



VILLAGE OF LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY
21 East Church Street, Lake Orion, MI 48362

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

AGENDA

REGULAR MEETING OF THE LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY BOARD OF DIRECTORS

Tuesday, February 20, 2024
6:30 PM

Lake Orion Village Hall Council Chambers
21 East Church Street
LAKE ORION, MI 48362
(248) 693-8391 ext. 102

ADDRESSING THE DDA BOARD: Each person wishing to address the DDA Board shall be afforded an opportunity to do so. If you wish to comment, please stand or raise a hand to indicate that you wish to speak. When recognized, give your name and address and direct your comments to the Chair.

I. Call to Order 6:30 PM

II. Roll Call and Determination of Quorum

III. Approval of Minutes

1. DDA Board Regular Meeting Minutes - January 16, 2024
2. DDA Board Special Meeting Minutes - January 23, 2024
3. DDA Board Special Meeting Minutes - January 30, 2024
4. DDA Board Special Meeting Minutes - February 6, 2024

IV. Call to the Public

V. Consent Agenda

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

1. Director's Report
2. Financial Reports

VI. Approval of Agenda

By order of the President/Chair, no matters will be discussed after 10:30 p.m., unless council/board/commission votes to continue the meeting.

VII. Financial Matters

1. Bill Approval
2. Budget - 2024-2025

VIII. New and Old Business

1. Budget Amendment -Brand Marketing
2. DDA Staffing

IX. Reports

A. Executive Director

1. Verbal Director Report

B. Village Manager

X. Call to the Public

XI. Board Comments

XII. Next Regular Meeting - March 19, 2024

XIII. Adjournment

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

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



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DDA Board Meeting

DATE: February 20, 2024
FROM: Sonja Stout, Finance Director/Treasurer
SUBJECT: DDA Board Regular Meeting Minutes - January 16, 2024

RECOMMENDED MOTION: To approve the Downtown Development Authority Board Regular meeting minutes of Tuesday, January 16, 2024.

ATTACHMENT 2024-01-16 Approval of Minutes



VILLAGE OF LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY
21 East Church Street, Lake Orion, MI 48362

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

MINUTES

REGULAR MEETING OF THE LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY BOARD OF DIRECTORS

Tuesday, January 16, 2024

6:30 PM

Lake Orion Village Hall Council Chambers
21 East Church Street
LAKE ORION, MI 48362
(248) 693-8391 ext. 102

I. Call to Order

The Tuesday, January 16, 2024 Regular Meeting of the Lake Orion Downtown Development Authority Board of Directors was called to order in the Lake Orion Village Hall Council Chambers located in the 21 East Church Street, Lake Orion, MI 48362 by Chairperson Debbie Burgess at 6:30 PM.

II. Roll Call and Determination of Quorum

Attendee Name	Organization	Title	Status	Arrived
Debbie Burgess	Village of Lake Orion	Chairperson	Present	
Sam Caruso	Village of Lake Orion	Vice Chairperson	Present	
Matt Shell	Village of Lake Orion	Board Member	Present	
Henry Lorant	Village of Lake Orion	Secretary	Excused	
Chris Barnett	Village of Lake Orion	Board Member	Excused	
Alaina Campbell	Village of Lake Orion	Board Member	Present	
Lloyd Coe	Village of Lake Orion	Board Member	Excused	
Sally Medina	Village of Lake Orion	Board Member	Excused	
Jerry Narsh	Village of Lake Orion	President	Present	

STAFF PRESENT:

- Janet Bloom, Interim DDA Director
- Sonja Stout, Village Finance Director/Treasurer/Clerk

III. Approval of Minutes

Attachment: 2024.01.16 revised (6529 : 2024-01-16 Approval of Minutes)

Village of Lake Orion Downtown Development Authority Board of Directors Minutes

Regular Meeting, Tuesday, January 16, 2024

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1. DDA Board Regular Meeting Minutes -December 19, 2023

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Jerry Narsh, President
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

RESOLVED: To approve the Downtown Development Authority Board Regular meeting minutes of Tuesday, December 19, 2023.

IV. Presentation - MSOC Assessment Overview

Tim Colbeck, Senior Planner, MSOC, went over various checklist requirements for the MSOC assessment that is coming up for the Lake Orion DDA February 6th, 2024 assessment.

V. Call to the Public

Let the record show no public comments were received.

VI. Consent Agenda

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

Motion to: approve the Consent Agenda.

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Jerry Narsh, President
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

1. Director's Report

RESOLVED: To receive and file the DDA Executive Director's Report for January 2024.

2. Committee Minutes & Workplan and Event Updates

RESOLVED: To receive and File the Committee Meeting Minutes & Event updates.

3. Financial Reports

RESOLVED: To receive and file the financial reports for December 2023.

VII. Approval of Agenda

Attachment: 2024.01.16 revised (6529 : 2024-01-16 Approval of Minutes)

Village of Lake Orion Downtown Development Authority Board of Directors Minutes

Regular Meeting, Tuesday, January 16, 2024

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1. **Motion to:** add Agenda Item IX.7 MSOC Tech Visit and Agenda Item IX.8 Hazardous Materials Contract Approval to the Tuesday, January 16, 2024 DDA Regular Meeting Agenda.

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Jerry Narsh, President
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

2. **Motion to:** approve the Tuesday, January 16, 2024 regular meeting Agenda as amended adding Agenda Item IX.7- MSOC Tech Visit and adding Agenda Item IX.8 Hazardous Materials Contract Approval.

RESULT:	APPROVED AS AMENDED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Jerry Narsh, President
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

VIII. Financial Matters

1. Bill Approval

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Jerry Narsh, President
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

RESOLVED: To approve disbursements in the amount of \$17,412.03 for December 2023.

2. Budget - 2024-2025

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Jerry Narsh, President
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

RESOLVED: To Review and File the fy 2024-2025 DDA Budget with comment.

IX. New and Old Business

Attachment: 2024.01.16 revised (6529 : 2024-01-16 Approval of Minutes)

Village of Lake Orion Downtown Development Authority Board of Directors Minutes

Regular Meeting, Tuesday, January 16, 2024

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1. RFP Rebid Approval- Dumpsters

RESULT: ADOPTED [UNANIMOUS]
MOVER: Matt Shell, Board Member
SECONDER: Alaina Campbell, Board Member
AYES: Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED: Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

RESOLVED: To approve publication of the Dumpster RFQ rebid, and to appoint Board Member Shell, Vice Chairperson Caruso, and Chairperson Burgess to review and evaluate the proposals.

2. DDA Credit Card

RESULT: ADOPTED [UNANIMOUS]
MOVER: Matt Shell, Board Member
SECONDER: Jerry Narsh, President
AYES: Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED: Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

RESOLVED: To cancel current DDA credit card.

Motion to: obtain a new credit card for DDA Administrator Coordinator, Diane Kochis, at a \$1000 credit limit.

RESOLVED: To obtain a new credit card for DDA Administrator Coordinator, Diane Kochis, at a \$1000 credit limit.

RESULT: ADOPTED [UNANIMOUS]
MOVER: Matt Shell, Board Member
SECONDER: Sam Caruso, Vice Chairperson
AYES: Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED: Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

3. Parking Lease Agreement - 115 N. Broadway

RESULT: ADOPTED [UNANIMOUS]
MOVER: Matt Shell, Board Member
SECONDER: Alaina Campbell, Board Member
AYES: Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED: Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

RESOLVED: To approve the parking agreement for 115 N. Broadway for the use of eleven parking stalls on the south side of the lot in exchange for the maintenance of the

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Village of Lake Orion Downtown Development Authority Board of Directors Minutes

Regular Meeting, Tuesday, January 16, 2024

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lot with snow removal, weeding, mowing, and striping plus reimbursement of Tarr Properties taxes on the lot for five years, pending attorney review.

4. Budget Amendment - Lumberyard Property Tax

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Jerry Narsh, President
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

RESOLVED: To increase 301-905-745-001 Property Taxes - Orion Twp. \$3,353.36 and; To reduce 301-901-950-000 Demolition & Land Improvement, and reflect it in the balance sheet.

5. Budget Amendment -Brand Marketing (Orion Living)

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Sam Caruso, Vice Chairperson
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

RESOLVED: To increase 248-728-888-000 Brand Marketing by \$731.12 and;
To reduce 248-729-880-001 Event Promo - Gazebo Series account by \$29.93 and;
To reduce 248-729-880-017 Movie Night by \$701.19, totaling \$731.12 to be reflected in the balance sheet.

6. Budget Amendment - Legal Services

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Jerry Narsh, President
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

RESOLVED: To increase 248-260-810-000 Legal Services by \$144.15 and; to reduce 248-729-880-004 Event Promo - Halloween Parade account by \$144.15, to be reflected in the balance sheet.

Attachment: 2024.01.16 revised (6529 : 2024-01-16 Approval of Minutes)

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Regular Meeting, Tuesday, January 16, 2024

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7. 2024 MSOC Tech Visit Contract - Heritage Consulting

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Jerry Narsh, President
SECONDER:	Sam Caruso, Vice Chairperson
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

RESOLVED: To approve the fundraising proposal by Heritage Consulting, Inc. at the cost of \$11,873, of which, \$7,500 will be covered by MSCOC funds, for a final total for Lake Orion DDA of \$4,373. The Lake Orion DDA will remit the remainder of the funds, \$4,373, from account #248-260-829-000, Planning Services.

8. Contract Approval - Pre-Demolition Hazardous Materials and Asbestos Survey

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Sam Caruso, Vice Chairperson
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

RESOLVED: To execute the contract from Baker & Associates for Pre-Demolition Hazardous Materials and Asbestos Survey of the Lake Orion Lumberyard.

X. Reports, Resolutions and Recommendations

A. Executive Director

1. Verbal Director Report

Interim Janet Bloom gave a verbal director report on the following:

- Power Hour
- Upcoming Events would include Ice fest (February 10th, 2024) which is now a one-day event versus the previous month-long event as in the past and the Stronger together restaurant week event will be from February 24, 2024- March 3rd, 2024. Currently reaching out for more participants.
- Interim DDA Director, Janet Bloom has taken a tour with the DPW director Wes Sanchez, which has now made the Interim DDA Director more familiar with the Lumberyard property.
- MSOC Assessment is approved for February 6th, 2024. Currently working on compilations for the materials and data for that day. Attendance from

the board is required at 75%.

- Update on the S2 lot, which is behind Hanson's, the pipe connection for the stormwater should be done in the next few days.
- Looking at doing surveys between property owners and business owners to determine their temperature when it comes to the Paid Parking that is possibly being proposed to the Village in the future.
- DDA is currently working on reviewing the website and reviewing updates that need to be made on the Website.
- Job posting for the DDA Director was added to the Downtown Association of Website and went to a few other websites as well. Final submissions for the job posting DDA Director is due January 19, 2024, interview dates are January 24th 2024, January 31st 2024, and February 7th, 2024. Interview questions and guidance is available through Mainstreet Oakland County.

B. Village Manager

XI. Call to the Public

Let the record show no public comments were received.

XII. Board Comments and Training Feedback

Secretary Shell stated no comment at this time.

Vice Chairperson Caruso is looking forward to the MSOC evaluation and is looking to possibly get a 4.0 versus a 3.8 rating.

Board Member Campbell reiterates the comment from Vice Chairperson Caruso in regards to the hopes of getting a better MSOC rating. She also suggested the importance of frequenting the downtown businesses when it's this cold, there is a hard impact on the local businesses.

Board Member Narsh suggested supporting local businesses even with take out menus. January and February are usually the worst months for our local businesses.

Chairperson Burgess let Interim DDA Director Janet Bloom know she is appreciated and thanked her for being very present and moving items along. She is looking forward to the upcoming accreditation process. She also stated the importance of supporting local businesses at this time

Village of Lake Orion Downtown Development Authority Board of Directors Minutes

Regular Meeting, Tuesday, January 16, 2024

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of the year.

XIII. Next Regular Meeting - February 20, 2024

XIV. Adjournment

Motion to: adjourn the Tuesday, January 16, 2024 regular meeting of the Lake Orion Downtown Development Authority Board.

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Jerry Narsh, President
AYES:	Burgess, Caruso, Shell, Campbell, Narsh
EXCUSED:	Henry Lorant, Chris Barnett, Lloyd Coe, Sally Medina

The Tuesday, January 16, 2024 regular meeting of the Downtown Development Authority Board adjourned at 7:29 PM.

XV. Action Items

Debbie Burgess
Chairperson

Sonja Stout
Village Clerk

Date Approved: as presented February 20, 2024.

Attachment: 2024.01.16 revised (6529 : 2024-01-16 Approval of Minutes)



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DDA Board Meeting

DATE: February 20, 2024
FROM: Sonja Stout, Finance Director/Treasurer
SUBJECT: DDA Board Special Meeting Minutes - January 23, 2024

RECOMMENDED MOTION: To approve the Downtown Development Authority Board Special meeting minutes of Tuesday, January 23, 2024.

ATTACHMENT 2024-01-23 Approval of Minutes



VILLAGE OF LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY
21 East Church Street, Lake Orion, MI 48362

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MINUTES

SPECIAL MEETING OF THE LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY BOARD OF DIRECTORS

Tuesday, January 23, 2024

6:30 PM

Lake Orion Village Hall Council Chambers
21 East Church Street
LAKE ORION, MI 48362
(248) 693-8391 ext. 102

I. Call to Order

The Tuesday, January 23, 2024 Special Meeting of the Lake Orion Downtown Development Authority Board of Directors was called to order in the Lake Orion Village Hall Council Chambers located in the 21 East Church Street, Lake Orion, MI 48362 by at 6:30 PM.

II. Roll Call and Determination of Quorum

Attendee Name	Organization	Title	Status	Arrived
Debbie Burgess	Village of Lake Orion	Chairperson	Present	
Sam Caruso	Village of Lake Orion	Vice Chairperson	Present	
Matt Shell	Village of Lake Orion	Treasurer	Present	
Henry Lorant	Village of Lake Orion	Secretary	Excused	
Chris Barnett	Village of Lake Orion	Board Member	Late	6:32 PM
Alaina Campbell	Village of Lake Orion	Board Member	Excused	
Lloyd Coe	Village of Lake Orion	Board Member	Present	
Sally Medina	Village of Lake Orion	Board Member	Present	
Jerry Narsh	Village of Lake Orion	President	Excused	

STAFF PRESENT:

- Janet Bloom, Interim DDA Director
- Sonja Stout, Village Treasurer/Clerk

III. Statement by Chairperson or Vice-Chairperson Purpose of Meeting

The purpose of the meeting is to receive recommendations from the Lake Orion Downtown Development Authority (DDA) Committees regarding the fiscal year 2024-2025 budget. The

committees are as follows: Promotions Committee, Organization Committee, Design Committee, and Economic Vitality Committee.

In addition, this meeting includes a budget amendment for Legal Services.

IV. Public Comment

Let the record show No Public Comment was received.

V. New and Old Business

1. Budget Amendment - Legal Services

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Sam Caruso, Vice Chairperson
AYES:	Burgess, Caruso, Shell, Barnett, Coe, Medina
EXCUSED:	Henry Lorant, Alaina Campbell, Jerry Narsh

RESOLVED: To increase 248-260-810-000 Legal Services by \$144.15 and; to reduce 248-729-880-005 Event Promo - Hometown/Holiday Village account by \$144.15, to be reflected in the balance sheet.

VI. Items for Consideration

1. Budget - 2024-2025

Board members discussed various recommendations for the budget. The committees that were discussed were: Promotions Committee, Design Committee, Organization Committee, and the Economic Vitality Committee.

Board member Coe discussed various ideas for budgetary increases from the Design committee which included flower beds, hanging baskets, and possibly increasing flower basket sizes. He also discussed the dumpster enclosures and coming up with a solution is a goal for the upcoming year.

Interim DDA Director Bloom covered the Organization committee's requests which included reviewing the current Hudson Collective contract which is set to expire in June 30, 2024 and possibly modifying the bid specs/contract for the upcoming year.

Treasurer Shell covered the Economic Development committee and stated there would be no additional budget increase requests. He did mention the possibility of applying for some grants in the future to help out with the facade for some vacant businesses.

Board member Medina covered the Promotions committee and discussed various possibility for increases in the following categories: event promotions, Octoberfest, restaurant week, stronger together, athletic events.

Chairperson Burgess stated she really appreciated the feedback from the chair members on the budget proposals and she enjoyed hearing the feedback.

Board member Barnett requested an update on the interviewing process. The board went over the following dates in regards to the interviewing process, Wednesday, January 24, 2024 the committee will be reviewing applications and Thursday February 1st, 2024 interviews will be arranged. Currently there are 5 applicants now for the Director of Development Authority position.

NO MOTION: DDA Committee presentations for recommendations to fy 2024-2025 DDA Budget.

VII. Adjournment

Motion to: adjourn the Tuesday, January 23, 2024 special meeting of the Downtown Development Authority Board.

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Matt Shell, Board Member
SECONDER:	Debbie Burgess, Chairperson
AYES:	Burgess, Caruso, Shell, Barnett, Coe, Medina
EXCUSED:	Henry Lorant, Alaina Campbell, Jerry Narsh

The January 23, 2024 special meeting of the Downtown Development Authority adjourned at 7:02 PM.

Debbie Burgess
Chairperson

Sonja Stout
Village Clerk

Date Approved: as presented February 20, 2024.



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DDA Board Meeting

DATE: February 20, 2024
FROM: Sonja Stout, Finance Director/Treasurer
SUBJECT: DDA Board Special Meeting Minutes - January 30, 2024

RECOMMENDED MOTION: To approve the Downtown Development Authority Board Special meeting minutes of Tuesday, January 30, 2024.

ATTACHMENT 2024-01-30 Approval of Minutes



VILLAGE OF LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY
21 East Church Street, Lake Orion, MI 48362

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MINUTES

SPECIAL MEETING OF THE LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY BOARD OF DIRECTORS

Tuesday, January 30, 2024

6:30 PM

Lake Orion Village Hall Council Chambers

21 East Church Street

LAKE ORION, MI 48362

(248) 693-8391 ext. 102

I. Call to Order

The Tuesday, January 30, 2024 Special Meeting of the Lake Orion Downtown Development Authority Board of Directors was called to order in the Lake Orion Village Hall Council Chambers located in the 21 East Church Street, Lake Orion, MI 48362 by Chairperson Debbie Burgess at 6:30 PM.

II. Roll Call and Determination of Quorum

Attendee Name	Organization	Title	Status	Arrived
Debbie Burgess	Village of Lake Orion	Chairperson	Present	
Sam Caruso	Village of Lake Orion	Vice Chairperson	Present	
Matt Shell	Village of Lake Orion	Board Member	Excused	
Henry Lorant	Village of Lake Orion	Secretary	Present	
Chris Barnett	Village of Lake Orion	Board Member	Present	
Alaina Campbell	Village of Lake Orion	Board Member	Excused	
Lloyd Coe	Village of Lake Orion	Board Member	Present	
Sally Medina	Village of Lake Orion	Board Member	Present	
Jerry Narsh	Village of Lake Orion	President	Excused	

STAFF PRESENT:

- Janet Bloom, Interim DDA Director
- Sonja Stout, Village Treasurer/Clerk

III. Statement by Chairperson or Vice-Chairperson Purpose of Meeting

The purpose of the meeting is to discuss the fiscal year 2024-2025 budget, with Board review of requests and Committee recommendations from the January 23, 2024 Special Meeting. This meeting will also have a Closed Session for DDA Board Legal Counsel.

IV. Public Comment

Let the record show no public comment was made.

V. Items for Consideration

1. Budget - 2024-2025

The Special Meeting on January 23, 2024 allowed the following DDA Committees to make recommendations to the budget. Those committees are: Promotions Committee, Design Committee, Organization Committee, and Economic Vitality Committee. Each of the committees were allowed the option to add any additional comments and each committee declined any further comments.

Board Member Barnett stated to the board, the importance of a unified response in regards to questions about the DDA bond payment from the public.

Chairperson Burgess agreed on having a unified response from the DDA board members as well as DDA employees to help create a simple, uniform message to the public in regards to the DDA bond payments.

Chairperson Burgess asked about the breakdown of attorney fees for the DDA from the petitions. Interim DDA Director Bloom provided a cost breakdown which included the cost of \$12,425.98 is what has been spent on attorney fees. Interim DDA Director Bloom to determine the cost of increased services for the attorney to the DDA.

NO MOTION: DDA Board discussion from DDA Committee presentations for recommendations to fy 2024-2025 DDA Budget from January 23, 2024.

2. Closed Session

ADJOURN TO CLOSED SESSION AT 6:41 PM.

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Henry Lorant, Secretary
SECONDER:	Lloyd Coe, Board Member
AYES:	Burgess, Caruso, Lorant, Barnett, Coe, Medina
EXCUSED:	Matt Shell, Alaina Campbell, Jerry Narsh

Village of Lake Orion Downtown Development Authority Board of Directors Minutes

Special Meeting, Tuesday, January 30, 2024

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RESOLVED: to adjourn to Closed Session as permitted under the Open Meetings Act, PA 297 of 1976, as amended, Section 15.268e, discussion of pending litigation with DDA legal counsel.

Closed Session

RECONVENE TO OPEN SESSION AT 6:55 PM.

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Chris Barnett, Board Member
SECONDER:	Lloyd Coe, Board Member
AYES:	Burgess, Caruso, Lorant, Barnett, Coe, Medina
EXCUSED:	Matt Shell, Alaina Campbell, Jerry Narsh

RESOLVED: to adjourn to Closed Session as permitted under the Open Meetings Act, PA 297 of 1976, as amended, Section 15.268e, discussion of pending litigation with DDA legal counsel.

