

Rik Kowall, Supervisor  
Anthony L. Noble, Clerk  
Mike Roman, Treasurer



Trustees  
Scott Ruggles  
Liz Fessler Smith  
Andrea C Voorheis  
Michael Powell

**CORRIDOR IMPROVEMENT AUTHORITY BOARD**  
**LOCATION: TOWNSHIP ANNEX, 7527 HIGHLAND ROAD, WHITE LAKE, MI 48383**  
**THURSDAY, APRIL 04, 2024 – 5:00 PM**

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*White Lake Township | 7525 Highland Rd | White Lake, MI 48383 | Phone: (248) 698-3300 | [www.whitelaketwp.com](http://www.whitelaketwp.com)*

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## **AGENDA**

1. **CALL TO ORDER**
2. **ROLL CALL**
3. **PLEDGE OF ALLEGIANCE**
4. **APPROVAL OF AGENDA**
5. **APPROVAL OF MINUTES**
  - A. [February 1, 2024](#)
6. **CALL TO THE PUBLIC (FOR ITEMS NOT ON THE AGENDA)**
7. **NEW BUSINESS**
  - A. [Review and consideration draft Oakland County Tax Sharing Agreement](#)
8. **OTHER BUSINESS**
9. **COMMUNICATIONS**
10. **NEXT MEETING DATE:** May 2, 2024
11. **ADJOURNMENT**

**Procedures for accommodations for persons with disabilities:** The Township will follow its normal procedures for individuals with disabilities needing accommodations for effective participation in this meeting. **Please contact the Township Clerk's office at (248) 698-3300 X-164 at least two days in advance of the meeting.** An attempt will be made to make reasonable accommodations.

**WHITE LAKE TOWNSHIP  
CORRIDOR IMPROVEMENT AUTHORITY  
FEBRUARY 1, 2023**

**CALL TO ORDER**

Member Walklet called the meeting to order at 5:00 P.M. He then led the Pledge of Allegiance.

Roll was called:

**ROLL CALL****Present:**

Rik Kowall, Supervisor

Jim Christopher

Rick Walklet, Chairperson

Tony Madaffer

Debbie Lennis, Vice Chairperson

**Also Present:**

Sean O'Neil, Community Development Director

Justin Quagliata, Staff Planner

Hannah Kennedy-Galley, Recording Secretary

**APPROVAL OF AGENDA**

**MOTION by Supervisor Kowall, seconded by Member Madaffer, to approve the agenda as presented. The motion carried with a voice vote: 5 yes votes).**

**APPROVAL OF MINUTES**

A. August 3, 2023

**MOTION by Member Madaffer, seconded by Member Lennis, to approve the minutes of December 7<sup>th</sup>, 2023 as presented. The motion carried with a voice vote: (5 yes votes).**

**CALL TO THE PUBLIC (FOR ITEMS NOT ON THE AGENDA)**

None.

**NEW BUSINESS**

A. Update on TIF Plan Opt-Out Status

The White Lake Library had officially opted out of the TIF Plan. Several staff had met with Oakland County, and met additionally with Oakland County's TIF sub-committee. The sub-committee opted out as well and was putting together their own agreement to negotiate with the Township. The hope was for the agreement to be ready to review in March. OCC and Huron Clinton Metro Authority did not opt out, so their funds would be captured.

Supervisor Kowall said it was disheartening that there were members of the sub-committee at the County who did not know what the Township was doing. He was distressed by the lack of knowledge and understanding from the sub-committee.

Mary Earley, 5985 Pine Ridge Court, said she had ran into the Library Board director about opting into the TIF Plan. Mrs. Earley was told the library was not allowed to opt in as it was against “their” law.

#### **OTHER BUSINESS**

A. Election of Officers

**MOTION by Member Madaffer, seconded by Member Christopher appoint Rick Walklet and Debbie Lennis as Chairperson and Vice Chairperson of the CIA Board, respectively. The motion carried with a roll call vote: (5 yes votes).**

**(Madaffer/yes, Christopher/yes, Kowall/yes, Walklet/yes, Lennis/yes).**

#### **COMMUNICATIONS**

RCOC granted the permit to rebuild Elizabeth Lake Road. There would be a contribution from the County to the Township to cover \$200,000.00 of engineering costs. Bids for the project would be due February 7<sup>th</sup>. There was a bid opening for Triangle Trail and Stanley Park. The Parks fund did not have the funds to cover both projects, so a possible option to bond was being considered. The Parks and Rec millage was considering language as the previous millage expired December 31, 2023. Renewal was would be .3%, or a new millage at .5%.

**NEXT MEETING DATE:** March 7, 2024

#### **ADJOURNMENT**

**MOTION by Supervisor Kowall, seconded by Member Madaffer to adjourn at 5:22 P.M. The motion carried with a voice vote: (5 yes votes).**

# **Development Plan and Tax Increment Financing Plan for the White Lake Township Corridor Improvement Authority**

White Lake Township  
Corridor Improvement Authority

Recommended by the Corridor Improvement Authority  
Board on: August 3, 2023

Adopted by White Lake Township Board on: November 28, 2023

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## ACKNOWLEDGEMENTS

### Township Board

Rik Kowall  
Andrea Voorheis  
Anthony Noble  
Liz Smith  
Michael Powell  
Mike Roman  
Scott Ruggles

### Corridor Improvement Authority Board

Rik Kowall  
Debbie Lennis  
Jim Christopher  
Rick Walklet  
Tony Madaffer

### Citizens Advisory Council

Kristiana Kaufmann  
John M. Newberry  
Dale (Boomer) Ulman  
Sandra Ulman  
Shawn Austin  
Mary Kotcher  
Bruce Johnson

### Township Staff

Sean O'Neil, Community Development Director  
Justin Quagliata, Staff Planner

Assisted by: Carlisle/Wortman Associates, Inc.  
Ann Arbor, MI

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# Section 1

## Introduction

The Charter Township of White Lake, located in Oakland County, is bordered on the east by Waterford Charter Township, on the north by Springfield Charter Township, on the west by Highland Charter Township, and on the south by Commerce Charter Township. The current population is 30,950 (2020 Census). The White Lake Township Corridor Improvement Authority (CIA) was created by the Township Board in October 2006. The CIA is governed by a Board of Directors whose primary purpose is to correct and prevent deterioration and promote economic growth within White Lake Township's principal business district. Other purposes of a CIA include reversing declining property values, improving the overall business climate, and increasing employment opportunities.

A primary benefit of forming the CIA is the ability to capture the incremental increase in the property taxes that result from improvements in the development area. Local school taxes are not captured by the Authority. The captured revenues are used to finance public improvement projects within the development area, as a means for jump-starting economic growth.

A Corridor Improvement Plan is one tool the CIA relies on for achieving its purposes. The goals, objectives and recommended actions presented in this document are intended to plan and prioritize projects, such that the development, redevelopment and other improvements within the corridor occur in an orderly manner. Recommendations also ensure improvements match the available revenues and can enable the CIA to become eligible for other funding sources. The Plan was prepared in accordance with the Recodified Tax Increment Financing Act of 2018, Part 6 Corridor Improvement Authorities, which is the successor act to PA 280 of 2005.

### PURPOSE OF CIA ACT

Both Part 6 of PA57 of 2018 (the "Act" or "Act 57") and successor PA 280 of 2005 were enacted to provide a new community development tool designed specifically for the commercial corridors of Michigan. The Act allows communities to create "Corridor Improvement Authorities" with special powers, conditions, and criteria unique to commercial corridors. One of the chief features of a CIA is the ability to fund infrastructure improvements using tax increment financing, discussed more in depth later in this report.

The Act is intended to combat the deterioration of existing business districts and promote economic development efforts within the development area. Communities are permitted to create as many CIA's as they wish, provided no single parcel is located within more than one CIA development area.

Another distinction of a CIA is the ability for municipalities to develop a single CIA development area for a corridor that is located in more than one community. Such benefits as continuity of appearance, uniformity of improvements and land use regulations, and cooperative traffic management are all potential benefits of multi-jurisdictional CIA's development areas.

The CIA is granted specific powers and duties to empower it to accomplish its mission. These include, but are not limited to, the following:

## PURPOSE OF THE CIA ACT (CONT)

- Acquire and construct public facilities, and improve public facilities to comply with barrier-free design requirements;
- Conduct analysis of economic changes in the development area along with impacts of metropolitan growth on the development area; and develop long range plans (in coordination with planning/building department) to halt deterioration of property values and promote economic growth;
- Implement any plans of development which achieve the purposes of the Act;
- Make and enter into contracts and acquire, own, convey, dispose of or lease all or part of land, real or personal property, or interests in property, grant or acquire licenses, easements, and options;
- Improve land, construct, re-construct, rehabilitate, restore, and preserve, equip, improve, maintain, repair, and operate any building, including multiple-family dwellings, of any public or private person or combination thereof;
- Accept grants and donations of property, labor, or other things of value and fix, charge, and collect fees, rents, and charges for the use of any facility, building or property under its control; and,
- Conduct market research and public relations campaigns, develop, coordinate, and conduct retail and institutional promotions, and sponsor special events and related activities.

## ACTIONS OF THE TOWNSHIP TO DATE

The White Lake Township Corridor Improvement Authority was originally established on October 17, 2006, when the Township Board adopted a Corridor Improvement Authority Ordinance. Although a Corridor Improvement Plan was prepared, the Township Board took no further action to formalize the Authority. The CIA remained inactive until the latter part of 2022 when the Township Board moved to resurrect the CIA and hired a consultant to begin the process of updating the Development and Tax Increment Financing Plan for the Corridor. On January 17, 2023, the Township Board approved the Township Supervisor's recommendations and appointed a five-person Corridor Improvement Authority Board. Minor amendments to the Corridor Improvement Authority Ordinance were adopted by the Township Board on May 16, 2023. With more than one hundred residents in the Development Area, the Township Board also established a Citizens Advisory Council (CAC).

The boundaries of the CIA development area are identified in Figure 1 found on Page 11 which follows, and the parcel list is in Appendix 1.

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## **CONTENT OF THE PLAN**

The CIA Plan consists of two (2) components required by Part 6 of Act 57, as amended: the Development Plan and the Tax Increment Financing Plan. The Development Plan includes specific programs, projects, and strategies the CIA intends to pursue for the revitalization of underutilized properties, improve visual appearance, and encourage new investment in the development area. The Tax Increment Financing (TIF) Plan provides the legal foundation for funding these improvements within the development area.

