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# **DEVELOPMENT AND TAX INCREMENT FINANCING PLANS**

FOR THE CHARTER TOWNSHIP OF OSHTEMO  
SOUTH DRAKE ROAD CORRIDOR IMPROVEMENT AUTHORITY

**SOUTH DRAKE ROAD CORRIDOR IMPROVEMENT AUTHORITY  
CHARTER TOWNSHIP OF OSHTEMO  
KALAMAZOO COUNTY, MICHIGAN**

DRAFT – April 15, 2014  
ADOPTED – April 22, 2014

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**DEVELOPMENT AND  
TAX INCREMENT FINANCING PLANS**

**For the  
Charter Township of Oshtemo  
South Drake Road Corridor Improvement Authority**

**South Drake Road Corridor Improvement Authority  
Charter Township of Oshtemo,  
Kalamazoo County, Michigan**

**Recommended for Approval by the South Drake Road Corridor Improvement Authority:  
April 15, 2014**

**Approved by the Oshtemo Charter Township Board of Trustees:  
April 22, 2014**

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## **ACKNOWLEDGMENTS**

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## **BACKGROUND AND PURPOSES OF THE DEVELOPMENT AND TAX INCREMENT FINANCING PLANS**

On March 18, 2014, the Township Board of the Charter Township of Oshtemo adopted the Resolution Establishing the South Drake Road Corridor Improvement Authority (“SoDA”). A copy of the Resolution is attached to this Plan in Appendix A. The SoDA was given all of the powers and duties prescribed for a Corridor Improvement Authority pursuant to Act 280 of the Public Acts of 2005, as amended, also known as the Corridor Improvement Authority Act.

Also on March 18, 2014, the Township Board approved the appointment of the SoDA Board of Directors, a Board of between five and nine members that will guide and administer the work of the SoDA.

The intent of Act 280 is to provide a means for municipalities to address deteriorating commercial corridors that are located outside of traditional downtown areas. Those traditional downtown areas are often revitalized through the use of downtown development authorities under the provisions of Act 197 of the Public Acts of 1975, as amended (“Act 197”). Like DDAs under Act 197, Act 280 authorizes the establishment of corridor improvement authorities and the use of tax increment financing to finance and encourage the revitalization of and economic growth within existing commercial corridors.

Act 280 specifically authorizes local units of government to establish one or more corridor improvement authorities to correct and prevent deterioration in business districts; to encourage historic preservation; to authorize the acquisition and disposal of interests in real and personal property; to authorize the creation and implementation of development plans and development areas in the districts; to promote the economic growth of the districts; to create a board and prescribe its powers and duties; to authorize the levy and collection of taxes; to authorize the issuance of bonds and other evidences of indebtedness; to authorize the use of tax increment financing; to prescribe the powers and duties of certain state officials; and to provide for rule promulgation.

The primary tool available to local governments to revitalize these corridors is tax increment financing. Through tax increment financing, a portion of the increase in the tax base resulting from the economic growth and development within the development area is reinvested in the corridor and used for infrastructure improvements and facility enhancement, thereby reinvigorating the development area and facilitating economic growth and development.

Act 280 seeks to accomplish its goals by providing local units of government with the necessary legal, monetary, and organizational tools to eliminate property value deterioration and to

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promote economic growth through publicly initiated projects undertaken cooperatively with privately initiated projects.

## **HISTORY OF DRAKE ROAD CORRIDOR AND DEVELOPMENT PLAN OBJECTIVES**

The South Drake Road Corridor Improvement Authority Development District is described in Appendix B and is illustrated on Map 2.

Drake Road serves as a border road between Oshtemo Township and the City of Kalamazoo as well as between Oshtemo Township and Kalamazoo Township. Running north-south between Parkview Avenue and Ravine Road, maintenance authority over the road surface alternates between the City of Kalamazoo and the Kalamazoo County Road Commission.

Originally a two-lane section line road, Drake Road was expanded from two lanes to five lanes in the 1970's. This expansion was necessary due to the increased multi-family residential development that was occurring along with the commercial development present along both West Main Street and Stadium Drive. Drake Road was experiencing a significant increase in population density as well as increased popularity as a route to key commercial destinations in the region.

Over time, these trends have not tapered off. Additional apartment units have been added along the west side of Drake Road as well as along KL Avenue not far from Drake Road. Commercial development along both West Main Street and Stadium Drive has expanded and stretched out from the intersections onto Drake Road. Traffic – both local and through traffic – has increased substantially over time along the corridor.

This corridor is home to the highest density of population in Oshtemo Township. A significant portion of this population relies on alternative means of transportation, including non-motorized transportation and public transit. There are also a large number of persons with disabilities, children, and seniors in this area along with institutional uses like churches and schools. It is an area with a high number of people and a high demand for services.

## **DRAKE ROAD CORRIDOR AND OSHTEMO TOWNSHIP**

The Drake Road corridor lies along the eastern boundary of Oshtemo Township. In the designated area, it establishes the boundary between Oshtemo Township and the City of Kalamazoo. (To the north, the road lies between Oshtemo and Kalamazoo Townships.) Maintenance responsibility for Drake Road alternates between the City of Kalamazoo and the Kalamazoo County Road Commission. Within the designated corridor, the Road Commission



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has responsibility over the portion of the corridor north of KL Avenue and the City of Kalamazoo has responsibility over the portion of the corridor south of KL Avenue.

The area of the Township between Drake Road and US-131 is zoned and planned for the highest intensity development in the Township – both residential and commercial. This is due to the proximity to the urban development in the City as well as the road and utility infrastructure available in the area.

The designated corridor has access to US-131 via Stadium Drive and West Main Street (M-43) at both its north and south ends. There is also access to Western Michigan University, Kalamazoo College, and downtown Kalamazoo for both motorized and non-motorized travelers via existing roads and non-motorized facilities in the City. (See Map 1 - Regional Location Map).

### **PURPOSES OF THIS EFFORT**

In order to have the opportunity to capture funds and use those funds within the district, the SoDA must adopt Development and Tax Increment Financing Plans. The process of generating the Development Plan is an opportunity to generate ideas for projects and identify objectives to accomplish within the SoDA district. Not all of them will be accomplished, particularly not within the first few years of the planning period. It is also probable that the SoDA will share the costs of some of these projects with other public or private agencies.