Motion to: approve recommended action to dismiss the current ballot litigation regarding election matter without prejudice with no additional cost or fees to current parties.

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Chris Barnett, Board Member
SECONDER:	Lloyd Coe, Board Member
AYES:	Burgess, Caruso, Lorant, Barnett, Coe, Medina
EXCUSED:	Matt Shell, Alaina Campbell, Jerry Narsh

VI. Adjournment

Motion to: adjourn the Tuesday, January 30, 2023 Special Meeting of the Downtown Development Authority Board.

RESULT:	ADOPTED [UNANIMOUS]
MOVER:	Lloyd Coe, Board Member
SECONDER:	Henry Lorant, Secretary
AYES:	Burgess, Caruso, Lorant, Barnett, Coe, Medina
EXCUSED:	Matt Shell, Alaina Campbell, Jerry Narsh

The Downtown Development Authority Board Special Meeting of Tuesday, January 30, 2024 adjourned at 6:58 PM.

Attachment: 2024.01.30 minutes draft updated (6558 : 2024-01-30 Approval of Minutes)

Village of Lake Orion Downtown Development Authority Board of Directors Minutes

Special Meeting, Tuesday, January 30, 2024

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Debbie Burgess
Chairperson

Sonja Stout
Village Treasurer/Clerk

Date Approved: as presented February 20, 2024.

DRAFT

Attachment: 2024.01.30 minutes draft updated (6558 : 2024-01-30 Approval of Minutes)



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

DDA Board Meeting

DATE: February 20, 2024
FROM: Sonja Stout, Finance Director/Treasurer
SUBJECT: DDA Board Special Meeting Minutes - February 6, 2024

RECOMMENDED MOTION: To approve the Downtown Development Authority Board Special meeting minutes of Tuesday, February 6, 2024.



VILLAGE OF LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY
21 East Church Street, Lake Orion, MI 48362

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

MINUTES

SPECIAL MEETING OF THE LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY BOARD OF DIRECTORS

Tuesday, February 6, 2024

9:00 AM

Lake Orion Village Hall Council Chambers
21 East Church Street
LAKE ORION, MI 48362
(248) 693-8391 ext. 102

I. Call to Order

The Tuesday, February 6, 2024 Special Meeting of the Lake Orion Downtown Development Authority Board of Directors was called to order in the Lake Orion Village Hall Council Chambers located in the 21 East Church Street, Lake Orion, MI 48362 by Chairperson Debbie Burgess at 9:00 AM.

II. Roll Call and Determination of Quorum

Attendee Name	Organization	Title	Status	Arrived
Debbie Burgess	Village of Lake Orion	Chairperson	Present	
Sam Caruso	Village of Lake Orion	Vice Chairperson	Present	
Matt Shell	Village of Lake Orion	Board Member	Excused	
Henry Lorant	Village of Lake Orion	Secretary	Excused	
Chris Barnett	Village of Lake Orion	Board Member	Excused	
Alaina Campbell	Village of Lake Orion	Board Member	Excused	
Lloyd Coe	Village of Lake Orion	Board Member	Present	
Sally Medina	Village of Lake Orion	Board Member	Present	
Jerry Narsh	Village of Lake Orion	President	Excused	

STAFF PRESENT:

- Janet Bloom, Interim DDA Director
- Diane Kochis, Administrative Coordinator
- Arizona Goulet, Events Coordinator

OTHERS PRESENT:

- Dana Walker, Michigan Downtown Association
- Annaka Norris, MSOC
- Erick Phillips, MSOC

III. Statement by Chairperson or Vice-Chairperson Purpose of Meeting**IV. Public Comment****V. Items for Consideration**

1. Annual Year End Main Street Evaluation Schedule

Annually, the National Main Street Center and Main Street Oakland County evaluate the Lake Orion DDA Main Street Program for accreditation. Lake Orion has been accredited since 2006.

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

The Main Street Community Assessment Visit has the following objectives:

1. Determine the progress the program has made to meet or maintain the current Main Street America Assessment Criteria.
2. Introduce the new Main Street America Standards and important steps for becoming familiar and start aligning this more holistic framework.
3. Recognize strengths and celebrate the growth and accomplishments of the past year.
4. Identify needs, trends and obstacles that might challenge the district and the program's efforts.
5. Determine technical assistance and services that can continue to grow and sustain the local Main Street Program.

The Main Street Community Assessment Visit consisted of the following:

9:00 am - 12:00 Noon: Introductory meeting with the Board of Directors, Committees, staff and other Main Street leaders.

- Overview of the new Accreditation Standards by MSA

Village of Lake Orion Downtown Development Authority Board of Directors Minutes

Special Meeting, Tuesday, February 6, 2024

Page 3 of 3

- MSA overview on how the Program meets current National Accreditation Criteria and expectations based on Program's self-assessment.
- Opportunity for the Main Street Board to highlight the organization's direction for the past year and its priorities.

12:00 pm-1:30: Lunch with Board Chair and Village Manager**1:30 pm:** Community Tour**2:30 pm:** Stakeholder Meeting

- Downtown business and building owners, residents, and representatives of organizations with a presence downtown to meet with the team and share their perspectives on the local economic environment and value of the Main Street program.
- City leaders and staff highlight the City's vision and support the district's revitalization and the Main Street program.

4:30 pm: Adjourn**5:00 pm:** Verbal Assessment with Main Street Board of Directors and staff**VI. Adjournment**

The Main Street Evaluation meeting adjourned at 5:50 PM.

Debbie Burgess
Chairperson

Sonja Stout
Village Clerk

Date Approved: as presented February 20, 2024

Attachment: 2024.02.06 Minutes draft (6574 : 2024-02-06 Approval of Minutes)

Main Street America and MSOC Year-End Evaluation

Lake Orion MI



February 6, 2024 (Tuesday)

PURPOSE AND SUMMARY

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

Your Main Street Community Assessment Visit has the following objectives:

1. Determine the progress the program has made to meet or maintain the current Main Street America Assessment Criteria.
2. Introduce the new Main Street America Standards and important steps for becoming familiar and start aligning this more holistic framework.
3. Recognize strengths and celebrate the growth and accomplishments of the past year.
4. Identify needs, trends and obstacles that might challenge the district and the program's efforts.
5. Determine technical assistance and services that can continue to grow and sustain the local Main Street Program.

AGENDA

- **9:00 a.m. Introductory meeting with the Board of Directors, Committees, staff and other Main Street leaders**
Location: Village Council Chambers, 21 E. Church St.
 - Overview of the new Accreditation Standards by MSA
 - MSA overview on how the Program meets current National Accreditation Criteria and expectations based on Program's self-assessment.
 - Opportunity for the Main Street Board to highlight the organization's direction for the past year and its priorities for 2023. **At least 75% of Board attendance is expected with advanced confirmation.**
- **Noon Lunch with Board Chair and Village Manager**
Location: Fork and Pint
- **1:30 p.m. Community Tour**
- **2:30 p.m. Stakeholder Meeting**
Location: Village of Lake Orion Council Chamber (virtual option available)
 - Downtown business and building owners, residents and representatives of organizations with a presence in downtown to meet with the team and share their perspectives on the local economic environment and value of the Main Street program.
 - City leaders and staff to highlight the City's vision and support to the district's revitalization and the Main Street program.
- **4:30 p.m. Adjourn**
- **5:00 p.m. Verbal Assessment with Main Street Board of Directors and staff**
Location: Village of Lake Orion Council Chambers
- **6:30 p.m. End of Evaluation**

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

Posted: October 17, 2023

Attachment: 2024.02.06 Minutes draft (6574 : 2024-02-06 Approval of Minutes)



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

DDA Board Meeting

DATE: February 20, 2024

FROM: Janet Bloom,

SUBJECT: Director's Report

Attached: Director's Report

Recommended Motion: To receive and file the Director's Report

2024 Director Report



February 2024

Prepared by
Janet Bloom
Interim Executive Director



Attachment: January 2024 Director Report-reduced size (6588 : Director's Report)

2024 STRATEGIES FOR

ECONOMIC DEVELOPMENT

DINING AND ENTERTAINMENT DISTRICT

DINING & ENTERTAINMENT DISTRICTS ARE DEFINED BY AN OVERWHELMING COMBINATION OF FANTASTIC DINING, NIGHTLIFE, SHOPPING, AND LIVE EVENTS IN ONE CONCENTRATED AREA.



PLACEMAKING

PLACEMAKING IS A PARTICIPATORY PROCESS FOR SHAPING PUBLIC SPACE THAT HARNESSES THE IDEAS AND ASSETS OF THE PEOPLE WHO USE IT.



COMMUNITY DEVELOPMENT

COMMUNITY DEVELOPMENT IS A PROCESS WHERE COMMUNITY MEMBERS WORK TOGETHER TO SOLVE PROBLEMS AND IMPROVE QUALITY OF LIFE.



WHAT IS ECONOMIC DEVELOPMENT?

ECONOMIC DEVELOPMENT IS THE PROCESS OF IMPROVING THE STANDARD OF LIVING FOR A COMMUNITY. IT INVOLVES JOB CREATION, SUPPORT FOR INNOVATION, WEALTH CREATION, IMPROVING QUALITY OF LIFE



Attachment: January 2024 Director Report-reduced size (6588 : Director's Report)

LAKE ORION GATEWAY PROJECT (LUMBERYARD)

PLAN OVERVIEW

Location: Lake Orion Lumberyard, 215 S. Broadway Lake Orion MI 48362

Property Purchased: August 28, 2023, DDA takes possession November 14, 2023

Goals and objectives: Updated by DDA Board, Jan 17, 2023

Design Charette, November 27th, 5pm - 7pm attended by approximately 50pp for an interactive program to get public participation regarding the future of Downtown Lake Orion.

March 2023: Public Q&A hosted by Village Manager and DDA Executive Director

April 2023: Village Council approved \$5M Bond Issue

June 2023: Bonds issued June 29, 2023, 301 Fund created

August 2023: Property Closed August 28, 2023, DDA takes possession of the property on November 14, 2023

September 2023: Proposal requests for demolition and hazardous materials survey

October 2023: Review Team Consults with Steve Auger regarding the bids. Recommends checking with AKA regarding the Hazardous Materials noting delays due to these can be costly if demolition is interrupted.

November 2023: AKT Peerless reviewed and made recommendations for the bid request. The request was reposted to the original vendors. Four of the original vendors responded to the re-bid. DDA Board appoints DDA Board Members Sam Caruso, Hank Lorant, Jerry Narsh and Chris Barnett to LO Gateway Project Committee

December 2023: Hazardous Materials Survey contractor selected by Bid Review Team for recommendation to the DDA Board. Gateway committee has initial meeting to review next steps in process. Committee plans initial meeting with developers in January.

January 2024: Baker and Associates selected for Hazardous Materials Survey. Plan to complete February 2024.

Attachment: January 2024 Director Report-reduced size (6588 : Director's Report)

FEBRUARY 2024

PROPERTY
DEVELOPMENT

PROPERTY DEVELOPMENT

MISSION STATEMENT

Location: Lake Orion Lumberyard, 215 S. Broadway Lake Orion MI 48362

Due Diligence ends: August 30, 2023

Goals and objectives: updated by DDA Board, Jan 17, 2023

The Lake Orion Lumberyard Project will create a gateway space on the south end of the downtown that

- honors the character of the community,
- provides more parking for the downtown,
- is balanced by pedestrian and event-friendly amenities, and
- improves the safety and ease of accessibility (Entrances & Exits) to the corner of Atwater and M24

It will be a legacy for future Lake Orion Stakeholders; focusing on

- enhancing Meeks Park and the Paint Creek Trail,
- adding some commercial and high-end residential buildings, and
- a multi-purpose event space with a flexible, open design

The Lake Orion DDA has requested support from the Village of Lake Orion Council for a \$5 million dollar bond. After purchase, the DDA will use the remaining funds to

- Address environmental issues present on the property and
- Build a foundational infrastructure on the property from which to build upon

The DDA will Invest in a multi-phase plan which clearly identifies parameters for all amenities.

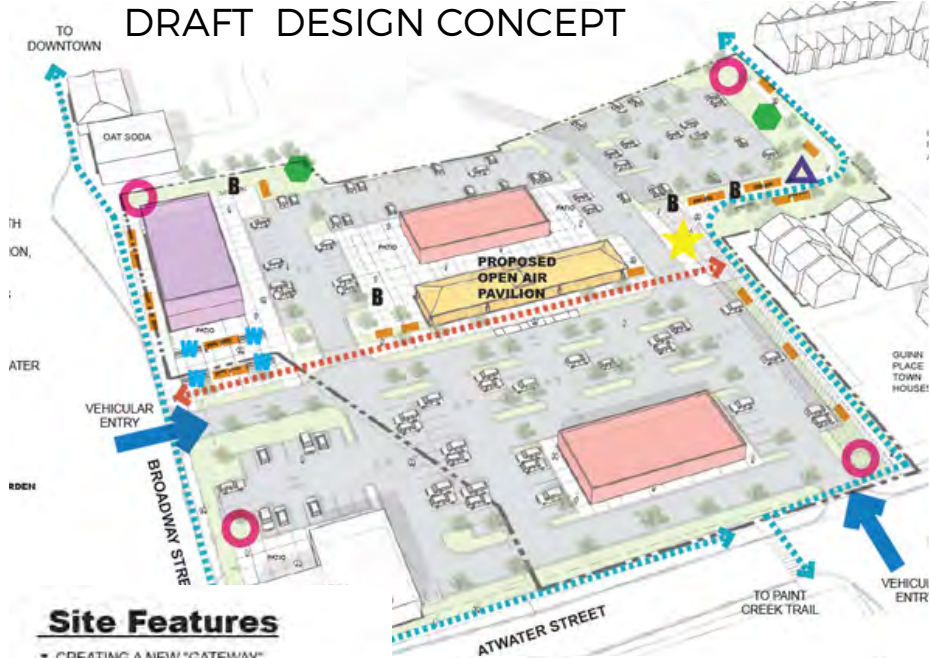
The DDA will augment their funding for this project by seeking private and public partners who can help achieve the vision for the Lake Orion Lumberyard Project.

Attachment: January 2024 Director Report-reduced size (6588 : Director's Report)

JANUARY 2024

PROPERTY
DEVELOPMENT

DRAFT DESIGN CONCEPT



Site Features

- CREATING A NEW "GATEWAY" TO DOWNTOWN LAKE ORION
- PROPOSED MULTIUSE EVENT PAVILION
- MAINTAIN EXISTING ATWATER TRAIL LOCATION ADD LANDING PAD PLAZA AREA WITH BIKE RACKS, BIKE REPAIR KIOSK, SEATING, AND EVENT SPACE FOR STARTING/FINISH LINES
- STRENGTHEN THE CONNECTION TO THE PAINT CREEK TRAIL AND REINFORCE DOWNTOWN LAKE ORION AS A TRAIL WAY DESTINATION WITH ADDITION OF NEW TRAIL PLAZA WITH SEATING PUBLIC ART, BIKE REPAIR STATION, BIKE RACKS, LANDSCAPE
- PROPOSED PUBLIC ART OPPORTUNITIES
- PROPOSED BUTTERFLY GARDEN OR COMMUNITY GARDEN OPPORTUNITY
- PROPOSED PLAZA WITH SEATING AND WATER FEATURE

Legend

- PROPOSED PUBLIC ART
- PROPOSED BUTTERFLY/COMMUNITY GARDEN
- PROPOSED WATER FEATURES
- PROPOSED TRAIL PLAZA EVENT SPACE
- PROPOSED SEATING AREAS
- PROPOSED BIKE REPAIR KIOSK
- PROPOSED BIKE RACKS
- EXISTING PEDESTRIAN ACCESS
- PROPOSED PEDESTRIAN ACCESS
- EXISTING VEHICULAR ACCESS
- PROPOSED VEHICULAR ACCESS

Attachment: January 2024 Director Report-reduced size (6588 : Director's Report)

FEBRUARY 2024

SHOP OAKLAND
E-COMMERCE

Participating Businesses in Lake Orion

- Amazing Petals
- Broadway Embroidery
- Caruso Chiropractic
- Cookies & Cream
- Lake Orion DDA
- Simply Marcella
- Roses of Silverbell
- And more to come!



Shop Now!



SHOP OAKLAND COUNTY
Main Streets

Attachment: January 2024 Director Report-reduced size (6588 : Director's Report)

LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY

Promotions Committee - First Tuesday, (Feb 8th) at 11am online and at DDA office
Committee Chair: Sally Medina, DDA Board Member

The Promotion Committee markets Downtown's unique characteristics to shoppers, investors, new businesses, tourists, and others while promoting retail events, special events and ongoing programs.

Design Committee - Third Monday, (Feb. 19th) at 2:30pm online (usually 3 pm)
Committee Chair: Lloyd Coe, DDA Board Member

The Design Committee works to improve the appearance of Downtown so that it is perceived as clean, safe and friendly while preserving its historic appeal.

Organization Committee - Third Wednesday, (Feb. 21st) at 11:30am, DDA Office
Committee Chair: Alaina Campbell, DDA Board Member

The Organization Committee works to communicate the vision, philosophy and activities of the Main Street organization to the community through membership and partnership development and a communications program.

Economic Vitality Committee - Fourth Thursday, (Feb. 22nd) at 11:30am, TBD
Committee Chair: Matthew Shell, DDA Board Member

The Economic Vitality Committee works to strengthen the economic base in Downtown by helping existing businesses to expand, recruiting new businesses for a balanced mix, and converting unused space into productive property.

DDA Business Power Hour - Third Thursday, (TBD) at TBD time, TBD location
Committee Chair: Dr. Sam Caruso, DDA Board Member

The DDA Business Power Hour is a meeting for business owners, managers, and employees to learn about upcoming events and projects and to provide feedback to the DDA

Attachment: January 2024 Director Report-reduced size (6588 : Director's Report)



2023 VOLUNTEER IMPACT

of the nationally Accredited Lake Orion Main Street program



**79 Total
Volunteers**



**851 Hours
Donated**



\$27,082
Equivalent Employee Salary

FEBRUARY 2024

MAIN STREET
ACCREDITATION

CONGRATULATIONS! WE ARE REACCREDITED FOR 2023!
More details to come and presentation and celebration to be planned!



Community Assessment Results - Y/E 2022

Standard 1: "Broad-based Community Commitment to Revitalization"

Strengths:

- United to face adversity by small minority – used this challenge as an opportunity to improve awareness of the DDA/Main Street
- Strong local business atmosphere
- Visibility in community throughout pandemic – proactively worked to support business owners and create opportunity for safe public gatherings (e.g., cornhole league, warming stations)
- Good working relationship with Village Manager

Opportunities:

Lake Orion is on the cusp of becoming an "it" town, creating unique challenges. Consider the following:

- Continue expanding relationships with large and small-scale developers
- Stay abreast on rising property value trends – advocate for smart housing growth
- Continue evaluating, implementing, and communicating progress on major initiatives in the downtown (e.g., parking study, Lumber Yard)
- Include neutral third-party experts to disseminate information, justify new projects, and to advocate for the DDA

Standard 2: "Inclusive Leadership and Organizational Capacity"

Strengths:

- DDA Board identifies annual priorities (e.g., public safety)
- Executive Director actively monitors committee progress on projects
- Multiple personnel/staff support

LAKE ORION DOWNTOWN DEVELOPMENT AUTHORITY

Attachment: January 2024 Director Report-reduced size (6588 : Director's Report)

Community Assessment Results - Y/E 2022 continued

Standard 2: “Inclusive Leadership and Organizational Capacity”, continued

Opportunities:

- Leverage network(s) of individual Board members to advocate for DDA and challenge false narratives
- Board members lead outreach and education
- Pursue new engagement by taking outreach to where people are and/or need to be reached
- Use special events as starting point for developing diversity
- Mentor new volunteers who are interested in a leadership role within the organization (committees, Board)
- Use demographic data to crosscheck/confirm DDA leadership representation

Standard 3: “Diversified Funding and Sustainable Program Operations”

Strengths:

- Ability to, and successful experience in, purchasing real estate
- Predictable and consistent revenue from DDA tax district (historically)
- Leverages events and activities to solicit sponsorship revenue
- Detailed budget alignment with work plan activities

Opportunities:

- Continue education efforts on how TIF district's function
- Explore alternate funding mechanisms in event TIF revenue fade—examples include: 501c3 or 501c6 status
- End-of-Year fundraising initiative
- Business supplier support (see sample letter) ▪ Additional state and national grant programs

Standard 4: “Strategy-Driven Programming”

Strengths:

- Incorporation of stakeholder's top concerns: parking, public safety, and gateway (Lumber Yard) redevelopment
- Coordination of community visioning for Lake Orion Lumberyard project
- Promotion of downtown as positive, thriving amidst pandemic
- Access to ongoing market data via Main Street Oakland County
- Detailed workplans for individual initiatives

Opportunities:

- Explore potential Transformation Strategy of making Lake Orion a place of steady activity (day and night, year-round)
- Consider a texting service that sends push notifications on things happening downtown
- Develop initiatives to promote existing parking options and consider new temporary (valet service, downtown trolley, create and enforcing parking limits, etc.)
- Find creative ways to attract M24 travelers downtown
- Grants to small businesses for back-of-building signage installation
- Develop design guidelines for tasteful billboards that do not jeopardize the integrity of the historic district (see Schuler's in Marshall)
- Rent existing billboards along M-24 to promote and direct people to downtown
- Use demographic data to crosscheck/confirm DDA leadership representation

Community Assessment Results - Y/E 2022 continued

Standard 5: “Preservation-based Economic Development”

Strengths:

- Streetscape project served as catalyst for reinvestment
- Purchasing of (and selling) two underutilized buildings that now add to the vibrancy of downtown
- First social district in southeast Michigan
- Increasingly diverse business representation and engagement

Opportunities:

- Position and promote Lake Orion as multimodal to counter lack of parking (see Ferndale, MI’s “Walk Ferndale” signage)
- Consider a “Lake Orion Fitness Month!” challenge
- Incorporate scavenger hunt program into parking lot discoveries
- Leverage existing assets and businesses who align with health/fitness
- Use existing Facebook Live and other media platforms to demonstrate where to park and how long it takes to walk from point A to point B
- Emphasize importance of shopping local in promotions/marketing to build further community support for downtown
- Continue developing programs and activities that support Lake Orion becoming a hub of activity (such as the recently retrofitted streetlights, crosswalk safety project, and increasing participation at “Power Hour”)

Standard 6: “Demonstrated Impact and Results”

Strengths:

- DDA has quickly increased communication with the community, emphasizing value/impact
- Strong marketing arm
- Collects testimonials in addition to quantifiable data
- Access to impact-sharing support from Main Street Oakland County (data template)

Opportunities:

- Explore development of a local ambassador or “influencer” program to support positive promotion of downtown
- Leverage existing marketing outlets (regional, state, national) to promote downtown and impact of DDA
- Include QR codes and/or fliers showcasing DDA’s impact in utility bills
- Utilize business owner’s POS systems to gather contact information to include in communications
- Use existing outreach platforms to invite the public into conversations regarding major projects (early and often)

ORGANIZATION COMMITTEE

CAMPAIGN FOR MAIN STREET

The Lake Orion DDA demonstrates its commitment to the Village of Lake Orion

What does it mean to be a good community partner? Being a community partner means:

- You are actively working together with others in your community to make positive changes.
- You are part of a team that cares about the well-being of everyone in the community, working towards common goals.