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# Section 2

## Development Plan

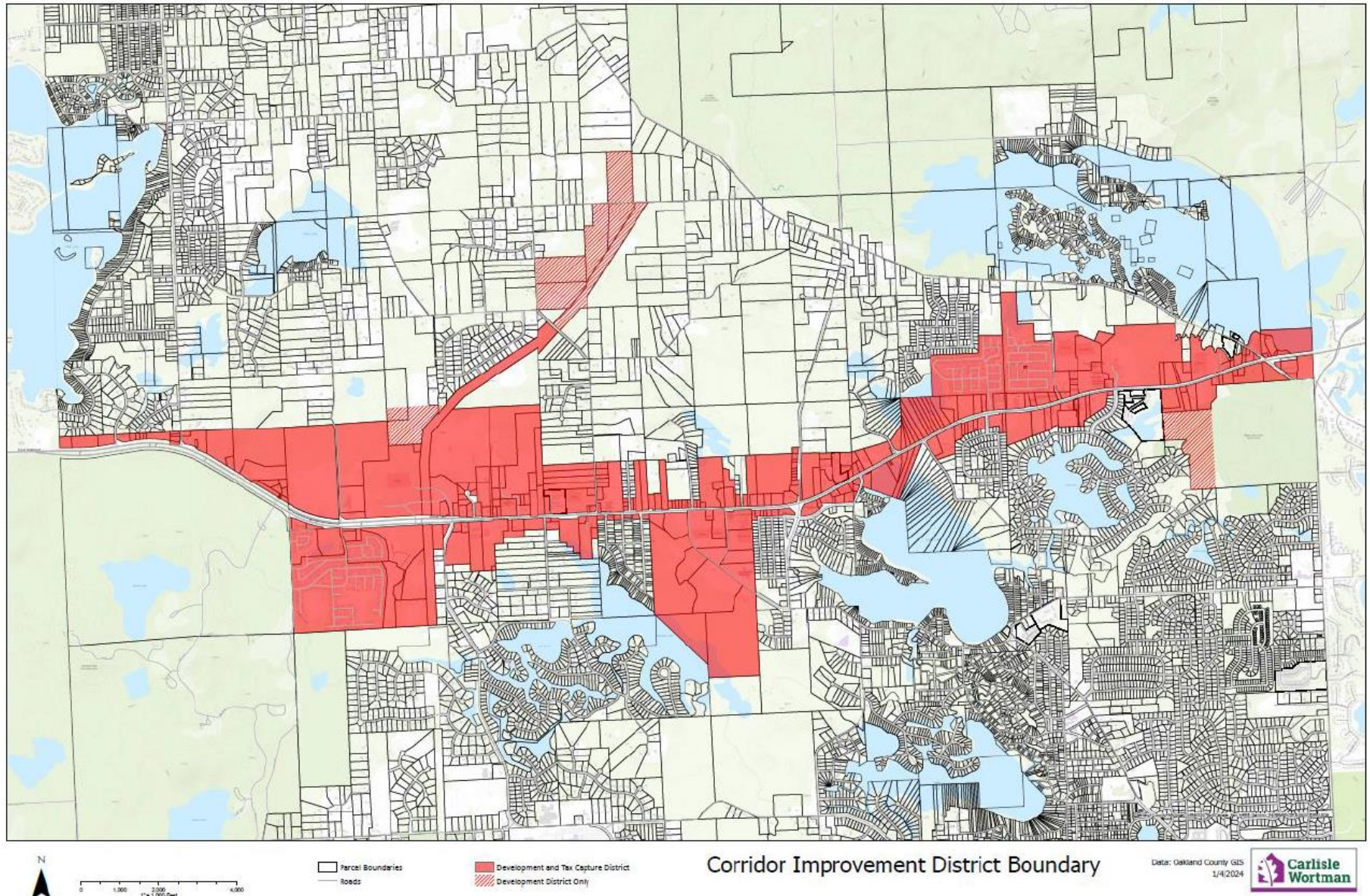
### DESCRIPTION OF DEVELOPMENT AREA

#### Designation of Boundaries of the Development Area in Relation to Highways, Streets, Streams, or Otherwise

The White Lake Township CIA has been given the authority by the Township Board to operate within the boundaries identified in Figure 1. In general, the Corridor District includes all properties with frontage along M-59 (Highland Road) from the boundary of Highland Charter Township to the west and Waterford Charter Township to the east. The development area abuts several land use designations and is located within the areas identified in the Township Master Plan as the Highland West, Lakes Village and Highland East Planning Areas. These areas are connected via the M-59 Corridor and shown on Figure 3.



FIGURE 1. CIA Development Area and CIA Authority Boundary



## Existing Streets and Public Facilities

The predominant roadway within the development area is M-59 (Highland Road) with prominent intersections at Teggerdine Road, Ormond Road, and Elizabeth Lake Road. M-59 is a state trunkline under the administration of the Michigan Department of Transportation (MDOT). Teggerdine Road, Elizabeth Lake Road and Ormond Road all serve as primarily north / south collectors and minor arterials as shown below. Interstate and Highway access is supported by US-23 to the west and I-75 to the north.

The National Functional Classification System designates major roads within the development area as:

- M-59 / Principal Arterial
- Teggerdine Road / Collector
- Elizabeth Lake Road / Minor Arterial
- Ormond Road / Minor Arterial

Public Facilities include the White Lake Township Hall and Police Department, Library, three Fire Stations, the Dublin Community Senior Center, six Township parks, Town Center, and several urgent care centers. The nearest major hospital is Detroit Medical Center Huron Valley-Sinai Hospital which is approximately two miles south of the Township's southern border.

**TABLE 1: Major Road Data**

Road	Segment	Traffic Volumes / Average Daily Trips (ADT)
M-59 / Highland Road	Teggerdine Rd. intersection	32,800 (2019)
	Elizabeth Lake Rd. intersection	31,300 (2015)
	Ormond Rd. intersection	17,300 (2021)

*Source: SEMCOG AADT Traffic Tool*

## Existing and Proposed Land Uses

M-59 is a major entry point to White Lake Township from areas to the east and west. Historically, uses along the corridor have been commercial / office, institutional, industrial, agricultural, mobile home parks, multi-family, and various densities of single family residential. Undeveloped land still exists along portions of the corridor as shown in Figure 2.

Commercial use varies from big box and retail mall establishments to local business services. Portions of the corridor are utilized by public facilities and religious institutions. Residential uses range in the form of single and multiple-family residential as well as mobile home parks. Industrial uses are sparse and of lighter intensities. In general, the condition of all uses along the corridor look to be either newer development in good condition or older/original development showing signs of age.

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The Township Master Plan places greater emphasis on planned uses along M-59 as well as sustainable development practices, natural feature conservation, infrastructure, and open space throughout the Township. The Master Plan also segments the community into several Planning Areas as shown on Figure 3. Within these Planning Areas are specific Area Plans which are created to highlight certain locals within the greater community that provide unique opportunities to spur economic development, correct blight or fill specific communal needs. These Area Plans, titled Four Towns, Lakes Town Center, Pontiac Lake Gateway, and Elizabeth Lake Road / Union Lake Road. The Master Plan outlines where there are areas for development and redevelopment opportunities, provides specific recommendations and encourages new investment that will gradually shape the appearance and character of the Township.

Regarding the development area, the current Master Plan recognizes the need for more uses to accommodate the higher demand for investment along the M-59 corridor. Figure 4 presents the future land use concepts within this geography as shown in the Township Master Plan.