The overall goal of the Plan is to undertake public improvements that will provide the framework and impetus for additional private investments, improvements, and redevelopment projects in the SoDA District as well as maintain and improve the quality of life of residents and businesses in the community. Additionally, the Plan's goals include:

- Provision of non-motorized facilities along Drake Road
- Provision of non-motorized facilities along KL Avenue
- Improved public transit facilities / shelters
- Streetscape or gateway treatment
- Incentives for modernization and improvement of aging or obsolete development

There are two separate documents contained within this text. First the Development Plan defines the Development Area within which the SoDA can make improvements and describes what these improvements might be. It describes what projects the SoDA may implement over the course of the Plan. Second, the Tax Increment Financing (TIF) Plan explains one method the SoDA uses to collect funds and estimates how much money it will generate over the life of the Plan. This helps the SoDA understand how much money they will have to use, and it helps the tax jurisdictions understand what the impact will be on them. Both documents are prepared in accordance with the Corridor Improvement Authority Act (PA 280 of 2005, as amended).

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## **HOW TAX INCREMENT FINANCING WORKS**

Once the SoDA establishes a special district and a plan for specific public and private improvements to prevent or correct deterioration within that district, tax increment financing is one tool that can be used to finance those improvements. This funding is provided through taxes paid on the increased value created within the district by new investment.

For example, if the SoDA district has a current taxable value of \$1,000,000, and as a result of implementation of the Plan, new investment in the district increases the taxable value to \$2,000,000, the SoDA would capture taxes paid on the increase in value of \$1,000,000. The taxing entities – Township, County, Community College, Library, etc. – would continue to receive their share of taxes paid on the current, or baseline, value of \$1,000,000.

In reality, investments made by the SoDA are funded by the increase in taxes paid by private investment in the district. The taxes paid on the original value of the district continue to be distributed to the applicable taxing entities. Thus, no taxes are lost by any taxing entity, and no additional tax burden is placed upon existing entities that would not occur otherwise.

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## Insert Map 1 – Regional Location Map

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## SUMMARY OF PROPOSED IMPROVEMENTS

The Development Plan contains projects that may be completed by the SoDA over the course of the next 30 years. Projects were identified based on review and discussions with the SoDA Board, discussion at a Joint Board and Commission meeting (all Township Boards and Commissions), and review of the Township Master Plan.

In order for the SoDA to fund a project in the District, it must be included in the Development Plan. Therefore, there are several projects included in this Plan, some of which may not happen for 20-25 years toward the end of the planning period. Also, it is possible that the SoDA may only pay for a portion of the costs of the proposed improvements. The remaining costs may be paid for by a private party, donations, grants, or another public agency. In addition, new projects may emerge in the future that were not anticipated at the time of drafting of this plan. Those projects may be completed by simply amending the Plan to include the desired project.

*Transportation Enhancements (TE)* – The purpose of this expenditure category is to enhance pedestrian, vehicular, bicycle, and transit options within the Development Area. To maintain its vibrancy and accessibility, the Corridor must be well served by public transit, vehicles must be accommodated through parking and ease of traffic movements, and pedestrians and bicyclists must have clearly delineated areas for walking and biking. Enhancements to transportation include bus shelters, route scheduling and signage improvements, safe sidewalks and non-motorized facilities connecting commercial and residential areas, bike racks, and bike lanes.

*Aesthetic Improvements (AI)* – The purpose of this expenditure category is to enhance the overall character and aesthetic quality of the corridor, both public and private spaces. Activities focus on creating gateways to the district and the Township using landscape treatments, planters, and lighting to help maintain and enhance the appearance of the area. Other opportunities include provision of streetscape amenities and assistance with improvements to existing private development within the district in order to achieve the stated goals of the SoDA.

*Public Realm/Infrastructure (PI)* – The purpose of this expenditures category is to assure that the areas within the rights-of-way function properly and safely to serve the needs of local residents and businesses and their customers as well as providing high quality services to citizens and businesses in an efficient and aesthetically pleasing manner. These improvements may not always be visible or the most exciting, but they often have a significant impact on the quality of life of residents in the community and the quality of the experience of working, shopping, and living in the district.

*Administration (A)* – The purpose of this expenditures category is to cover any other necessary administrative requirements related to a Corridor Improvement Authority and District.

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## DEVELOPMENT PLAN

### 1. Designation of Boundaries of the Development Area

The Development Area is located within the limits of Oshtemo Township. The boundaries of the Development Area are the same as the boundaries of the Corridor Improvement Authority. The boundary is shown on Map 2, and a legal description of the boundary is provided in Appendix B. Generally, the development area is bounded by the Township limits to the east (Drake Road), Stadium Drive to the south, West Main Street to the north, and a staggered western boundary depending on the depth of parcels with an extension of the district along KL Avenue.

### 2. Location and Extent of Existing Streets and Other Public Facilities Within the Development Area; Location, Character, and Extent of Existing Public and Private Land Uses.

Existing land uses in the Development Area are shown on Map 3. The map also shows existing land uses on surrounding properties in order to illustrate the relationship of the properties in the district to those outside of it.

#### A. Public / Quasi-Public Uses

Public Uses in the Development Area include at least portions of the following public streets: Drake Road, West Main Street (M-43), Skyridge Avenue, Driftwood Avenue, Green Meadow Drive, Beckley Road, Claymoor Drive, Mount Royal Road, Concord Place Drive, West Michigan Avenue, and Stadium Drive.

The only public facility located within the district is the Post Office located just south of West Main Street.

#### B. Private Uses

- 1) Residential – Skyridge Avenue and Driftwood Avenue are lined with single family homes and provide access to an established neighborhood of single family homes west of the district. Several of these homes fall within 500 feet of Drake Road and therefore are within the SoDA district. There are several additional houses in this vicinity that front on Drake Road and are also within the district.

In addition to the single family residences, there are many multi-family residential units within the designated area. Along KL Avenue, and between KL Avenue and Skyridge Avenue are several multi-family

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developments that contain hundreds of dwelling units. They represent the highest population density in the Township and a large share of the Township's overall population.