Community partners can be individuals, organizations, or businesses that collaborate with others to address important issues and create a better future for everyone. Here are fifteen ways the Lake Orion Downtown Development Authority (DDA) is a good community partner for the Village of Lake Orion:

1. **The DDA collaborates with Village Council** to identify ways to better serve the community and has set aside a significant portion of new capture (75% to the Village) for village-approved infrastructure projects.
2. The DDA uses taxes collected from the community to make improvements in the downtown area that **benefit the community as a whole**. Examples of this are: sidewalk and road improvements, directional signage, parking creation and maintenance, Paint Creek Trail extension and bike amenities, public restrooms at the Fire Hall, and new playground equipment in Children's Park.
3. **A higher share of the taxes collected are reinvested locally**. In 2023, over \$400,000, normally distributed throughout the county, instead will be reinvested in Lake Orion through the DDA. This is not an extra tax, rather, it is use of normally collected taxes.
4. **The DDA pays the village** for administrative services, police, public works services, utilities, and other shared costs, **which helps the village save money**.
5. **The DDA creates and maintains public spaces**, such as the Paint Creek Trail extension, Flint Street Alleyway, the Lake Orion Social District, and the new playground in Children's Park, which provide recreation opportunities for residents and visitors.
6. **The DDA manages the Main Street America Program**, through which the community has been accredited since 2006. Volunteers help make things happen through their participation in different Main Street Committees: Economic Vitality, Design, Promotions, and Organization. Having Main Street America accreditation helps the Village of Lake Orion and its businesses qualify for grants which help to pay for special projects like the playground equipment in Green's Park.

ORGANIZATION COMMITTEE

CAMPAIGN FOR MAIN STREET

The Lake Orion DDA demonstrates its commitment to the Village of Lake Orion - Continued

7. **The DDA decorates seasonally**, dressing up the town with flower baskets in the spring and summer, holiday lights on the trees in the winter, and decorative scenes on downtown windows throughout the year.

8. **The DDA markets Lake Orion and its businesses** through various channels (Facebook and Instagram pages, Orion Living Magazine, website, banners, a-frame signs, posters, ads in local publications, and weekly e-newsletters).

9. In Partnership with the Oxford DDA, **The DDA provides the Downtown Trolley Express** for free rides to and from each downtown.

10. **The DDA invests in projects that help the community thrive**, such as restoring Front Street, installing electric vehicle charging stations, and improving downtown lighting with Dark Sky technology.

11. **The DDA promotes and/or hosts 50 events and activities annually** to attract people to Downtown Lake Orion.

12. **The DDA enables downtown restaurants to be eligible for location-based Class C liquor licenses** at significant savings over traditional liquor licenses.

13. **The DDA manages the Social District** allowing customers to purchase a drink from a downtown restaurant to enjoy outside in town.

14. **The DDA offers Shop Local rewards programs** like Downtown Dollars and the Shopping Passport

15. **The DDA provides signage** throughout town which helps visitors navigate our town and learn about our history.

All of these efforts demonstrate the Lake Orion Downtown Development Authority's commitment to being a good community partner by reinvesting in the village, collaborating with Village Council, and helping the community to thrive.

FEBRUARY 2024

IDEA BANK

2023-2024

1.	CREEKSIDE LIGHTING	<input type="checkbox"/>
2.	ADOPT A GARDEN PROGRAM (\$2,500 FLAGSTAR GRANT)	<input checked="" type="checkbox"/>
3.	TASTE OF TOWN IN ALLEYWAY	<input type="checkbox"/>
4.	STEAMPUNK ART & ADAPTIVE REUSE DESIGN BRUCE ROSENBAUM (MODVIC.COM)	<input type="checkbox"/>
5.	DIGITAL MARQUEE	<input type="checkbox"/>
6.	PORTABLE MONITOR FOR SPONSOR RECOGNITION	<input type="checkbox"/>
7.	ELABORATE SEASONAL PICTURE SPOTS (LIKE OXFORD FALL TRUCK SCENE)	<input type="checkbox"/>
8.	TRASH BIN BEAUTIFICATION (PARTENSHIP WITH HS ART DEPT)	<input type="checkbox"/>
9.	AMERICA IN BLOOM INTEGRATION (TWP HOSTING SYMPOSIUM IN 2025)	<input type="checkbox"/>
10.	OPEN HOUSE TOUR OF PROPERTY (SNOW FENCE FOR PUBLIC SAFETY	<input type="checkbox"/>
11.	SAFETY CROSSWALK SIGNAGE IN STREET (DISCUSS WITH LOPD) SEE PHOTO	<input type="checkbox"/>
12.	PROPERTY OPEN HOUSE - TICKETED EVENT SNOW FENCING FOR PUBLIC SAFETY AND POSTERS OF PROPOSED AMENITIES IN PROPOSED LOCATION	<input type="checkbox"/>
13.	RIDGELINE LIGHTING AND SPANNER LIGHTING - MAIN INTERSECTION	<input type="checkbox"/>
14.		<input type="checkbox"/>



15.	<input type="checkbox"/>
16.	<input type="checkbox"/>
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28.	<input type="checkbox"/>

Attachment: January 2024 Director Report-reduced size (6588 : Director's Report)

FEBRUARY 2024

MAJOR MILESTONES

MILESTONES

Branding & Outreach

- Branding Kit - colors, font, logos, style
- Brand Marketing
- E-Newsletters
- Orion Living Magazine
- Podcast Series
- Educational Campaigns through Editorial Ads, Social Media, and Direct Mail postcards
- Samet Backyard Meet & Greet Neighborhood event
- Legislative Tour with Orion Area Chamber of Commerce

Historic Preservation

- Historic Signs - downtown
- Downtown History - Website
- Timeshift History Videos - Downtown
- Historic Building Facade Grants

Physical Improvements

- Front Street restoration to 2 way traffic
- Wayfinding Signage
- Overall street and sidewalk improvements
- Dark Sky compliant streetlamp retrofit
- Bond issue for Lumberyard Project
- "Enter the Dragon" Mural
- Flint Street Alleyway Lighting
- Eagle Scout project benches
- Seasonal downtown Decorations including holiday tree light and Summer hanging baskets

Business Support

- Match On Main Business support
- Patronicity Business Support Campaign
- PPE
- Destination Business Boot Camp
- Shop Oakland Business Set Up Assistance
- Monthly Business Power Hour
- Event Logistics communication

Parking

- Anderson/Front Parking Lot
- Art Center Parking Lot and Restroom
- Slater Parking lot
- Shared Parking Leases
- Parking Study updates (2018 and 2020)
- Safety Path Slater Street Parking lot Anderson Street
- Electrical Vehicle Charging Stations

Alt Transportation

- Paint Creek Trail Extension
- Art Center Bike Parking
- Children's Park Bike Parking
- Meeks Park Bike Parking
- Public Boat Docks

Parks

- Playground Equipment - Children's Park
- Electrical upgrades - Gazebo
- First Responder boat docks
- Paint Creek Bank Stabilization match funds
- Pedestrian Safety railing improvement Children's Park

Events

- #StrongerTogether Events with Oxfam
 - Trolley
 - IceFest
 - Summer Social
 - Witches Night
 - Restaurant Week
 - Letterboxing
- LOLive! Music Summer Series
- Halloween Extravaganza
- Sing & Stroll Tree Lighting
- Small Business Saturday
- Here Lies Lake Orion Cemetery Tour
- Overall Event Promotion - all events

Attachment: January 2024 Director Report-reduced size (6588 : Director's Report)

2024 DDA BOARD MEETINGS - 6:30PM, VILLAGE COUNCIL CHAMBERS



Attachment: January 2024 Director Report-reduced size (6588 : Director's Report)

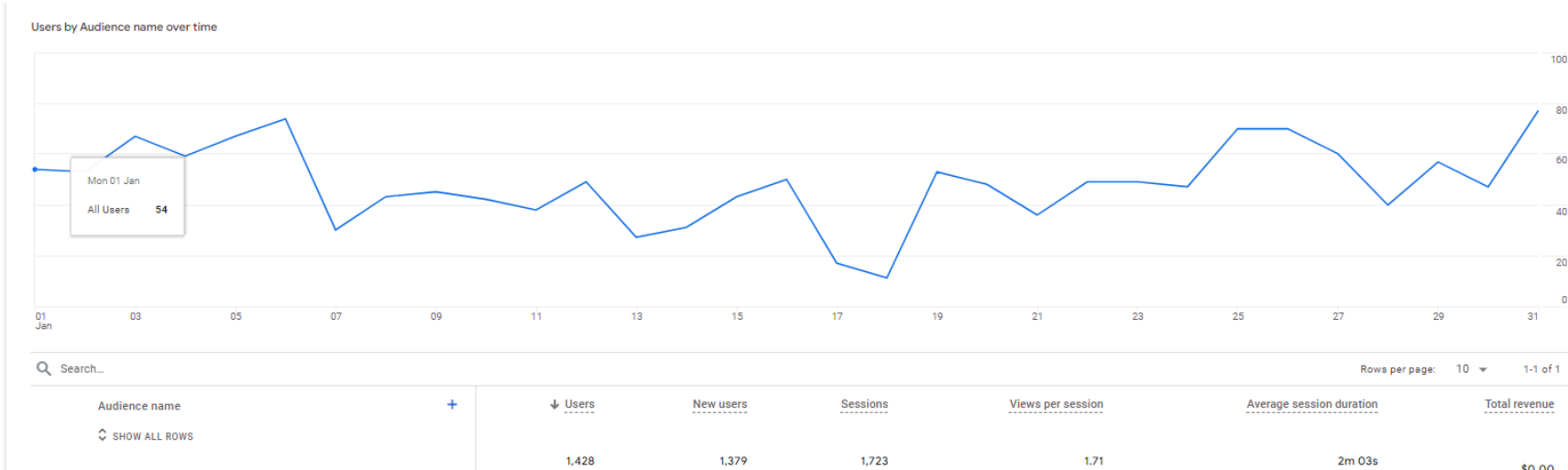
Website Analytics
January 2024

To: Lake Orion DDA Board of Directors
From: Molly LaLone, Executive Director

View our website at: www.downtownlakeorion.org


Audience:

- 1,723 Sessions
- 1,379 New Users



New Users:

New users by
First user primary ...



FIRST USER PRIMA...	NEW USERS	
Organic Search	1K	↓ 24.8%
Direct	254	↓ 18.3%
Organic Social	60	↓ 43.4%
Referral	41	↓ 2.4%

Page Views:

Views by
Page title and scree...



PAGE TITLE AND S...	VIEWS	
downtownlakeorion....	378	↓ 31.1%
Events downtownla...	164	↓ 33.3%
Downtown Lake Orio...	173	↓ 22.8%
downtownlakeorion...	89	↓ 64.7%
Horse & Carriage Rid...	11	↓ 96.3%
Business Directory ...	104	↓ 24.1%
About Us downtown...	106	↑ 17.8%



Lake Orion DDA Social Report

January 1 - December 31, 2023

Summary

This report is prepared for the Lake Orion DDA by Hudson Collective. If you have any questions, feel free to reach out to the HC team.

Key Findings:

1. Video outperformed all other mediums
2. Photos outperformed graphics
3. Facebook performed the best of the three platforms

Performance

 Downtown Lake Orion

Lake Orion DDA Facebook content had 74,778 users interact with our content and 104,500 page and post engagements over fewer posts than the previous year.

Facebook earned more than 10,000 link clicks in the same time frame.

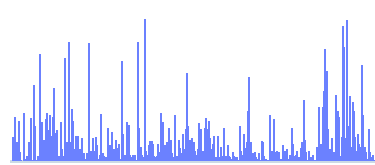
Daily average engagements, impressions and link clicks showed significant increases in 2023.

Engaged Users 74,778 ↗ 26%	Post Impressions 813,761 ↘ 18%	Reactions 10,982 ↘ 15%	Post Reach 548,924 ↘ 16%
Page & Post Engagements 104,500 ↗ 23%	Link Clicks 10,267 ↗ 15%	New Fans 463 ↘ 45%	Posts 525 ↘ 4%

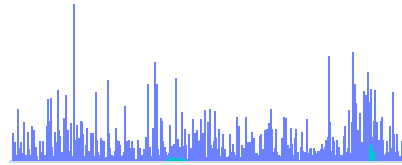
Average performance

 Downtown Lake Orion

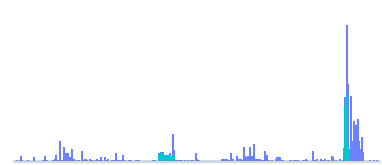
These charts show daily performance. Each line represents a day of the month.



Daily average engagements
286 ↗ 23%



Daily average impressions
3,239 ↗ 23%



Daily average clicks
185 ↗ 671%

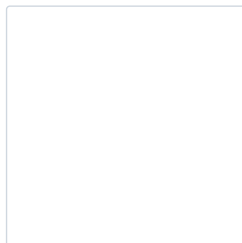
Post insights

 Downtown Lake Orion

Top performing posts on Facebook for January 1 - December 31 of 2023.

Showing 5 posts in total

Sorted by Impressions



November 10, 2023 07:00pm

It's official! As of today, the Lake Orion lumber yard property is in the hands of the village of Lake Orion. The DDA has big plans for the property, including a potential event space and extra parking for the city. The lumber yard

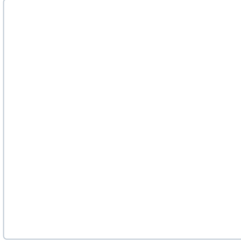
Post Clicks	Reactions	Impressions	Reach	Eng. Rate	Spend
8,909	305	29,555	28,469	29.45%	\$20



January 31, 2023 12:47pm

Ice Fest begins this Thursday!! Grab a social district drink and enjoy the live ice carving show by Clear Cut Ice Sculptures from 5-8pm. Horse & Carriage Rides Feb. 2nd ONLY from 4:30-8:30pm! Thank you to our Week 1 sponsor!

Post Clicks	Reactions	Impressions	Reach	Eng. Rate	Spend
576	63	17,469	14,183	4.14%	—



November 25, 2023 01:00pm

Don't miss the Downtown Trolley this December! The Trolley will be running on the following schedule: December 1: 5-9p with an additional stop at Ox Marketplace December 2: 3-5p NOTA bus will run 5-10p December 3:

Post Clicks	Reactions	Impressions	Reach	Eng. Rate	Spend
1,058	417	17,183	15,284	7.47%	\$40
\$		\$	\$		



February 25, 2023 10:08am

There is still time to get downtown and see this week's amazing sculptures!! Clear Cut Ice Sculptures did not disappoint this season. See castle Grayskull sponsored by Mocer Companies, Scrooge McDuck from Michigan U

Post Clicks	Reactions	Impressions	Reach	Eng. Rate	Spend
4,604	44	14,304	13,097	32.59%	—



December 26, 2023 01:01pm

Keep an eye out while you're strolling the streets of our historic downtown! In partnership with Orion Historical Society and TimeShift America, the Lake Orion Historical Society has added "A Moment in Time" information

Post Clicks	Reactions	Impressions	Reach	Eng. Rate	Spend
2,202	303	12,812	9,162	52.54%	\$25
\$		\$	\$		

Answers overview

Downtown Lake Orion

This notes the best day and time to post on Facebook for optimal engagement. We have used this to inform our posting strategy.



Best day to post
Sunday



Best type of post
Video



Best frequency to post
5 posts a day

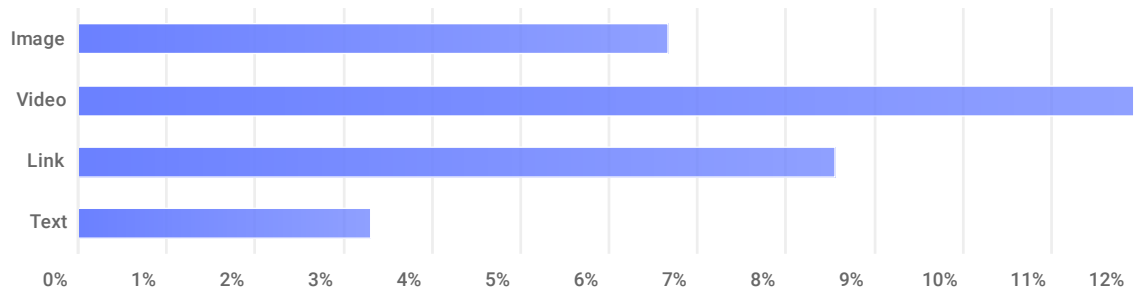
Which is the best type of post?

 Downtown Lake Orion


The upcoming business highlight videos will boost engagement.

Video

When crunching the numbers, we've worked out that this is the best way to earn the highest engagement



Performance

 Downtownlakeorion

Across Feed and Story placements, the Lake Orion DDA Instagram reach increased to more than 100,000 unique users as well as 144,763 impressions.

Posts

164 ↗ 11%

Impressions

144,763 ↘ 1%

Post Reach

102,226 ↗ 4%

Likes

2,342 ↘ 36%


Comments

61 ↘ 44%

New Followers

281 ↘ 12%

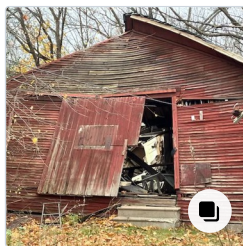
Post insights

 Downtownlakeorion

Top performing posts on Instagram for January 1 - December 31 of 2023.

Showing 5 posts in total

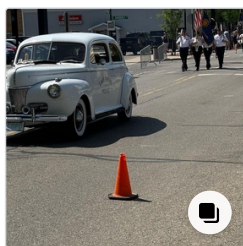
Sorted by Likes



November 10, 2023 07:00pm

It's official! As of today, the Lake Orion lumber yard property is in the hands of the village of Lake Orion. The DDA has big plans for the property including a potential event space and extra parking for the city. The lumber yard

Likes	Comments	Impressions	Reach	Eng. Rate	Spend
188	19	2,896	2,385	7.32%	—



May 29, 2023 04:26pm

Downtown Lake Orion Memorial Parade.

Likes	Comments	Impressions	Reach	Eng. Rate	Spend
82	0	1,256	980	6.53%	—



Ride through downtown Lake Orion in a festive horse & carriage this Holiday Season! Thanks to our sponsors, Michigan United Credit Union, and Pronto Moving Company, there is no cost to ride. The carriage will be available

Likes	Comments	Impressions	Reach	Eng. Rate	Spend
78	0	1,130	1,068	7.08%	—



January 16, 2023 07:43pm

My elderly neighbor has a sweet cat who needs a home. His Name is Toughy. He is 13 years old and neutered. Indoor only cat. He is good with one other cat. He is a long haired calico. Very sweet and loves to be brushed. <#>

Likes	Comments	Impressions	Reach	Eng. Rate	Spend
73	1	1,749	1,612	4.52%	—



October 17, 2023 01:01pm

Allen Goetz, along with several other local residents, founded 20 Front Street in 2016. Since then, it has become known as one of the top independent venues in the country. 20 Front Street offers its patrons a unique and

Likes	Comments	Impressions	Reach	Eng. Rate	Spend
70	0	1,455	1,364	5.70%	—

Hashtag performance



@towntownlakeorion

Rank	Hashtag	Posts	Average Reach	↓	Average Eng. Rate
1	#winterfun	1	1,211		3.46%
2	#RestaurantWeek	1	1,209		2.56%
3	#StrongerTogether	11	905		2.63%
4	#letterboxing	1	717		1.65%
5	#Foodies	3	712		2.53%

Performance



Lake Orion DDA Twitter (X) content earned 13,485 impressions and 170 engagements from January - December of 2023.

