

OSHTMO CHARTER TOWNSHIP BOARD
7275 West Main Street
Kalamazoo, MI 49009

October 28, 2025

Refer to page 3 for Virtual Meeting Information

REGULAR MEETING
5:30 P.M.
AGENDA

1. Call to Order
2. Pledge of Allegiance
3. Remote Location Identification (for remote attendance when permitted by statute)
4. Township Mission/Vision/Core Values:
Core Value: Each customer is welcomed and that their input is wanted.
5. Approval of the Agenda
6. Public Officials and Community Partner Updates
7. Public Comment on Consent Agenda or Non-Regular Session Items
8. Consent Agenda
 - a. Meeting Minutes [[Minutes of Regular Meeting October 14, 2025](#)]
 - b. Memo re Energy Systems Zoning Ordinance Text Amendments ([Pg 5](#))
9. Budget Amendments
 - a. 3rd Quarter Worksheet ([Pg 7-12](#))
 - b. Fire Vehicle Fund Reimbursement ([Pg 13](#))
 - c. Legal Filing Fees ([Pg 15](#))
 - d. Legal Contracted Services ([Pg 17](#))
 - e. POC Fire Salary, FICA, & Pension ([Pg 19](#))
 - f. Building Department Inspections & Non-Compete Clause ([Pg 21](#))
10. Discussion & Consideration Board Retreat Facilitator Contract ([Pg 23-109](#))
11. Discussion & Consideration of the Bid Award re Fruitbelt Rail Trail Project ([Pg 111-113](#))
12. First Reading re Text Amendment to Non-Motorized Facilities/Sidewalks Ordinance ([Pg 115-122](#))
13. Discussion & Consideration Traffic Control Order re KL Ave ([Pg 123-127](#))
14. Closed Session re Written Opinion of Counsel
15. Public Comment
16. Board Member Comments & Committee Updates
17. Adjournment

Policy for Public Comment
Township Board Regular Meetings, Planning Commission & ZBA Meetings

All public comment shall be received during one of the following portions of the Agenda of an open meeting:

- a. Citizen Comment on Non-Agenda Items or Public Comment – while this is not intended to be a forum for dialogue and/or debate, if a citizen inquiry can be answered succinctly and briefly, it will be addressed or it may be delegated to the appropriate Township Official or staff member to respond at a later date. More complicated questions can be answered during Township business hours through web contact, phone calls, email (oshtemo@oshtemo.org), walk-in visits, or by appointment.
- b. After an agenda item is presented by staff and/or an applicant, public comment will be invited. At the close of public comment there will be Board discussion prior to call for a motion. While comments that include questions are important, depending on the nature of the question, whether it can be answered without further research, and the relevance to the agenda item at hand, the questions may not be discussed during the Board deliberation which follows.

Anyone wishing to make a comment will be asked to come to the podium to facilitate the audio/visual capabilities of the meeting room. Speakers will be invited to provide their name, but it is not required.

All public comment offered during public hearings shall be directed, and relevant, to the item of business on which the public hearing is being conducted. Comment during the Public Comment Non-Agenda Items may be directed to any issue.

All public comment shall be limited to four (4) minutes in duration unless special permission has been granted in advance by the Supervisor or Chairperson of the meeting.

Public comment shall not be repetitive, slanderous, abusive, threatening, boisterous, or contrary to the orderly conduct of business. The Supervisor or Chairperson of the meeting shall terminate any public comment which does not follow these guidelines.

(adopted 5/9/2000)
(revised 5/14/2013)
(revised 1/8/2018)

Questions and concerns are welcome outside of public meetings during Township Office hours through phone calls, stopping in at the front desk, by email, and by appointment. The customer service counter is open from Monday-Thursday, 8 a.m.-1 p.m. and 2-5 p.m., and on Friday, 8 a.m.-1 p.m. Additionally, questions and concerns are accepted at all hours through the website contact form found at www.oshtemo.org, email, postal service, and voicemail. Staff and elected official contact information is provided below. If you do not have a specific person to contact, please direct your inquiry to oshtemo@oshtemo.org and it will be directed to the appropriate person.

