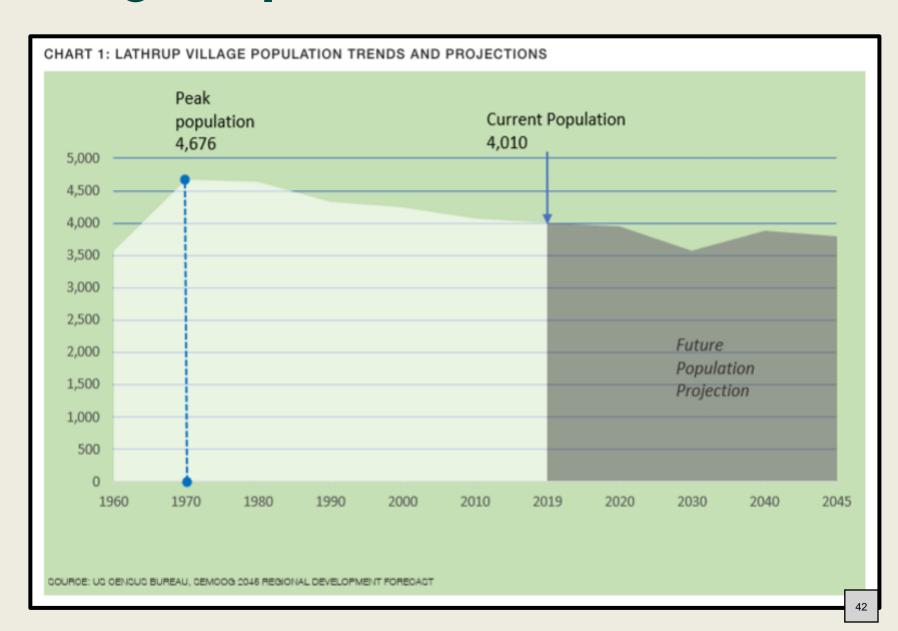
**MEDC Communications** 

Tuesday, May 20, 2025



#### **Lathrup Village Population Statistics**

- Lathrup Village's population peaked in 1970
- Current population down
   15% from that peak
- Projected to keep trending downwards thru 2045
- The City's current tax
   revenue shortage is
   connected to the overall
   housing shortage and the
   lack of housing turnover



Item 2B.

# Lathrup Village Master Plan's Commentary on Attainable Housing

Finding attainable housing can be a challenge in Lathrup Village and it can stress family finances. Many people find themselves spending more on housing, leaving less of their income available for other household expenses.

Lathrup Village Master Plan, April 2021

"

## **Aging Housing Stock**

92% of all apartment units in the Lathrup Village area were developed prior to 1989.

Year Opened	Projects	Units	Vacant Units	Vacancy Rate
Before 1970	5	2,068	100	4.8%
1970 to 1979	4	914	3	0.3%
1980 to 1989	5	1,064	22	2.1%
1990 to 1999	0	0	0	-
2000 to 2009	0	0	0	-
2010 to 2014	1	85	1	1.2%
2015	1	114	3	2.6%
2016	0	0	0	-
2017	1	103	3	2.9%
2018	0	0	0	-
2019	0	0	0	-
2020	0	0	0	-
2021	0	0	0	-
2022	0	0	0	-
2023	1	78	0	0.0%
2024*	0	0	0	-
Total	18	4,426	132	3.0%

## New Development Lacking

Since 2018, there have been **ZERO** new housing developments in Lathrup Village and only one new housing development in the entire market radius

Year Opened	Projects	Units	Vacant Units	Vacancy Rate
Before 1970	5	2,068	100	4.8%
1970 to 1979	4	914	3	0.3%
1980 to 1989	5	1,064	22	2.1%
1990 to 1999	0	0	0	-
2000 to 2009	0	0	0	-
2010 to 2014	1	85	1	1.2%
2015	1	114	3	2.6%
2016	0	0	0	-
2017	1	103	3	2.9%
2018	0	0	0	-
2019	0	0	0	-
2020	0	0	0	-
2021	0	0	0	-
2022	0	0	0	-
2023	1	78	0	0.0%
2024*	0	0	0	-
Total	18	4,426	132	3.0%

## **High Demand for New Units**

The only new housing unit is fully leased up and has a 0% vacancy rate – showcasing a high demand for housing