FIGURE 2. Existing Land Uses

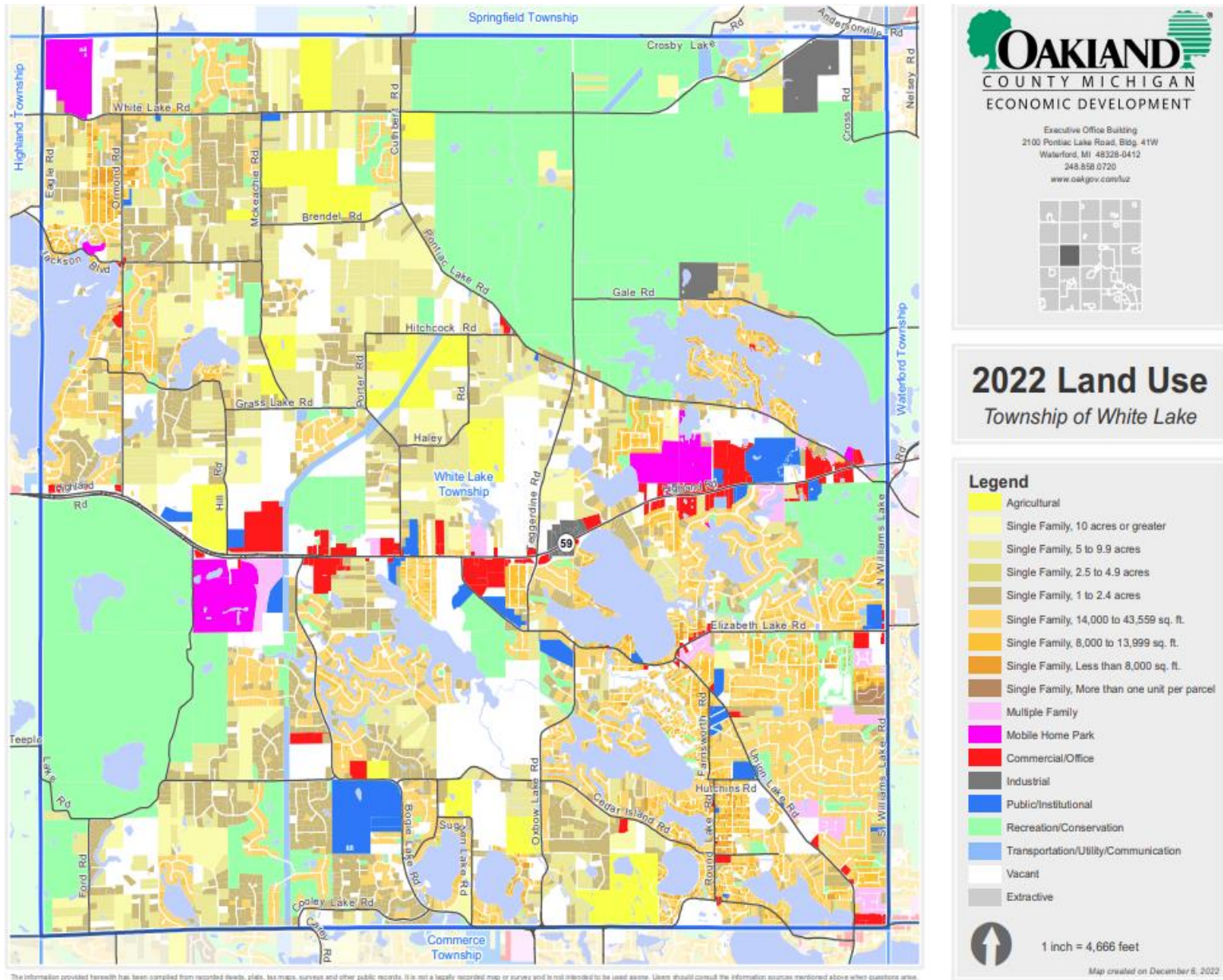


FIGURE 3. Planning Areas

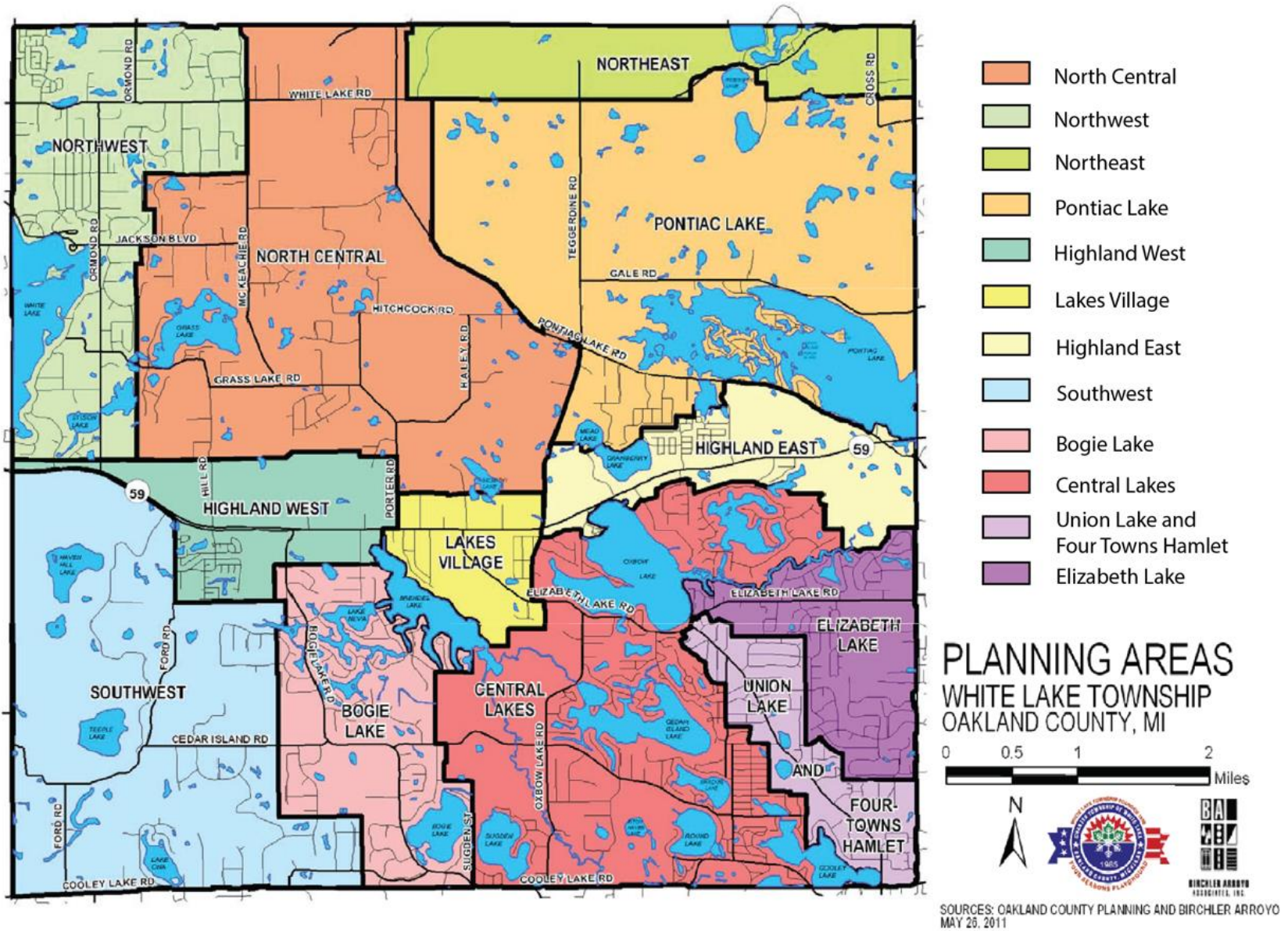




FIGURE 4. White Lake Future Land Use

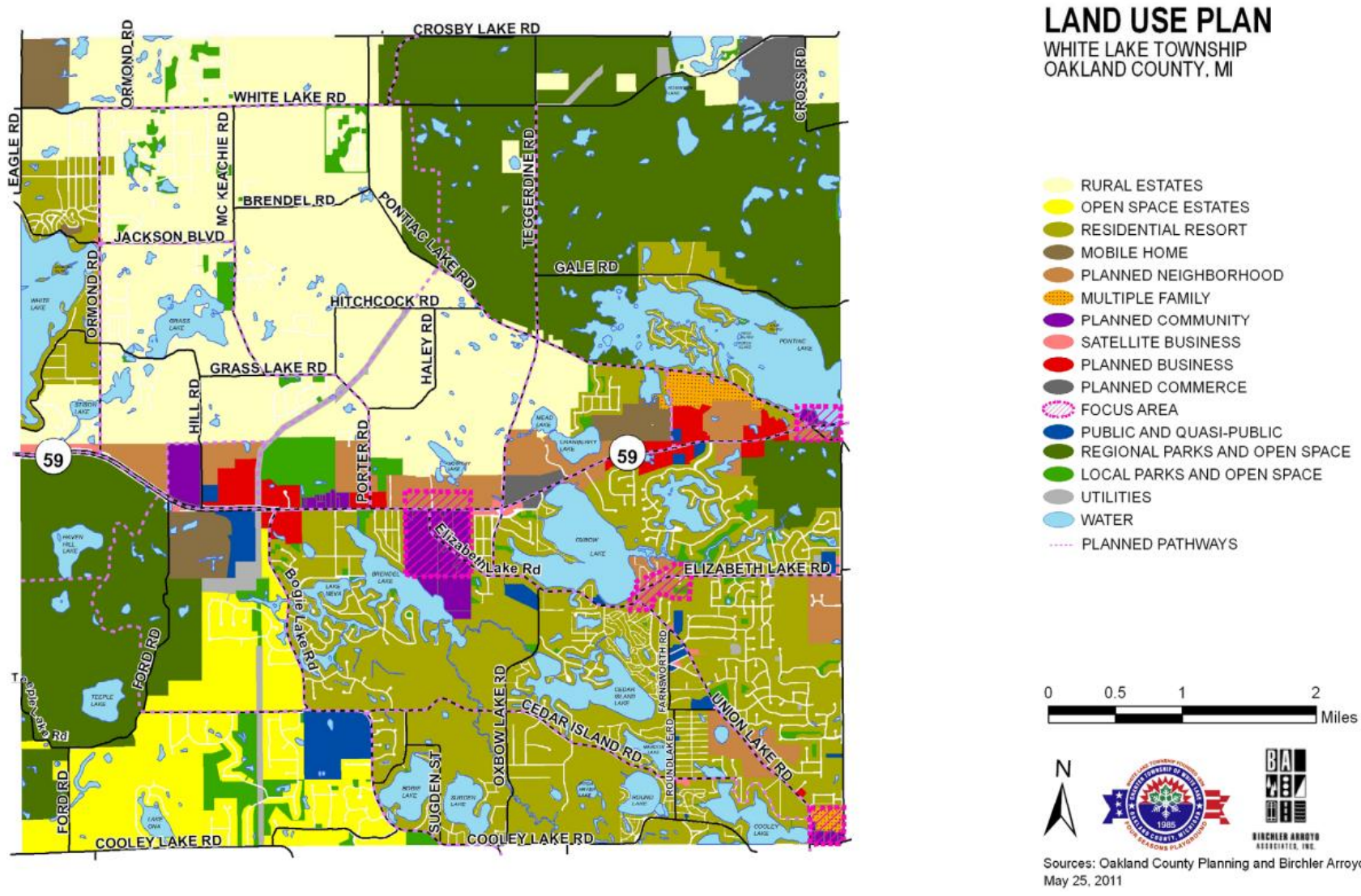
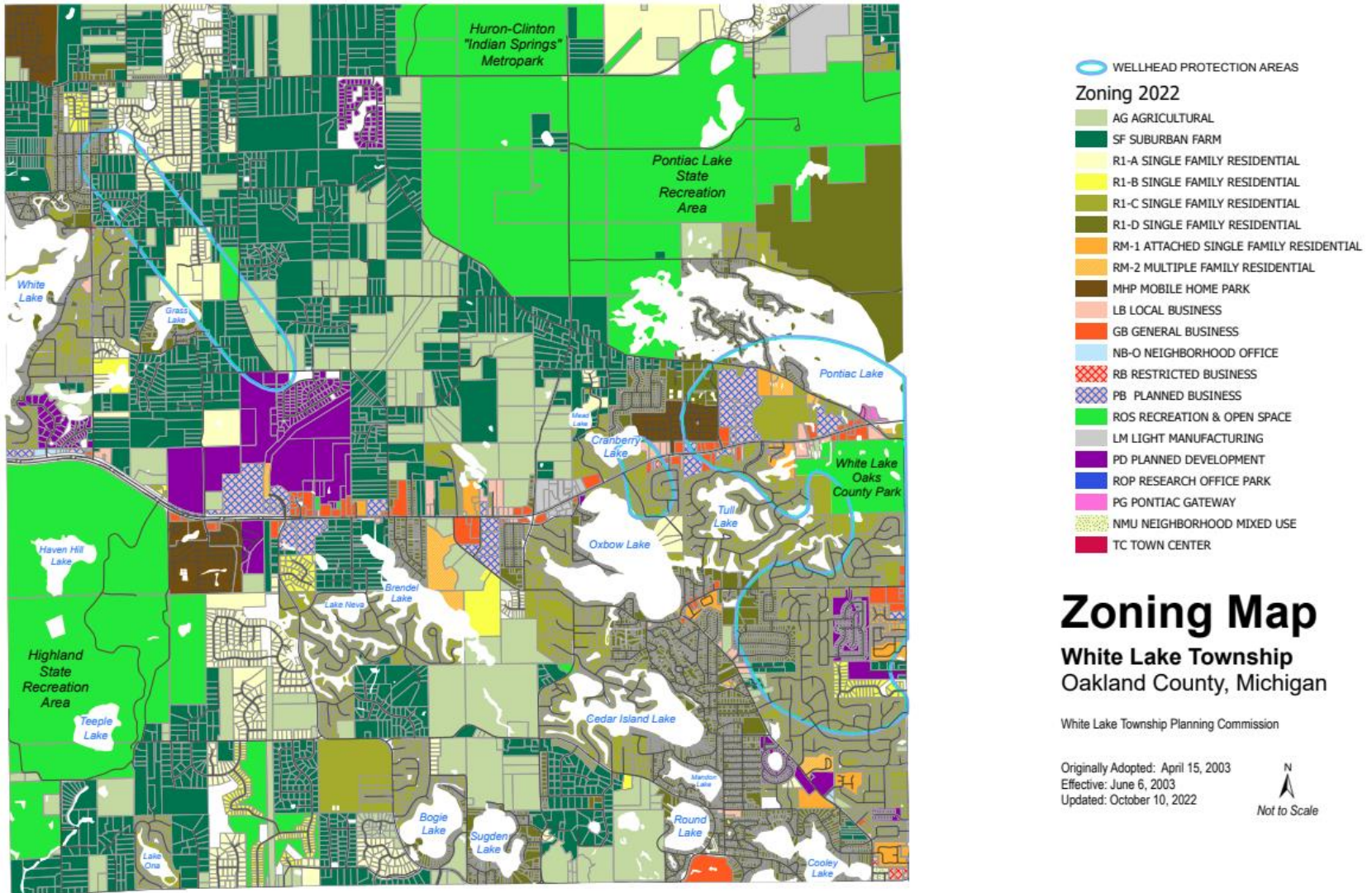


FIGURE 5. Corridor Improvement Development Area Existing Zoning





## Zoning

There are numerous existing zoning districts represented in the Development Area, as illustrated in Figure 5. The following describes the purpose and intent of each designation represented in the Development Area.