Twitter engagements, replies and likes saw increases of 46%, 67% and 100%, respectively.

Tweets	Retweets	Impressions	Engagements
140 ↗ 95%	1 ↘ 83%	13,485 ↗ 28%	170 ↗ 46%
Replies	Clicks	Likes	New Followers
5 ↗ 67%	22 ↘ 8%	102 ↗ 100%	-1 ↘ 103%

Tweet insights



These are the top 5 performing posts for January 1 - December 31 of 2023.

Showing 5 posts in total

Sorted by Impressions

Zombies are taking over Lake Orion! Ed's Broadway Gift and Costu...

September 12, 2023 07:30pm

Zombies are taking over Lake Orion! Ed's Broadway Gift and Costume's 10th Annual Zombie Walk and Poker Run takes place on Saturday, September 16th, 2023 at 8pm in Downtown Lake Orion. Adults: \$10 Kids: Free Poker

Clicks	Retweets	Likes	Impressions	Eng. Rate
0	0	3	361	0.80%

Our Annual Jubilee event put on by the Lake Orion Lions Club is ...

June 20, 2023 05:01pm

Our Annual Jubilee event put on by the Lake Orion Lions Club is this weekend! There will be a carnival, a beer tent, and so much more! Come help the Lion's Club raise money for our community! #LakeOrion #DowntownLake

Clicks	Retweets	Likes	Impressions	Eng. Rate
0	0	3	348	1.10%

The Orion Township Public Library offers the community so much m...

August 31, 2023 07:01pm

The Orion Township Public Library offers the community so much more than books. Members can also borrow audiobooks, movies, household items, tools, tech & more! 825 Joslyn Road, Lake Orion, MI 48362 #LakeOrionDL

Clicks	Retweets	Likes	Impressions	Eng. Rate
0	0	3	317	1.30%

No, your taxes would NOT go down if the #LakeOrionDDA was defund...

August 30, 2023 05:00pm

No, your taxes would NOT go down if the #LakeOrionDDA was defunded. Without the DDA, the taxes currently collected would go to other entities, instead of being reinvested into downtown. #LakeOrion would actu

Clicks	Retweets	Likes	Impressions	Eng. Rate
0	0	2	207	2.40%


Everything kicks off tomorrow for the annual Dragon on the Lake ...

August 23, 2023 07:05pm


Everything kicks off tomorrow for the annual Dragon on the Lake Festival. Boat races, chalk art, a tiki bar, lighted boat parade, vendor markets, kids' activities and more await. There's something fun for Dragons of all s


Clicks	Retweets	Likes	Impressions	Eng. Rate
0	0	3	201	1.50%


Answers overview

 LakeOrionDDA

This notes the best day and time to post on Twitter for optimal engagement. We have used this to inform our posting strategy.

 Best day to post
Friday

 Best type of post
Link

 Best frequency to post
1 post a day

Michigan Downtown Association

Certificate of Proclamation

Lake Orion Downtown Development Authority

WHEREAS, Michigan downtowns distinguish a community, are the drivers of economic development, and help to offer a sense of place that contribute significantly to the quality of life of residents; and,

WHEREAS, a downtown is the commercial core of a community that serves as its social and economic center; and,

WHEREAS, since 1975, the State of Michigan has enabled Downtown Development Authorities (DDAs) to utilize Tax Increment Financing (TIF) to invest in infrastructure improvements, redevelopment of blighted areas, job creation, and events and promotions that make downtowns relevant, exciting and a key reason why people choose to live in a community; and,

WHEREAS, DDAs that use TIF are self-sustaining, because as a DDA invests in the district, property values increase and as property values increase, the DDA can complete more projects within the DDA District; and,

WHEREAS, DDAs comprehensively manage downtowns to maximize the local economy and help fund significant projects and on-going economic development activities to improve the quality of life, retain residents, attract talent and support private reinvestment; and,

WHEREAS, the Lake Orion DDA undertook a series of events and activities in an educational campaign to inform the public regarding a land acquisition project and promoted the purpose and importance of a DDA;

NOW THEREFORE, the Michigan Downtown Association, founded in 1980 and a state-wide, non-profit organization and driving force in the interest and growth of downtowns and communities throughout Michigan, do hereby recognize and proclaim the Lake Orion Downtown Development Authority as the recipient of the 2023 MDA Best Educational & Promotional Campaign for their Lake Orion Educational Campaign.

Cristina Sheppard-Decius

Cristina Sheppard-Decius

Chair

Michigan Downtown Association



November 3, 2023



Village of Lake Orion

Development Training Strategy

Original Plan published: April 2022
Updated Plan Published: October 2023

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General Information

Introduction

The Village of Lake Orion encourages ongoing training for staff, elected official, and appointed officials charged with making development related decisions for the community. The Village of Lake Orion engaged with the Michigan Economic Development Corporation's (MEDC) Redevelopment Ready Communities (RRC) program in September 2019 to help enhance its local planning, zoning, and development review process. Since that time, the village has made steady progress towards achieving RRC Essentials status and continues to work towards establishing an effective and useful method of keeping local officials up to date on critical development concepts.

In recognition of the village's self-investment in other RRC Best Practices, RRC staff has dedicated time and resources to provide this training strategy as a direct form of technical assistance to the village. The village incurred no cost for this project aside from a small amount of time to coordinate with RRC staff and ask officials to take a brief survey and review the draft document prior to finalization.

The Development Training Strategy aims to help identify resources available to these individuals to foster a more productive, collaborative, and informed decision-making process. This guide is not meant to be an exhaustive list of trainings available, but to be used to encourage continuing education and explore potential opportunities for such. The availability of trainings listed in this guide is subject to change at any time.

The RRC program includes best practices and benchmarks related to recruitment and training for the community's development-related boards/commissions. Lake Orion' development decision-making boards and commissions include the following:

Village Council
Planning Commission
Downtown Development Authority
Zoning Board of Appeals

Specifically, [Best Practice 4.6](#) encourages communities to adopt a more strategic approach to training to ward off fatigue, apathy, and general time constraints that can hinder delivery of necessary training for board members to stay up to date on the information needed to make informed decisions. As with any strategic document, it establishes high level goals which are realized via the specific training strategies for each board. The goals have been extrapolated from the Lake Orion 2022 Training Survey and are as follows:

- Goal 1:** Expand the village's toolbox of training to include new methods and resources.
- Goal 2:** Meet the established annual training hours for each board.
- Goal 3:** Tie training activity to established local goals and needs.
- Goal 4:** Enhance board and commission knowledge for enhanced community outcomes.

Initial Assessment

This strategy aims to identify goals and expectations for training opportunities, identify ongoing funding sources for those opportunities, and identify how training is encouraged. To inform this strategy, a survey was sent out in February of 2022 to all Lake Orion Council Members, Downtown Development Authority Members, Planning Commission Members, and Zoning Board of Appeals Members. Of the twenty members, seven responded to the survey (not including the Village Manager), providing an 35% response rate. [Members were asked a total of 13 questions and a summary of those questions and results can be found by following this link.](#) All the information contained in this Guide is based on the responses provided by board and commission members. All development related boards and commissions should discuss training opportunities annually and determine needs as they arise. The Guide is to be updated every other year, at the beginning of each new calendar year. A new survey should be conducted each year to solicit the training preference of board and commission members and the updated Guide should be built accordingly.

Importance of Training

Members of Lake Orion's development related boards and commissions make important decisions for the community which can reach far into the future. As such, it is important to prioritize continued education and onboarding training for appointed and elected board members and staff. Ongoing training is an important form of risk management that will help the village avoid potential planning and zoning lawsuits. Training also helps align the Master Plan goals and objectives with the Village's planned projects and utilization of resources.

Staff Contact

Each Board and Commission member is encouraged to reach out to their staff liaison with suggestions and requests for training. Although this guide provides a recommendation on training curriculum, it is important that boards and commission members communicate to village staff if they are interested in certain training opportunities to pursue, either individually or as a group. Village staff will communicate potential training opportunities to boards and commission members as they become available.

Joe Young, Village Manager - youngj@lakeorion.org

Susan Galeczka, Clerk - galeczkas@lakeorion.org

Molly LaLone, DDA Executive Director - director@downtownlakeorion.org

Hunter Whitehill, Economic Development Director – zoning@lakeorion.org

Types of Training

Article Discussions

Staff may present articles of interest and relevance which may facilitate general group education and discussion.

Webinars & YouTube Videos

Many of our training partners and organizations offer online resources and presentations on relevant development and land-use topics. Webinars allow individuals to save time and money, avoid the need to travel, and gain an added element of convenience and flexibility to suit trainee's schedules.

On-Site Training Workshops

This allows for training topics to be brought in-person to Village Hall, these types of trainings are typically provided by industry professionals or other experts in the field. It is more convenient and often more cost-effective for large groups rather than traveling to an off-site conference. On-site workshops also allow for collaboration between boards and commissions and potentially with other communities.

Off-Site Conferences and Workshops

These trainings are available across Michigan and the country. They cover a wide variety of topics and allow for networking in addition to educational benefit.

Training Resources

The following organizations offer relevant trainings, workshops, and conferences which may be available to Lake Orion's development related elected and appointed officials and staff members.

880 Cities	www.880cities.org
AARP Livable Communities	https://www.aarp.org/livable-communities/
American Planning Association (APA)	www.planning.org
City Lab	www.citylab.com
Community Economic Development Association of Michigan (CEDAM)	https://cedamichigan.org/
Congress for New Urbanism (CNU)	www.cnu.org
Desegregate Connecticut	https://www.desegregatect.org/data
Form Based Code Institute (FBCI)	www.formbasedcodes.org
Governing	https://www.governing.com/
International City Managers Association (ICMA)	www.icma.org
International Downtown Association	https://downtown.org/
International Economic Development Council	https://www.iedonline.org/
Michigan Association of Planning (MAP)	https://www.planningmi.org/
Michigan Department of Environment, Great Lakes, and Energy (EGLE)	https://www.michigan.gov/egle/
Michigan Department of Natural Resources (DNR)	https://www.michigan.gov/dnr/
Michigan Downtown Association (MDA)	https://www.michigandowntowns.com/
Michigan Economic Development Corporation (MEDC)	https://www.michiganbusiness.org/
Michigan Municipal League (MML)	https://www.mml.org/
Michigan State Housing Development Authority (MSDHA)	https://www.michigan.gov/mshda
Michigan State University Extension (MSU-E)	https://www.canr.msu.edu/planning/planning_and_zoning_resources/
National Development Council	https://ndconline.org/
National League of Cities	https://www.nlc.org/resources-training/
National Main Street Program	https://www.mainstreet.org/home
Not Just Bikes YouTube	https://www.youtube.com/c/NotJustBikes/featured
Planetizen	https://www.planetizen.com/
Planetizen Courses	https://www.youtube.com/c/PlanetizenCourses/featured
Recast City	https://www.recastcity.com/
Redevelopment Ready Communities Library	https://www.miplace.org/rrclibrary/
Sightline	https://www.sightline.org/
Smart Growth America	https://smartgrowthamerica.org/
Southeast Michigan Council of Governments (SEMCOG)	https://semcog.org/
State Historic Preservation Office (SHPO)	https://www.miplace.org/historic-preservation/
Strong Towns	https://www.strongtowns.org/
Tactical Urbanism Guides	http://tacticalurbanismguide.com/guides/

Policies and Procedures

Training Expectations

Redevelopment Ready Communities encourages the village to establish annual training targets for members. Doing this in the form of hours allows the village to measure progress but also affords flexibility to members to meet those goals in whatever way is easiest for them. Each development related board and commission member, with the exception of the zoning board of appeals, shall attend a minimum of six hours training annually. It is recommended that least one hour of that training should be completed independently, outside of regular meetings.

Village Council	6 hours annually
Planning Commission	6 hours annually
Downtown Development Authority	6 hours annually
ZBA	4 hours annually

Annual Joint Training, Meeting, or Workshop

To improve communication and collaboration between development related boards and commissions, the village should establish a tradition of holding **at least one annual joint training or meeting** event on a topic of common interest to officials. These meeting can be traditional formal meetings or of a more informal and collaborative nature. They could even be a hands-on workshop out in the community. This can and should be scheduled well in advance each year to ensure proper notice requirements are followed.

Training Reminders

The village should **add training as a standing agenda topic** for all of its development related boards and commission. This encourages consistent reminders about upcoming trainings and report outs from recent training events. Village staff will also encourage training by emailing opportunities to board and commission members or including training opportunities as part of meeting packets. Board and Commission members are encouraged to share training opportunities they come across with each other.

Post-Training Communication

Upon completion of training, staff and board members are asked to **share their lessons learned**. This can be **done via email, through handouts included in meeting packets, or verbally at the following meeting of the board or commission**. Village staff will remind board and commission members who attend trainings of this expectation.

Funding

There is no specific amount of training money which needs to be set, but the village should budget for some level of training each year for staff and officials as a dedicated line item(s). Ideally the village will assess its training needs at the beginning of each year and budget as close to those needs as possible. The village should also explore other funding methods including:

Free Trainings	Free trainings from local organizations (SEMCOG), state agencies (MEDC, SHPO, Treasury, MDOT), and national organizations (The White House, SmartGrowth, StrongTowns) are abundant and should be utilized first and as much as possible.
Scholarships	Training scholarships from organizations such as MML or MAP; these are commonly event specific.

Insurance Funds	Training funding through the village's insurance company; some offer funds to encourage training and therefore reduce their risk exposure.
Pooling Resources	Pooling resources with nearby communities to pay for training; this can often bring additional partners to the table too.
State Support	Working with state level partners such as RRC to potentially pay for training.

Annual Update

Training priorities will likely shift from year to year depending on emerging trends and the community's planning goals. As such, this document should be reviewed each year and adjusted for the upcoming year. The following steps should be taken:

STEP	DETAILS	TIMING
Assess Outcomes	Review the outcomes. If goals were not met, why? Compare against priority topics and identify ones that have been met or new ones that should be added	February
Conduct Updated Survey	Conduct an updated survey to determine success of prior year training strategy and determine new training interests	February
Update Strategy	Update the strategy document with new survey information	February
Review	Officials review document, make any needed edits	March
Distribution	Final version distributed	April

A Guide to Conducting In-House Training at Existing Meetings

This section of the Training Strategy will help you as you begin conducting in-house training at existing meetings. It is not meant to be the definitive guide for training at meetings, just something to get the conversation started.

1. Staff or Board Chair: **Ensure that training is on the agenda and the materials are included in the packet** or ensure that everyone has the training strategy and is reminded of the upcoming training.
 - a. It might be helpful to make training a standing agenda item at every meeting so that all that must be done is to put the specific resource or link to the resource in the packet
2. Board and Commission Members should be sure to **read or watch the assigned training materials before coming to the meeting.**
3. Chair or Vice Chair kicks off an open discussion, utilizing the following optional questions:
 - a. What were your overall thoughts on this material?
 - b. What was the thing that surprised you the most?
 - c. What surprised you the least?
 - d. Where/how do you think this could be applicable to the village?
 - e. What else would you like to learn in relation to this topic?
 - f. What are the next steps to implement some of these idea in our community?

Training Strategies 2024-2025

Village Council

The Lake Orion Village Council plays a crucial role in the development process as they have final say and authority over the master plan, zoning ordinance, annual budget, and most utilization of economic development incentives. All topics were identified through the Lake Orion Training Strategy Survey, conducted in February 2022.

Schedule	Priority Topic	Why/What	Resource Title & Hyperlink
May 2024	Master Plan to Zoning to Development	Ensuring your community attracts the types of development it wants starts with establishing a strong foundation in a master plan that is then articulated in your regulations to guide development.	Getting What You Want: Master Plan to Zoning to Development
July 2024	Housing	Just as the housing needs of individuals change over a lifetime, unprecedented shifts in both demographics and lifestyle have fundamentally transformed our nation's housing requirements.	AARP's Making Room: Housing for a Changing America
September 2024	Development Review Process	Understanding the Business Perspective	RRC QuickSheet: Understanding the Development Process
November 2024	Capital Improvements Plans	A CIP helps a municipality plan for its near-term public infrastructure needs.	RRC Capital Improvement Plans QuickSheet
January 2025	Capital Improvements Plans	A CIP is a list of capital projects (public buildings, infrastructure or large equipment), anticipated cost of	Getting Started: A CIP Plan Guide and Process Document

Attachment: Lake Orion_Training_Strategy_24-25 draft (6588 : Director's Report)

		those projects, scheduled over six or more years.	
March 2025	Development & Municipal Budgets	The financial considerations of development on your community's budget	RRC QuickSheet Budget Impacts
May 2025	Development and Parking	Eliminating parking minimums can reduce unnecessary parking supply and encourage development constrained by excessive minimum requirements.	Minus Minimums Development Response to the Removal of Minimum Parking Requirements in Buffalo (NY)
July 2025	Economic Development	"Livable communities are good for people and good for business. They are places where Americans increasingly want to live, work and play. Whether a person is young or old, starting a family or a business, livable communities provide a host of appealing advantages that enhance the quality of life of residents, the economic prospects of businesses and the bottom lines of local governments."	AARP Livability – Economic Development Workbook
September 2025	SEMCOG EV Webinar Series	As part of the effort toward educating communities on the topic of EV and EV infrastructure, SEMCOG held a webinar Series focusing on the initiatives at the State and Local Level.	Planning for Electric Vehicles (EVs): What does your community need to know?

November 2025	Local Incentive Policies	Economic development incentives are financial and nonfinancial support to help promote real estate projects and business growth.	RRC Guide for Local Incentive Policies
January 2024	Annual Joint Meetings	The annual joint meeting may be a chance to come to resolution on issues facing the community or it may be the first step in assigning some concrete tasks for the respective boards to accomplish.	RRC Annual Joint Meeting QuickSheet

Planning Commission

The Planning Commission assists with updating the Master Plan and reviews all amendments to the zoning ordinance and zoning map, special land uses, site plan approvals, and planned unit developments. All topics were identified through the Lake Orion Training Strategy Survey, conducted in February 2022.

Schedule	Priority Topic	Why/What	Resource Title & Hyperlink
May 2024	Master Plan to Zoning to Development	Ensuring your community attracts the types of development it wants starts with establishing a strong foundation in a master plan that is then articulated in your regulations to guide development.	Getting What You Want: Master Plan to Zoning to Development
July 2024	Zoning Reform	Zoning is a key tool for plan implementation and obsolete zoning regulations can discourage development and investment.	Enabling Better Places: Users Guide to Zoning Reform (RRC & CNU)

September 2024	Development Review Process	Understanding the Business Perspective	RRC QuickSheet: Understanding the Development Process
November 2024	Capital Improvements Plans	A CIP helps a municipality plan for its near-term public infrastructure needs.	RRC Capital Improvement Plans QuickSheet
January 2025	Capital Improvements Plans	A CIP is a list of capital projects (public buildings, infrastructure or large equipment), anticipated cost of those projects, scheduled over six or more years.	Getting Started: A CIP Plan Guide and Process Document
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		economic prospects of businesses and the bottom lines of local governments.”	
September 2025	SEMCOG EV Webinar Series	As part of the effort toward educating communities on the topic of EV and EV infrastructure, SEMCOG held a webinar Series focusing on the initiatives at the State and Local Level.	Planning for Electric Vehicles (EVs): What does your community need to know?
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January 2024	Annual Joint Meetings	The annual joint meeting may be a chance to come to resolution on issues facing the community or it may be the first step in assigning some concrete tasks for the respective boards to accomplish.	RRC Annual Joint Meeting QuickSheet

Development Authority

The Downtown Development Authority is responsible for implementing the Downtown Development Plan Tax Increment Financing (TIF) Plan and generally promote the downtown as a destination area. The DDA offers small business financial incentives like façade improvement grants to facilitate the physical development of downtown commercial buildings. Similarly, the DDA’s efforts to promote downtown as a community gathering spot and economic engine are essential to fostering a high quality of life in Lake Orion.

Schedule	Priority Topic	Why/What	Resource Title & Hyperlink
May 2024	Master Plan to Zoning to Development	Ensuring your community attracts the types of development it wants starts with	Getting What You Want: Master Plan to Zoning to Development

		establishing a strong foundation in a master plan that is then articulated in your regulations to guide development.	
July 2024	Placemaking & Plan Implementation	When residents help identify and solve the challenges that affect their daily lives communities and local leaders are more likely to achieve and sustain success.	The Pop-Up Placemaking Tool Kit
September 2024	Development and Parking	Eliminating parking minimums can reduce unnecessary parking supply and encourage development constrained by excessive minimum requirements.	Minus Minimums Development Response to the Removal of Minimum Parking Requirements in Buffalo (NY)
November 2024	Capital Improvements Plans	A CIP helps a municipality plan for its near-term public infrastructure needs.	RRC Capital Improvement Plans QuickSheet
January 2025	Capital Improvements Plans	A CIP is a list of capital projects (public buildings, infrastructure or large equipment), anticipated cost of those projects, scheduled over six or more years.	Getting Started: A CIP Plan Guide and Process Document
March 2025	Traffic Calming	These measures are used to slow motor-vehicle traffic, often without reducing overall daily traffic volumes. The efforts increase safety and create a balanced urban environment	AARP Livability Fact Sheet - Traffic Calming

		for all users, including pedestrians and bicyclists.	
May 2025	Economic Development	“Livable communities are good for people and good for business. They are places where Americans increasingly want to live, work and play. Whether a person is young or old, starting a family or a business, livable communities provide a host of appealing advantages that enhance the quality of life of residents, the economic prospects of businesses and the bottom lines of local governments.”	AARP Livability – Economic Development Workbook
July 2025	SEMCOG EV Webinar Series	As part of the effort toward educating communities on the topic of EV and EV infrastructure, SEMCOG held a webinar Series focusing on the initiatives at the State and Local Level.	Planning for Electric Vehicles (EVs): What does your community need to know?
September 2025	Hands-On Community Engagement	For two decades, James Rojas and John Kamp have been looking to art, creative expression, and storytelling to shake up the classic community meeting.	Dream ▪ Play ▪ Build: Hands-On Community Engagement for Enduring Spaces and Places
November 2025	Local Incentive Policies	Economic development incentives are financial and	RRC Guide for Local Incentive Policies

		nonfinancial support to help promote real estate projects and business growth.	
January 2024	Annual Joint Meetings	The annual joint meeting may be a chance to come to resolution on issues facing the community or it may be the first step in assigning some concrete tasks for the respective boards to accomplish.	RRC Annual Joint Meeting QuickSheet

Zoning Board of Appeals

The Zoning Board of Appeals may grant an appeal to modify the zoning ordinance based on practical difficulties or hardships in carrying out the regulations of the ordinance. All topics were identified through the Lake Orion Training Strategy Survey, conducted in February 2022.