Oshtemo Township Board of Trustees

Supervisor

Cheri Bell 216-5220 cbell@oshtemo.org

Clerk

Dusty Farmer 216-5224 dfarmer@oshtemo.org

Treasurer

Clare Buszka 216-5260 cbuszka@oshtemo.org

Trustees

Neil Sikora 760-6769 nsikora@oshtemo.org

Kristin Cole 375-4260 kcole@oshtemo.org

Zak Ford 271-5513 zford@oshtemo.org

Michael Chapman 375-4260 mchapman@oshtemo.org

Township Department Information

Assessor:

Kristine Biddle 216-5225 assessor@oshtemo.org

Fire Chief:

Greg McComb 375-0487 gmccomb@oshtemo.org

Ordinance Enforcement:

Alan Miller 216-5230 amiller@oshtemo.org

Parks Director:

Vanessa Street 216-5233 vstreet@oshtemo.org

Rental Info 216-5224 oshtemo@oshtemo.org

Planning Director:

Jodi Stefforia 375-4260 jstefforia@oshtemo.org

Public Works Director:

Anna Horner 216-5228 ahorner@oshtemo.org

Zoom Instructions for Participants

Before a videoconference:

1. You will need a computer, tablet, or smartphone with a speaker or headphones. You will have the opportunity to check your audio immediately upon joining a meeting.
2. If you are going to make a public comment, please use a microphone or headphones with a microphone to cut down on feedback, if possible.
3. Details, phone numbers, and links to videoconference or conference call are provided below. The details include a link to “**Join via computer**” as well as phone numbers for a conference call option. It will also include the 11-digit Meeting ID.

To join the videoconference:

1. At the start time of the meeting, click on this link to [join via computer](#). You may be instructed to download the Zoom application.
2. You have an opportunity to test your audio at this point by clicking on “Test Computer Audio.” Once you are satisfied that your audio works, click on “Join audio by computer.”

You may also join a meeting without the link by going to join.zoom.us on any browser and entering this **Meeting ID: 832 9236 8430**

If you are having trouble hearing the meeting or do not have the ability to join using a computer, tablet, or smartphone then you can join via conference call by following instructions below.

To join the conference by phone:

1. On your phone, dial the teleconferencing number: **1-929-205-6099**
2. When prompted using your touchtone (DTMF) keypad, enter the Meeting ID number: **832 9236 8430#**

Participant controls in the lower-left corner of the Zoom screen:



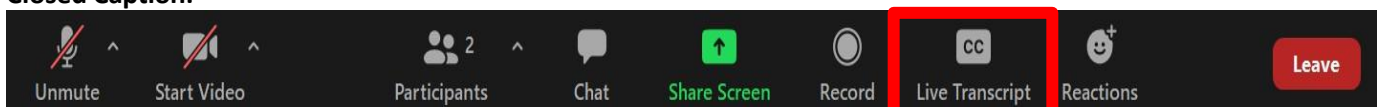
Using the icons at the bottom of the Zoom screen, you can (some features will be locked to participants during the meeting):

- Participants – opens a pop-out screen that includes a “Raise Hand” icon that you may use to raise a virtual hand. **This will be used to indicate that you want to make a public comment.**
- Chat – opens pop-up screen that allows participants to post comments during the meeting.

If you are attending the meeting by phone, to use the “Raise Hand” feature **press *9 on your touchtone keypad.**

Public comments will be handled by the “Raise Hand” method as instructed above within Participant Controls.

Closed Caption:



Turn on Closed Caption:

Using the icons at the bottom of the Zoom screen:

1. Click on the “Live Transcription” button.
2. Then select “Show Subtitle”.

Mission:

To advance the quality of life of all residents through a commitment to responsible growth, and value-driven municipal services that promote the relationships among economic vitality, environmental stewardship, and social equity.

Vision:

A sustainable and innovative community built through a legacy of planned, responsible growth and rural preservation.

Core Values:

PUBLIC SERVICE

- Fair treatment to all people.
- Each customer is welcomed, and their input is wanted.
 - Difficult questions are not marginalized.
- Allow residents to interact directly with Township staff and officials.
- Decisions are made based on the value to our Township and residents.