- AG / Agricultural – The Agricultural District is established as a district in which the principal use of land is for farming, dairying, forestry operations and other agricultural activities. The intent of this article is to protect land needed for agricultural pursuits from encroachment by untimely and unplanned residential, commercial, or industrial development.
- SF / Suburban Farms - The Suburban Farms District was created to establish areas of the Township for single family residences in a rural environment characterized by low densities and significant open spaces.
- R1-B, C&D / Single Family - The Single-Family Residential Districts are established as districts in which the principal use of land is for single family dwellings, located in neighborhoods that include open space and that preserve sensitive natural environmental features.
- MHP / Mobile Home Park - The Mobile Home Park District is for areas of the Township suitable for mobile home parks. For the Mobile Home Park District, in promoting the general purpose of this ordinance, the specific intent of this Article is: A)- To require adequate space and facilities for healthy living conditions for occupants of such mobile home parks so as to maintain the residential character of the area. B)- To require all such districts to have access to a major thoroughfare for easy accessibility. C)- To ensure suitable water and sewer facilities would be provided in accordance with state, county and township health regulations and statutes. D)- To provide for the development of mobile home parks for long-term residential use.
- RM-1 / Attached Single Family - The Attached Single-Family Residential District is designed to permit various attached single-family dwellings including row or townhouse dwellings and two-family or duplex dwellings. These areas should be located near shopping, community services and facilities, and major roads for good accessibility.
- RM-2 / Multiple Family Residential - The Multiple-Family Residential District is designed to permit a more intensive residential use of land with various types and sizes of multiple-family dwellings, two-family dwellings, apartments and convalescent or nursing homes. These areas should be located near shopping, community services and facilities, and major roads for good accessibility.
- PD / Planned Development – The Planned Development District is intended to provide for the location and various types of planned land use on large parcels held in common ownership and includes such alternate terms as cluster zoning, planned development, community unit plan, planned residential development and other similar terminology. Uses planned may include single-family detached housing, single-family attached housing, multiple-family housing, local commercial business, office uses, and similar activities. The PD District is intended to result in a unique, planned development that includes such techniques as open space preservation. A public hearing shall be held prior to formal consideration of the PD.

- NB-O / Neighborhood Office - The Neighborhood Office District permits those office and service uses which are compatible in intensity and character with nearby residential areas. The intent of this article is to encourage well-designed office buildings, employing high quality architecture, in a professionally landscaped setting, as well as uses which will not cause large volumes of traffic, traffic congestion, or parking problems. These uses will be designed and constructed to fully complement and enhance the adjoining or nearby residential areas.
- LB / Local Business - The Local Business District is intended to be that district permitting retail business and service uses which are needed to provide for the day-to-day needs of the nearby residential areas. The specific intent of the Local Business District is: A)- To encourage the concentration of local business uses in certain strategic locations to the mutual advantage of both the consumers and merchants and to avoid the continuance of marginal strip business development along major streets. B)- To prohibit uses that would create hazards, offensive and loud noises, dust, dirt, smoke, odor, glare, vibrations, or excessive truck traffic.
- GB / General Business - The General Business District, as established in this article, is intended to permit a wider range of business activities than those permitted in the Local Business and Restricted Business districts. The specific intent of this article is to allow those uses which would not only serve nearby residential areas, but also the entire community's comparison business, offices, services, and automotive service needs, including open-air sales and uses requiring location on a major highway or street. These uses would generate larger volumes of vehicular traffic, would need more off-street parking and loading, and would require more detailed planning to provide an appropriate transition between such districts and adjacent residential areas.
- PB / Planned Business - The PB Planned Business District is primarily a commercial district intended to permit, with Township approval, private and/or public development in a coordinated and cohesive arrangement which may be more difficult to achieve under more conventional, piecemeal development designed to conform with standard zoning requirements. To that end it becomes possible to permit greater flexibility in the types of land uses, land use arrangements and development requirements than would otherwise apply. It is further intended that the PB District be located along major thoroughfares, such as M-59, as opposed to locations in residential neighborhood areas where conflicts of land uses may arise more easily.

Development standards, as approved in a development plan, in this district shall result in a project that is superior to one constructed under standard zoning requirements and shall be mutually acceptable to the applicant(s) and the Township. Therefore, any PB Plan shall be substantially consistent with the Township Master Plan, desirable principals of land use planning, zoning ordinance standards and other applicable development requirements. To achieve these objectives, approval of a PB development requires approval of both a Site Plan and PB Agreement which sets forth specific physical, functional, amenity and design features and other related requirements considered essential to the development.

- PG / Pontiac Lake Gateway - The Pontiac Lake Gateway sub-district is intended to create a unique gateway into White Lake Township, enhancing the views of Pontiac Lake and White Lake Oaks Golf Course and reinforcing the appeal of the Township as a "four seasons playground." Properties located in this area, adjacent to the state trunkline, may accommodate greater height and more intense land activity than elsewhere in this otherwise low-density community. This district will allow flexibility in the redevelopment of property along Highland Road (M-59), encourage pedestrian-oriented design, provide a unique identity to this region of the Township, and be compatible with existing residential, institutional, and recreational uses.

- 
- ROS / Recreation and Open Space - The Recreation and Open Space District is intended to provide areas for the development of public and private outdoor recreation facilities and open space preservation uses. The intent of the Recreation and Open Space District is: to encourage recreational uses of an outdoor nature that will take full advantage of the land in its natural state; and to encourage those large outdoor recreation uses that could not easily be provided in the already urbanized portions of White Lake Township and the metropolitan area.
  
  - LM / Light Manufacturing - The LM, Light Manufacturing District is established as a district in which the principal uses allowed are light manufacturing, fabrication, processing, wholesale activities or warehousing activities. The intent of this article is to control nuisance effects of warehousing, wholesale activities, open storage, and light industry such as smoke, noise, odor, dust, dirt, glare, vibrations, and other adverse effects so that such uses could be compatible with other nearby land uses such as commercial or residential. The light manufacturing district encourages uses to locate on major highways so that traffic generated by these uses would not utilize local residential streets.

## VISION STATEMENT

*Public investment brought about by the Corridor Improvement Authority will attract private development and redevelopment that promotes the White Lake Township “Four Season’s Playground” concept. The M-59 / Highland Road Corridor will become a destination for world-class recreational opportunities. The uses along the corridor act as a lifeline to the community’s many lakes, natural areas, and parks. Residents and visitors know when they’ve arrived in White Lake, because of the consistent use of high-quality, unique materials and environmentally friendly landscaping that reflects a hardy resort atmosphere. An interconnected network of pathways and equestrian trails draw people to the out-of-doors. Distinct nodes of activity will feature retail, dining, entertainment, or lodging experiences, while providing employment and an increased tax base. Enhanced transit stops and transit-oriented development will support the long-term development and sustainability of the corridor.*

## GOALS AND PRIORITIES

***The overall goal of the White Lake Township Corridor Improvement Authority is to improve and encourage the long-term economic viability of the development area.*** The projects and improvements outlined in this Development Plan are designed to nurture the necessary physical, economic, and social environment which will enable White Lake Township to protect existing investment, attract new development, and stimulate the revitalization of properties within the development area. Furthermore, the goal is to foster a mix of uses that both serve the surrounding neighborhood and attract regional visitors to the Township.

### Physical Environment

- Support infrastructure improvements necessary to ensure that existing businesses can expand, and new businesses develop in the development area.
- Promote environmental awareness in the design and implementation of improvements.
- Encourage good design, architectural compatibility, color coordination, high-quality materials, consistent building orientation, and façade articulation that contribute to a cohesive and inviting corridor.
- Promote streetscape improvements, outdoor seating areas, pathways, bike racks and other measures that will make the development area a comfortable place to visit and will encourage the neighborhood residents to walk or bike to commercial offerings.
- Create new opportunities for transportation options linking residential communities with public and recreational facilities.
- Incorporate enhanced facilities that will serve transit and identify nodes for transit-oriented development.



## Economic Environment

- Undertake projects and programs which are designed to create a corridor with a competitive advantage that is attractive to owners and investors and offers quality customer environment and healthy business mix.
- Support financing of projects by leveraging TIF dollars with Federal and State grants, State tax incentives, Township funds and private investment.
- Retain the economically viable businesses which presently exist and encourage their expansion.
- Provide economic development support to businesses and potential developers.

## Social Environment

- Promote a positive and welcoming image of the corridor that fosters cooperation between the public and private sector.
- Distribute promotional materials and maintain online resources and tools for living, working, and doing business in the district.

## DESCRIPTION OF IMPROVEMENTS

The Development Plan for the White Lake Township Corridor Improvement Authority includes projects and programs which will fulfill the priorities and objectives of this Plan. The following projects directly impact the physical environment to increase investment in the development area, improve the visual image of the development area, and enhance the overall economic and social environment. The programs are intended to create a stable economic and social environment for sustained investment in the development area.

## Projects and Programs

- Branding
- Development area entryways and wayfinding.
- Streetscape improvements including landscaping, trees, flower planters, plazas, trash receptacles, and other amenities.
- Pathways and pedestrian improvements including sidewalks, bike racks, pedestrian lighting, and seating.
- Enhanced transit stops / TOD / Designated Transit Routes.
- Traffic safety improvement.
- Extension of sewer and water utilities to unserved areas including tap fee assistance.

- Economic development assistance including façade improvement programs, site circulation, access management, and utility tap fee assistance, particularly focused on redevelopment of substandard and underutilized properties.
- Property / Easement Acquisition needed to implement anticipated improvements.

The duration of this program will be for twenty (20) years and will conclude with a final capture of tax increment revenues on December 31, 2043, and expenditure of those revenues by December 31, 2044. Projects and programs will be undertaken based on the ability of the CIA to finance such. It is recognized by the CIA that the projects listed may be beyond the scope of the CIA to complete with its own limited resources. Public-private partnerships as well as State and Federal grant assistance may be necessary to implement all of the above-mentioned items.

## LOCATION, EXTENT, CHARACTER, ESTIMATED COST, AND TIMELINE OF IMPROVEMENTS

The CIA is positioned to fund small scale improvements as well as projects related to marketing, planning, and operations. There are no plans for large scale construction projects; however, the CIA may provide economic development services and support to private redevelopment, particularly where other funding can be leveraged. The following projects on Table 2 represent the scope of potential projects that will accomplish the objectives of the CIA and the Development Plan and Tax Increment Financing Plan. A description of each project is provided below as well as the estimated cost and year of completion.