Schedule	Priority Topic	Why/What	Resource Title & Hyperlink
Q1	Primary Function of ZBA	For many communities, significant amounts of time can lapse without action from the Zoning Board of Appeals (ZBA). This time gap, however, can create significant legal problems for a community if regular attention is not being given to the ZBA.	MSU Extension: The importance of your Zoning Board of Appeals
Q2	Development and Parking	Eliminating parking minimums can reduce unnecessary parking supply and encourage development constrained by excessive minimum requirements.	Minus Minimums Development Response to the Removal of Minimum Parking Requirements in Buffalo (NY)
Q3	Appeals of Administrative Decisions	This article covers the importance of detailed minutes to document conformance (or not) with ordinance standards.	Administrative decisions require careful application to ordinance standards: Part 2
Q4	Traffic Calming	These measures are used to slow motor-vehicle traffic, often without reducing overall daily traffic volumes. The efforts increase safety and create a	AARP Livability Fact Sheet - Traffic Calming

		balanced urban environment for all users, including pedestrians and bicyclists.	
Q1	Accessory Dwelling Units	Accessory Dwelling Units (ADUs) have become a hot topic throughout the U.S. – with strong emotions on all sides of discussions about whether and where and how to allow them.	The Evolving World of ADU Regulations
Q2	Appeals of Administrative Decisions	The zoning board of appeals is the only entity authorized to hear appeals on the administration and enforcement of the zoning ordinance at the local level.	How to handle appeals of administrative decisions
Q3	Annual Joint Meetings	The annual joint meeting may be a chance to come to resolution on issues facing the community or it may be the first step in assigning some concrete tasks for the respective boards to accomplish.	RRC Annual Joint Meeting QuickSheet
Q4	Variances	A variance is official permission to deviate from a requirement of the zoning ordinance, granted by the Zoning Board of Appeals	RRC QuickSheet: Variances



Awards CATALOG

Recognizing Excellence in Oakland
County Downtown Development

**Make Plans Today to Attend
The Main Event Awards Ceremony**
June 6, 2024

Online Awards Submittal Form:
[Forms.oakgov.com/129](https://forms.oakgov.com/129)

Deadline: 5 p.m. on April 26, 2024

OAKLAND
COUNTY MICHIGAN
ECONOMIC DEVELOPMENT
DAVID COULTER
OAKLAND COUNTY EXECUTIVE

Packet Pg. 71

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Select Level

Berkley
Birmingham
Clawson
Farmington
Ferndale
Franklin
Highland
Holly
Lake Orion
Ortonville
Oxford
Pontiac
Rochester
Royal Oak

Partner (Associate) Level

Clarkston
Lathrup Village
Wixom
Auburn Hills
South Lyon

Allied (Affiliate) Level

Groveland Township
Hazel Park
Huron Corridor/Pontiac
Holly Township
Leonard
Lyon Township
Madison Heights
Oak Park



INTRODUCTION

Main Street Oakland County Awards

The Awards

Each community has had impactful people, projects and/or events that have shaped their downtown and given it renewed direction over the last year. Whether it be the individual who continues to lead the charge using the Main Street model as the focus of keeping downtown businesses open; the saving of a historic building that the community rallied behind; an event that grew from 10 attendees to 1,000; or a development that improved the long-term economic outlook of the downtown. Each award in this catalog represents the Four Main Street pillars: Design, Economic Vitality, Promotion, and/or Organization.

Winning a MSOC award brings prestige to your downtown and allows your community to take a bow highlighting the value of the work being done. In every category, winners will receive a custom-made plaque with a handcrafted tile from Pewabic Pottery, plus recognition in Oakland County's post award press release and social media.

- Winning could also mean additional dollars for your budget with the Spirit of Main Street Award sponsored by Genisys Credit Union.
- Each award description and eligibility requirements are detailed on the following pages. MSOC may award more than one winner for each category if it is deemed appropriate by the judging committees.
- MSOC designated districts may apply for only one award per category, for a total of 11 possible awards.

Submissions

All submissions will be made to MSOC via an online awards submittal form available at MainStreetOaklandCounty.com

Please enter one nomination per form. Enter community name, nomination name, etc. using this form. Select the award category from the pulldown menu. Nominations for additional categories can be submitted using the same online form/link.

Deadline

All award nominations must be received by Oakland County's Department of Economic Development by 5 p.m., April 26, 2024. If you have any questions regarding the submission process, you may contact John Bry at (248) 858-5444 or by email at bryj@oakgov.com

INTRODUCTION *(cont.)*

Extensions

There are no extensions to the deadline — no exceptions. Late entries will not be accepted, so please start early.

Award Judging

Award judges are professionals and experts in the field but may be from across the state or even out of state. Therefore, it is important to assume the judges are not familiar with your community and/or project so please be thorough and detailed with your submittals.

Helpful Tips

- Do not assume that the judges know your community or project.
- When reviewing the specific award criteria, think of ways that you can communicate why your nominee qualifies for the award.
- Be specific and provide short descriptions or bullet points highlighting the impact the individual or project has had on your Main Street program or community.
- Pictures are worth a thousand words; so, include high-quality photos where available to offer insight on the impact of your nomination/nominee. Good 'before' and 'after' photos are critical for the judges to make better evaluations — especially for physical project submissions such as façades, streetscapes or placemaking.
- Have a third party who is not familiar with the project, program, or individual read and review the content.
- Scan in (vs. using links) press clippings, letters of support, awards or other items that substantiate the reason you have made the specific nomination.

Awards



SPIRIT OF MAIN STREET

A Video Essay sponsored by Genisys Credit Union

Every MSOC community is eligible to enter and compete to win \$2,000 for its local program. Your video must be between 2-3 minutes in length, as one complete edited video. The video will be judged on content and production quality. Videos should be enthusiastic, energetic, and tell your story. The video needs to impart the spirit of your program and district.

Rules & Eligibility

- Video must be between 2-3 minutes in length, as a final edited version.
- Video must be new.
- Video must not be a contracted, professionally produced product.
- Past submitted videos are not eligible.
- Last year's winner is not eligible.

Judging Criteria

- Running time 2-3 minutes total
- Quality of imagery and audio
- Story line and delivery
- Originality and creativity
- People and/or places highlighted
- Excitement and energy conveyed
- Collaboration in production

The Prize

\$2,000 will be presented to the winner by Genisys Credit Union at The Main Event.

Tips

- Decide what your "Spirit of Main Street" story is.
- Develop a story line. It could be all-encompassing or a single, unique event/challenge/accomplishment that demonstrates your district's spirit.
- Determine who or what will tell the story; get it on video.
- Include images in the video to demonstrate a particular point.
- Give it a title — it helps the viewer understand what they are seeing.
- Music is always good.

Deadline of intent to participate

5 p.m. | April 26, 2024

Notification of intent to participate to:

John Bry, MSOC Program Coordinator
(248) 858-5444 | bryj@oakgov.com

Deadline for video submission:

May 17, 2024

ACHIEVEMENT IN HISTORIC PRESERVATION

The Main Street model has always been rooted in Historic Preservation. This award recognizes a program or project that spotlights a community's unique history, preserving its past and/or telling the important story of where the community came from. This could be anything from the physical preservation of a building or space, creating awareness of your historical assets, or developing a program designed to ensure your past is preserved for future generations.

Examples: Building renovation/preservation, historical markers, history tours, or establishing a historic district.

Rules & Eligibility

- The nomination is a program or project that was completed in the last year, uses the unique aspects of the community's history, and reflects the uniqueness of your community.
- The nomination can be for either a public or private entity or effort.

Deadline

5 p.m. | April 26, 2024

Need Help? Contact:

John Bry, *MSOC Program Coordinator*
(248) 858-5444 | bryj@oakgov.com

Judging Criteria

- Nomination's contribution toward achieving district goals
- Uniqueness and creativity of the program that addresses a pressing historic preservation need or new opportunity for the Main Street
- Positive impact that can be measured

BUSINESS INNOVATION & ENTREPRENEURSHIP

The Main Street approach is one of the leading Economic Development tools for downtowns throughout the U.S. Having strong businesses and business practices are essential to the Economic Vitality of our communities, and what that looks like in each Main Street can vary greatly. This award recognizes original and/or innovative programs or practices leading to the transformation of your local economy. This award is not an apples-to-apples comparison, think specifically about your Main Street program, the downtown, and what has moved the needle in a positive direction for your local economy over the last year.

Examples: Business training programs on topics like merchandizing and online sales, unique partnerships that add to the sense of place or creates opportunities for business growth, and new and innovative business practices that support entrepreneurship and small business development.

Rules & Eligibility

- Nomination can be a public policy or program, a private business or new private and/or public partnership.
- This can be a public initiative or series of initiatives.
- The nomination must support the overall economic vitality of your Main Street.

Deadline

5 p.m. | April 26, 2024

Need Help? Contact:

John Bry, MSOC Program Coordinator
(248) 858-5444 | bryj@oakgov.com

Judging Criteria

- Relevance to the district's strategies and goals
- Broad-based involvement and support in the development of the project
- Measurable results or impact upon the district

COMMUNITY ENGAGEMENT OR EVENT OF THE YEAR

This award recognizes an outstanding special event or digital, image, or public relations campaign that advanced new opportunities for your downtown. Getting people downtown to shop, eat and drink, have fun, explore, and live is a goal of all Main Street organizations. This award recognizes efforts that made the downtown more accessible or improved the visiting experience for visitors, businesses, and residents.

Examples can be special events, new platforms for shopping or visiting online, promotion through social media, podcasts, or other methods used to reach the public and promote your downtown.

Rules & Eligibility

- Project can be publicly-developed or a combination of private and public partnership.
- Project can be a reoccurring activity or one-time event.

Judging Criteria

- Nomination's relevance to the district's strategies and goals
- Broad-based involvement and support in the development of the project
- Collaborative and innovative partnerships
- Measurable outcomes leading to positive change

Deadline

5 p.m. | April 26, 2024

Need Help? Contact:

John Bry, MSOC Program Coordinator
(248) 858-5444 | bryj@oakgov.com

DOWNTOWN BEAUTIFICATION

Placemaking attracts businesses, customers, and residents to our Main Streets. Downtowns that offer exciting and unique things to do and see are more likely to experience greater investment. This award is for a project that has improved the physical appearance of a district through landscaping/streetscaping, public art, improved public spaces, or new private development.

Examples: Streetscape improvements, public art, new gathering spaces, and building rehabilitation or new construction.

Rules & Eligibility

- Project can be publicly- developed, privately- developed, or a combination.
- Project must contribute to the overall quality of the built environment of your downtown.
- Project must be accessible to all the stakeholders of the downtown district.

Judging Criteria

- Nomination's relevance to the district's long-term strategy and transformative goals
- Broad-based involvement and support in the development of the project
- Degree the project transformed the activity within the district

Deadline

5 p.m. | April 26, 2024

Need Help? Contact:

John Bry, *MSOC Program Coordinator*
(248) 858-5444 | bryj@oakgov.com

SMALL BUSINESS RETENTION AND ATTRACTION

Business retention and attraction are at the heart of economic development within the Main Street approach. A strong local economy is built through the character and unique mix of our businesses. This award recognizes the best program or effort that supported existing businesses or attracted new ones to your Main Street.

Examples: Using data and market analysis to create new strategies and/or programs, new permitting processes that made it easier for a business to locate or expand, or financial incentives such as façade and signage grants.

Rules & Eligibility

- Project can be a public or private initiative.
- Project must contribute to strengthening the district's economic vitality.

Judging Criteria

- Nomination's relevance to the district's long-term strategy and transformative goals
- Broad-based involvement and support in the development of the project
- Collaboration and innovation
- Degree the project transformed the economic vitality of the district
- Measurable results or impact upon the district

Deadline

5 p.m. | April 26, 2024

Need Help? Contact:

John Bry, MSOC Program Coordinator
(248) 858-5444 | bryj@oakgov.com

VOLUNTEER OF THE YEAR

The Main Street model is a grass roots, community-driven program. Good board members and volunteers are the life blood of every local program. The volunteers offer time, talent, and treasure to drive the revitalization or management process.

These volunteers serve on boards and committees, lead projects, lend a helping hand when needed and serve as positive community ambassadors for the district and its ongoing success. This award honors that special individual(s) who has invested considerable personal time and energy to enhance the downtown and organization in the last year. This award is for the individual(s) who has so positively influenced the community that their impact will continue to be felt for many years.

Rules & Eligibility

Nominee no longer needs be active with the Program/Downtown.

Judging Criteria

- Nominee's contribution toward achieving district goals and assisting with activities
- Extent of the nominee's participation, the quality and amount of the time donated (e.g., time volunteered, money raised, programs initiated, etc.)
- Degree which nominee's commitment went above and beyond expectations

Deadline

5 p.m. | April 26, 2024

Need Help? Contact:

John Bry, *MSOC Program Coordinator*
(248) 858-5444 | bryj@oakgov.com

MOBILITY ON MAIN STREET

Accessibility is a key to the success of our main streets. Downtowns are intended for everyone and adding services and amenities that ensure this are always important. This award recognizes projects and/or programs that have incorporated innovative strategies to enhance mobility, accessibility, and transit options in our communities. These projects/programs are sustainable, providing positive environmental impacts, are effective in creating alternative transit opportunities, and improve overall safety in downtowns.

Examples can be complete streets implementations, improved accessibility and connectivity projects, access to public transit, multi-modal infrastructure improvements, or community engagement programs that promote alternative mobility solutions.

Rules & Eligibility

- Project can be publicly-developed or a combination of private and public partnership.
- Project should demonstrate an impact to accessibility in the main street district.
- Project may be a physical improvement, technological improvement, public education or promotional campaign/event.

Deadline

5 p.m. | April 26, 2024

Need Help? Contact:

John Bry, *MSOC Program Coordinator*
(248) 858-5444 | bryj@oakgov.com

Judging Criteria

- Nomination's relevance to the district's strategies and goals
- Collaboration and innovative partnerships
- Measurable outcomes leading to positive change

MAIN STREET RESILIENCE

The Main Street approach has always been flexible, which is especially important when our downtowns face adversity. This award is for the community, Main Street program, or business that has continued to thrive even in tough times. Whether it be the lingering effects of the pandemic, ongoing staffing challenges, or other disasters where the Main Streets and their businesses have shown resilience.

Examples: Business recruitment/retention programs, business support and/or training programs that give businesses needed tools for success, unique partnerships that create vibrancy and interest in our downtowns, and other new and innovative business practices that support entrepreneurship and small business development.

Rules & Eligibility

- Project can be a public policy or program, a private business or new private and/or public partnership.
- This can be a public initiative or series of initiatives.
- The nominee must support the overall economic vitality of your Main Street.

Deadline

5 p.m. | April 26, 2024

Need Help? Contact:

John Bry, MSOC Program Coordinator
(248) 858-5444 | bryj@oakgov.com

Judging Criteria

- Nomination's relevance to the district's strategies and goals
- Broad-based involvement and support in the development of the project
- Measurable results or impact upon the district

OUTSTANDING PARTNERSHIP

Partnerships are vital to the Main Street approach and should be an everyday occurrence in a successful program. This award acknowledges a particularly successful partnership that created a positive impact on your downtown. Whether it be public-public, public-private, or private-private this partnership accomplished something that could not have been done alone.

Examples: Public spaces on private property, city/county/state programs, business to business support and/or events, or joint marketing.

Rules & Eligibility

- Project can be a public policy or program, a private business or new private and/or public partnership.
- This can be a public or private initiative or series of initiatives.
- The nominee must support the overall economic vitality of your Main Street.

Deadline

5 p.m. | April 26, 2024

Need Help? Contact:

John Bry, MSOC Program Coordinator
(248) 858-5444 | bryj@oakgov.com

Judging Criteria

- Nomination's relevance to the district's strategies and goals
- Broad-based involvement and support in the development of the project
- Measurable results or impact upon the district

MAIN STREET LEADER

While the Main Street model is volunteer-driven, great staff are equally important. The employees of the Main Street program are the daily faces of the downtown—visiting businesses, offering support, and implementing the program’s vision. Whether it be the Executive Director, the program coordinator, or the part-time assistant, the great work being done daily relies on these people. This award acknowledges the hard work and dedication of the Main Street staff, being there when needed and always remaining positive.

Rules & Eligibility

Nominee no longer needs to be employed by the Program/Downtown.

Judging Criteria

- Nominee’s contribution toward achieving district goals and assisting with activities
- Extent of the nominee’s participation and quality of work done
- Degree which nominee’s commitment went above and beyond expectations

Deadline

5 p.m. | April 26, 2024

Need Help? Contact:

John Bry, *MSOC Program Coordinator*
(248) 858-5444 | bryj@oakgov.com



Thank You

FOR ALL YOU DO!

If you have any questions regarding the award submissions, contact John Bry:
(248) 858-5444 | bryj@oakgov.com

Online Awards Submittal Form, visit:
Forms.oakgov.com/129



DAVID COULTER
OAKLAND COUNTY EXECUTIVE



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

DDA Board Meeting

DATE: February 20, 2024

FROM: Janet Bloom,

SUBJECT: Financial Reports

See attached Reports

248 Fund Balance Sheet (General DDA Fund)

301 Fund Balance Sheet (DDA Bond 2023 Fund)

404 Fund Balance Sheet (Property Acquisition Fund)

Revenue and Expenditure Report

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

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

Recommended Motion: Receive and file the financial reports for January 2024.