SUSTAINABILITY

- Meet the needs of the present without compromising future generations.
 - Consider the environment through practices that reduce impacts.
 - Value-conscious decision-making.
 - Committing to quality fire and police protection.

INNOVATION

- Providing the best value-conscious technology currently available.
- Leverage new technologies and ways of doing business to increase accessibility and improve services.

PROFESSIONALISM

- Hire staff with strong core competencies within their given profession.
- Commitment to continuous improvement to government operations.
- Dedicated to open communication to improve productivity and effectiveness.

INTEGRITY

- Decisions are made logically through the collection of evidence, facts, and public input.
 - When promises are made, we follow through.
 - We do not obfuscate – we say what we mean and do what we say.
 - Transparent governmental practices are of the highest priority.

FISCAL STEWARDSHIP

- Ensure that taxpayer investments are spent wisely, effectively and efficiently.

Memorandum



Date: October 17, 2025
To: Township Board
From: Jodi Stefforia, Planning Director
Subject: Energy Systems Zoning Ordinance Text Amendments

Objective

Update the Township Board on the status of drafting zoning ordinance text to address energy systems, including energy storage systems.

Background

In 2023, the Michigan Legislature passed what became PA 233 of 2023 that limits local zoning of solar, wind and energy storage systems. The Act took effect in November 2024.

The Act grants the Michigan Public Service Commission (MPSC) new authority to issue certificates for renewable energy projects at designated thresholds and gives developers the *option* to go directly to the MPSC for approval rather than through local zoning.

The Township can stay silent or develop an ordinance to address utility scale systems. Not providing language in the ordinance directs a developer to the MPSC for approvals to build a facility. If we do develop an ordinance, two approaches can be taken:

1. Develop what is called a 'Compatible Renewable Energy Ordinance' (CREO) that meets but does not exceed the regulations provided for in PA 233.
2. Develop a 'Workable Incompatible Ordinance' (WIO) that exceeds the requirements of PA 233 but is reasonable to the extent that a developer would choose to follow our ordinance instead of essentially bypassing the Township and seeking approval.

Based upon direction given by the Planning Commission last year, I have prepared a comprehensive ordinance that addresses utility scale solar, wind and energy storage as well as accessory-scale uses that a business or homeowner may desire for on-site use. A first draft, which has since been revised per continued research and observation of other communities dealing with this issue, was on the Planning Commission agenda last February. It was a full agenda that evening resulting in meeting adjournment before the item was discussed. As result, there has not yet been a formal discussion or review of a draft ordinance at the Planning Commission. I hope to place a draft on the December or January agenda as room allows.

There are presently no applications for a facility in the Township. I do know there's interest in establishing energy storage facility on Van Kal Street near the ITC substation. Staff has met with a company that made general inquiries which resulted in the invitation to formally present the technology which occurred at the August 14, 2025 Planning Commission meeting. No specific sites were the focus of the presentation or discussion that followed.

Core Values

Public Service
Sustainability

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Date of Request and Description:					
8/1/25 - GIS professional services extended through end of September					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
204-441-82100	Professional Fees	\$ 5,000.00	204-441-70200	Salaries	\$ 5,000.00
485-536-97600	Professional Fees	\$ 5,000.00	485-536-70200	Salaries	\$ 5,000.00
101-441-80800	Consultant	\$ 6,000.00	101-441-7020	Salaries	\$ 6,000.00
	Total	\$ 16,000.00		Total	\$ 16,000.00
Date of Request and Description:					
8/5/2025: Shipping costs for GPS unit exceeded estimated amount.					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
486-536-75700	Tools & Supplies	\$ 17.61	486-000-40000	Carryover	\$ 17.61
	Total	\$ 17.61		Total	\$ 17.61
Date of Request and Description:					
8/7/25: HARC Financing Allocation					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
485-966-99500	Transfer to Sewer Hardship	\$50,000.00	485-000-40000	Carryover	\$50,000.00
246-536-96400	Construction Costs	\$50,000.00	246-931-69900	Transfer from Other Funds	\$50,000.00
	Total			Total	
Date of Request and Description:					
9/22/2025 Fire Capital Outlay Vehicle					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
211-344-97600	Capital Revenue	\$77,000.00	211-000-67601	Capital Outlay / Vehicles	\$77,000.00