**TABLE 2: Proposed CIA Projects**

<b>Branding</b>	<b>2024 – 2025</b>	<b>\$75,000 - \$100,000</b>
<p>A branding process creates a distinct identity to be established for the District as the Township and CIA promotes the area as a community center and an area of regional appeal and business attraction. Branding of the District will also set the themes of other visual improvements, gateway signage, marketing, and wayfinding so that a consistent message is conveyed. While branding the District should be distinct, it should also tie into Township identification as a “Four Season Playground.” This effort will be undertaken in conjunction with several other Township boards.</p>		
<b>Entryway and Wayfinding Signage</b>	<b>2027-2029</b>	<b>\$250,000 - \$400,000</b>
<p>The project would include wayfinding that would direct visitors within the district to the Town Center, Gateway district, parks, community buildings, and other points of interest. Wayfinding signage will reflect the theme created through the branding process. To reinforce the identity of the Township and District, identification signage will be erected at key entry points in the Township.</p>		

<b>Streetscape Improvements</b>	<b>2030-2032</b>	<b>\$2,000,000 - \$2,500,000</b>
<p>This project involves enhancements to the streetscaping, including gateway improvements in the Development Area. Proposed improvements may include unifying elements via a streetscape plan which would include landscaping of street frontages, public spaces and art, seasonal displays, design elements and sound buffers. A key objective of streetscape improvements is to provide a visual connection between M-59 and other significant roadway corridors such as Elizabeth Lake, Teggerdine and Ormond Roads.</p>		
<b>Pathway Extensions and Improvements</b>	<b>2028 - 2032</b>	<b>\$3,000,000 - \$4,000,000</b>
<p>An important objective of the CIA is to improve pathway options throughout the District. Pathways will be improved and extended along the length of M-59 within the District connecting residential areas with commercial and recreational resources. The Township Triangle trail will be completed to connect the Town Center and Library to M-59 and Teggerdine Road.</p>		
<b>Traffic Safety Improvements</b>	<b>2025 - 2035</b>	<b>\$2,000,000 - \$3,000,000</b>
<p>Intersection capacity and safety improvements are needed at Elizabeth Lake and M-59, at White Banks Boulevard and M-59, at Teggerdine Road and M-59 and at Fisk Road and M-59. Access management is also needed along the more congested commercial areas of M-59. In conjunction with non-motorized improvements, safe pedestrian crossings of M-59 are also needed.</p>		
<b>Enhanced Transit Stops / TOD / Dedicated Transit Routes</b>	<b>2028-2034</b>	<b>\$1,500,000 - \$2,250,000</b>
<p>White Lake Township is part of the Western Oakland Transportation Authority (WOTA) system, which is expected to be expanding service along M-59 and the Town Center area. Enhanced transit stops with cover and seating will be strategically located to improve ridership. In conjunction with improved transit, the Township will also promote transit-oriented development in conjunction with enhanced transit stops. These stops will be meant to serve dedicated WOTA / SMART routes along the M-59 corridor.</p>		

<b>Sewer Extensions</b>	<b>2028 - 2035</b>	<b>\$1,500,000 - \$3,000,000</b>
<p>There are areas within the district that lack adequate sanitary sewer-service. This project would include extension and / or upgrading of sewers into underserved and unserved areas.</p>		
<b>Water Extension / System Improvement</b>	<b>2028 - 2034</b>	<b>\$1,500,000 - \$3,000,000</b>
<p>As with sanitary sewers, there are areas within the district which lack adequate drinking water. This project would include extension and / or upgrading of the water service into underserved and unserved areas. System improvements are also needed to upgrade fire flows and capacity with additional pumping and booster stations. Improvements to the Twin Lakes Wellhouse including filtration and maintenance facilities will be considered for this fund.</p>		
<b>Economic Development Assistance</b>	<b>2024-ongoing</b>	<b>\$1,500,000- \$2,000,000</b>
<p>Provide economic development assistance targeted at substandard or underutilized including façade improvements, improvements to site circulation and access management (addressing vehicle-pedestrian safety conflicts) and utility tap fee assistance. The latter may be provided to new or expansion of existing uses in sewerred areas or in areas where sewer service will be extended.</p>		
<b>Property / Easement Acquisition</b>	<b>2025 - 2035</b>	<b>\$3,000,000 - \$4,000,000</b>
<p>To implement the specific projects set forth in this plan, it may be necessary to acquire property in either fee simple or by easement. This will be coordinated via the necessary agencies such as the Department of Environmental, Great Lakes and Energy (EGLE), Michigan Department of Transportation (MDOT) and any other necessary organizations. Permits and/or entitlements will be acquired where needed.</p>		
<b>Administrative, auditing, operating &amp; consultation</b>	<b>2024 - 2043</b>	<b>\$500,000 - \$600,000</b>
<p>The CIA will incur annual administrative, auditing, and operating costs which may also include planning, legal, engineering, and promotion consultation. These expenses are not anticipated to exceed \$25,000 - \$40,000 per year and will be reflected in the annual budget of the Authority, as approved by the Township Board.</p>		

## STATEMENT OF CONSTRUCTION

Construction of the projects proposed above will be accomplished during construction seasons.

## OPEN SPACE

It is anticipated open space features may be incorporated as part of the entryway and streetscape improvements and at strategic locations within the development area. Where applicable, green infrastructure to manage stormwater will be incorporated in both open space and project design.

## DEVELOPMENT AREA OWNERSHIP AND TENURE

It may be necessary for property to be acquired either through fee simple purchase or easement acquisition to implement the overall purpose or specific projects within the plan. If the CIA acquires land for roads or improvements, the necessary rights-of-way will be dedicated to either the Township or the appropriate County or State entity.

## ZONING CHANGES AND CHANGES IN STREETS, STREET LEVELS, INTERSECTIONS, AND UTILITIES

Most of the land within the CIA development area is zoned for commercial use. The Township Master Plan contemplates allowing mixed-use within the development area, including transit-oriented development. The Township is committed to reflecting both concepts in revisions to their Master Plan. As a result, there is the potential for additional residential development within both mixed-use and transit-oriented developments.

It is anticipated that public utilities will be extended, and improved in the Development Area, as needed. It may also be necessary to loop water lines as developments are made. As the specific areas are redeveloped, it may also be necessary to re-route or construct new utilities to service the new buildings.

## PROPOSED METHOD OF FINANCING THE DEVELOPMENT

Projected improvements and their anticipated costs are shown in Table 3. These projects are set to occur over a period of approx. twenty years. This program will shift as developments are finalized and financing is secured. The estimated cost of the specific projects anticipated in this Development Plan is approximately \$16,825,000 to \$24,850,000, as summarized in Table 3. Table 5 anticipates that the CIA will capture approximately \$11,126,852 from TIF sources. Approximately \$11,325,000 to \$15,950,000 is planned to be expended using TIF funds by the CIA towards projects outlined in Table 2 and 3. It should be noted that all expenses and revenues discussed in these sections are estimates that attempt to account for inflation over time and potential changes in the scope of projects. As capture commences and project bids are reviewed, annual CIA budgets will be adjusted accordingly.

Pursuant to Part 6 of Act 57, as amended, the costs of development may be financed by private contributions or donations received by the CIA, Federal and State grants, tax increment financing revenues, revenue bonds issued pursuant to Act 94 of 1933, as amended, general obligation bonds issued by the Township payable from the anticipated tax increment revenues available for payment of debt service on such bond, tax increment bonds issued by the CIA pledging solely the tax increments, other revenues of the CIA, and other dedicated Township funds.

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Tables 4 and 5 in the Tax Increment Financing Plan indicate the sources of income available to the CIA to pay the costs of the development and the estimated amounts of each source, based on captured assessed value of property within the District.

It is unlikely that all projects can be financed from revenues received by the CIA. Therefore, the TIF and millage funds should be used to leverage funding from other sources. The various available methods of financing the CIA may seek to use are described in the following text.

TABLE 3: Summary of Proposed Development Activities

Proposed Project	Cost	CIA Share	Year	Anticipated Method of Financing
Branding	\$75,000 - \$100,000	\$75,000 - \$100,000	2024 - 2025	1
Entryways / Wayfinding	\$250,000 - \$400,000	\$250,000 - \$400,000	2027 - 2029	1, 4, 5
Streetscape Improvements	\$2,000,000 - \$2,500,000	\$1,000,000 - \$1,500,000	2030 - 2032	1, 4
Pathway Extension / Improvements	\$3,000,000 - \$4,000,000	\$1,000,000 - \$1,500,000	2028 - 2032	1, 2, 4
Traffic Safety Improvements	\$2,000,000 - \$3,000,000	\$500,000 - \$1,000,000	2025 - 2035	1,2, 4
Enhanced Transit Stops / TOD / Dedicated Transit Routes	\$1,500,000 - \$2,250,000	\$500,000 - \$850,000	2028 - 2034	1, 2, 4, 5
Sewer Extension	\$1,500,000 - \$3,000,000	\$1,500,000 - \$2,000,000	2028 - 2035	1, 3, 4
Water Extension / System Improvements	\$1,500,000 - \$3,000,000	\$1,500,000 - \$2,000,000	2028 - 2034	1, 3, 4
Economic Development Assistance	\$1,500,000 - \$2,000,000	\$1,500,000 - \$2,000,000	2024 - Ongoing	1
Property / Easement Acquisition	\$3,000,000 - \$4,000,000	\$3,000,000 - \$4,000,000	2025 - 2035	1
Administrative, auditing, operating & consultation	\$500,000 - \$600,000 (\$25,000 - \$30,000 per year)	\$500,000 - \$600,000	2024 - Ongoing	1
<b>Estimated Totals</b>	\$16,825,000 - \$24,850,000	\$11,325,000 - \$15,950,000		
1 = Annual Tax Increment 2 = Tax Increment Bonds 3 = Township Funds (either General or Dedicated) 4 = State and Federal Grants 5 = Private donation				

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## White Lake Township Limited Tax General Obligation Bonds Issued Pursuant to Section 216 of Act 57, as amended.

Section 216(1) of Act 57 permits the Township to issue general obligation bonds, which pledge CIA revenues as additional security. Section 216(2) permits the CIA to issue bonds payable solely from tax increment revenues. Currently, neither the Township nor the CIA have outstanding bonds issued under Section 216 of Act 57. It is anticipated the CIA or Township will incur no more than \$9,000,000 in bonded indebtedness under this Plan.



## Special Assessment/General Obligation Bonds

The Township may also issue special assessment bonds along or in combination with general obligation bonds to finance all or part of the projects identified in this plan. The size of such bond issues would depend on the project included and the portion of each such project to be financed from special assessments and the portion, if any, to be financed from general funds. Payment of such special assessment bonds would be from the proceeds of the special assessment rolls consisting of the lands specially benefitted by the project. Payment of the general obligation bonds would be from the general fund of the Township derived from the proceeds of taxes levied upon all property within the Township.

## State and Federal Grant Programs

The Township will also assist the CIA in pursuing relevant State and Federal transportation, environmental, economic development, and community enhancement grants that either are or may become available. Supplemental sources of funding will be necessary to fully complete all the projects outlined in this plan.

## Private Contributions

The CIA may also accept private contributions from individuals, corporations, and foundations.

## LEASE, SALE, OR CONVEYANCE OF DEVELOPMENT

All public improvement projects undertaken as part of this Plan will remain in public ownership for the public benefit.

It is anticipated certain lands may be acquired and later sold to commercial developers who are willing to build a project acceptable to the Authority. There are no known direct beneficiaries at this time. To the extent that certain projects, such as the provision of public parking facilities, will benefit a set of businesses, efforts will be made to capture such benefit through special assessments and development agreements.

## RESIDENTIAL POPULATION AND THE DISPLACEMENT OF PERSONS

There is no anticipated displacement or relocation required for this Plan. However, if there is the need for relocation of any individuals, the CIA, when required, will provide for the cost of relocation and reimbursement of expenses in accordance with the Federal Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970.

The relocation of any families, individuals, or businesses shall also be carried out in accordance with the statutory requirements and provisions of State of Michigan Act No. 227 of the Public Acts of 1972, being sections 213.321 to 213.332 of the Michigan Compiled Laws.

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## **DEVELOPMENT AREA CITIZENS ADVISORY COUNCIL**

If a Development Area has one hundred (100) or more residents residing within it, a Development Area Citizens Advisory Council (CAC) must be appointed at least ninety (90) days before the public hearing on the Plan. The Citizen Advisory Council was appointed by the Township Board ninety (90) days prior to the adoption of the Plan. In a joint meeting with the CIA Board on August 3<sup>rd</sup>, 2023, the CAC recommended approval of the Plan.

# Section 3

## Tax Increment Financing Plan

### INTRODUCTION

This Tax Increment Financing Plan is established to make possible the financing of the public improvements necessary or desirable for the Corridor Improvement Authority Development Area in accordance with the Development Plan for that area.