Year Opened	Projects	Units	Vacant Units	Vacancy Rate
Before 1970	5	2,068	100	4.8%
1970 to 1979	4	914	3	0.3%
1980 to 1989	5	1,064	22	2.1%
1990 to 1999	0	0	0	-
2000 to 2009	0	0	0	-
2010 to 2014	1	85	1	1.2%
2015	1	114	3	2.6%
2016	0	0	0	-
2017	1	103	3	2.9%
2018	0	0	0	-
2019	0	0	0	-
2020	0	0	0	-
2021	0	0	0	-
2022	0	0	0	-
2023	1	78	0	0.0%
2024*	0	0	0	-
Total	18	4,426	132	3.0%

#### **Big Picture**

1.
Aging Housing
Stock

2. Lacking New Developments

3. Clear Demand for Housing

4.
Overall Vacancy
Rate = Shortage

Year Opened	Projects	Units	Vacant Units	Vacancy Rate
Before 1970	5	2,068	100	4.8%
1970 to 1979	4	914	3	0.3%
1980 to 1989	5	1,064	22	2.1%
1990 to 1999	0	0	0	-
2000 to 2009	0	0	0	-
2010 to 2014	1	85	1	1.2%
2015	1	114	3	2.6%
2016	0	0	0	-
2017	1	103	3	2.9%
2018	0	0	0	-
2019	0	0	0	-
2020	0	0	0	-
2021	0	0	0	-
2022	0	0	0	-
2023	1	78	0	0.0%
2024*	0	0	0	-
Total	18	4,426	132	3.0%

# Multi-Family Buildings Deep Dive

There are 4,426 total units in the Lathrup Village Proximity and 4,294 are occupied.

This represents a 97% occupancy rate and showcases a low supply and high demand for housing

Map ID	Project Name	Project Type	QR	Year Built/ Renovated	Total Units	Vacant	Occupancy Rate	DTS
1	42 West	MRR	N	2015	114	3	97.4%	0.8
2	Keswick Manor Apts.	MRR	В	1981	50	1	98.0%	1.3
3	Cambridge Square	MRR	C+	1964 / 2017	104	3	97.1%	1.8
4	Spring Haven Apts.	MRR	N	2017	103	3	97.1%	1.3
5	Country Court North & South	MRR	С	1971 / 2009	176	0	100.0%	2.1
6	The Crossroads at Southfield	MRR	B+	1965 / 2023	588	23	96.1%	2.3
7	Arbor Lofts	MRR	Α	2013	85	1	98.8%	1.9
8	The Loop on Greenfield	MRR	B+	1965 / 2017	717	55	92.3%	2.0
9	Lincoln Towers Apts.	MRR	В	1974 / 2000	480	0	100.0%	2.3
10	Chatsford Manor Apts.	MRR	B-	1976 / 2015	48	0	100.0%	2.6
11	Monticello Apts.	MRR	N	1988 / 2021	106	0	100.0%	3.3
12	Park Lane Apts.	MRR	N	1986 / 2010	184	0	100.0%	3.4
13	The Addison at Southfield	MRR	N	1988 / 2015	396	10	97.5%	3.6
14	Franklin River Apts.	MRR	N	1987 / 2010	328	11	96.6%	3.8
15	Radius at Ten Mile	MRR	N	1971 / 2010	210	3	98.6%	4.2
16	IVY Lofts	MRR	N	2023	78	0	100.0%	2.7
17	The Oxley	MRR	B+	1966 / 2017	346	6	98.3%	3.4
18	The Sapphire	MRR	В	1968 / 2023	313	13	95.8%	3.5

Project Type	Projects Surveyed	Total Units	Vacant	Occupancy Rate	U/C
MRR	18	4,426	132	97.0%	0

### Increase the number of available workforce housing units in the City



Encourage expansion of the population of the City



# Benefits to a PILOT Program

Facilitate the addition of attractive and viable housing units in locations consistent with the goals & objectives of the City's Master Plan



Protect and improve the health, safety and general welfare of the City's residents, business ownership, property owners & community as a whole





#### PILOT Resolution: High Level Deal Terms

\$22,000

4.5%

\$120,000

\$158,500

**Current Real Estate Taxes** 

PILOT Percentage

Minimum Yearly Real Estate Taxes Collected Year 1 Taxes Collected at 100% Occupancy