	Total	\$77,000.00		Total	\$77,000.00
Date of Request and Description:					
10/14/2025 Legal Filing Fees					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
101-250-74000	Legal Filing Fees	\$8,000.00	101-249-90300	Legal Notices	\$8,000.00
	Total	\$ 8,000.00		Total	\$ 8,000.00
Date of Request and Description:					
10/14/2025 PW Annual Reductions					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
101-000-40000	Carryover	\$ 350,000.00	101-441-97600.NMDR	NM Drake Rd	\$ 350,000.00
101-000-40000	Carryover	\$ 50,000.00	101-441-97600.NMDR	NM H Ave	\$ 50,000.00
101-000-40000	Carryover	\$ 90,000.00	101-441-97600.NMKL	NM KL Ave Phase 2	\$ 90,000.00
101-000-40000	Carryover	\$ 258,500.00	101-441-97600.NMPP	NM Parkview Ave	\$ 258,500.00
	Total	\$ 748,500.00		Total	\$ 748,500.00
Date of Request and Description:					
10/14/2025 PW Annual Reductions					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
101-000-40000	Carryover	\$ 745,000.00	101-441-97600.NMSS	NM S 9th St	\$ 745,000.00
101-000-40000	Carryover	\$ 280,000.00	101-441-97600.WHTG	NM Whitegate	\$ 280,000.00
101-000-40000	Carryover	\$ 225,000.00	101-441-97600	NM Repair & Maintenance	\$ 225,000.00
	Total	\$ 1,250,000.00		Total	\$ 1,250,000.00
Date of Request and Description:					

10/14/2025 PW Annual Reduction					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
204-000-40000	Carryover	\$ 125,000.00	204-441-82100	Professional Fees	\$ 125,000.00
204-441-92600	Street Light Operations	\$ 25,000.00	204-441-82100	Professional Fees	\$ 25,000.00
204-000-40000	Carryover	\$ 525,000.00	204-441-97600	Capital Outlay	\$ 525,000.00
204-000-40000	Carryover	\$ 20,000.00	204-441-97000	Capital Outlay - Streetlights	\$ 20,000.00
	Total	\$ 695,000.00		Total	\$ 695,000.00
Date of Request and Description:					
See 'POC Fire Salary, FICA, & Pension Budget Amendment' Memo					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
206-340-70500	Fire Pay - On Call	\$10,000	206-340-87200	New Hire Expenses	\$10,000
206-340-70500	Fire Pay - On Call	\$5,000	206-338-70200	Fire Maintenance Salaries	\$5,000
206-340-70500	Fire Pay - On Call	\$35,000	206-000-40000	Fire Carryover	\$35,000
206-340-71500	Fire Pay - On Call Payroll Taxes - FICA	\$500	206-338-71500	Fire Maintenance Payroll Taxes - FICA	\$500
206-340-71500	Fire Pay - On Call Payroll Taxes - FICA	\$700	206-000-40000	Fire Carryover	\$700
206-340-72200	Fire Pay - On Call Pension	\$500	206-338-72200	Fire Maintenance Pension	\$500
206-340-72200	Fire Pay - On Call Pension	\$4,500	206-000-40000	Fire Carryover	\$4,500
	Total	\$ 56,200.00		Total	\$ 56,200.00
Date of Request and Description:					
10/23/25 PW Annual Reduction					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
101-000-40000	Carryover	\$ 20,000.00	101-441-82000	Engineering Fees	\$ 20,000.00
485-000-40000	Carryover	\$ 123,000.00	5-536-82000.N8TH	N 8th St Engineering Fees	\$ 123,000.00
486-536-96400	Construction Costs	\$ 40,000.00	486-53682100	Professional Fees	\$ 40,000.00
485-000-40000	Carryover	\$ 330,000.00	5-536-96400.SAWS	Construction Costs	\$ 330,000.00
	Total	\$ 513,000.00		Total	\$ 513,000.00
Date of Request and Description:					
10/23/25 PW Reallocate funds within existing budget line for GIS services.					

Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
101-441-80800	Consultant	\$ 2,000.00	101-441-80800	Consultant	\$ 2,000.00
	Total	\$ 2,000.00		Total	\$ 2,000.00

Date of Request and Description:

10/23/25 PW Reallocate IT Tools & Supplies to Tools & Supplies in Wtr/Swr Funds

Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
485-536-75700	Tools and Supplies	\$ 3,196.52	485-536-80900	IT Tools and Supplies	\$ 3,196.52
486-536-75700	Tools and Supplies	\$ 800.00	486-536-80900	IT Tools and Supplies	\$ 800.00
	Total	\$ 3,996.52		Total	\$ 3,996.52

Date of Request and Description:

10/23 Parks - Vehicle Maintenance - Camry repairs put line item over budget

Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
107-756-75100	Vehicle Maintenance	\$ 1,000.00	107-756-93100	Maintenance Services	\$ 1,000.00
	Total	\$ 1,000.00		Total	\$ 1,000.00

Date of Request and Description:

10/23 Parks Gange Hall basketball court striping - exceeded estimated amount by \$880

Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
107-756-93100	Maintenance Services	\$ 880.00	107-756-93100	Maintenance Services	\$ 880.00

	Total	\$ 880.00		Total	\$ 880.00
Date of Request and Description:					
10/23/2025 Legal - Contracted Services					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
207-301-96300	Contracted Services	\$85,532.00	101-000-4000	Carryover	\$85,532.00
	Total	\$ 85,532.00		Total	\$ 85,532.00
Date of Request and Description:					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
101-567-72800	Supplies	\$ 100.00	101-567-75700	Tools & Supplies	\$ 100.00
	Total	\$ 100.00		Total	\$ 100.00
Date of Request and Description:					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
101-262-93200	County Early Voting Agreement	\$ 1,500.00	101-262-97000	Capital Outlay - Equipment	\$ 1,500.00

	Total	\$ 1,500.00		Total	\$ 1,500.00
Date of Request and Description:					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
	Total	\$ -		Total	\$ -
Date of Request and Description:					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
	Total	\$ -		Total	\$ -
Date of Request and Description:					
Funds Requested To		Amount	Funds Requested From		Amount
GL Number	Description		GL Number	Description	
	Total	\$ -		Total	\$ -
Date of Request and Description:					

Memorandum & Request



Date: September 22, 2025
To: Oshtemo Township Board
From: Chief Greg McComb
Subject: Budget Amendment for vehicle reimbursement

Objective

To move \$77,000 from revenue to expenditures.

From: GL 211-000-67601 Capital Revenue (\$77,000)
To: GL 211-344-97600 Capital Outlay / Vehicle (\$77,000)

Proposed Motion: Motion to approve a budget amendment in the amount of \$77,000, transferring funds from 211-000-67601 (Capital Revenue) to 211-344-97600 (Capital Outlay / Vehicle), in order to reimburse the Capital Outlay / Vehicle fund for the purchase of the 2025 GMC pickup truck designated for medical response.

Background

In 2024, the Fire Department sustained the loss of a Chevrolet Tahoe in a vehicle accident. The vehicle was deemed a total loss, and the insurance settlement provided \$77,000, which was recorded in the Capital Revenue fund. A replacement vehicle has since been purchased; however, the reimbursement of the Capital Outlay / Vehicle account has not yet been completed. This amendment seeks to align the revenue received with the corresponding expenditure.

Core Values

Sustainability, Fiscal Stewardship

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Memorandum & Request



Date: October 28, 2025
To: Township Board
From: James Porter, Legal Counsel & Sierra Lucas,
Paralegal Manager
Subject: Budget Amendment - Legal Filing Fees

Objectives

That the Board authorize a budget amendment for Legal Filing Fees to support a title search for drainage agreements involving a group of commercial properties that border a small parcel of land owned by the Township.

From: GL 101-249-90300 Legal Notices
To: GL 101-250-74000 Legal Filing Fees

Proposed Motion

MOTION: to approve a budget amendment in the amount of \$8,000.00 from Legal Notices to Legal Filing Fees for title search services with Sun Title.

Background

In 2018, the Township received multiple complaints regarding drainage issues impacting several commercial properties along South 9th Street. At that time, a centrally located parcel (Parcel No. 05-26-380-071) that was being sold by the County was acquired by the Township with the intent of partnering with adjacent property owners to resolve the drainage concerns.