PERIOD ENDING 01/31/2024

% Fiscal Year Completed: 58.74

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

GL NUMBER	DESCRIPTION	2023-24 AMENDED BUDGET	YTD BALANCE 01/31/2024	ACTIVITY FOR MONTH 01/31/2024	AVAILABLE BALANCE	% BDG USE
Fund 248 - DOWNTOWN DEVELOPMENT AUTHORITY FUND						
Revenues						
Dept 000 - REVENUE						
248-000-402-000	Current Real Property Taxes	903,236.00	491,711.65	0.00	411,524.35	54.44
248-000-402-100	Property Tax - Twp DDA Capture	0.00	0.00	0.00	0.00	0.00
248-000-405-000	Property Tax - Personal	0.00	0.00	0.00	0.00	0.00
248-000-412-000	Property Tax - DPPT P/Y & C/Y	0.00	1,474.57	767.17	(1,474.57)	100.00
248-000-441-000	Local Community Stabilization Share Tax	10,000.00	15,970.70	0.00	(5,970.70)	159.71
248-000-445-000	Penalties & Interest on Taxes	2,000.00	0.00	0.00	2,000.00	0.00
248-000-539-000	State Grants	109,028.00	11,000.00	0.00	98,028.00	10.09
248-000-582-000	Intergovernment - Police	0.00	201,995.92	0.00	(201,995.92)	100.00
248-000-664-000	Interest Earned	2,500.00	3,747.22	615.24	(1,247.22)	149.89
248-000-671-999	Appropriation from Fund Balanc	107,459.00	0.00	0.00	107,459.00	0.00
248-000-673-000	Gain/Loss on Sale of Assets	0.00	0.00	0.00	0.00	0.00
248-000-676-404	Transfer From Prop Acq Fund	0.00	0.00	0.00	0.00	0.00
248-000-676-592	Reimbursement -Admin Fee - W&S	0.00	0.00	0.00	0.00	0.00
248-000-681-000	Reimburse - Insurance Claims	0.00	7,218.00	5,705.00	(7,218.00)	100.00
248-000-683-000	Reimbursements-Other	0.00	0.00	0.00	0.00	0.00
248-000-685-000	Sponsorships	102,400.00	11,094.22	3,402.22	91,305.78	10.83
248-000-685-100	Transportaion Sponsorship	28,000.00	13,415.00	0.00	14,585.00	47.91
248-000-686-000	Downtown Events	20,000.00	4,993.01	2,635.01	15,006.99	24.97
248-000-686-002	Flower Fair Revenue	0.00	305.00	0.00	(305.00)	100.00
248-000-686-003	New Year Resolution Run Revenue	0.00	0.00	0.00	0.00	0.00
248-000-686-004	OktoberFest Revenue	0.00	0.00	0.00	0.00	0.00
248-000-686-005	Babes On Broadway	0.00	0.00	0.00	0.00	0.00
248-000-686-006	Electircal Vehicles	0.00	299.19	0.00	(299.19)	100.00
248-000-687-000	Merchandise Sales	10,000.00	0.00	0.00	10,000.00	0.00
248-000-688-000	Gift Certificate Sales	5,000.00	355.00	75.00	4,645.00	7.10
248-000-692-000	Rent	0.00	0.00	0.00	0.00	0.00
248-000-694-000	Miscellaneous	0.00	315.00	0.00	(315.00)	100.00
248-000-696-000	PROCEEDS FROM THE SALE OF BONDS/NOTES	0.00	0.00	0.00	0.00	0.00
Total Dept 000 - REVENUE		1,299,623.00	763,894.48	13,199.64	535,728.52	58.78
TOTAL REVENUES		1,299,623.00	763,894.48	13,199.64	535,728.52	58.78
Expenditures						
Dept 260 - GENERAL ACTIVITIES						
248-260-701-000	Wages	45,248.00	36,245.25	8,143.47	9,002.75	80.10
248-260-701-019	COVID 19 PAYROLL	0.00	0.00	0.00	0.00	0.00
248-260-704-000	Wages - Administrative Coordinator	33,280.00	22,967.45	3,531.00	10,312.55	69.01
248-260-706-000	Wages - Event Coordinator	33,280.00	14,426.81	3,608.00	18,853.19	43.35
248-260-706-001	Marketing Coordinator	0.00	0.00	0.00	0.00	0.00
248-260-707-000	Wages - Grounds Coordinator	5,000.00	1,819.25	0.00	3,180.75	36.39
248-260-711-013	OVERTIME	0.00	0.00	0.00	0.00	0.00
248-260-715-000	Social Security	9,688.00	5,730.27	1,165.30	3,957.73	59.15
248-260-716-000	Health Insurance- Medical	7,200.00	2,877.74	(573.15)	4,322.26	39.97
248-260-717-000	Life & Disability Insurance	1,200.00	330.67	(89.24)	869.33	27.56
248-260-718-000	Dental Insurance	700.00	222.13	(42.85)	477.87	31.73
248-260-719-000	Pension	5,120.00	3,004.64	0.00	2,115.36	58.68
248-260-720-000	Unemployment	0.00	0.00	0.00	0.00	0.00
248-260-721-000	Vision Care	130.00	45.91	(8.95)	84.09	35.32
248-260-722-000	Worker's Comp. Insurance	0.00	0.00	0.00	0.00	0.00
248-260-801-000	Contractual Services	16,499.00	6,000.00	3,000.00	10,499.00	60.00

Attachment: January 2024 R&E (6589 : Financial Reports)

PERIOD ENDING 01/31/2024

% Fiscal Year Completed: 58.74

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

GL NUMBER	DESCRIPTION	2023-24 AMENDED BUDGET	YTD BALANCE 01/31/2024	ACTIVITY FOR MONTH 01/31/2024	AVAILABLE BALANCE	% BDG USE
Fund 248 - DOWNTOWN DEVELOPMENT AUTHORITY FUND						
Expenditures						
248-260-801-002	Contr Services - Police Admin Fee	60,000.00	36,400.00	5,200.00	23,600.00	60.67
248-260-801-003	Contract Services - DPW Admin Fee	30,000.00	18,073.88	2,500.00	11,926.12	60.25
248-260-801-004	Contract Services - GF Admin Fee	70,000.00	40,833.31	5,833.33	29,166.69	58.33
248-260-801-005	Contractual Services- Township	2,700.00	0.00	0.00	2,700.00	0.00
248-260-801-012	Contractual Services-Parking Code Enforc	21,000.00	12,740.00	1,820.00	8,260.00	60.67
248-260-801-022	Cont Service-Police Crowd Control	20,000.00	12,133.31	1,733.33	7,866.69	60.67
248-260-801-023	Contract Services-DPW event support	10,000.00	6,066.69	866.67	3,933.31	60.67
248-260-801-033	Contract Services-DPW snow removal	15,000.00	9,100.00	1,300.00	5,900.00	60.67
248-260-805-000	Audit Fees	2,000.00	2,000.00	0.00	0.00	100.00
248-260-810-000	Legal Services	16,484.15	15,821.76	0.00	662.39	95.98
248-260-823-000	Website/Software	6,000.00	2,094.17	399.47	3,905.83	34.90
248-260-823-001	Municipal Software	3,501.00	2,519.90	1,787.90	981.10	71.98
248-260-829-000	Planner Services	5,000.00	0.00	0.00	5,000.00	0.00
248-260-851-000	Telephone	3,500.00	1,930.87	290.75	1,569.13	55.17
248-260-900-000	Printing and Publication	100.00	0.00	0.00	100.00	0.00
248-260-920-000	Utilities	4,000.00	2,921.52	970.19	1,078.48	73.04
248-260-921-000	Municipal Street Lighting	6,500.00	4,414.93	1,839.84	2,085.07	67.92
248-260-930-000	Repair and Maintenance	0.00	58.00	58.00	(58.00)	100.00
248-260-930-002	Building Maintenance	400.00	179.57	4.53	220.43	44.89
248-260-940-000	Equipment Rental	0.00	0.00	0.00	0.00	0.00
248-260-941-000	Office Rent	12,000.00	9,000.00	0.00	3,000.00	75.00
248-260-942-000	Office Expenses	3,865.00	928.64	64.69	2,936.36	24.03
248-260-942-019	Covid Office Expenses	0.00	0.00	0.00	0.00	0.00
248-260-946-000	Credit Card Fees	100.00	0.00	0.00	100.00	0.00
248-260-955-001	Credit Card Fees	0.00	0.00	0.00	0.00	0.00
248-260-956-000	Dues & Miscellaneous	1,500.00	1,209.00	0.00	291.00	80.60
248-260-957-000	Education & Training	4,500.00	919.38	0.00	3,580.62	20.43
248-260-958-000	General Activities Misc	0.00	0.00	0.00	0.00	0.00
248-260-958-019	Covid General Activities	0.00	0.00	0.00	0.00	0.00
248-260-961-000	Tax Tribunal Refunds	0.00	0.00	0.00	0.00	0.00
248-260-962-000	Mileage	500.00	37.65	0.00	462.35	7.53
248-260-965-101	Transfer Out - General Fund	0.00	0.00	0.00	0.00	0.00
248-260-965-401	Transfer to Capital Imp Fund	0.00	0.00	0.00	0.00	0.00
248-260-965-404	Transfer Out - DDA Property Acq Fund	157,500.00	157,500.00	0.00	0.00	100.00
248-260-974-000	Capital Outlay - Equipment	1,235.00	1,234.84	0.00	0.16	99.99
Total Dept 260 - GENERAL ACTIVITIES		614,730.15	431,787.54	43,402.28	182,942.61	70.24
Dept 725 - ORGANIZATION						
248-725-822-000	Newsletter	1,720.00	390.00	65.00	1,330.00	22.67
248-725-824-000	Volunteer Recognition & Dvp.	0.00	0.00	0.00	0.00	0.00
248-725-825-000	Gift Certificate Redemption	5,000.00	1,850.00	125.00	3,150.00	37.00
248-725-826-000	Historic Celebration/Education	580.00	579.74	0.00	0.26	99.96
248-725-827-000	Awareness Program	1,200.00	132.68	10.05	1,067.32	11.06
248-725-827-019	Covid Awareness Program/Organization	0.00	0.00	0.00	0.00	0.00
248-725-864-000	Grant & Scholarship Distriubution	0.00	0.00	0.00	0.00	0.00
248-725-881-000	Merchandise to Sell	500.00	211.01	0.00	288.99	42.20
Total Dept 725 - ORGANIZATION		9,000.00	3,163.43	200.05	5,836.57	35.15
Dept 726 - DESIGN						
248-726-745-000	Beautification Supplies	1,500.00	647.71	0.00	852.29	43.50

Attachment: January 2024 R&E (6589 : Financial Reports)

PERIOD ENDING 01/31/2024

% Fiscal Year Completed: 58.74

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

GL NUMBER	DESCRIPTION	2023-24 AMENDED BUDGET	YTD BALANCE 01/31/2024	ACTIVITY FOR MONTH 01/31/2024	AVAILABLE BALANCE	% BDG USE
Fund 248 - DOWNTOWN DEVELOPMENT AUTHORITY FUND						
Expenditures						
248-726-746-000	Hanging Baskets	3,400.00	0.00	0.00	3,400.00	0.00
248-726-801-000	Contractual Services	5,200.00	2,525.00	375.00	2,675.00	48.56
248-726-843-000	Facade Program	7,800.00	5.00	0.00	7,795.00	0.06
248-726-845-000	Public Art Program	0.00	0.00	0.00	0.00	0.00
248-726-883-000	Banners and Holiday Lighting	6,600.00	5,999.66	0.00	600.34	90.90
248-726-975-001	Capital Outlay - Beautification	0.00	0.00	0.00	0.00	0.00
248-726-975-002	Capital Outlay - Streets	0.00	0.00	0.00	0.00	0.00
248-726-975-019	Covid Capital Outlay	0.00	0.00	0.00	0.00	0.00
Total Dept 726 - DESIGN		24,500.00	9,177.37	375.00	15,322.63	37.46
Dept 728 - ECONOMIC DEVELOPMENT						
248-728-801-000	Contractual Services	34,500.00	4,750.00	0.00	29,750.00	13.77
248-728-860-000	Trolley Expense	28,000.00	12,915.81	352.33	15,084.19	46.13
248-728-861-000	Survey Expense	0.00	0.00	0.00	0.00	0.00
248-728-862-000	Training Materials	0.00	0.00	0.00	0.00	0.00
248-728-864-000	Grant & Scholarship Distriubution	0.00	0.00	0.00	0.00	0.00
248-728-886-000	Marketing Materials	0.00	0.00	0.00	0.00	0.00
248-728-886-001	Blight Reduction	0.00	0.00	0.00	0.00	0.00
248-728-886-002	Social District	1,000.00	231.60	0.00	768.40	23.16
248-728-888-000	Brand Marketing	20,731.12	20,729.24	3,593.05	1.88	99.99
248-728-888-001	Contractual Services Brand Marketing	29,700.00	16,520.00	0.00	13,180.00	55.62
Total Dept 728 - ECONOMIC DEVELOPMENT		113,931.12	55,146.65	3,945.38	58,784.47	48.40
Dept 729 - PROMOTION						
248-729-880-000	Event Promotion	500.00	307.65	0.00	192.35	61.53
248-729-880-001	Event Promo - Gazebo Series	10,170.07	10,170.07	0.00	0.00	100.00
248-729-880-004	Event Promo - Halloween Parade	2,500.00	2,450.61	0.00	49.39	98.02
248-729-880-005	Event Promo - Hmtwn/Holiday Vill	8,355.85	7,794.29	927.48	561.56	93.28
248-729-880-006	Event Promo - New Years Res. Run	0.00	0.00	0.00	0.00	0.00
248-729-880-007	Event Promo - Flower Fair	0.00	0.00	0.00	0.00	0.00
248-729-880-008	Event Promo-Photo Contest	0.00	0.00	0.00	0.00	0.00
248-729-880-009	Event Promo-Lake Orion Love Shop to Win	0.00	0.00	0.00	0.00	0.00
248-729-880-010	Babes On Broadway	0.00	0.00	0.00	0.00	0.00
248-729-880-011	Restaurant week	0.00	0.00	0.00	0.00	0.00
248-729-880-012	Sing & Stroll Tree Lighting	12,000.00	11,807.72	0.00	192.28	98.40
248-729-880-013	SD Nights- Stronger Together Winter	600.00	54.00	0.00	546.00	9.00
248-729-880-014	Octoberfest	0.00	0.00	0.00	0.00	0.00
248-729-880-015	Winter Activities	10,200.00	22.00	0.00	10,178.00	0.22
248-729-880-016	Athletic Events-other	0.00	0.00	0.00	0.00	0.00
248-729-880-017	Movie Night	998.81	998.81	0.00	0.00	100.00
248-729-880-019	Covid Event Promotion	0.00	0.00	0.00	0.00	0.00
248-729-880-100	Stronger Together- smr fall	3,300.00	600.18	432.30	2,699.82	18.19
248-729-885-000	Port-A-Johns	2,200.00	1,793.51	0.00	406.49	81.52
248-729-895-000	Event Promo-Comm. Sponsorships	0.00	0.00	0.00	0.00	0.00
248-729-975-020	Capital Outlay Parks & rec	0.00	0.00	0.00	0.00	0.00
Total Dept 729 - PROMOTION		50,824.73	35,998.84	1,359.78	14,825.89	70.83

Attachment: January 2024 R&E (6589 : Financial Reports)

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GL NUMBER	DESCRIPTION	2023-24 AMENDED BUDGET	YTD BALANCE 01/31/2024	ACTIVITY FOR MONTH 01/31/2024	AVAILABLE BALANCE	% BDG USE
Fund 248 - DOWNTOWN DEVELOPMENT AUTHORITY FUND						
Expenditures						
Dept 730 - CAPITAL PROJECTS						
248-730-253-885	Knox Box Grant Program	0.00	0.00	0.00	0.00	0.00
248-730-885-100	Knox Box Grant Program	4,000.00	0.00	0.00	4,000.00	0.00
248-730-931-000	Repair & Maintenance-Equipment	0.00	0.00	0.00	0.00	0.00
248-730-965-101	Transfer Out - General Fund	0.00	0.00	0.00	0.00	0.00
248-730-965-301	Interfund TRF 2023 DDA Bond Project	422,709.00	0.00	0.00	422,709.00	0.00
248-730-965-404	Transfer Out - DDA Property Acq Fund	0.00	0.00	0.00	0.00	0.00
248-730-965-592	Transfers To Water/Sewer Fund	0.00	0.00	0.00	0.00	0.00
248-730-975-000	Capital Outlay	23,969.00	1,636.00	0.00	22,333.00	6.83
248-730-975-003	DDA Capital Outlay	5,000.00	3,371.00	0.00	1,629.00	67.42
248-730-975-005	DDA Capital Outlay- Wayfinding/Lighting	0.00	0.00	0.00	0.00	0.00
248-730-975-006	DDA Capital Outlay - Parking	0.00	0.00	0.00	0.00	0.00
248-730-975-009	Capital Outlay - Dumpsters	30,000.00	0.00	0.00	30,000.00	0.00
248-730-975-011	Capital Outlay - Trail Extensi	10,000.00	0.00	0.00	10,000.00	0.00
248-730-975-015	Captial Outlay- Outdoor Sound	0.00	0.00	0.00	0.00	0.00
248-730-975-020	Capital Outlay Parks & rec	0.00	0.00	0.00	0.00	0.00
248-730-992-000	Bond Principal	0.00	0.00	0.00	0.00	0.00
248-730-995-000	Bond Interest	0.00	0.00	0.00	0.00	0.00
Total Dept 730 - CAPITAL PROJECTS		495,678.00	5,007.00	0.00	490,671.00	1.01
TOTAL EXPENDITURES		1,308,664.00	540,280.83	49,282.49	768,383.17	41.28
Fund 248 - DOWNTOWN DEVELOPMENT AUTHORITY FUND:						
TOTAL REVENUES		1,299,623.00	763,894.48	13,199.64	535,728.52	58.78
TOTAL EXPENDITURES		1,308,664.00	540,280.83	49,282.49	768,383.17	41.28
NET OF REVENUES & EXPENDITURES		(9,041.00)	223,613.65	(36,082.85)	(232,654.65)	2,473.33

Attachment: January 2024 R&E (6589 : Financial Reports)

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION
PERIOD ENDING 01/31/2024
% Fiscal Year Completed: 58.74

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

GL NUMBER	DESCRIPTION	2023-24 AMENDED BUDGET	YTD BALANCE 01/31/2024	ACTIVITY FOR MONTH 01/31/2024	AVAILABLE BALANCE	% BDG USE
Fund 301 - DOWNTOWN DEV BOND PROJECT 2023						
Revenues						
Dept 000 - REVENUE						
301-000-300-001	2023 Downtown Dev Tax Exempt Bond Projec	0.00	0.00	0.00	0.00	0.00
301-000-300-002	2023 Downtown Dev Tax Exempt Bond Projec	0.00	0.00	0.00	0.00	0.00
301-000-664-000	Interest Earnings	0.00	1,189.28	159.20	(1,189.28)	100.00
301-000-671-999	Appropriation from Fund Balanc	2,755,000.00	0.00	0.00	2,755,000.00	0.00
301-000-699-301	TRF in from DDA	0.00	0.00	0.00	0.00	0.00
Total Dept 000 - REVENUE		2,755,000.00	1,189.28	159.20	2,753,810.72	0.04
TOTAL REVENUES		2,755,000.00	1,189.28	159.20	2,753,810.72	0.04
Expenditures						
Dept 901 - 905						
301-901-930-000	Repair and Maintenance	0.00	0.00	0.00	0.00	0.00
301-901-950-000	Demolition & Land Improvement	296,646.64	1,968.02	41.72	294,678.62	0.66
301-901-956-000	Dues & Miscellaneous	0.00	0.00	0.00	0.00	0.00
301-901-971-000	Capital Outlay - Buildings	2,200,000.00	2,120,874.70	0.00	79,125.30	96.40
Total Dept 901 - 905		2,496,646.64	2,122,842.72	41.72	373,803.92	85.03
Dept 905 - Downtown Dev Bond 2023						
301-905-301-000	Bond Issuance Expense	0.00	0.00	0.00	0.00	0.00
301-905-731-000	2023 Bond Taxable Issuance Expenses	1,000.00	500.00	0.00	500.00	50.00
301-905-731-001	2023 Tax exempt Bond Issuance Expense	1,000.00	500.00	0.00	500.00	50.00
301-905-745-001	Property taxes-Orion Twp	3,353.36	3,353.36	3,353.36	0.00	100.00
301-905-920-000	Utilities	0.00	0.00	0.00	0.00	0.00
301-905-992-003	2023 DDA bonds Taxable	75,000.00	0.00	0.00	75,000.00	0.00
301-905-992-004	2023 DDA BONDS TAX EXEMPT	180,000.00	0.00	0.00	180,000.00	0.00
301-905-993-001	2023 DDA bond taxable interest	62,000.00	20,609.02	0.00	41,390.98	33.24
301-905-993-002	2023 DDA tax exempt bond interest	106,000.00	35,777.78	0.00	70,222.22	33.75
Total Dept 905 - Downtown Dev Bond 2023		428,353.36	60,740.16	3,353.36	367,613.20	14.18
TOTAL EXPENDITURES		2,925,000.00	2,183,582.88	3,395.08	741,417.12	74.65
Fund 301 - DOWNTOWN DEV BOND PROJECT 2023:						
TOTAL REVENUES		2,755,000.00	1,189.28	159.20	2,753,810.72	0.04
TOTAL EXPENDITURES		2,925,000.00	2,183,582.88	3,395.08	741,417.12	74.65
NET OF REVENUES & EXPENDITURES		(170,000.00)	(2,182,393.60)	(3,235.88)	2,012,393.60	1,283.76

Attachment: January 2024 R&E (6589 : Financial Reports)

REVENUE AND EXPENDITURE REPORT FOR VILLAGE OF LAKE ORION
PERIOD ENDING 01/31/2024
% Fiscal Year Completed: 58.74

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

GL NUMBER	DESCRIPTION	2023-24 AMENDED BUDGET	YTD BALANCE 01/31/2024	ACTIVITY FOR MONTH 01/31/2024	AVAILABLE BALANCE	% BDG USE
Fund 404 - DDA PROPERTY ACQUISITION						
Revenues						
Dept 000 - REVENUE						
404-000-664-000	Interest Earnings	150.00	74.51	9.97	75.49	49.67
404-000-694-000	Miscellaneous Revenue	0.00	0.00	0.00	0.00	0.00
404-000-699-248	Interfund Transfer In - DDA	483,750.00	157,500.00	0.00	326,250.00	32.56
Total Dept 000 - REVENUE		483,900.00	157,574.51	9.97	326,325.49	32.56
TOTAL REVENUES		483,900.00	157,574.51	9.97	326,325.49	32.56
Expenditures						
Dept 901 - 905						
404-901-901-000	Debt Service- Parking Deck	168,750.00	0.00	0.00	168,750.00	0.00
404-901-930-000	Repair & Maintenance - Bldg	0.00	0.00	0.00	0.00	0.00
404-901-950-000	Demolition & Land Improvement	0.00	0.00	0.00	0.00	0.00
404-901-956-000	Miscellaneous	0.00	0.00	0.00	0.00	0.00
404-901-971-000	Capital Outlay - Building	0.00	0.00	0.00	0.00	0.00
404-901-980-248	Prop Acq Transfer to DDA	0.00	0.00	0.00	0.00	0.00
404-901-992-000	Bond Principal	300,000.00	300,000.00	0.00	0.00	100.00
404-901-995-000	Bond Interest	15,000.00	15,000.00	0.00	0.00	100.00
Total Dept 901 - 905		483,750.00	315,000.00	0.00	168,750.00	65.12
TOTAL EXPENDITURES		483,750.00	315,000.00	0.00	168,750.00	65.12
Fund 404 - DDA PROPERTY ACQUISITION:						
TOTAL REVENUES		483,900.00	157,574.51	9.97	326,325.49	32.56
TOTAL EXPENDITURES		483,750.00	315,000.00	0.00	168,750.00	65.12
NET OF REVENUES & EXPENDITURES		150.00	(157,425.49)	9.97	157,575.49	14,950.33
TOTAL REVENUES - ALL FUNDS		4,538,523.00	922,658.27	13,368.81	3,615,864.73	20.33
TOTAL EXPENDITURES - ALL FUNDS		4,717,414.00	3,038,863.71	52,677.57	1,678,550.29	64.42
NET OF REVENUES & EXPENDITURES		(178,891.00)	(2,116,205.44)	(39,308.76)	1,937,314.44	1,182.96