- 2) Commercial – The Development Area covers one of the key commercial and multi-family corridors in the Kalamazoo region. The north and south ends of the corridor have a significant commercial presence extending from the intersections of Drake Road with West Main Street and Stadium Drive respectively. These are both high intensity, high volume commercial corridors in the region, and the intersections represent two of the busiest in the County. Thus, commercial use extends outward along Drake Road at each end. In these areas, commercial use is primarily retail and service

In the remainder of the corridor, multi-family residential is the predominate use (which is classified as commercial by the assessing department). Scattered additional commercial uses include a node of retail, restaurant, and service uses at the intersection of Drake Road and KL Avenue as well as office uses distributed throughout the corridor.

- 3) Industrial – There are no industrial uses in the district.

**C. Recreational Uses**

There are no recreational areas located within the Development Area. The Prairies Golf Course is located just to the west on the south side of West Main Street. Also on the east side of Drake Road is the Kalamazoo AYSO soccer field complex. Asylum Lake natural area, owned by Western Michigan University and located in the City of Kalamazoo, is located to the southeast of the district at the southeast corner of Drake Road and Stadium Drive.

**D. Semi-Public Uses**

There are several semi-public uses located along or near the designated corridor district. The Skyridge Church and West Kalamazoo Church of Christ are both located along Drake Road in the corridor, and the Sojourner House is located on Green Meadow Drive immediately adjacent to the designated district. The Calvary Bible Church is located on the east side of Drake Road across from the district.

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**insert map 2 boundary**

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**INSERT MAP 3 ELU**



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**E. Educational Uses**

There are no public educational uses within the Development Area. Everest Institute, a private technical college, is located at the north end of the district. Linden Grove Middle School, part of the Kalamazoo Public School District, is located on Arboretum Parkway just east of the district. Kalamazoo Central High School is located on Drake Road north of the district, and Western Michigan University's Business and Technology Research (BTR) Park and Engineering Studies Campus is located south of the district off Drake Road.

**F. Vacant Land**

There is very little vacant land available within the Development Area. A significant exception is located at the south end of the development area (northwest corner of Stadium Drive and Drake Road). Nonetheless, there are opportunities for redevelopment, modernization, or improvement along the corridor at existing commercial and multi-family developments, as evidenced by the significant upgrades occurring at the West Century Center development.

**3. Existing Improvements in the Development Area to be Demolished, Repaired, or Altered; and Time Required for Completion.**

The extent of demolition, repair, or alteration of existing public improvements is not yet known for certain since funding for specific projects has not been committed nor design plans been completed.

No structure or improvement is specifically designated for demolition in the Plan. One possible project allows the SoDA to provide financial incentives / assistance for the modernization of obsolete structures and developments thus bringing those properties into compliance. It is unlikely this would result in outright demolition, but that is a possibility depending on the desires of the owner.

There are a few existing improvements that may be altered or repaired as a result of the proposed improvements contained in Table 1 (page 14). (A summary description of each of the projects included in Table 1 can be found in Appendix C.) Development of non-motorized facilities along Drake Road is a key priority for the SoDA. It has been a top priority for the Township for over a dozen years. During this time, several studies and conceptual plans have been developed. As a result, enough information has been collected to understand that utility infrastructure, existing signal and transportation equipment, and topographic contours will be affected and may need to be relocated in order to accomplish this goal. With the exception of easement acquisition and grade changes, it is unlikely there will need to be changes made to private improvements along the corridor as a result of the non-motorized facilities.

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Also, as referenced above, some of the projects involve incentives or assistance for improvements to property owners to encourage modernization of their facilities. If the project is completed and successful, this would clearly involve alterations to existing improvements in the area.

**4. The Location, Extent, Character, and Estimated Cost of Improvements, Including Rehabilitation Contemplated for the Development Area and an Estimate of Time Required for Completion.**

Public improvements contemplated to be completed in the Development Area over the 30-year life of this Plan, along with estimated costs and time of completion, are included in Table 1. The projects have been grouped into phases for scheduling purposes. For those projects with a known geographic reference at this time, they are shown on Map 4. Those projects not shown on Map 4 either have no specific geographic reference (e.g. Streetscape Plan), or the specific location of the improvement has not yet been determined (e.g. Development of Small Park Areas).

Cost estimates for the projects are very preliminary because plans have not been completed. Where possible, estimates were based upon recent, comparable construction and vendor estimates.

Funding for the public projects is proposed from a variety of sources including the following: tax increment revenues, federal and state grants (including MDNR and MDOT), private donations, and additional sources to be determined. The proposed improvements include pathways and pedestrian access, streetscape and gateway improvements, public transit facilities, public sanitary sewer extensions, incentives for private property improvements, and business development.

**Table 1**  
**Project Cost and Timing**  
**South Drake Road Corridor Improvement Authority, Oshtemo Township**

Map #	Project	Category	Estimated Cost
<b>ON-GOING PROJECTS: 2014-2043</b>			
	<i>Maintenance of Sidewalks and Streetscape Project</i>	A	\$20,000/year
	<i>Community Improvement Projects</i>	PI	\$3,500/year
	<i>Administration</i>	A	\$3,000/year
	<i>Community / Neighborhood Engagement &amp; Security</i>	A	\$100,000/year
<b>PHASE I: 2014-2018</b>			
<b>1</b>	<i>Non-Motorized Facilities – Drake Rd., KL Ave., and W. Michigan Ave.</i>	TE	\$1,500,000
<b>2</b>	<i>Explore Expansion of District Boundaries</i>	A	\$5,000
<b>PHASE II: 2019-2028</b>			
	<i>Develop a Streetscape Plan</i>	TE	\$35,000
	<i>Pedestrian Access Improvements</i>	TE	\$80,000
<b>3</b>	<i>Local Road Sidewalks</i>	TE	\$180,000
<b>4</b>	<i>Gateway Features</i>	AI	\$450,000
<b>5</b>	<i>Public Transportation Access Improvements</i>	TE	\$250,000
<b>6</b>	<i>Streetscape Improvements and Maintenance</i>	AI	\$500,000
<b>PHASE III: 2029 – 2043</b>			
	<i>Bury Overhead Utility Lines</i>	PI	\$400,000
	<i>Utility Infrastructure Improvements</i>	PI	\$1,200,000
	<i>Development of Small Park Areas</i>	PI	\$250,000
	<i>Modernization of Dated / Obsolete Properties</i>	AI	\$750,000
	<i>Create and Implement Lighting Plan</i>	AI	\$300,000
	<i>Acquisition of Blighted or Obsolete Properties</i>	AI	\$1,000,000

- Categories: A – Administration; PI – Public Realm/Infrastructure; TE – Transportation Enhancements; AI – Aesthetic Improvements
- Estimated cost is in 2014 dollars.
- A summary of all projects is included in Appendix C.
- Not all projects are identified on the map as they are not place specific or a specific place is not yet known.