The parcel is now owned by the Township and unfortunately, despite our efforts, we were unable to obtain the level of cooperation anticipated from neighboring property owners. As a result, we may need to consider alternative approaches. Before moving forward, we are seeking to determine whether any existing drainage agreements, either among the surrounding properties or involving the Township parcel, are currently on record.

Core Value(s)

Public Service
Integrity

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Memorandum & Request



Date: October 28, 2025
To: Township Board
From: Sierra Lucas, Paralegal Manager
Subject: Budget Amendment - Contracted Services

Objectives

That the Board authorize a budget amendment for Contracted Services to reallocate unused funds back to Carryover.

From: GL 207-301-96300 Contracted Services
To: GL 101-000-40000 Carryover

Proposed Motion

MOTION: to approve a budget amendment in the amount of \$85,532.00 from Contracted Services to Carryover to reallocate unused funds for year end.

Background

Due to ongoing litigation involving three separate properties, the blight cleanup projects tied to the unused funds will not move forward in 2025. A budget amendment will be presented in spring 2026.

Core Value(s)

Fiscal Stewardship, Integrity

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Memorandum & Request



Date: 10/28/25
To: Township Board
From: Sara Feister, Human Resources Director
Subject: POC Fire Salary, FICA, & Pension Budget Amendment

Objective

Receive Board approval of the budget amendment for the POC Fire Salary, FICA & Pension.

FROM:	GL#206-340-87200	New Hire Expenses	\$10,000
FROM:	GL#206-338-70200	Fire Maintenance Salaries	\$5,000
FROM:	GL#206-000-40000	Fire Carryover	\$35,000
TO:	GL#206-340-70500	Fire Pay - On Call	\$50,000
FROM:	GL#206-338-71500	Fire Maintenance Payroll Taxes - FICA	\$500
FROM:	GL#206-000-40000	Fire Carryover	\$700
TO:	GL#206-340-71500	Fire Pay - On Call Payroll Taxes - FICA	\$1,200
FROM:	GL#206-338-72200	Fire Maintenance Pension	\$500
FROM:	GL#206-000-40000	Fire Carryover	\$4,500
TO:	GL#206-340-72200	Fire Pay - On Call Pension	\$5,000

Proposed Motion

I move to approve the budget amendment as outlined.

Background

The projected overall cost for the POC Fire Program was under budgeted for 2025. We added four (4) new Full Time Firefighter positions in 2024. We expected that adding these positions would have a significant impact on the cost of the POC Fire Program since the four new positions were filled by existing POC Firefighters. Therefore, we budgeted less for the POC Fire Program. We underestimated the number of hours that the existing POC Firefighters would be filling for 2025. We have ensured that the 2026 budget reflects the anticipated hours for the POC Fire Program

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Memorandum & Request

Date: October 24, 2025

To: Township Board

From: David Kobb, Operations Coordinator

Subject: Building Department Inspection Services & Non-Compete Clause Budget Amendment



Objective

Receive Board approval of a budget amendment to allocate new funding for Building Department personnel and contractual obligations.

From: GL 249-000-40000	\$10,000	Building Department Carryover
To: GL 249-371-96300	\$10,000	Building Department Contracted Services
From: GL 249-000-40000	\$17,000	Building Department Carryover
To: GL 249-371-81100	\$17,000	Electrical Inspector
From: GL 249-000-40000	\$12,000	Building Department Carryover
To: GL 249-371-81200	\$12,000	Mechanical Inspector
From: GL 249-000-40000	\$10,000	Building Department Carryover
To: GL 249-371-81300	\$10,000	Plumbing Inspector
From: GL 249-000-40000	\$10,000	Building Department Carryover
To: GL 249-371-8100	\$10,000	Building Inspector

Proposed Motion

I move to approve the budget amendment as outlined.

Background

The Building Department requires additional funding to support inspection services and fulfill a contractual non-compete agreement. These expenses were not included in the original FY25 budget and are necessary to maintain departmental operations and compliance. The need for these funds has arisen due to a sustained increase in permit applications, which has placed additional demands on inspection staffing and contractual obligations. These funds will ensure adequate staffing and continuity of inspection services.