### EXPLANATION OF THE TAX INCREMENT PROCEDURES

The Corridor Improvement Authority enabling legislation, Act. No. 57 of the Public Acts of 2018 enables Corridor Improvement Authorities (CIA) to undertake a broad range of development area improvement activities which will contribute to the economic growth and the halting of deterioration of property values in the designated development area. These improvement activities include, but are not limited to, the following: plan and propose the construction, renovation, repair, remodeling, rehabilitation, restoration or reconstruction of public facilities or buildings; development of long-range plans; and otherwise implement any plan for development in the development area necessary to achieve the purpose of the enabling statute.

To provide the Authority with the means of financing the planning and implementation of development proposals, the statute affords the opportunity to undertake tax increment financing or development programs. These programs must be identified in a Tax Increment Financing Plan which has been approved by the governing body of a municipality.

Simply stated, tax increment financing permits the Authority to capture tax revenues attributable to the increase in value of real and personal property located within an approved development area. The increases in property value may be attributable to new construction, rehabilitation, remodeling, alterations, additions, or to such other factors the assessor may deem appropriate.

At the time the CIA Ordinance establishing the Tax Increment Financing Plan is approved, the sum of the most recently assessed values, i.e., the values as finally equalized by the State Board of Equalization, of those taxable properties located within the development area, is established as the "Initial Assessed Value." Property exempt from taxation at the time of determination of the Initial Assessed Value shall be included as zero on the date of adoption of this Plan. The local taxing jurisdictions consist of the White Lake Township Operating & Parks, Township Police, Township Fire, Oakland County Operating, Oakland County Parks & Rec, Oakland County Transportation, Oakland Community College, and the Huron-Clinton Metropolitan Authority. The White Lake Township Library has opted out of capture. As a result of Proposal A passed in March 1994, local school districts, intermediate school districts, and the State of Michigan are no longer included as part of the capture.

In each subsequent year, the total assessed value of real and personal property within the district is termed the "Current Assessed Value."

The difference between any one (1) year period between the Current Assessed Value and the Initial Assessed Value is the “Captured Assessed Value.” During that period which the TIF Plan is in place, local taxing jurisdictions continue to receive ad valorem taxes based on the Initial Assessed Value. Taxes paid on the Captured Assessed Value in allotted years after the establishment of the TIF Plan, however, are payable to the CIA for the purposes established in the Tax Increment Financing Plan.

For the White Lake Township Corridor Improvements Authority Tax Increment Financing Plan, the initial assessed value will be the assessed value of all real and personal property in the Development Area as of December 31, 2023, and equalized by the State in May of 2024. The initial taxable value of the Development Area is estimated to be \$114,855,580, which includes both real and personal property. The Township Assessor does not anticipate significant growth in personal property due to the characteristics of land use in the Township and increased availability of exemptions from the State of Michigan.

The tax levy of all participating taxing jurisdiction in 2023 is 15.7365 mills. Under the Tax Increment Financing Plan, the tax levy on the entire capture assessed valuation is to be utilized by the CIA in the manner as hereinafter set forth.

## PROJECTION OF CAPTURED ASSESSED VALUES AND REVENUES

The Tax Increment Financing Plan is based on the redevelopment or revitalization of desired properties within Development Area.

As noted in the Development Plan, there are areas available for commercial expansion and the CIA may support these large redevelopment projects by providing economic development services or applying for State and Federal grants. However, most projects will focus on supporting existing businesses via branding, gateways, signage improvements, utility extensions, safety path extensions and improvements, traffic improvements, and streetscape improvements. CIA projects will also enhance the overall physical and economic environment of the corridor to promote revitalization and investment.

The taxing jurisdictions and their respective millages subject to capture are presented in Table 4.

**TABLE 4: Millage Capture**

<b>Millage Name</b>	<b>Ad Val Rate</b>
White Lake Township Operating (inc. Twp. Parks and Recreation)	1.1884
Township Police	4.6871
Township Fire	2.9032
Oakland County Operating	3.9686
Oakland County Parks & Rec.	.3431
Oakland County Transport	.95
Huron Clinton Metro Auth.	.2070
Oakland Community College	1.4891
<b>Total</b>	<b>15.7365</b>

The Township has taken a somewhat unique approach by proposing only a 35% capture of taxes for the TIF. Such an approach allows all taxing jurisdictions to enjoy a substantial benefit in the economic growth of the development area. Based on the projected growth outlined in the Development Plan and the existing tax rate of 15.7365 to be captured, the anticipated revenues are summarized in Table 5. Detailed estimates of the impact on tax capture for each taxing jurisdiction are provided in Appendix 3.

This projection is based on current tax rates. Possible factors leading to the deviation from current values are below:

1. If other taxing districts that are subject to capture in the Development Area raise their millage, more revenues will be raised for the Corridor Improvement Plan.
2. An annual inflation growth rate of 3% has been projected for each year and is reflected in Table 5. To develop this estimate, taxable value increases were reviewed over a ten-year period beginning in 2014 and ending with anticipated values from 2024. This review is shown in Appendix 2. The result was an average real property taxable value increase of 4.92% over the ten-year span. Using conservative parameters, 3% was chosen to inform the projections.

Proposal A, adopted in March 1994, limits the annual assessment increase for each property parcel in the State of Michigan to 5% or the inflation rate, whichever is less. When property is sold or transferred, the tax assessment is adjusted to current values.

TABLE 5: Estimated TIF Capture 2024 - 2043

Year	Capture
2024	\$25,731
2025	\$121,081
2026	\$211,030
2027	\$303,678
2028	\$399,105
2029	\$428,548
2030	\$458,874
2031	\$490,109
2032	\$522,282
2033	\$555,420
2034	\$589,552
2035	\$624,708
2036	\$660,919
2037	\$698,216
2038	\$736,632
2039	\$776,200
2040	\$816,956
2041	\$858,934
2042	\$902,171
2043	\$946,706
<b>Total Est.</b>	<b>\$11,126,852</b>

## USE OF TAX INCREMENT REVENUES

The tax increment revenues generated within the development area, pursuant to the Development Plan as it now exists or is hereafter amended, shall be used according to the budget of the Authority as approved by Township Board in accordance with the following:

- First, to pay the administrative, auditing, and operating expenses of the CIA and the Township for the development area, including planning, legal, engineering and promotion to the extent provided in the annual budget of the Authority, as approved by the Township Board.
- Second, to pay for projects and ongoing programs identified in the Development Plan.
- Third, any tax increment receipts more than those needed under the preceding paragraphs would be used for future development activities within the development area, as defined in the Development Plan. Expansion or contraction of the development area is possible pursuant to an amendment or modification of the Development Plan and Tax Increment Financing Plan via applicable provisions of Act 57 and other laws.

## STATEMENT OF THE ESTIMATED IMPACT OF TAX INCREMENT FINANCING ON TAXING JURISDICTIONS

The primary overall impact of the Plan is anticipated increased economic activity within the development area. This increase in activity will, in turn, generate additional tax revenue to local taxing jurisdictions through increases in assessed valuation of real and personal property, improved residential neighborhoods, and from increased personal income from new employment within the development area.

To the extent the current assessed value equals the initial assessed value, the taxing jurisdictions would always receive the tax revenues they would have received prior to the adoption of this Plan. The local taxing jurisdictions shall, therefore, suffer no loss of current tax revenues.

The debt retirement millages for any local taxing jurisdiction within the development area will also remain with those taxing jurisdictions.

It is anticipated the development activities of the Corridor Improvement Authority, financed in whole or in part by tax increment revenues, will produce a positive, material effect on the assessed values of property within, and in, the proximity of the development area and will ultimately result in the eventual collection of greater real and personal property tax revenues than would otherwise have been available.

The CIA proposed all the eligible taxes, minus those presently collected for debt service retirement, subject to any agreements with the various taxing units, levied on the captured assessed value within the district, be used by the Authority to the extent needed from year-to-year to accomplish the purpose of this Plan.

## JUSTIFICATION OF THE TAX INCREMENT FINANCING PLAN

This Tax Increment Financing Plan is based upon the premise that the anticipated increase in development would not occur without the public improvements projected in the Development Plan. Since 2020 private investment within the development area has stagnated. Portions of commercial properties remain vacant or underutilized with higher than desired rates of business turnover. Without the benefits that would result from implementation of the Development Plan, the loss of value and taxes is projected to continue.

The basic premise of this Plan is that private development would not take place without public investment. Therefore, the short-term investment made by the taxing units in foregoing initial growth in tax revenues is repaid by the long-term benefit of substantially greater taxes, improved neighborhoods, and increased employment realized from a significantly stronger commercial tax base.

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# Appendices

- Appendix 1 Parcel List of CIA Development Area
- Appendix 2 Historical Percent Change Real Property
- Appendix 3 Estimates of TIF Capture



## Appendix 1: Parcel List of CIA Development Area

\* - Parcel included in Development Area but excluded from TIF Capture

12-09-476-005*	12-16-301-011
12-13-351-004	12-19-101-016
12-13-376-004	12-19-101-017
12-13-376-010	12-19-101-021
12-13-376-011	12-19-101-023
12-13-376-012	12-19-101-024
12-13-376-014	12-19-101-025
12-13-376-015	12-19-101-027
12-13-451-011	12-19-101-028
12-13-454-005	12-19-101-033
12-13-454-006	12-19-101-034
12-13-454-013	12-19-101-035
12-13-454-015	12-19-101-036
12-13-454-018	12-19-101-037
12-13-454-019	12-19-201-001
12-13-454-046	12-19-201-003
12-13-454-047	12-19-201-006
12-13-455-008	12-19-201-011
12-13-455-009	12-19-201-012
12-13-455-017	12-19-226-006
12-13-455-020	12-19-226-007
12-13-455-021	12-19-276-002
12-13-455-024	12-19-276-003
12-13-476-001	12-19-276-006
12-13-476-003	12-19-276-007
12-13-476-004	12-19-276-008
12-13-476-007	12-19-276-009
12-13-476-008	12-20-101-003
12-13-476-009	12-20-126-005
12-13-476-010	12-20-126-006
12-13-477-002	12-20-151-006
12-13-478-001	12-20-151-007
12-13-478-003	12-20-151-008
12-13-478-007	12-20-176-001
12-13-478-008	12-20-226-003
12-14-300-019	12-20-251-019
12-14-451-002	12-20-251-020
12-14-451-003	12-20-276-005
12-14-476-002	12-20-276-013
12-14-476-007	12-20-276-014
12-14-476-009	12-20-276-020
12-14-476-010	12-20-276-023
12-14-476-011	12-20-276-024
12-14-476-012	12-20-276-025
12-14-476-013	12-20-276-026
12-14-476-015	12-20-276-027
12-16-176-001*	12-20-276-028
12-16-176-002*	12-20-276-029
12-16-200-023*	12-20-276-030
12-16-200-024*	12-20-276-034
12-16-200-025*	12-20-276-035