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## Insert Map 4 - Improvement Projects

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**5. A Statement of the Construction or Stages of Construction Planned, and the Estimated Time of Completion.**

An estimated schedule for the completion of the proposed projects is outlined in Table 1. Over time, as the District changes, budgets fluctuate, and opportunities present themselves, specific projects may be moved into a different phase for implementation. Moving projects from one phase to another shall not require an amendment of the Plan. In approving the project, the SoDA, at that time, shall provide a short explanation as to why the shift was justified.

The projects have been divided into four phases based primarily on priority, considering the financial status of the SoDA at the time. On-going projects are those projects that are likely to continue on an annual basis throughout the life of the Plan. Many are likely to start within the next one to five years but may not start until later in the Plan. In some instances, these projects are already on-going in the Township or by some other entity, and this amendment allows the SoDA to assume or otherwise participate in the funding of the work.

Phase I projects were identified as high priority projects addressing immediate needs. These are projects that will likely be implemented within the first five years of the Development Plan. Only two projects are identified in Phase I due to the fact that the non-motorized facilities are a high priority and the majority of funding available to the SoDA will be dedicated to this project in the early years of the authority.

Phase II projects were also identified as priority projects. They will likely be implemented during the next 10 years (2019-2028).

Finally, the Phase III projects were either not as high of a priority or will require additional revenue and thus additional time for the SoDA to generate savings from their capture. If opportunities arise to develop one or more of these projects through private money, private development, grants, donations, or other alternative sources prior to Phase III, the SoDA will explore those opportunities and shift the timing appropriately. Otherwise, these are likely to be addressed during the final 15 years (2029-2043) of the Plan when additional revenue may be available to the SoDA.

**6. Parts of the Development Area to be left as Open Space and Description of Contemplated Use.**

The only portions of the Development Area intended to be left as Open Space are spaces required to be designated as such within existing developments such as

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commercial centers or apartment complexes. There are no existing parks or open spaces within the corridor area at this time.

**7. Portions of the Development Area which the Authority Desires to Sell, Donate, Exchange, or Lease To or From the Municipality and the Proposed Terms.**

Currently, the SoDA does not own any property. The Township also does not own any property within the Development Area. There are no immediate plans for the SoDA or Township to purchase any property.

**8. Desired Zoning Changes and Changes in Streets, Street Levels, Intersections, and Utilities.**

There are no changes to zoning districts expected within the Development Area. Although there are several zoning districts represented within the Development Area, there are no immediate plans or need to change the zoning within the Development Area. The current zoning is consistent with the Township Master Plan.

A high priority for the Plan is the development of non-motorized facilities along Drake Road and KL Avenue as well as the provision of public transit shelters or similar facilities within the corridor. Although the facilities have not yet been designed, it is unlikely the facilities will result in significant changes to the traveled portion of the streets or street levels. However, they will result in improvements and modifications within and immediately adjacent to the right of way of Drake Road and KL Avenue. In certain locations, the plans may also require acquisition of easements and/or relocation of utilities.

The non-motorized facilities may also result in intersection modifications depending on existing equipment installed at the intersections and the design of the intersection. The facilities will require upgraded pedestrian signals and equipment as well as appropriate ramps and crosswalks. Some of the intersections along Drake Road already have these components as they were included with recent upgrades to the signal equipment. Others, however, may need to be updated.

As stated previously, in order to implement some of the projects identified, particularly the non-motorized facilities, it is likely that some utility equipment may need to be moved slightly to accommodate the walk or path. Further, the SoDA may explore the possibility of consolidating utilities or locating existing utilities underground to improve the appearance of the corridor.

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**9. An Estimate of the Cost of the Development, Proposed Method of Financing, and Ability of the Authority to Arrange the Financing.**

The estimated cost of each proposed project is included in Table 1. Estimated costs are provided in 2014 dollars. For projects that are shown with annual costs, the total cost of the project is the product of the annual cost multiplied by the number of years that program could be in place under this proposed schedule. The total cost of all of the proposed On-going Projects is \$3,795,000. The total cost of all of the proposed projects in Phase I is \$1,505,000. The total cost of all of the proposed projects in Phase II is \$1,495,000. The total cost of all of the proposed projects in Phase III is \$3,900,000. Therefore, the total cost of all improvements in the Development Plan is \$10,695,000. These costs include the associated administration, engineering, planning, and design work anticipated for each project.

Funding for each project will be based on the specific project and the timing of the project. The primary source of funding to the SoDA will be from the tax increment captured from the properties located within the district (see the TIF Plan attached). However, there are alternative sources of funding that can be used as well, such as grants, donations, and partnerships with public and private agencies. Each project will offer a unique funding opportunity, and the SoDA will take advantage of the opportunity that allows for successful implementation of the project and as many additional projects as possible.

Cost estimates for projects are rough estimates because construction or design drawings have not yet been prepared. Therefore costs are based on preliminary concepts and designs. A percentage has been factored into the cost estimates to cover the cost of some contingencies and cost overruns.

**10. Designation of Person or Persons, Natural or Corporate, to Whom All or a Portion of the Development is to be Leased, Sold, or Conveyed in any Manner, and for Whose Benefit the Project is Being Undertaken, if that Information is Available to the Authority.**

The majority of projects to be completed are public improvements. All public improvement projects undertaken as part of this tax increment financing and development plan will remain in public ownership for the public benefit.