Core Values

Public Service
Professionalism
Fiscal Stewardship

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Memorandum

Date: 10/23/2025
To: Township Board
From: David Kobb, Operations Coordinator
Subject: Strategic Board Retreat Facilitator Selection



Objective

To update the Board on the evaluation process for the Strategic Board Retreat facilitator and obtain approval to proceed with the selected applicant.

Background

A Request for Proposals (RFP) was developed collaboratively by the Township Supervisor, Operations Coordinator, and Media and Communications Manager to identify a qualified facilitator for the upcoming Strategic Board Retreat. The RFP emphasized the importance of guided discussion, strategic planning, and collaborative development among Board members.

The RFP was open for two weeks, during which eight proposals were received. Submitted fees ranged from \$5,000 to \$29,573, with the selected proposal totaling \$11,250.

A selection committee was formed consisting of the Township Supervisor, Clerk, Treasurer, and Township Attorney. The committee utilized a standardized evaluation rubric to assess all submissions and narrowed the field to three finalists:

- People Forward
- Dams & Associates, Inc.
- Quest Management

Following deliberation, the committee selected **Dams & Associates, Inc.** as the preferred facilitator. Their proposal stood out due to their extensive experience working with local government entities, including Kalamazoo County, Kalamazoo Township, and the Kalamazoo County Transportation Authority. Their familiarity with regional governance and proven facilitation expertise were key factors in the committee's decision.

Proposed Motion

I move to approve Dams & Associates, Inc. as the facilitator for the Strategic Board Retreat at a cost of \$11,250.

Attachments

Peter Dams & Associates, Inc. Proposal Report
Quest Management Proposal
People Forward Planning Proposal

Core Value(s)

Professionalism
Integrity
Fiscal Stewardship



September 18, 2025

David Kobb, Operations Coordinator
Oshtemo Township

SUBJECT: Proposal – Township Board Retreat Facilitator

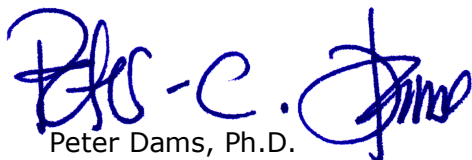
Dear David:

Attached please find my proposal for facilitating the strategic planning retreat for the Township Board.

Please do not hesitate to let me know if we need to modify the scope of work in order to make this proposal better suit your expectations.

Respectfully submitted,

Dams & Associates, Inc.



Peter Dams, Ph.D.
President

Attachments:

- Strategic Plan and Retreat Report, Kalamazoo Township (2022)
- Curriculum Vitae, Peter Dams

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A. Consultant Qualifications



Dr. Peter Dams is a facilitator and strategic planner with over twenty years' experience leading a wide range of strategic planning processes.

Clients include municipalities, nonprofit organizations, small to mid-size businesses, global corporate functions, state and international associations, as well as state universities.

Peter received his Ph.D. in Psychology from Western Michigan University with an emphasis on the science of behavior analysis and organizational systems.

In 2005, Peter founded Dams & Associates and since then has authored strategic plans for over 90 organizations in Michigan and around the nation. He is also a frequent presenter at regional and international conferences.

Please see the attached CV for more information.

B. Select Municipal and Public Sector Clients

Peter's work with municipal and public sector organizations in the Kalamazoo area includes the following clients:

- City of Battle Creek
- City of Portage
- Kalamazoo/Battle Creek International Airport
- Kalamazoo Central County Transportation Authority
- Kalamazoo County Government
- Kalamazoo County Transportation Authority
- Kalamazoo Township
- Regional Prosperity Initiative - Southwest Prosperity Region
- Township of Kalamazoo Police Department
- Village of Lawrence
- Village of Vicksburg

C. Experience Facilitating Similar Retreats

Most recently, I have facilitated strategic planning retreats for the following municipalities and public sector organizations:

- College of Arts and Sciences, Western Michigan University (2016, 2023)
- Kalamazoo/Battle Creek International Airport (2020, 2025)
- Kalamazoo Township (2015, 2017, 2022, 2025 [strategy review])
- Village of Vicksburg (2023, 2025)

D. Understanding of the Project and Its Goals

Oshtemo Township seeks an experienced facilitator to design, deliver, and document a high-impact strategic planning retreat for the Township Board. The retreat will provide a disciplined forum for board members to take stock of recent accomplishments, confront emerging challenges, and align on a focused set of three to five-year strategic priorities.