12-21-176-009	12-20-276-036
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12-21-176-012	12-20-300-018
12-21-176-013	12-20-300-021
12-21-176-014	12-20-300-022
12-21-176-015	12-20-300-023
12-21-176-016	12-20-300-024
12-21-176-017	12-20-401-004
12-21-176-018	12-20-401-005
12-21-176-019	12-20-402-003
12-21-176-020	12-20-426-003
12-21-176-021	12-20-427-004
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12-21-176-050	12-21-100-066
12-21-176-051	12-21-100-071
12-21-176-052	12-21-100-072
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12-21-176-055	12-21-100-075
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12-21-176-061	12-21-176-006
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12-21-326-014	12-21-176-008
12-21-326-015	12-21-176-062
12-21-326-016	12-21-176-063
12-21-401-019	12-21-176-064
12-21-402-022	12-21-176-065
12-21-402-025	12-21-176-066
12-21-403-001	12-21-176-067
12-21-403-012	12-21-176-068
12-21-406-038	12-21-176-069
12-21-426-001	12-21-176-070
12-21-426-006	12-21-176-071
12-21-426-007	12-21-176-072
12-21-426-008	12-21-176-073
12-22-126-002	12-21-176-074
12-22-151-002	12-21-176-075
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12-22-151-011	12-21-176-077
12-22-151-012	12-21-176-078
12-22-151-013	12-21-176-079
12-22-151-016	12-21-176-080
12-22-151-017	12-21-176-081
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12-22-177-006	12-21-251-024
12-22-177-007	12-21-251-025
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12-22-226-011	12-21-276-013
12-22-227-011	12-21-276-014
12-22-251-003	12-21-276-023
12-22-251-004	12-21-278-010
12-22-251-009	12-21-278-011
12-22-251-010	12-21-301-004
12-22-251-014	12-21-301-005
12-22-251-015	12-21-301-032
12-22-251-016	12-21-326-004
12-23-101-011	12-21-326-006
12-23-101-012	12-21-326-009

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## Appendix 2: Historical Percent Change Real Property

<b>Historical Percent Change Real Property - White Lake Township</b>			
Year	Prior Year's Taxable Value	Current Year's Taxable Value	% Change
2014 Comparison	903,891,530	926,341,810	2.48%
2015 Comparison	926,341,810	955,486,460	3.15%
2016 Comparison	955,486,460	981,439,960	2.72%
2017 Comparison	981,439,960	1,025,833,710	4.52%
2018 Comparison	1,025,833,710	1,078,549,040	5.14%
2019 Comparison	1,078,549,040	1,139,844,130	5.68%
2020 Comparison	1,139,844,130	1,195,930,760	4.92%
2021 Comparison	1,195,930,760	1,244,632,260	4.07%
2022 Comparison	1,244,632,260	1,326,390,710	6.57%
2023 Comparison	1,326,390,710	1,430,154,920	7.82%
2024 Comparison	1,430,154,920	1,530,265,764	7.00%
		<b>Average % Change</b>	<b>4.92%</b>

**Appendix 3: White Lake Township Estimated Tax Capture of Corridor Improvement Authority**

<b>Assumed Percent of Growth*: 3.00%</b>				35% Capture of Township Operating & Parks (1.1884)	35% Capture of Township Police (4.6871)	35% Capture of Township Fire (2.9032)	35% Capture of County Operating (3.9686)	35% Capture of County Parks & Rec (.3431)	35% Capture of County Transport (.95)	35% Capture of Huron Clinton Metroparks (.2070)	35% Capture of Oakland CC (1.4891)
Tax Year	Taxable Value of Real Property	Taxable Value of Personal Property	Captured TV Over Base Year	0.41594	1.64049	1.01612	1.38901	0.12009	0.33250	0.07245	0.52119
2023	105,726,120	9,129,460	0	0	0	0	0	0	0	0	0
2024	110,397,904	9,129,460	4,671,784	1,943	7,664	4,747	6,489	561	1,553	338	2,435
2025	127,709,841	9,129,460	21,983,721	9,144	36,064	22,338	30,536	2,640	7,310	1,593	11,458
2026	144,041,136	9,129,460	38,315,016	15,937	62,855	38,933	53,220	4,601	12,740	2,776	19,969
2027	160,862,370	9,129,460	55,136,250	22,933	90,450	56,025	76,585	6,621	18,333	3,995	28,736
2028	178,188,241	9,129,460	72,462,121	30,140	118,873	73,630	100,651	8,702	24,094	5,250	37,766
2029	183,533,888	9,129,460	77,807,768	32,363	127,642	79,062	108,076	9,344	25,871	5,637	40,552
2030	189,039,905	9,129,460	83,313,785	34,654	136,675	84,657	115,724	10,005	27,702	6,036	43,422
2031	194,711,102	9,129,460	88,984,982	37,012	145,979	90,419	123,601	10,686	29,588	6,447	46,378
2032	200,552,435	9,129,460	94,826,315	39,442	155,561	96,355	131,715	11,387	31,530	6,870	49,422
2033	206,569,008	9,129,460	100,842,888	41,945	165,431	102,468	140,072	12,110	33,530	7,306	52,558
2034	212,766,079	9,129,460	107,039,959	44,522	175,597	108,765	148,680	12,854	35,591	7,755	55,788
2035	219,149,061	9,129,460	113,422,941	47,177	186,069	115,251	157,546	13,620	37,713	8,217	59,114
2036	225,723,533	9,129,460	119,997,413	49,912	196,854	121,932	166,678	14,410	39,899	8,694	62,541
2037	232,495,239	9,129,460	126,769,119	52,728	207,963	128,813	176,084	15,223	42,151	9,184	66,070
2038	239,470,096	9,129,460	133,743,976	55,629	219,405	135,900	185,772	16,061	44,470	9,690	69,705
2039	246,654,199	9,129,460	140,928,079	58,618	231,190	143,200	195,751	16,923	46,859	10,210	73,450
2040	254,053,825	9,129,460	148,327,705	61,695	243,329	150,719	206,029	17,812	49,319	10,746	77,306
2041	261,675,439	9,129,460	155,949,319	64,866	255,833	158,463	216,615	18,727	51,853	11,299	81,278
2042	269,525,703	9,129,460	163,799,583	68,131	268,711	166,440	227,519	19,670	54,463	11,867	85,370
2043	277,611,474	9,129,460	171,885,354	71,494	281,975	174,656	238,750	20,641	57,152	12,453	89,584
				<b>840,285</b>	<b>3,314,121</b>	<b>2,052,774</b>	<b>2,806,089</b>	<b>242,597</b>	<b>671,719</b>	<b>146,364</b>	<b>1,052,902</b>

<b>Estimated Annual TIF Revenue</b>	
2023	
2024	<b>25,731</b>
2025	<b>121,081</b>
2026	<b>211,030</b>
2027	<b>303,678</b>
2028	<b>399,105</b>
2029	<b>428,548</b>
2030	<b>458,874</b>
2031	<b>490,109</b>
2032	<b>522,282</b>
2033	<b>555,420</b>
2034	<b>589,552</b>
2035	<b>624,708</b>
2036	<b>660,919</b>
2037	<b>698,216</b>
2038	<b>736,632</b>
2039	<b>776,200</b>
2040	<b>816,956</b>
2041	<b>858,934</b>
2042	<b>902,171</b>
2043	<b>946,706</b>
	<b>TOTAL</b>
	<b>11,126,852</b>

<b>POTENTIAL PROJECT VALUE:</b>		
2024	Commercial / Retail Development	1,500,000
2025	Commercial / Retail Development Mixed-Residential Development	14,000,000
2026	Mixed-Residential Development	12,500,000
2027	Mixed-Residential Development	12,500,000
2028	Mixed-Residential Development	12,500,000

\*The above table reflects 2024-2028 anticipated developments' taxable value in addition to annual 3% normal taxable value increase.

**TAX SHARING AGREEMENT BETWEEN THE  
COUNTY OF OAKLAND, WHITE LAKE TOWNSHIP, AND THE WHITE LAKE  
TOWNSHIP CORRIDOR IMPROVEMENT AUTHORITY**

THIS TAX SHARING AGREEMENT ("Agreement") is entered into this \_\_\_\_ day of \_\_\_\_\_, 2024 between the COUNTY OF OAKLAND ("County"), 1200 North Telegraph Road, Pontiac, Michigan, 48341, the TOWNSHIP OF WHITE LAKE ("Township"), 7525 Highland Road, White Lake, Mi. 48383-2900, and the WHITE LAKE TOWNSHIP CORRIDOR IMPROVEMENT AUTHORITY ("CIA"). In this Agreement, the County, the Township, and the CIA may be referred to individually as a "Party" and collectively as the "Parties."

On or about October 17, 2006, the White Lake Township Board adopted a Corridor Improvement Authority Ordinance in response to the fact that the Township did not have a traditional downtown district, and the Township desired to stimulate development and make improvements to major arterial connectors in the Township, primarily the M-59 corridor. After passage of the Ordinance an original Corridor Improvement Plan was prepared, but the Township Board took no further action to formalize the Authority at that time. In 2022, the Township Board began the process of updating the Tax Increment Financing ("TIF") plan and the Corridor Improvement Plan ("Plan"). On January 17, 2023, the Township Board appointed a five-person Corridor Authority Improvement Board. On November 28, 2023, the Township held a public hearing as required by MCL 125.4101, et. seq, being the Recodified Tax Increment Financing Act, Act 57, Public Acts of Michigan, 2018 ("Act 57"). One of the purposes of Act 57 is to permit a municipality to finance improvements in a designated "development area" as defined by Sec. 602 of the ~~Act~~ (Act (MCL 125.4602, et.seq.) by capturing the property taxes levied on any incremental increase in property values within



that development area. This process is commonly referred to as "Tax Increment Financing" or TIF.

The Plan adopted by the Township primarily addresses the M-59 corridor which is the only principal arterial East/West connector through the Township and is a gateway into the central portion of the community. The Plan includes several specific programs, projects and strategies designed to revitalize underutilized properties, improve visual appearance and encourage new development in the development area. A copy of the Plan is attached as Exhibit A.

Sec. 618(5) of Act 57 provides that the County has 60 days from the date of the November 28, 2023 public hearing to opt out of capture of County taxes by passage of a resolution to that effect and furthermore, Sec. 618(3) allows the County and the Township an opportunity to enter into an intergovernmental agreement to share a portion of the captured assessed value of the development area upon agreed terms and conditions. A resolution to that effect was passed by the Oakland County Board of Commissioners on January 26, 2024<sup>3</sup>.

The Parties agree that the Plan is a desirable and appropriate means of achieving the purposes of halting property value deterioration and increasing property values where possible in the development area, eliminating the causes of that deterioration; and promoting economic growth. Further, the Parties wish to enter into this Sharing Agreement, whereby each Party to this Agreement would be entitled to share in a portion of the incremental increase in tax revenue of the district as permitted by Act 57, in the manner set forth in this Agreement. The ad valorem property taxes levied on the subject properties are included in **Exhibit A, Appendix 3**.



Now, therefore, the ~~Parties parties~~ agree as follows:

1. In accordance with the following conditions, County agrees to allow the tax increment revenue generated by its millage rate to be captured from the properties listed in **Exhibit A, Appendix 1**, or any future divisions of such properties for the limited purpose of paying County's Pro-rata Share of the funding required for the Township Development Plan (**Exhibit A, Appendix 3**).

(a) "County's Pro-rata Share" is defined as County's proportionate share, as stated within, of the combined millage funds captured by the CIA from all participating taxing jurisdictions, which include: County of Oakland, White Lake Township, Oakland Community College and the Huron-Clinton Metropolitan Authority and any applicable future taxing jurisdictions that may be created after the date of this Agreement. With respect to the levy of any new additional millage by County, either to restore amounts reduced by the Headlee Amendment, or a new additional millage approved by County electors after the date of this Agreement, such millages shall be exempt from this Agreement unless the County Board of Commissioners, in its sole discretion, adopts a Resolution submitting such additional millages to this Agreement for capture by the CIA.