The SoDA currently owns no property. There are no plans or projects identified that include the purchase of property. An exception could be the development of small parks or open space areas depending on how that goal is accomplished. The SoDA has the authority to purchase and lease property.

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**11. The Procedures for Bidding for the Leasing, Purchasing, or Conveying of All or a Portion of the Development Upon its Completion, if There is no Expressed or Implied Agreement between the Authority and Persons, Natural or Corporate, that all or a Portion of the Development will be Leased, Sold, or Conveyed to Those Persons.**

The SoDA has no commitments for the acquisition or sale of property nor does it have any property under its responsibility. Further, with the possible exception of the small park project, none of the other identified projects indicate any intention to acquire property. Therefore, such information is unavailable. The SoDA in conjunction with the Township Board may discuss policies to explore acquisition of tax reverted property should properties within the SoDA District become available for acquisition by the Township through tax reversion procedures.

**12. Estimates of the Number of Persons Residing in the Development Area.**

In the 2010 Census, Block Groups 2 and 3 within Census Tract 29.03 covered the South Drake Road Corridor Development Area. In fact, the boundaries of these block groups exceed the boundary of the Development Area. They extend from West Main Street to Parkview Avenue and from Drake Road to US-131. Therefore, the population from the 2010 Census for these block groups is higher than what is actually located within the Corridor due to the additional residents along Skyridge Avenue, Driftwood Avenue, and the neighborhood to the west.

That being said, the population from these two block groups in the 2010 Census was 2,989 people.

The Plan and the proposed projects contained within it propose to displace no individuals, and the Authority designates no occupied residences for acquisition and clearance at this time. If the SoDA does acquire property in the future, it is likely to occur on non-residential or vacant properties.

**13. Plan for establishing priority for the Relocation of Persons Displaced by Development in the Development Area.**

No relocation of families or individuals is contemplated within the scope of this Development and Tax Increment Finance Plan. Therefore, relocation plans are not required.



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**14. Provision for the Costs of Relocating Persons and Financial Assistance**

No relocation of families or individuals is contemplated within the scope of this Development and Tax Increment Finance Plan. Therefore, relocation plans are not required.

**15. A Plan for Compliance with 1972 PA 227, MCL 213.321 to 213.332.**

No relocation of families or individuals is contemplated within the scope of this Development and Tax Increment Finance Plan. Therefore, relocation plans are not required.

**16. Requirement that Amendments to an Approved Development and TIF Plan be Submitted by the Authority to the Township Board for Approval**

In accordance with the Corridor Improvement Authority Act (PA 280 of 2005, as amended), any amendment to the Development and TIF Plan shall be reviewed and approved by the Township Board following the same review and approval process as the original Plan, which includes a public hearing and final approval by the Township Board. Over the 30 year life of the plan, amendments are anticipated.

**17. A Schedule to Periodically Evaluate the Effectiveness of the Development Plan**

Annually, the SoDA must present their budget to the Township Board for approval and incorporation into the Township-wide budget. This process of preparing an annual budget, presenting and discussing the budget with the Board, and seeking approval of specific requests requires the SoDA Board annually review the Development Plan, its goals, and the projects desired for the year. As a part of this budget process, the SoDA will incorporate a brief report indicating the activities completed over the past year and goals anticipated for the immediate future. This will serve to not only inform the Township and other taxing entities as to the activities of the SoDA but again will result in review and analysis of the Development Plan and facilitate identification of any changes that may need to be made.

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**18. Other Material that the Authority, Local Public Agency, or Township Board Considers Pertinent.**

This Development Plan contemplates the use of tax increment financing and other sources of funds including grants and donations. There are no other identified matters for disclosure at this time.

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## TAX INCREMENT FINANCING PLAN

### 1. Explanation of the Tax Increment Procedure.

As provided in PA 280 of 2008, as amended, tax increment financing is a financing tool for the redevelopment of designated development areas within a Corridor Improvement Authority (CIA) District. Tax increment financing is the process of expending new property tax dollars for improvements that generally benefit the source of the taxes. Tax dollars generated from new private property developments and from improvements to existing private property within a designated development area are "captured" and utilized by a CIA to finance public improvements within the development area. This process supports and encourages continued private investment.

To utilize tax increment financing, the CIA must prepare a development plan and a tax increment financing plan. Both plans are submitted for approval to the Township Board. The Board must adopt the plans by Ordinance. The plans specify the initial assessed value, estimate the captured assessed value, and provide for the expenditure of the funds. These plans may be amended in the future to reflect changes desired by the Authority. All amendments must follow the procedures of the Act.

"Captured assessed value" is defined in the Act as the amount in any one year by which the current assessed value of the development area exceeds the initial assessed value.

"Initial assessed value" is defined as the assessed value, as equalized, of all the taxable property within the boundaries of the Development Area at the time the ordinance establishing the tax increment financing plan is approved, as shown by the most recent assessment roll of the Township.

Such funds transmitted to a CIA are called "tax increment revenues." Tax increment revenues are the amount of ad valorem and specific local taxes attributable to the application of the levy of all taxing jurisdictions other than the state education tax and local or intermediate school districts upon the captured assessed value of real property in the development area.

For this Plan, the initial assessed value is the total taxable value for all real property in the development area as equalized on December 31, 2013. The initial assessed value, which totaled \$32,454,849 for the district in 2013, establishes the base value upon which the calculation of the annual capture is based.

The applicable tax levy for tax increment purposes in the SoDA Development Area will be the total millage levied by the taxing jurisdictions listed in Table 2. The Kalamazoo Public School District, State of Michigan State Education Tax, and KRESA taxes are not

included because the tax levies of these jurisdictions are exempt from capture. In addition, the Kalamazoo Public Library opted out of capture. Therefore, the remaining jurisdictions – Kalamazoo County, Oshtemo Township, and Kalamazoo Valley Community College – will have their millage rate captured. The total captured tax levy is listed in Table 2 at 9.9262. It is the intent of the Plan to capture all of the available millage levied on real property in the Development Area over the duration of the Plan above and beyond the baseline value established for the district.