**120% AMI** 

All units must be attainable housing units priced up to 120% area median income

2026

Estimated date to begin construction

2027

Estimated date for initial increased tax payment

#### **Oakland County PILOT Percentages**

#### 13 of the 19 PILOT Programs in Oakland County are 4% or lower

ш	0:4	Facilitae Mana	Address	11	MOUDA Nation	PILOT
#	City	Facility Name	Address	Units	MSHDA Notice	Percentage
	Township of Milford	Heritage Place @ Ridge Valley	700 Napa Valley Dr	130	10/4/2006; 06/27/2012	1%
2	City of Pontiac	Village of Oakland Woods I (Pres. Village)	420 S Opdyke	150	1/20/2022	3%
3	City of Birmingham	Baldwin House	200 S Chester St	130	6/21/1993	4%
4	City of Ferndale	Vester Flats Apartments	141 Vester Street	72	4/23/2025	4%
5	City of Ferndale	Devon Trace Apartments	1225 Orchard St	60	5/21/2010	4%
6	City of Hazel Park	Baldwin House	749 E Woodward Hts	125	6/19/1990; 12/22/2021	4%
7	City of Hazel Park	Hazelcrest Place	100 Hazelcrest	241	4/11/1979; 12/22/2021	4%
8	City of Pontiac	American House Oakland (Lakehaven)	1915 Baldwin Ave	161	12/07/2021 (06/26/2019)	4%
9	City of Pontiac	North Hill Farms I & II	550 W Kennett Rd	525	1/13/2022	4%
10	City of Pontiac	Phoenix Place	47251 Woodward	201	8/4/2010	4%
11	City of Pontiac	Crystal Lake Apartments	850 Golf	144	5/20/2020	4%
12	City of Pontiac	Spring Lk Village (Aub Hls Twnhs)	252 Carriage Circle Dr	250	1/6/2011	4%
13	City of Pontiac	Village of Oakland Woods II	440 S Opdyke	66	2/2/2006	4%
14	City of Ferndale	Raymond E. Shepherd House	410 Vester St	53	10/2/2024	4.5%
15	City of Pontiac	Winston Commons	69 Douglas St	54	07/20/2022 (11/16/2020)	6%
16	City of Pontiac	The Hamilton	5 Carter St	42	9/3/2019	6%
17	City of Pontiac	Carriage Place Apts.	255 Carriage Circle Dr	234	8/10/2021	6%
18	City of Pontiac	Newman Court Apts	630 Kettering	172	7/16/2018	7%
19	Village of Milford	South Hills II / MHT	101 Gwendolyn Blvd	120	12/13/2006	10%

#### **Oakland County PILOT Percentages**

### At 4.5% the proposed PILOT Program for Annie Lathrup School would be among the highest percentages of shelter rents captured in Oakland County

						PILOT
#	City	Facility Name	Address	Units	MSHDA Notice	Percentage
1	Township of Milford	Heritage Place @ Ridge Valley	700 Napa Valley Dr	130	10/4/2006; 06/27/2012	1%
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13	City of Pontiac	Village of Oakland Woods II	440 S Opdyke	66	2/2/2006	4%
14	City of Ferndale	Raymond E. Shepherd House	410 Vester St	53	10/2/2024	4.5%
15	Lathrup Village	Annie Lathrup School	20700 Southfield Road	145	TBD	4.5%
16	City of Pontiac	Winston Commons	69 Douglas St	54	07/20/2022 (11/16/2020)	6%
17	City of Pontiac	The Hamilton	5 Carter St	42	9/3/2019	6%
18	City of Pontiac	Carriage Place Apts.	255 Carriage Circle Dr	234	8/10/2021	6%
19	City of Pontiac	Newman Court Apts	630 Kettering	172	7/16/2018	7%
20	Village of Milford	South Hills II / MHT	101 Gwendolyn Blvd	120	12/13/2006	10%