(b) The Plan is projected to cost approximately \$16,825,000 - \$24,850,000 over 20 years.

(c) The County's Pro-~~rata~~Rata Share of the captured millage funds (as also set forth in **Exhibit A, Appendix 3**) shall be as follows:

- (i) Oakland County Operating: 35%
- (ii) Oakland County Parks and Recreation: 35%

(iii) Oakland County Transit: 35%

The combined total dollar amount limitation on capture of all Oakland County millages by the CIA for this Plan is set at \$3,728,810.

If the total dollar amount of capture is reached during the term of this Agreement, regardless of the stated duration of the Plan, the contract will automatically terminate and no further capture by the CIA shall occur. Likewise, capture will cease immediately upon the date of termination of the Plan, as expressed in subsection (d) below, regardless of whether the total dollar amount of allowed capture has been achieved. All excess capture shall be refunded to the County by the CIA as provided in Section 4 below.

(d) The duration of the Plan shall be limited to 20 years.

(e) The base year to be used to calculate capture shall be: 2023

(f) White Lake Township, the CIA and County acknowledge that the total anticipated expenditure is an approximation only. The Project shall be subject to applicable public bid procedures and the final cost will be adjusted accordingly. However, notwithstanding the above acknowledgments, White Lake Township and the CIA agree that County's participation shall not exceed the amount or percentages of capture expressed in subsection (c), above, of this Agreement, or the total number of years of duration of the Plan described in subsection (d), above.

(g) In no event shall the capture from County's millage be used to bury utility lines, for land acquisition, municipal facilities used to house White Lake Township's departments or operations, or for event and marketing materials not directly related to the implementation of projects approved within the Plan.

(h) The elected or appointed officials of the Township, Township employees or their immediate family members, whether in their individual capacity or as officers, members, trustees, principals or employees of a legal entity shall not engage in a business transaction relating to property in the CIA/TIF District, which he or she may profit from because of his or her official position, authority or relationship or through benefit of confidential information which he or she may have obtained by reason of such position, authority or relationship. This provision does not prohibit members of the governing body of the Authority from having an ownership or business interest in the CIA/TIF District. Any plans by the Authority to purchase property in the CIA/TIF District from elected or appointed officials of the Township, Township employees, or their immediate family members whether in their individual capacity or as officers, members, trustees, principals or employees of a legal entity shall be immediately disclosed in writing to the County. "Immediate Family" shall be defined as Township elected or appointed officials or employees, their present or former spouse(s), parents, siblings or children.

(i) County capture shall not be used to accumulate funding to attract a developer to invest in the CIA.

(a) The CIA must provide the Oakland County Board of Commissioners and the Oakland County Economic Development Department with the following financial information:

- 1) Copies of any financial information or reports that are required to be submitted to the Michigan Department of Treasury set forth under Part 9 of [Act of Act 57](#), being MCL 125.4901, et. seq., specifically MCL 125.4911, as may be amended.

- 2) Within three (3) months after the end of the CIA's fiscal year, copies of any other financial information or documentation of development within the CIA as may be deemed necessary in the discretion of the Oakland County TIF Ad Hoc Review Committee ("TIF Ad Hoc Review Committee"). This information may include, but is not limited to, the following items:
- (i) The amount of taxes captured by the Authority.
  - ~~(ii) The amount spent on each project in the Plan.~~
  - ~~(iii)~~(ii) The amount of private sector investment received.
  - ~~(iv)~~(iii) \_\_\_\_\_ The number of buildings rehabilitated the square footage per building rehabilitated and the amount spent per building.
  - ~~(v)~~(iv) The amount of new construction including the dollar amount spent and the square footage added.
  - ~~(vi)~~(v) The number of new businesses locating in the CIA.
  - ~~(vii)~~(vi) \_\_\_\_\_ The number of new jobs created, and
  - ~~(viii)~~(vii) \_\_\_\_\_ The increase/decrease in taxable value.
- 3) A narrative report, submitted annually to the Oakland County Board of Commissioners and the Oakland County Economic Development Department, providing up to date information on the progress of each project enumerated in the Plan, including the amount spent on each project, a list of those projects which have been completed, the current status of those projects pending completion, and a description of and explanations for any significant deviations from the Plan document in terms of scope, cost, construction commencement or anticipated completion date(s) of any projects. The report shall also contain a summary of current budget



information, including Initial and Capture Assessed Value, Revenues, Expenditures, Capital Improvement Bonds/ Financing and Fund Balance. The CIA shall also provide to the Oakland County Economic Development Department any additional information it deems necessary with respect to those items described in this section.

(b) When requested by the County, Appropriate representative(s) of the Township and/or CIA shall appear before the TIF Ad Hoc Review Committee within the first ~~five~~ two (52) years after the date of execution of this contract, and annually each five (5) years thereafter, to discuss the status of the Plan, the financial information referenced in subsection (j), above, and to discuss the TIF district's current return on investment.

(c) Appropriate representative(s) of the Township and/or the CIA shall appear before the TIF Ad Hoc Review Committee at the first reasonable opportunity, but not later than 30 calendar days prior to the creation or expansion of other TIF districts, to advise the Committee of any other TIF districts created or expanded after the date of this Agreement, ~~as well as the requirement to terminate this Agreement should the amount of capture by the CIA exceed the cap on County capture specified in subsection 1 (c), above.~~

2. The CIA ~~shall may~~ use County captured funds only for ~~the following "permitted agreed upon projects"~~ in the TIF district. The "permitted projects" are those described in Exhibit A, Table 2 and summarized in Table 3, with the exception of the following... Such projects (list those **not** approved). ~~must include the construction or improvement to physical assets such as the construction of a building or improvements to a roadway. In the event of a deviation to the Plan by the CIA which results in the elimination of a~~

~~“permitted project” or a significant change in the scope, cost or construction deadlines~~ Each such project shall be completed by the date specified below, of any “permitted projects” funded by County capture, or if it is determined that County capture was used for a purpose other than a “permitted project”, the CIA may be subject, upon recommendation by the TIF Ad Hoc Review Committee to the County Board of Commissioners, to a revision in the Pro-Rata share of capture or the total dollar limitation on capture, as expressed in Section 1, above, to compensate for the change in cost due to elimination of or significant modification to a “permitted project.” In the event it is determined that there has been an excess capture due to an elimination or significant modification to a “permitted project”, or that funds were used for a purpose other than a “permitted project”, the excess capture of or the amount of the County’s taxes captured for the construction or improvement of such asset(s) must be refunded by the CIA/TIF to the County with interest at the rate of prime plus one (1) percent. Such permitted projects are described in **Exhibit A, Table 2 and summarized in Table 3, (with the exception of .... We would list any projects not permitted)** Such refund may be enforced in the manner provided in Section 4, below in addition to any other legal remedies.

3. The CIA and the Township shall submit to County's Economic Development Department and the TIF Ad Hoc Review Committee any proposed modification or amendments to the ~~CIA DDA~~ Development Plan and Tax Increment Financing Plan.
4. The Township and the CIA agree that they will in good faith notify the County of capture in excess of the amounts permitted by this Agreement, including any funds remaining in the CIA Fund Balance that was captured from County millages, at the conclusion of the

Plan Duration established in Section 1(d), above. - If upon written notice from County, the CIA and the Township fail to tender over to County, within sixty (60) days of the notice from County, the excess retained tax increment revenue, then without waiving any legal claims under this Agreement, County shall be entitled to reduce, set-off, and permanently retain any amount due to the Township from the County's Delinquent Tax Revolving Fund ("DTRF") by any such amount then still due and owing to County pursuant to this Agreement at the time the County distributes funds to the Township from the DTRF. ~~{CHECK THIS WITH FINANCE}~~

5. **Amendment.** The Parties agree that no modification of this Agreement, or any Exhibits or Amendments hereto, shall be of any force or effect unless such amendment is dated, reduced to writing, executed by all Parties and attached to and made a part of this Agreement. No services shall be commenced, and no costs or obligations incurred in anticipation of an amendment by any of the Parties until such amendment has been executed and made a part of this Agreement.
6. **Assignment.** This Agreement shall not be assigned, transferred or conveyed.
7. **Applicable laws.** This Agreement shall be governed, interpreted and enforced by the laws of the State of Michigan, excluding Michigan's conflict of laws principles. Any action brought to enforce, interpret or decide any provision of this Agreement or any claim arising under this Agreement shall be brought in the Sixth Judicial Circuit Court of the State of Michigan, the 50<sup>th</sup> District Court of the State of Michigan or the United States District Court for the Eastern District of Michigan, Southern Division, as dictated by the applicable jurisdiction of the Court. Except as otherwise required by law, venue is proper in the Courts set forth above.



8. **Waiver.** Waiver of any term or condition of this Agreement must be in writing and agreed to by all Parties. No written waiver, in one or more instances, shall be deemed or construed to be a continuing waiver of any term or condition of this Agreement. No waiver by any Party shall subsequently affect its right to require a strict performance of this Agreement.
9. **Severability.** If a Court of competent jurisdiction finds a term or condition of this Agreement to be illegal or invalid, then that term or condition shall be considered severed from the Agreement. All other terms, conditions and provisions of this Agreement shall remain in full force.
10. **Survival of Terms and Conditions.** The following terms and conditions shall survive and continue in full force beyond the termination or cancellation of this Agreement: Sec. 1(c),(d),(e),(f) and (j); Secs. 2, 4 , 7, 9,10,11,12 and 13.
11. **No Third Party Beneficiaries.** Except as provided for the benefit of the Parties, this Agreement does not and is not intended to create any obligation, duty, promise, contractual right or benefit in favor of any other person or entity.
12. **Liability; Release.** In no event shall the County be liable to any third party or entity for any consequential, incidental, direct, indirect, special, exemplary, treble, punitive or any other damages or claims arising out of or related to this Agreement or the Plan. The Township of White Lake and/or the White Lake Township CIA shall defend and indemnify the County to the extent permitted by law, from any and all damages and claims presented or brought forth by any third party, whether anticipated or unanticipated, in connection with this Agreement.



13. **Entire Agreement.** This Agreement sets forth the entire agreement between County, the Township and the DDA and fully supersedes all prior agreements or understandings between them in any way related to this subject matter. It is further understood and agreed that the terms and conditions herein are contractual and are not a mere recital and that there are no other agreements, understandings, contracts, or representations between the Parties in any way related to the subject matter hereof, except as expressly stated herein.

14. County, Township and the DDA warrant that they each have the appropriate authority to enter into this Agreement and that each of them, and their respective elected officials, appointed officials, agents, employees and successors are bound by the respective signatures below.

FOR AND IN CONSIDERATION of the mutual assurances, promises, acknowledgments, warrants, representations, and agreements set forth in this Agreement, and for other good and valuable consideration, the receipt and adequacy of which is hereby acknowledged, the undersigned hereby execute this Agreement on behalf of the Parties, and by doing so legally obligate and bind the Parties to the terms and conditions of this Agreement.

White Lake Township CIA

By: \_\_\_\_\_

Its: \_\_\_\_\_

Date: \_\_\_\_\_

White Lake Township

By: \_\_\_\_\_

Name

Its: \_\_\_\_\_

Date: \_\_\_\_\_

OAKLAND COUNTY

By: \_\_\_\_\_

Its: Chairperson Board of Commissioners

Date: \_\_\_\_\_

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