**Table 2  
Applicable Millage  
Oshtemo Township  
South Drake Road Corridor Improvement Authority**

Taxing Jurisdiction <sup>a</sup>	Projected Captured Millage Rate <sup>b</sup>
Oshtemo Township	0.9765
Kalamazoo County	6.1362
Kalamazoo Valley Community College	2.8135
<b>Total Applicable Millage:</b>	<b>9.9262</b>

**Notes:**

- a. Kalamazoo Public Schools, State Education Tax, and KRESA millage rates are not included because the tax levies of these jurisdictions are exempt from capture. Kalamazoo Public Library millage is not included because they opted out of capture.
- b. Rates are per \$1,000 of taxable value.

Under this Tax Increment Financing Plan, the tax levy on the entire captured assessed valuation is to be utilized by the SoDA. The tax increment revenues will be expended in the manner as set forth in this Plan. Estimates of the projected growth in taxable value, the revenues captured from taxing jurisdictions, and the tax increment revenues to be received by the SoDA are included in Table 3.

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**2. Duration of the Program.**

The duration of this Tax Increment Financing Plan is 30 years, commencing upon the first tax collection in 2014 and will terminate with tax collections due in winter 2043, unless this Plan is amended to extend or shorten its duration.

**3. Statement of the Estimated Impact of Tax Increment Financing on Taxing Jurisdictions In Which the Development Area is Located.**

The maximum effect of this Plan on the taxing jurisdictions in which the Development Area is located is that the taxable value upon which the taxes are now levied will remain constant over the life of this Plan and the tax revenue received will not increase. This is the current situation and will continue as it has for the next 30 years or until the district or Plan is amended. An estimate of the potential taxes to be captured from each jurisdiction is included in Table 3.

At the expiration of this Tax Increment Financing Plan, all taxing jurisdictions will benefit substantially from the proposed improvements and the private development that results from it. The tax base will stabilize and once again begin to build as a result of the public improvements within the district.

**4. Plan for the Expenditure of Captured Assessed Value by the Authority**

**A. Estimate of Tax Increment Revenues**

Table 3 shows projected value increases over the next 30 years and the resulting tax increment revenues accruing to the SoDA. The projected annual growth in taxable value is estimated in Table 3 at a 1.5% rate. Both real and property assessments are included in the taxable value projections.

In addition, development plans have already been approved for commercial development at the northwest corner of Stadium Drive and Drake Road (also the southern end of the Development Area). Although this development has not occurred, very conservative estimates of the potential value anticipated to be generated from that development are included in the projections.

These projections and figures are based on discussions and coordination with the Township Assessor regarding recent trends in tax valuations and conservative projections of future valuations.

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Typically, the increase in taxable value resulting from inflation is determined by the Consumer Price Index (CPI). From 2004 to 2013, the CPI for Midwest Urban Consumers increased from 182.6 to 222.170, or an average of 2.17% per year. However, this has varied considerably in the past few years even including a negative percentage in 2009. Also, whenever the increase in assessed value (based on a study of sales data in the local area) is less than the CPI, then the increase in taxable value is based on the increase in assessed value. Therefore, for the purposes of our projection, even though the 10-year average of the CPI has been 2.17%, we are projecting an annual increase in taxable value of 1.5%. This allows for a few years where the assessed value increase may be less than the taxable value increase.

It is the intent of this Plan to increase value within the Development Area. As improvements are implemented and redevelopment, infill construction, expansion, rehabilitation, and improvements occur, additional increases in value within the Development Area are likely. These increases are beyond those projected in this Plan, but if such increases occur, the SoDA will be able to capture funds sooner than anticipated. The SoDA will use the additional funds captured to accelerate the implementation of the public improvement program. This plan may also be amended in the future if necessary to provide for the use of additional tax increment revenues for projects to be identified in the future. Funds not required for Development Plan activities may be returned to the taxing jurisdictions, in accordance with the requirements of the Act.

Should tax increment revenues be less than projected, the SoDA may choose to:

- 1) Amend the SoDA District and Development Area boundaries to include additional properties or to exclude properties that are diminishing the value of the District.
- 2) Delete or reschedule projects.
- 3) Borrow funds from the Township.

Option 1 requires an amendment to the Plan, in accordance with the requirements of the Act. Options 2 and 3 are considered temporary implementation measures and are deemed to be within the scope of this Plan as it is originally adopted.

**B. Maximum Amount of Bonded Indebtedness**

Depending on the projects that are selected and the timing with which they are scheduled, the SoDA may select to utilize bonds to finance the costs of those endeavors. The amounts of bonded indebtedness or indebtedness to be incurred by the SoDA or Oshtemo Township for these bonds including payments of capitalized interest, principal, and required reserve shall be determined by the

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Township Board upon the recommendation of the SoDA. At the time of adoption of this Plan, based on the estimates of revenues to be received by the SoDA, the estimate of maximum indebtedness, if any, to be incurred by the projects is approximately \$4,626,317, including project costs and any bonding expenses.

**C. Expenditure of Tax Increment Revenues**

The program and schedule for the expenditure of tax increment revenues to accomplish the proposed public improvements for the SoDA Development Area is outlined in Table 1. Cost estimates shown are current estimates only. These estimates are based solely upon concepts and have not been developed from construction drawings. No inflationary factor has been forecasted. Stated cost estimates include fees for design, preparation of construction drawings, and other contingencies. The difference between the cost estimate and the projected tax increment revenues will be made up by additional funding sources including grants, contracts with other agencies, and private donations.

Any additional tax increment revenues beyond those projected in this plan and required to fund the improvements contained within it will:

- 1) Be used to further the implementation of the public improvement program,
- 2) Be used to expedite payment of any debt service, or
- 3) Be returned, pro-rata, to the taxing units.

Should the tax increment revenues be less than projected, the SoDA may choose to:

- 1) Collect and hold the captured revenues until a sufficient amount is available to implement specific public improvements.
- 2) Implement public improvement projects based upon the ability to match existing funds with expenditures while seeking out additional funding sources.
- 3) Amend the development plan and/or tax increment financing plan to allow for alternative projects and funding.
- 4) Explore with the Township Board additional funds to be provided from the Township.