Attachment: January 2024 R&E (6589 : Financial Reports)

02/06/2024

COMPARATIVE BALANCE SHEET FOR VILLAGE OF LAKE ORION

GL Number	Description	PERIOD ENDED 01/31/2023	PERIOD ENDED 01/31/2024
Fund 248 - DOWNTOWN DEVELOPMENT AUTHORITY FUND			
*** Assets ***			
248-000-001-000	Cash	0.00	(125.04)
248-000-002-000	Cash Savings	187,307.83	313,239.25
248-000-007-000	Payroll-checking	0.00	(250.00)
248-000-010-000	Investment/LGIP County Inv	397,217.62	403,528.39
248-000-011-000	Cash - Payroll Savings	0.00	5,821.11
	Total Assets	584,525.45	722,213.71
*** Liabilities ***			
248-000-213-000	Accrued Property Tax - Est Chargebacks	400.00	400.00
248-000-247-000	Health Insurance	517.82	0.00
	Total Liabilities	917.82	400.00
*** Fund Balance ***			
248-000-390-000	Fund Balance - Unassigned	638,446.44	498,200.06
	Total Fund Balance	638,446.44	498,200.06
	Beginning Fund Balance	638,446.44	498,200.06
	Net of Revenues VS Expenditures	(54,838.81)	223,613.65
	Ending Fund Balance	583,607.63	721,813.71

Attachment: January 2024 balance sheet (6589 : Financial Reports)

Total Liabilities And Fund Balance	-----584,525.45	722,213.71
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Fund 301 - DOWNTOWN DEV BOND PROJECT 2023

*** Assets ***

301-000-001-000	Cash	0.00	56,386.80
301-000-002-000	CASH	0.00	2,706,175.43
	Total Assets	0.00	2,762,562.23

*** Liabilities ***

301-000-214-101	Due to General Fund	0.00	6.15
	Total Liabilities	0.00	6.15

*** Fund Balance ***

301-000-390-000	Fund Balance - Unassigned	0.00	4,944,949.68
	Total Fund Balance	0.00	4,944,949.68
	Beginning Fund Balance	0.00	4,944,949.68
	Net of Revenues VS Expenditures	0.00	(2,182,393.60)
	Ending Fund Balance	0.00	2,762,556.08
	Total Liabilities And Fund Balance	0.00	2,762,562.23

Attachment: January 2024 balance sheet (6589 : Financial Reports)

Fund 404 - DDA PROPERTY ACQUISITION

*** Assets ***

404-000-002-000	Cash-Savings-DDA Property Acq.	326,751.62	169,415.21
	Total Assets	326,751.62	169,415.21

*** Liabilities ***

Total Liabilities	0.00	0.00
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*** Fund Balance ***

404-000-390-000	Fund Balance - Unassigned	222,473.45	326,840.70
	Total Fund Balance	222,473.45	326,840.70
	Beginning Fund Balance	222,473.45	326,840.70
	Net of Revenues VS Expenditures	104,278.17	(157,425.49)
	Ending Fund Balance	326,751.62	169,415.21
	Total Liabilities And Fund Balance	326,751.62	169,415.21



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

DDA Board Meeting

DATE: February 20, 2024

FROM: Janet Bloom,

SUBJECT: Bill Approval

Attached:

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

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

Recommended Motion: (Roll Call)

To approve disbursements in the amount of \$23,192.41 for January 2024.

02/06/2024 08:13 AM
User: stouts
DB: Village Of Lake

INVOICE GL DISTRIBUTION REPORT FOR VILLAGE OF LAKE ORION
POST DATES 01/01/2024 - 01/31/2024
BOTH JOURNALIZED AND UNJOURNALIZED
BOTH OPEN AND PAID

Page: **7.1.a**

GL Number	Invoice Line Desc	Vendor	Invoice Description	Amount	Check #
Fund 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND					
Dept 000 REVENUE					
248-000-688-000	GIFT CERTIFICATES 4334 & 4BITTER TOM'S DISTILLERY	DOWNTOWN DOLLARS REDEMP	TIC	50.00	3280
Total For Dept 000 REVENUE				50.00	
Dept 260 GENERAL ACTIVITIES					
248-260-801-000	JANET BLOOM 2023 BALANCE	IJANET BLOOM	DECEMBER EMERGENCY MGMT SE	3,000.00	3281
248-260-810-000	LEGAL SERVICES DECEMBER	DAVIS LISTMAN PLLC	LEGAL SERVICES	662.39	
248-260-823-000	IONOS	COMERICA BANK	DECEMBER	99.47	23
248-260-823-000	NOVEMBER/DECEMBER 2023	WYLDR CREATIVE LLC	WEBSITE MAINTENANCE	300.00	3287
248-260-823-000	RESTORE WEBSITE AFTER HACK	BRIGHTWAY MARKETING	MALWARE REMOVAL	300.00	
248-260-823-000	248 15%	BS&A SOFTWARE	ANNUAL BS&A COST	864.90	
248-260-823-001	50% DDA	CIVICPLUS LLC	SOCIAL MEDIA ARCHIVING SUE	1,499.00	3280
248-260-823-001	AGENDA AND MINUTES DECEMBER	GRANICUS	BOARDS & COMMISSIONS/ AGEN	288.90	3285
248-260-823-001	AGENDA AND MINUTES JANUARY	GRANICUS	BOARDS & COMMISSIONS/ AGEN	288.90	
248-260-851-000	PHONE	MISWITCH COMMUNICATIONS	MONTHLY FEE	95.36	3282
248-260-851-000	118 N BROADWAY	COMCAST	118 N BROADWAY JAN 7-FEB6	195.39	3284
248-260-920-000	118 N BROADWAY	DTE ENERGY	DTE BILL-DECEMBER	212.50	3281
248-260-920-000	118 N BROADWAY ACCT# 1000	CONSUMERS ENERGY	DECEMBER BILL	226.36	3284
248-260-920-000	24 FRONT ST ACCT 9200 096	DTE ENERGY	24 FRONT ST DTE	19.36	3284
248-260-920-000	165 S BROADWAY	VILLAGE OF LAKE ORION	WATER BILLS Q4	511.97	3287
248-260-920-000	118 N BROADWAY	DTE ENERGY	DTE BILL-JANUARY	357.51	
248-260-921-000	165 S BROADWAY	DTE ENERGY	DTE BILL-DECEMBER	23.64	3281
248-260-921-000	380 S BROADWAY ACCT 910040	DTE ENERGY	DTE BILLS DEC	1,816.20	3284
248-260-921-000	165 S BROADWAY	DTE ENERGY	DTE BILL-JANUARY	26.80	
248-260-930-000	ANNUAL EXTINGUISHER INSPECT	PATRIOT FIRE EXTINGUISHERS	FIRE EXTINGUISHER INSPECTI	58.00	3286
248-260-930-002	12/4/23;SNAP KN 13PT	GREAT LAKES ACE HARDWARE	GREAT LAKES ACE PURCHASES-	4.53	3285
248-260-930-002	MATS	DarWel ENTERPRISES LLC	MATS	35.83	
248-260-942-000	DESK PAD	ODP BUSINESS SOLUTIONS LLC	OFFICE SUPPLIES	13.48	3282
248-260-942-000	AMAZON	COMERICA BANK	DECEMBER	51.21	23
248-260-956-000	EAGLE PARK BREW/CHARGE IN	COMERICA BANK	DECEMBER	90.61	23
Total For Dept 260 GENERAL				11,042.31	
Dept 725 ORGANIZATION					
248-725-822-000	SNAPRETAIL	COMERICA BANK	DECEMBER	65.00	23
248-725-825-000	REDEMPTION FOR CERTS 4305/GREEN HIPPO GIFTS		DOWNTOWN DOLLARS REDEMP	50.00	3285
248-725-825-000	DOWNTOWN DOLLARS CERTS 389	SIMPLY MARCELLA	DOWNTOWN DOLLARS REDEMP	75.00	3286
248-725-827-000	KROGER	COMERICA BANK	DECEMBER	10.05	23
Total For Dept 725 ORGANIZ				200.05	
Dept 726 DESIGN					
248-726-801-000	DDA CLEANING SEPTEMBER	PL CARPET CLEANING	MONTHLY CLEANING	375.00	3282
248-726-801-000	DDA CLEANING JANUARY	PL CARPET CLEANING	MONTHLY CLEANING	375.00	
Total For Dept 726 DESIGN				750.00	
Dept 728 ECONOMIC DEVELOPMENT					
248-728-860-000	COSTUME FOR POLAR EXPRESS	ED'S BROADWAY GIFT & COST	EVENT PROPS	25.00	3281
248-728-860-000	AMAZON	COMERICA BANK	DECEMBER	92.91	23
248-728-860-000	POLAR EXPRESS - TROLLY EX	NOTA	BUS RENTAL/WAGES	234.42	3285
248-728-888-000	BRAND MARKETING	20 FRONT STREET CONCEPTS,	MONTHLY ADVERTISING/MARKE	300.00	3279
248-728-888-000	FACEBOOK	COMERICA BANK	DECEMBER	217.87	23
248-728-888-000	ORION LIVING WINTER	CHARTER TOWNSHIP OF ORION	ORION LIVING MAGAZINE - WI	1,419.18	3284
248-728-888-000	DECEMBER ADVERTISING	VIEW NEWSPAPER GROUP	MONTHLY ADVERTISING	1,656.00	3286
248-728-888-001	MONTHLY BRANDING	HUDSON COLLECTIVE	MONTHLY BRANDING FEE	2,245.00	
Total For Dept 728 ECONOMI				6,190.38	
Dept 729 PROMOTION					
248-729-880-005	BANNERS/GIFT GUIDE/POSTERS	CANOE CIRCLE GRAPHICS	GRAPHIC DESIGN	675.00	3280
248-729-880-005	INV #155 - LIGHTED PARADE	NOTA	TROLLEY EVENTS - EXPENSES	252.48	3282
248-729-880-015	BANNERS/LOGO/AFRAMES/PEACH	CANOE CIRCLE GRAPHICS	GRAPHICS FOR ICEFEST	120.00	
248-729-880-100	INV #141 - OKTOBERFEST	NOTA	TROLLEY EVENTS - EXPENSES		

Attachment: January 2024 Invoice register (6591 : Bill Approval)

GL Number	Invoice Line Desc	Vendor	Invoice Description	Amount	Check #
Fund 248 DOWNTOWN DEVELOPMENT AUTHORITY FUND					
Dept 729 PROMOTION					
Total For Dept 729 PROMOTI				1,479.78	
Total For Fund 248 DOWNTOW				19,712.52	
Fund 301 DOWNTOWN DEV BOND PROJECT 2023					
Dept 901 905					
301-901-950-000	215 S. BROADWAY	DTE ENERGY	ELECTRIC BILL	41.72	3281
301-901-950-000	215 S. BROADWAY	DTE ENERGY	ELECTRIC BILL	84.81	
Total For Dept 901 905				126.53	
Dept 905 DOWNTOWN Dev Bond 2023					
301-905-745-001	PARCEL #OL-09-11-228-016	CHARTER TOWNSHIP OF ORION 2023 WINTER TAX / 215 S. E		963.81	3284
301-905-745-001	PARCEL #OL-09-11-228-004	CHARTER TOWNSHIP OF ORION 2023 WINTER TAX / 215 S. E		208.51	3284
301-905-745-001	PARCEL OL-09-11-228-020	CHARTER TOWNSHIP OF ORION 2023 WINTER TAX / 215 S. E		2,181.04	3284
Total For Dept 905 DOWNTOW				3,353.36	
Total For Fund 301 DOWNTOW				3,479.89	

Attachment: January 2024 Invoice register (6591 : Bill Approval)

GL Number	Invoice Line Desc	Vendor	Invoice Description	Amount	Check #
Fund Totals:					
			Fund 248 DOWNTOWN DEVELOPM	19,712.52	
			Fund 301 DOWNTOWN DEV BONI	3,479.89	
				23,192.41	

Attachment: January 2024 Invoice register (6591 : Bill Approval)



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

DDA Board Meeting

DATE: February 20, 2024
FROM: Janet Bloom,
SUBJECT: Budget - 2024-2025

Background Information:

The is the proposed budget for the Lake Orion DDA 2024-2025 fiscal year beginning July 1, 2024. The preliminary budget was presented at the December 19, 2023 DDA Board Meeting for review with comments due back from the board at the January meeting . At the December meeting, a budget review schedule was approved and all the meetings have been conducted up to this point.

Approved Budget Review Calendar:

6:30pm	19-Dec-23	Initial Presentation of Director suggested DDA Budget
6:30pm	16-Jan-24	DDA budget reflecting initial board feedback
6:30pm	23-Jan-24	Presentation by DDA Committees for recommendations
6:30pm	30-Jan-24	Board Review of requests and Committee recommendations
6:30pm	13-Feb-24	Review of DDA budget based upon board feedback
6:30pm	20-Feb-24	Recommendation of DDA budget for inclusion in VLO budget

Additional Detail:

248 Fund, Downtown Development Authority Fund: This fund is balanced and includes

- Funds Committed by DDA for VLO including unused this fiscal year plus the estimated 75% revenue share approved per resolution by both VLO and DDA

- Increased funds to build dumpster enclosures in all quadrants including the gateway property.
- Ridgeline lighting and Spanner lights on building near main intersection
- Façade grants for business and property owners in Downtown Lake Orion
- Increased funds for marketing and the marketing contracts
- Matching funds for potential grants the DDA may apply for
- Funds for Interns and other contractual staff
- Funds for public art and Historic building signs
- More holiday lights and fall décor.

301 Fund, Downtown Development Bond Project 2023: This fund is balanced. The DDA worked with the VLO Finance Director to develop the proper GL numbers for this fund. The initial budget includes a capital campaign goal which matches the annual bond payment. The LO Gateway Committee has discussed offering naming rights and private developer public benefit to help reach this goal. Additionally, the DDA Board voted to request a tech visit paid for by MSOC for additional fundraising assistance. Tim Colbeck, MSOC, has provided an initial quote for this tech visit for review.

404 Fund, DDA Property Acquisition and Improvements: This fund shows no activity for the upcoming fiscal year. Director M. LaLone recommended identifying a specific gateway project for which to use the funds. Per PA 57 of 2018, funds are not meant to sit, but instead to be used for public benefit.

Recommended Motion 1:

To approve the fy 2024-2025 DDA Budget, as presented, and forward to the Village of Lake Orion Council for review and approval.

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
FUND 248 - DOWNTOWN DEVELOPMENT AUTHORITY											
ESTIMATED REVENUES											
Dept 000 - REVENUE							80/20 bond	1.00%	1.00%	1.00%	Projection increase (1%) per Oak Cty Equalization Best Practice
248-000-402-000	Property Tax - Current Real	304,910	322,661	658,713	934,065	903,236	912,268	921,391	930,605	939,911	Tax rebate for 120 S. Broadway (PA210) until 2030, Land Bank payment from taxes until 2025, Property sales affect tax income
248-000-402-100	Property Tax - Twp DDA Capture	344,763	372,527	392,840							
248-000-405-000	Property Tax - Personal										
248-000-412-000	Property Tax - DPPT P/Y & C/Y	866	678	(3,397)	972						
248-000-441-000	Local Community Stabilization Share T	18,059	8,128	8,015	10,094	10,000	10,000	10,000	10,000	10,000	
248-000-445-000	Penalties & Interest on Taxes	2,063	2,113	2,022	0	2,000	2,000	2,000	2,000	2,000	
248-000-539-000	State Grants	5,000	32,418	3,688	2,813	109,028					MSOC, MEDC, etc
248-000-582-000	Intergovernment - Police	81,030	95,649	87,764	15,927						
248-000-664-000	Interest Earned	7,068	2,482	2,297	4,973	2,500	2,500	2,500	2,500	2,500	
248-000-671-999	Appropriation from Fund Balanc					107,459					\$20,000 for façade grant
248-000-673-000	Sale Of Fixed Assets				0						
248-000-681-000	Reimburse - Insurance Claims				12,465						insurance payment for street light damage
248-000-683-000	Reimbursements-Other	6,500			10,000						
248-000-685-000	Sponsorships	7,000	17,210	17,283	38,750	102,400					as of 23-24 on: goal to cover expenses for departments Economic Vitality and Promotion minus Trolley, see below
248-000-685-100	Transportation sponsorship				16,183	28,000	28,000	28,000	28,000	28,000	100% sponsorship for Trolley
248-000-686-000	Downtown Events				19	20,000	18,500	18,500	18,500	18,500	fundraising beyond event budget
248-000-686-002	Flower Fair Revenue	(8)	2660								
248-000-686-003	New Year Resolution Run Revenue										
248-000-686-004	OktoberFest Revenue			13,309	20,361		1,500	1,500	1,500	25,000	Oktoberfest on hold until property can be used. Trolley pub crawl income is here too.
248-000-686-005	Babes On Broadway										
248-000-686-006	Electrical Vehicles				16		500	500	500	500	
248-000-687-000	Merchandise Sales	25	1255	3,563	195	10,000	1,000	1,000	1,000	1,000	
248-000-688-000	Gift Certificate Sales	1,000	21913	20,900	3,425	5,000	500	500	500	500	
248-000-694-000	Miscellaneous	1,874	40	3,786	683						
248-000-696-000	PROCEEDS FROM THE SALE OF BC	500,000									
Totals for dept 000 - REVENUE		1,280,150	879,734	1,210,783	1,070,941	1,299,623	976,768	985,891	995,105	1,027,911	

Attachment: DDA Budget 24-25 initial dec 23 (6592 : Budget - 2024-2025)

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
TOTAL ESTIMATED REVENUES		1,280,150	879,734	1,210,783	1,070,941	1,299,623	976,768	985,891	995,105	1,027,911	

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
APPROPRIATIONS											
Dept 260 - GENERAL ACTIVITIES											
248-260-701-000	Wages	54,449	55,386	55,602	56,354	60,248	65,000	67,145	69,361	71,650	full time director salary (with COLA)
248-260-704-000	Wages - Administrative Coordinator	12,664	14,719	24,068	18,680	36,000	36,000	37,188	38,415	39,683	\$22/hour, up to 32 hours weekly
248-260-706-000	Wages - Event Coordinator	13,707	14,117	22,633	23,842	33,280	36,000	37,188	38,415	39,683	\$22/hour, up to 32 hours weekly
248-260-707-000	Wages - Grounds Coordinator	2,038	1,782	1,255	792	5,000	5,400	5,400	5400	5400	May - August, \$18/hr 20 hours weekly
248-260-715-000	Social Security	5,886	6,579	7,929	7,601	9,688	10,657	11,722	12,895	14,184	full time director benefits
248-260-716-000	Health Insurance- Medical	5,865	5,500	6,828	6,698	7,200	7,920	8,712	9,583	10,542	full time director benefits
248-260-717-000	Life & Disability Insurance	911	1,070	971	927	1,200	1,320	1,452	1,597	1,757	full time director benefits
248-260-718-000	Dental Insurance	472	463	489	480	700	770	847	932	1,025	full time director benefits
248-260-719-000	Pension	3,782	3,561	636	5,003	5,120	5,632	6,195	6,815	7,496	full time director benefits
248-260-721-000	Vision Care	96	108	107	100	130	143	157	173	190	full time director benefits
248-260-722-000	Worker's Comp. Insurance										
248-260-801-000	Contractual Services - general		1,599			15,000	20,000	20,600	21,218	21,855	Interns (\$5,000/qtr) & Interim Staff
248-260-801-002	Contr Services-Police Dtn Law Enforce	81,030	85,429	60,000	60,000	60,000	60,000	60,000	60,000	60,000	Change to original approval
248-260-801-003	Contract Services-DPW maintenance	31,200	31,200	26,196	30,000	30,000	30,000	30,000	30,000	30,000	Change to original approval
248-260-801-004	Contractual Services - administrative	1,739	66,738	68,004	70,000	70,000	70,000	70,000	70,000	70,000	Change to original approval
248-260-801-005	Contractual Services - Township			2,700	2,700	2,700					Change to reflect costs
248-260-801-012	Contr Services-Police Dtn parking & Code enforcement			20,004	21,000	21,000	21,000	21,000	21,000	21,000	Change to original approval
248-260-801-022	Contr Services-Police Crowd Control			9,996	20,000	20,000	20,000	20,000	20,000	20,000	Change to original approval
248-260-801-023	Contract Services-DPW event support			5,004	10,000	10,000	10,000	10,000	10,000	10,000	Change to original approval
248-260-801-033	Contract Services-DPW snow removal			12,000	15,000	15,000	15,000	15,000	15,000	15,000	Change to original approval
248-260-805-000	Audit Fees	2,200	1,839	1,560	1,545	2,000	2,000	2,000	2,000	2,000	Shared cost with VLO
248-260-810-000	Legal Services	3,152	4,364	6,868	12,132	5,340	5,000	5,000	5,000	5,000	Mr. Davis, legal counsel
248-260-823-000	Website/Software	2,645	5,862	4,968	6,706	6,000	6,000	6,000	6,000	6,000	downtownlakeorion.org
248-260-823-001	Municipal Software	3,599	1,249	4,035	1,248	5,000	5,000	5,000	5,000	5,000	Minutetrace, BS&A etc shared cost with
248-260-829-000	Planner Services	14,074			950	5,000	5,000	5,000	5,000	5,000	
248-260-851-000	Telephone	3,362	2,535	3,452	3,247	3,500	3,535	3,570	3,606	3,642	To reflect increase in cost
248-260-900-000	Printing and Publication	82	76	90	182	100	100	100	100	100	
248-260-920-000	Utilities	3,734	3,004	3,084	3,922	4,000	3,500	3,535	3,570	3,606	To reflect increase in cost
248-260-921-000	Municipal Street Lighting	20,039	7,645	6,782	28,967	6,500	6,500	6,565	6,631	6,697	utility bill plus light pole replacement (from fund balance as needed)
248-260-930-000	Repair and Maintenance	270	438	1,092	705	0	500	500	500	500	Office Related
248-260-930-002	Building Maintenance			47	1,019	0	500	500	500	500	DDA Office Maintenance
248-260-940-000	Equipment Rental				70	0	0	0	0	0	
248-260-941-000	Office Rent	12,000	12,000	12,000	12,000	12,000	15,000	15,000	15,000	15,000	New contract 24-25, recommend three year lease if possible