#### Sample Timeline

2025 2026 2027 2028 2029

**FINALIZE** FINANCING --**STATE, LOCAL &** CONVENTIONAL

CONSTRUCTION **STARTS** 

CONSTRUCTION CONSTRUCTION **ONGOING** 

**FINISHED** 

**BUILDING IS OPENED & LEASED** 

#### **Sample Timeline**

**AD VALORUM TAXES** 

**AD VALORUM TAXES** 

**SERVICE** CHARGE **PAYMENTS** 

2025 2026 2027 2028 2029

SERVICE CHARGE **PAYMENTS** 

HIGHER OF 4.5% PILOT OR **SERVICE CHARGE** 

#### **PILOT Program**

	4											Г					
~Total Annual Rent	\$3,378,240																
~3% Growth Per Year																	
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15	TOTAL Payment	~City/DDA Revenue
Current Taxes	\$ 23,000	\$ 23,690	\$ 24,401	\$ 25,133	\$ 25,887	\$ 26,663	\$ 27,463	\$ 28,287	\$ 29,136	\$ 30,010	\$ 30,910	\$ 31,837	\$ 32,793	\$ 33,776	\$ 34,790	\$ 427,775	\$ 205,332.01
4% - PILOT	\$ 135,130	\$139,183	\$143,359	\$147,660	\$152,090	\$156,652	\$161,352	\$166,192	\$171,178	\$176,313	\$181,603	\$187,051	\$192,662	\$198,442	\$ 204,396	\$ 2,513,264	\$ 1,206,366.62
5% - PILOT	\$ 168,912	\$173,979	\$179,199	\$184,575	\$190,112	\$195,815	\$201,690	\$207,740	\$213,973	\$220,392	\$227,004	\$233,814	\$240,828	\$248,053	\$ 255,495	\$ 3,141,580	\$ 1,507,958.28
6% - PILOT	\$ 202,694	\$208,775	\$215,038	\$221,490	\$228,134	\$234,978	\$242,028	\$249,289	\$256,767	\$ 264,470	\$272,404	\$280,576	\$288,994	\$297,664	\$ 306,593	\$ 3,769,896	\$ 1,809,549.93
7% - PILOT	\$ 236,477	\$243,571	\$250,878	\$ 258,405	\$266,157	\$274,141	\$282,366	\$ 290,837	\$299,562	\$308,549	\$317,805	\$327,339	\$337,159	\$347,274	\$ 357,692	\$ 4,398,212	\$ 2,111,141.59
8% - PILOT	\$ 270,259	\$278,367	\$286,718	\$295,320	\$304,179	\$313,304	\$322,704	\$332,385	\$342,356	\$352,627	\$363,206	\$374,102	\$385,325	\$396,885	\$ 408,791	\$ 5,026,528	\$ 2,412,733.24
9% - PILOT	\$ 304,042	\$313,163	\$322,558	\$332,234	\$342,201	\$352,468	\$363,042	\$373,933	\$385,151	\$396,705	\$408,606	\$420,865	\$433,491	\$446,495	\$ 459,890	\$ 5,654,844	\$ 2,714,324.90
10% - PILOT	\$ 337,824	\$347,959	\$358,397	\$369,149	\$380,224	\$391,631	\$403,380	\$415,481	\$427,945	\$440,784	\$454,007	\$467,627	\$481,656	\$496,106	\$ 510,989	\$ 6,283,159	\$ 3,015,916.55
Minimum Payment	\$ 120,000	\$126,000	\$129,780	\$133,673	\$137,684	\$141,814	\$146,069	\$150,451	\$154,964	\$159,613	\$164,401	\$169,333	\$174,413	\$179,646	\$ 185,035	\$ 2,272,877	\$ 1,090,980.89
~Taxable Value Payment	\$ 670,000	\$690,100	\$710,803	\$732,127	\$754,091	\$776,714	\$800,015	\$824,015	\$848,736	\$874,198	\$900,424	\$927,437	\$955,260	\$983,918	\$1,013,435	\$ 12,461,272	\$ 5,981,410.71

<sup>\*</sup>The applicant and the City have agreed to a 4.5% annual fee, as reflected in the payment and revenue projections outlined in the attached spreadsheet.



### **COMMUNITY BENEFITS**



September 2025





CONFIDENTIAL

#### Item 2B.

#### **Potential Community Benefits**

The Surnow Company is willing to invest into beautifying Annie Lathrup Park as part of our Community Benefits to the residents of Lathrup Village; examples include:



### **Current: Green Space Buffer Zone POV**



Walking Path Enhancements



#### Item 2B.

### **Current: Green Space Buffer Zone POV**



Walking Path Enhancements



#### **Project Summary**

#### **Project Qualifications**

 Adaptive reuse of vacant or under-utilized buildings



 New mixed-use or multifamily residential developments



Significant commercial renovations or expansions



Affordable housing developments



#### **Public Benefits**

 Expansion of the City's tax base in the long term



 Improvement of blighted or vacant property



 Expanded provision of affordable housing units



 Creation or retention of permanent jobs