The South Drake Road Corridor Improvement Authority shall annually review proposed increment expenditures and revenues to prioritize the use of additional funds. Other public improvements which would further the completion of the Development Plan may be funded by the SoDA, provided they

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are included in the Development Plan. If not, the Plan may be amended to include these projects.



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**Insert Table 3 - Projected Growth in Taxable Value and Estimated Impact on Taxing  
Jurisdiction**

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## **Appendix A**

### **Resolutions Establishing the Corridor Improvement Authority & Adopting the Development and Tax Increment Financing Plans South Drake Road Corridor Improvement Authority**

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**INSERT RESOLUTION ESTABLISHING SoDA HERE**

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**INSERT RESOLUTION ADOPTING TIF/DEV PLAN HERE**

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## Appendix B

### Legal Description of the Oshtemo Township South Drake Road Corridor Improvement Authority District

All those properties abutting the west side of Drake Road or within 500 feet thereof between West Main Street and Stadium Drive in Sections 13, 24, and 25 of Oshtemo Charter Township, and all those properties abutting KL Avenue north and south sides or within 500 feet thereof between Drake Road and 11<sup>th</sup> Street in Section 24 of Oshtemo Charter Township, known more specifically by the following:

05-13-430-037	05-24-230-064	05-24-282-018	05-24-282-063
05-13-430-038	05-24-230-069	05-24-282-019	05-24-282-064
05-13-430-041	05-24-230-070	05-24-282-020	05-24-282-065
05-13-485-005	05-24-230-080	05-24-282-021	05-24-282-066
05-13-485-011	05-24-230-091	05-24-282-022	05-24-282-067
05-13-485-020	05-24-280-032	05-24-282-023	05-24-282-068
05-13-485-030	05-24-280-040	05-24-282-024	05-24-282-069
05-24-226-010	05-24-282-001	05-24-282-025	05-24-282-070
05-24-226-020	05-24-282-002	05-24-282-026	05-24-282-071
05-24-226-030	05-24-282-003	05-24-282-027	05-24-282-072
05-24-226-300	05-24-282-004	05-24-282-028	05-24-282-073
05-24-226-310	05-24-282-005	05-24-282-029	05-24-282-074
05-24-226-320	05-24-282-006	05-24-282-030	05-24-282-075
05-24-226-330	05-24-282-007	05-24-282-031	05-24-282-076
05-24-226-340	05-24-282-008	05-24-282-032	05-24-282-077
05-24-226-351	05-24-282-009	05-24-282-041	05-24-282-150
05-24-226-360	05-24-282-010	05-24-282-042	05-24-330-040
05-24-226-370	05-24-282-011	05-24-282-043	05-24-410-015
05-24-226-550	05-24-282-012	05-24-282-044	05-24-410-030
05-24-226-580	05-24-282-013	05-24-282-045	05-24-430-020
05-24-230-010	05-24-282-014	05-24-282-046	05-24-430-035
05-24-230-020	05-24-282-015	05-24-282-047	05-24-430-050
05-24-230-040	05-24-282-016	05-24-282-048	05-24-452-010
05-24-230-050	05-24-282-017	05-24-282-062	05-24-460-010

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05-24-460-021  
05-24-480-011  
05-24-480-016  
05-24-480-020

05-24-485-011  
05-24-485-041  
05-24-485-071  
05-25-230-020

05-25-230-061  
05-25-231-010  
05-25-240-001  
05-25-240-101

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## Appendix C

### Description of Proposed Projects Contained in Development Plan

The following projects were all included in Table 1 of the Development Plan as proposed projects. By including the project in the Development Plan, it gives the SoDA the opportunity to complete that project in the future. However, there is no obligation for the SoDA to complete any of these projects. For those projects that are completed, the SoDA may cover all or a portion of the costs. The schedule shown below and in Table 1 is a proposed schedule generally indicating the priority of projects. If opportunities arise that were unforeseen at the time of passage of this Plan, the projects may be implemented out of schedule without amendment to the Plan. Additional projects may be added to the Plan through the amendment process, in accordance with the requirements of Public Act 280 of 2005, as amended. Below is a summary description of each of the projects, programs, or improvements:

#### On-going Projects: 2014-2043

**Maintenance of Sidewalks and Streetscape Project** – The highest priority project for the SoDA is a non-motorized path along Drake Road. It is not enough to just construct the pathway; such a facility must also be maintained. In addition, as further improvements identified in this list are made, they will also need to be maintained. These elements must be properly maintained so that they last their full lifetime and continue to provide a pleasant appearance. Maintenance includes both the day-to-day functions – sweeping, litter patrol, snow removal, etc. – but also repair and replacement – graffiti removal, light bulb replacement, broken bench replacement, etc.

**Community Improvement Projects** – With these projects, money shall be available for the SoDA to participate in small, community-based projects for the general improvement of the district. These projects could be generated from the Township, County, State, service organizations, or a private entity. For the SoDA to participate, the project must be located in the District. Examples might include purchasing new holiday decorations or flags, facilitating in accomplishing cross access, or helping to finance new landscaping.

**Administration** – The SoDA will likely utilize Township staff and resources for regular business and administrative tasks (i.e. minutes, distribution of packets, planning, accounting, auditing, etc.). In the future, it may seek to hire a Director or consultant for administrative purposes.

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Administration costs also include business expenses such as office supplies, copying, postage, training, subscriptions, equipment, and similarly related costs.

**Community / Neighborhood Engagement and Security** – SoDA will be making significant investments in the Drake Road Corridor demonstrating a commitment to the community and the neighborhood. To support these investments and the residents and businesses located along the corridor, the Authority may support a variety of activities intended to ensure the other stakeholders along Drake Road – property owners, home owners, residents, business owners, employees – share that level of pride and commitment to the community. These may include sponsoring community events, funding community policing, coordinating neighborhood association activities, and other similar activities meant to promote community engagement and commitment to district in hopes to foster further, grassroots improvements by others.