Attachment: DDA Budget 24-25 initial dec 23 (6592 : Budget - 2024-2025)

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
248-260-942-000	Office Expenses	3,468	3,550	5,689	4,979	4,000	5,000	5,050	5,101	5,152	
248-260-946-000	Credit Card Fees	477	168	65	9	100	50	50	50	50	for when DDA is paying cc fees from VLO instead customer
248-260-956-000	Dues & Miscellaneous	3,096	1,257	947	1,036	1,500	1,545	1,560	1,576	1,592	MDA, MSA,Chamber,
248-260-957-000	Education & Training	4,811	2,359	4,379	8,784	1,000	5,000	5,050	5,101	5,152	Main Street Now, MDA, Oak Cty
248-260-958-000	General Activities Misc	1,017	1,186	168	739	150	150	150	150	150	
248-260-961-000	Tax Tribunal Refunds										from Fund Balance if needed
248-260-962-000	Mileage	266	7	794	1,537	500	1,500	1,500	1,500	1,500	
248-260-965-101	Transfer Out - General Fund	66,738		120,000							
248-260-965-401	Transfer to Capital Imp Fund										
248-260-965-404	Transfer Out - DDA Property Acq Fund		14,250		110,000	157,500					2020 Parking Debt Service transfers to 404-000-699-248. Final payment paid August 17. 2023
248-260-974-000	Capital Outlay - Equipment	32	260	1,587	1,174	1,500	2,000	2,020	2,040	2,061	computer equipment upgrades
Totals for dept 260 - GENERAL ACTIVITIES		358,901	350,300	502,029	550,128	617,956	482,722	490,758	499,228	508,165	

Attachment: DDA Budget 24-25 initial dec 23 (6592 : Budget - 2024-2025)

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
Dept 725 - ORGANIZATION											
248-725-822-000	Newsletter	509	984	1,125	817	1,800	1,800	1,800	1,800	1,800	snapretail, flowcode, canva volunteer appreciation luncheon and other recognition
248-725-824-000	Volunteer Recognition & Dvp.	1,129	41	373	0	0	1,000	1,010	1,020	1,030	
248-725-825-000	Gift Certificate Redemption	2,900	15,270	29,601	9,365	5,000	5,000	5,000	5,000	5,000	Consider offering limited time offer dbi redemption to businesses
248-725-826-000	Historic Celebration/Education				1,588	500	2,500	2,525	2,550	2,576	Orion Historical Society building signs research and website info.
248-725-827-000	Awareness Program	942	400	1,209	1,637	1,200	1,500	1,515	1,530	1,545	Chamber luncheon, job advertisements, other board and committee related expenses
248-725-864-000	Grant & Scholarship Distriubution		32,011	1,188	1,000	0		0			MSOC and MSA pass through
248-725-881-000	Merchandise to Sell	1,140	46	137	75	500	5,000	5,050	5,101	5,152	Shop OC Main Streets E-commerce merch
Totals for dept 725 - ORGANIZATION		6,620	48,752	33,633	14,482	9,000	16,800	16,900	17,001	17,103	
Dept 726 - DESIGN											
248-726-745-000	Beautification Supplies	1,484	1,796	1,302	1,574	1,500	1,500	1,515	1,530	1,545	Main Intersection urns
248-726-746-000	Hanging Baskets		4,652		3,353	3,400	3,502	3,537	3,572	3,608	Summer flower on streetlights
To be added	#ST Fall Décor						1,500	1,515	1,530	1,545	September - October decorations to complement Oxford's Scarecrow Festival. Piechnik's is a likely sponsor/supplier
248-726-801-000	Contractual Services	1,625	3,555	2,285	5,172	5,200	5,252	5,305	5,358	5,411	cleaning: office and pub restroom at fire hall
248-726-843-000	Facade Program	20,150			0	7,800	25,680	45,419	36,186	28,552	Façade grant offered to businesses at Max \$20,000 per grant
248-726-845-000	Public Art Program			780	2,250	0	5,000	5,050	5,101	5,152	Window art, mural, matching funds for art related grant
248-726-883-000	Banners and Holiday Lighting	30,685	3,881	9,962	9,639	6,600	10,000	50,000	50,500	51,005	purchase light, installation, banners, and sponsor offset. Recommend 3 year contract. Added funds for spanner and ridgeline lights
248-726-975-001	Capital Outlay - Beautification	8,247	4,557	253	473		5,000	5,050	5,101	5,152	adopt a garden program, MSOC grant received, piechnik's supplier
248-726-975-002	Capital Outlay - Streets					0	500	505	510	515	Parklet creation, park benches, trash cans, cigarette urns
Totals for dept 726 - DESIGN		62,191	18,441	14,582	22,461	24,500	57,934	117,896	109,387	102,485	

Attachment: DDA Budget 24-25 initial dec 23 (6592 : Budget - 2024-2025)

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
Dept 728 - ECONOMIC DEVELOPMENT											
248-728-801-000	Contractual Services				5,563	34,500	34,500	34,500	34,500	34,500	G&G Grant services
248-728-802-000	Trolley Expense				28,064	28,000	28,000	28,000	28,000	28,000	Daily costs plus Maintenance paid through sponsorship then remainde split 50/50 Oxford/LODDA Survey Monkey ind plan Advantage
248-728-861-000	Survey Expense				0	0	468	473	477	482	Annual Volunteer handbook, DDA Board handbook, other training/reference materials
248-728-862-000	Training Materials	817			457	0	1,500	1,515	1,530	1,545	Pass Through for third party Grants awarded to dtn businesses and DDA funds to fulfill match requirements for grants applied for by DDA
248-728-864-000	Grant & Scholarship Distriubution	14,544	10				15,000	15,150	15,302	15,455	used to be prosper mag, now E-commerce fee
248-728-886-000	Marketing Materials	4,113	1,575		1,325	0	1,500	1,515	1,530	1,545	
248-728-886-001	Blight Reduction				0	0					
248-728-886-002	Social District		175	1,731	3,390	1,000	750	750	750	750	Fire wood, fire pits, propane, etc.
248-728-888-000	Brand Marketing	21,795	31,564	16,090	28,976	20,000	50,000	50,500	51,005	51,515	Banners, Signs, Graphics, news ads, media boosts, direct mail, Orion Living Mag, event related marketing,etc
248-728-888-001	Contractual Services Brand Marketing	21,000	18,320	17,748	29,545	29,700	75,000	75,750	76,508	77,273	Hudson Marketing - contract ends 6/30/2023. recommend adding crisis communication in addition to normal branding and a Pay to Play option for Businesses based upon frequency requested
Totals for dept 728 - ECONOMIC DEVELOPMENT		62,269	51,644	35,569	97,320	113,200	206,718	208,153	209,602	211,065	

Attachment: DDA Budget 24-25 initial dec 23 (6592 : Budget - 2024-2025)

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
Dept 729 - PROMOTION											
248-729-880-000	Event Promotion	1,038	17,898	2,655	1,796	500	2,500	1,000			Pop-up events
248-729-880-001	Event Promo - Gazebo Series	7,726	7,152	13,389	17,342	10,000	10,000	10,000	10,000	10,000	LOLive! 7 concerts, July 10 to August 28. Partial Sponsor by 20 Front Street
248-729-880-004	Event Promo - Halloween Parade	1,003	2,373	2,848	2,015	2,500	2,500	2,525	2,550	2,576	Halloween Extravaganza
+	Event Promo - Hmtwn/Holiday Vill	6,620	1,019	11,204	8,215	8,500	7,500	7,575	7,651	7,727	Horse & Carriage rides, Shop Small Sat
248-729-880-006	Event Promo - New Years Res. Run					0	0	0			
248-729-880-007	Event Promo - Flower Fair	1,084				0	0	0			
248-729-880-008	Event Promo-Photo Contest					0	250	50	50	50	
248-729-880-009	Event Promo-Lake Orion Love Shop to Win				0	0	0	0			
248-729-880-010	Babes On Broadway	372					0	0			
248-729-880-011	Restaurant week					0	2,500	2,525	2,550	2,576	ticketed event has giveaway and branded print materials for the restaurants (table tents, menus)
248-729-880-012	Sing & Stroll Tree Lighting	28	999	1,470	12,212	12,000	12,120	12,241	12,364	12,487	Production Co, marshmallow roasting supplies, Cocoa cups, candy canes. Once property is available for use, production may cost less.
248-729-880-013	Stronger together Winter		2400	3,629	682	600	2,500	2,525	2,550	2,576	letterboxing, passport
**248-729-880-014	Octoberfest			11,350	22,704		2,500	2,525	2,550	20,000	#ST trolley crawl (ticketed) until property can be used for full event. Free gift with purchase of ticket.
**248-729-880-015	Winter Activities			10,219	8,618	10,200	15,000	15,150	15,302	15,455	IceFest
248-729-880-016	Athletic Events - other					0	2,500	2,525	2,550	2,576	May Fitness month and July summer event
248-729-880-017	Movie Night				2,044	1,700	3,500	3,535	3,570	3,606	
248-729-880-100	Stronger Together -smr and fall				351	3,500	5,000	5,050	5,101	5,152	Giveaways for the following ticketed events: OktoberFest Trolley Crawl stein = \$1,250 plus costs for scavenger hunts or retail events during events like jubilee and dragon on the lake (both close roads)
248-729-885-000	Port-A-Johns	180		310	2,125	2,200	5,000	5,050	5,101	5,152	in children's Park May to Nov and additional at gateway property
248-729-895-000	Event Promo-Comm. Sponsorships	250	250	500	43	0	0	0	0	0	
Totals for dept 729 - PROMOTION		18,301	32,091	57,574	78,147	51,700	73,370	72,276	71,888	89,931	

Attachment: DDA Budget 24-25 initial dec 23 (6592 : Budget - 2024-2025)

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
Dept 730 - CAPITAL PROJECTS											
248-730-253-885	Knox Box Grant Program			19,333			4,000	5,000	6,000	10,000	Orion Twp Fire Dept collaboration for public safety
248-730-885-100	Knox Box Grant Program		2,680		0	4,000					
248-730-931-000	Repair & Maintenance-Equipment	2,235	999		3,146						
248-730-965-101	Transfer Out - General Fund	29,000	29,000								
248-730-965-301	Interfund TRF 2023 DDA Bond Project					422,709					
248-730-965-404	Transfer Out - DDA Prop Acq Fund	35,000		2,324	104,178		53,075	37,584	44,494	51,474	Bond paid through 301 fund Used to pay other debt, currently no other debt Used to pay other debt specifically from VLO for Village use within district (TIF Rev minus \$871,279)*.75 plus funds unused at end of current fiscal year. But also correct for TIF revenue at end of year for the unused funds Shared Lease payments: Caruso, 115 S. Broadway, Anderson/Flint lot, LO Community Schools
248-730-965-592	Transfers To Water/Sewer Fund	124,800			0						
248-730-975-000	Capital Outlay				387	23,969					
248-730-975-003	DDA Capital Outlay	4,419	5,271		2,521	5,000					
248-730-975-005	DDA Capital Outlay - Wayfinding/Lighting	1,050			39,266	0					
248-730-975-006	DDA Capital Outlay - Parking	544,374	32,903	1,056	251,182	0	75,000	30,000	30000	30000	Maintenance of lots Dumpsters in each quadrant of downtown and 1-2 on new property Trail connector, bike lot, and fix it stations maintenance
248-730-975-009	Capital Outlay - Dumpsters			155	0	30,000					
248-730-975-011	Capital Outlay - Trail Extensi				0	10,000					
248-730-975-015	Capital Outlay - Outdoor Sound				0						
248-730-975-020	Capital Outlay Parks & rec				25,705						
248-730-992-000	Bond Principal		120,000				139,225	79,909	87,998	99,162	#REF! matches 248-000-671-999
248-730-995-000	Bond Interest		14,900								
Totals for dept 730 - CAPITAL PROJECTS		740,878	205,753	22,868	426,385	495,678					
TOTAL APPROPRIATIONS		1,249,160	706,981	666,255	1,188,923	1,312,034	976,769	985,891	995,105	1,027,911	
NET OF REVENUES/APPROPRIATIONS - FUND 248		30,990	172,753	544,528	(117,982)	(12,411)	(0)	0	0	(0)	
BEGINNING FUND BALANCE		354,248	387,237	559,269	638,446	520,464	508,053	508,052	508,052	508,053	
FUND BALANCE ADJUSTMENTS		1,998									

Attachment: DDA Budget 24-25 initial dec 23 (6592 : Budget - 2024-2025)

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
ENDING FUND BALANCE		387,236	559,269	638,446	520,464	508,053	508,052	508,052	508,053	508,052	fund balance uses the cents we don't show to round up or down. Caluculations are based upon percentages.

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
Fund 301 - DOWNTOWN DEV BOND PROJECT 2023											To be developed with input from finance director
Revenues											Fund 301 - Bond issuance 6/29/23
Dept 000 - REVENUE											
301-000-300-001	2023 Downtown Dev Tax Exempt					-					
301-000-300-002	2023 Downtown Dev Taxable Bond					-					
301-000-664-000	Interest Earnings					1,000	800	640	512	410	less interest as funds are spent
301-000-671-999	Appropriation from Fund Balance						500,000	500,000	500,000	444,950	disbursement of bond revenue
ADD	Capital Campaign Fundraising						419,709	420,721	421,333	423,115	Equal to total bond payments
301-000-699-301	TRF in from DDA					-					Transfer from 248-730-965-301
Total Dept 000 -	Revenue					1,000	920,509	921,361	921,845	868,475	
TOTAL REVENUES						1,000	920,509	921,361	921,845	868,475	
Dept 901-905											
301-901-930-000	Repair and Maintenance										
301-901-950-000	Demolition & Land Improvement					300,000	500,800				
301-901-956-000	Dues & Miscellaneous					0					
301-901-971-000	Capital Outlay - Buildings					2,200,000			500,512		
ADD	Capital Outlay - Parking							250,640			
ADD	Capital Outlay - Infrastructure							250,000		445,360	
Total Dept 901-905						2,500,000	500,800	500,640	500,512	445,360	
Expenditures											
Dept 905 - Downtown Dev Bond 2023											
301-905-301-000	Bond Issuance Expenses					0	-	-			
301-905-731-000	2023 Bond Taxable Issuance					1,000					
301-905-731-001	2023 Tax exempt Bond Issuance					1,000					
301-905-992-003	2023 DDA bonds Taxable					75,000	60,000	60,000	65,000	70,000	
301-905-992-004	2023 DDA BONDS TAX EXEMPT					180,000	150,000	160,000	165,000	170,000	
301-905-993-001	2023 DDA bond taxable interest					62,000	76,909	73,921	70,933	69,315	
301-905-993-002	2023 DDA tax exempt bond interest										
						106,000	132,800	126,800	120,400	113,800	
Total Dept 905 - Downtown Dev Bond 2023						425,000	419,709	420,721	421,333	423,115	
TOTAL EXPENDITURES						2,925,000	920,509	921,361	921,845	868,475	
Fund 301 - DOWNTOWN DEV BOND PROJECT 2023:											

Attachment: DDA Budget 24-25 initial dec 23 (6592 : Budget - 2024-2025)

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
TOTAL REVENUES						1,000	920,509	921,361	921,845	868,475	
NET OF REVENUES & EXPENDITURES						(2,924,000)	0	0	0	(0)	
BEG. FUND BALANCE					4,944,950	4,944,950	2,020,950	1,520,950	1,020,950	520,950	
Adjustment to fund balance							(500,000)	(500,000)	(500,000)	(444,950)	removing appropriation from fund balance shown in revenue
END FUND BALANCE					4,944,950	2,020,950	1,520,950	1,020,950	520,950	75,999	

Attachment: DDA Budget 24-25 initial dec 23 (6592 : Budget - 2024-2025)

DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
Fund 404 - DDA PROPERTY ACQUISITION & IMPROVEMENTS											2020 Parking Improvement projects include Slater St lot, Front street restoration, and other parking lot and street resurfacing
ESTIMATED REVENUES											
Dept 000 - REVENUE											
404-000-664-000	Interest Earnings	138	138	162	150	150	0	0	0	0	
404-000-699-248	Interfund Transfer In - DDA	35,000	14,250	120,000	214,178	483,750	0	0	0	0	transfer from 248-260-965-404
Totals for dept 000 - REVENUE		35,138	14,388	120,162	214,328	483,900	0	0	0	0	
TOTAL ESTIMATED REVENUES		35,138	14,388	120,162	214,328	483,900	0	0	0	0	
APPROPRIATIONS											
Dept 901 - CAPITAL OUTLAY											
248-901-971-000	Captial Outlay - Building										
404-901-901-000	Debt Service - Parking Deck					168,750	0	0	0	0	
404-901-992-000	Bond Principal			100,000	300,000	300,000	0	0	0	0	Debt Service - Road improvements
404-901-995-000	Bond Interest			12,500	10,000	15,000	0	0	0	0	Interest - Road Improvements
Totals for dept 901 - CAPITAL OUTLAY				112,500	310,000	483,750	0	0	0	0	
TOTAL APPROPRIATIONS				112,500	310,000	483,750	0	0	0	0	
NET OF REVENUES/APPROPRIATIONS - FUND 404		35,138	14,388	7,662	(95,672)	150	0	0	0	0	
BEGINNING FUND BALANCE		165,286	200,424	214,812	222,474	126,802	126,952	126,952	126,952	126,952	
Fund Balance Adjustments											
ENDING FUND BALANCE		200,424	214,812	222,474	126,802	126,952	126,952	126,952	126,952	126,952	

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DDA Budget	2023-2024	2019-20	2020-21	2021-2022	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	
		ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	ACTIVITY	Board Request	PROJECTION	PROJECTION	PROJECTION	Notes
GL NUMBER	DESCRIPTION										
ALL FUNDS - 248, 301 AND 404											
ESTIMATED REVENUES - ALL FUNDS		1,315,288	894,122	1,330,945	1,285,269	1,784,523	1,897,277	1,907,252	1,916,950	1,896,386	
APPROPRIATIONS - ALL FUNDS		1,249,160	706,981	778,755	1,498,923	4,720,784	1,897,278	1,907,252	1,916,950	1,896,386	
NET OF REVENUES/APPROPRIATIONS - ALL FUNDS		66,128	187,141	552,190	(213,654)	(2,936,261)	(0)	0	0	(1)	
BEGINNING FUND BALANCE - ALL FUNDS		519,534	587,661	774,081	860,920	5,592,215	2,655,954	2,155,953	1,655,954	1,155,954	
FUND BALANCE ADJUSTMENTS - ALL FUNDS		1,998	0			0	(500,000)	(500,000)	(500,000)	(444,950)	
ENDING FUND BALANCE - ALL FUNDS		587,660	774,081	860,920	5,592,215	2,655,954	2,155,953	1,655,954	1,155,954	711,003	

Attachment: DDA Budget 24-25 initial dec 23 (6592 : Budget - 2024-2025)



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

DDA Board Meeting

DATE: February 20, 2024
FROM: Janet Bloom,
SUBJECT: Budget Amendment -Brand Marketing

Background Information: This budget amendment is to move MSOC grant monies of \$7,500 received for the awareness campaign in 2023. Funds were received into the State Grants account in the Fall of 2023 and now the funds need to be moved to cover costs of brand marketing.

Recommended Motion:

To increase 248-728-888-000 Brand Marketing by \$7,500 and;
To reduce 248-000-539-000 State Grants account by \$7,500.



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DDA Board Meeting

DATE: February 20, 2024

FROM: Janet Bloom,

SUBJECT: DDA Staffing

Background Information:

Special Meeting on 2/15/24 at 6:30 pm to review this action item.

The former Lake Orion Executive Director, Molly LaLone, vacated the role December 15, 2023. An interim executive director, Janet Bloom, was brought in December 11, 2023 and currently works in this capacity.

The position was posted on multiple sites and an Executive Search Committee was formed. Interviews of candidates have been conducted.

Recommended Motion #1: To hire _____ as DDA _____ with compensation package of _____ and;

To authorize DDA Board Chair, Debbie Burgess, to make decisions on behalf of the DDA Board for the hiring process.

Recommended Motion#2: To present the candidate and compensation package to the Lake Orion Village Council on March 11, 2024 for review.



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

DDA Board Meeting

DATE: February 20, 2024
FROM: Janet Bloom,
SUBJECT: Verbal Director Report

Recommended Motion: Receive and File