### **Phase I: 2014-2018**

**Non-Motorized Facilities** – This work task contemplates application and implementation of an MDOT Transportation Alternatives Grant for construction of a trailway along the Drake Road frontage of the entirety of the corridor. Non-motorized improvements are also desired along KL Avenue, and the most efficient time for implementation would be in coordination with the Kalamazoo County Road Commission’s scheduled improvement project on KL Avenue in 2018. Finally, although no road projects are planned at this time along West Michigan Avenue, non-motorized facilities are still desired along this roadway. The SoDA may fund such a project without the corresponding road project. Any of these road projects and their pathway plans may also include pedestrian oriented amenities to support non-motorized facilities such as benches, trash receptacles, landscaping, lighting, bike racks, and other similar amenities.

**Explore Expansion of District Boundaries** – This project will explore the existing SoDA boundary and potential expansion of the boundary to include the eastern frontage of Drake Road, which is in the City of Kalamazoo. This was not done originally in order to expedite the process for establishing the authority. This process involves engaging City Staff to gauge their interest as well as evaluating the economic impacts of the expansion.

### **Phase II: 2019-2028**

**Develop a Streetscape Plan** – Development of a plan for streetscape improvements along the frontage of Drake Road, KL Avenue, and other roadways within the Development Area. The plan may include such elements as street trees, benches, trash receptacles, decorative light fixtures, additional landscaping, hardscape areas, traffic calming improvements, and/or other elements.



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**Pedestrian Access Improvements** – The project includes a variety of pedestrian improvements building off the trailway construction on Drake Road. These may include construction of new sidewalks and reconstruction of existing sidewalks; construction, reconstruction, or relocation of sidewalks connecting existing businesses and uses in Development Area to trailway along Drake Road; and/or other improvements to enhance pedestrian use, including access by pedestrians to and from the Development District. The SoDA may also consider providing various forms of assistance – organization, financial, etc. – to property owners with frontage on Drake Road for winter maintenance of sidewalks within the Development Area to facilitate pedestrian access in winter months.

**Local Road Sidewalks** – While the focus in Phase I is on providing non-motorized facilities on the arterials roads in the district – Drake Road and KL Avenue – this project would provide funds to assist with sidewalk development along some of the local, side roads within the district. These are primarily residential roads that serve the neighborhoods to the west of the corridor.

**Gateway Features** – Design, installation, construction and maintenance of gateway features at the north and south ends of the corridor that serve as the gateway entries to the Township, the SoDA, and the City of Kalamazoo. The intent of the improvements is to welcome residents and visitors alike to the community and provide a strong sense of identity to the SoDA and Township. Additional elements may include directory signs for various businesses, identification of various segments of the corridor, lighting of such signage and landscaping associated with it, design and installation of other entry-point features to assist in identifying the corridor, and promotion of public awareness of the corridor.

**Public Transportation Access Improvements** – Construction and/or improvement of new and existing facilities for transit users along the Drake Road corridor to facilitate use of transit throughout the year by residents, employees, and customers. Such transportation facilities could include new lighted and comfortable bus stop stands for bus system patrons, reconstruction and reconfiguration of approaches to bus stops to facilitate safe entry to and exit from buses at bus stops, enhancement of structures and bus stops to facilitate access to public transportation for persons with disabilities, increased use of digital and electronic signs to take advantage of new bus mobilization system, and coordinated signage within the Development District to highlight public transportation access points and facilities.

**Streetscape Improvements and Maintenance** – This task allows for the implementation of the previously prepared Streetscape Plan. The Plan may call for a variety of improvements within the public realm, including planting or replacement of landscaping or street trees in the district; installation of decorative street lighting; and selection and installation of street furniture, trash receptacles, and directional signage in compliance with the approved Streetscape Plan. Due to the cost of the project, it is likely that additional funding sources such as an MDOT grant will need to be used to generate the necessary funds.

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### Phase III: 2029-2043

**Bury Overhead Utility Lines** – Overhead utility lines have an imposing presence along any streetscape, and any effort to improve the quality, appearance, and values along the corridor must consider removal of these lines and their placement underground. This includes coordination with utilities including electric, cable, telephone, and perhaps others.

**Utility Infrastructure Improvements** – The corridor is fairly well served by public water and wastewater services. However, as development occurs, the population expands, and demand increases on the aging infrastructure, improvements to these services are going to be necessary. In addition, the established single family neighborhood that extends to the west on Skyridge and Driftwood do not have wastewater service. A pump station will likely be necessary to provide such service. Such improvements would increase the value of the properties within the neighborhood as well as along the corridor as they are improved and redeveloped. SoDA may also participate in improvements to the traffic signals along the corridor including such items as signal coordination, pedestrian facilities and improvements, mast arms, and other improvements.

**Development of Small Park Areas** – Design, construction and maintenance of one or two small pocket park areas within the Development Area to enhance not only the pedestrian experience but also improve the quality of life for the thousands of residents that live in the area. Such facilities also serve to interrupt the large extent of concrete and asphalt and to enhance the overall appearance of the Drake Road Corridor.

**Modernization of Dated / Obsolete Properties** – Although there has been new development along the Drake Road corridor, there are several properties that were developed many years ago and no longer conform to current zoning or building standards. The SoDA will establish a program to provide financial incentives to such properties to encourage improvements and modernization. Such projects may be minor – such as landscape improvements – or more significant – such as to the structure or fire safety equipment within the facility. The improvements could also take the form of remodelings or improvements to the existing structures to enable them to better fit within the modern marketplace and/or ensure the buildings are provided with adequate fire protection. The program may take the form of a revolving loan, low interest loan through a partner financial institution, small grants, or other similar incentive program.

**Create and Implement Lighting Plan** – With the Streetscape Plan in Phase II, street lighting was replaced to provide a coordinated lighting plan for the corridor. A subsequent and further evaluation of secondary level lighting along side streets, in pedestrian areas, and in parking lots will identify areas where lighting improvements are necessary to promote public safety. Improvements to implement this plan would likely be necessary in both public and private areas.

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**Acquisition of Blighted or Obsolete Properties** – Over the course of the next 30 years, it is likely some properties within the district boundaries will not be improved, but in fact, will experience deterioration and fall into blight and disrepair. SoDA has the authority to acquire properties and effect improvements to achieve the desired change. Other property acquisitions may occur as SoDA identifies sites that would be better utilized in other ways or that impede progress toward achievement of greater goals.