My facilitation approach will ensure inclusive, active participation from every board member. Structured, guided discussions drive clarity, collaboration, and rigorous, future-focused thinking.

The desired outcomes will consist of: (1) alignment on strategic priorities; (2) stronger communication and collaboration among the board; and (3) a set of actionable goals that support the Township's existing mission and vision.

Deliverables shall include:

- A written report that captures retreat outcomes, the agreed strategic priorities, and clear next steps with owners and timelines.
- A concise summary of strategic priorities suitable for board and public communication.
- A follow-up debriefing with key Township staff on decisions, next steps, and implementation expectations.

E. Approach to Inclusive Engagement

The process of creating your strategic plan is just as important as the final plan itself; my facilitation style, therefore, is highly interactive. All participants will have many opportunities to contribute and provide input. Planning exercises will be designed to draw all participants into the conversation.

It is my goal to create a safe and open environment conducive to high levels of engagement. During some activities, participants jot down their thoughts on worksheets before sharing their ideas with the full group. Research has shown that this method, called “brainwriting,” yields higher-level creative thinking than traditional brainstorming where ideas are immediately captured on flipcharts.

F. Retreat Preparation

To prepare board members and myself for the retreat, I will engage in the following pre-planning steps:

1. Convene a *Strategic Planning Steering Team*. The Steering Team should consist of Supervisor Bell, Operations Coordinator Kobb, and one or two more board members. The Steering Team will meet for a *planning kickoff* to finalize the pre-retreat board member survey as well as the retreat agenda based on drafts that I will provide. The purpose of the Steering Team is to ensure everyone is comfortable moving forward.
2. Conduct *planning calls* with board members to clarify their goals and expectations for the retreat. I will conduct these calls via Zoom or telephone, based on board members’ preference. This information will help me design the retreat agenda so it optimally reflects board members’ expectations. We will work through your office to schedule these calls.
3. Conduct and tabulate a *survey for board members* that allows them to provide additional input along the lines of general priorities, expectations, and areas of interest or concern. This information will help me prepare the agenda for the retreat with respect to the range and scope of potential priorities that will be discussed during the retreat. I will share survey results with the board prior to the retreat.

G. Retreat Facilitation

"You are a laser-focused facilitator!"

Emily Greenman Wright, Vice President, Community Homeworks

Proposed workshop agenda (to be finalized with the Steering Team):

1. Welcome (Supervisor Bell).
2. Review of recent accomplishments.
3. Affirm the current mission and vision. This conversation will provide the big picture framework for the strategy conversations.
4. Board communication and collaboration: What's working well and where is room for improvement?
5. Discussion: Results of the pre-retreat board survey.
6. Gap analysis: Brainstorm major challenges, gaps, or barriers that could impede the successful execution of the mission and progress toward the vision.
7. Based on the results of the gap analysis, board members will brainstorm strategic goal areas and objectives.
8. Assign timelines for objectives.
9. Identify metrics for measuring progress for each goal area.
10. Concluding remarks and next steps (Supervisor Bell).

To keep myself and retreat participants on track, I will provide a detailed timeline for the planning activities. My goal is to time activities so that board members will have enough time to discuss the issues at hand. This timeline will be reviewed with the Steering Team when we finalize the retreat agenda.

H. Post-retreat Reporting

To turn the results of the retreat into an *actionable* strategic plan, I will meet with the Steering Team to review timelines and assign strategy leads for the identified strategies. I will focus on making the strategic plan easier to execute by formulating strategies as tangible work products that clearly specify what has to be accomplished in order to complete an objective.

The reason for Steering Team involvement is that it requires internal knowledge to assign timelines and staff to strategic objectives.

I will also provide a worksheet that will allow assigned leads to easily make the transition from strategy development to strategy implementation. This template will facilitate the development of project milestones for achieving a given objective.

The resulting strategic plan will provide the tabular summary of actionable strategic goals and objectives with assigned responsibilities, timelines, and measurable indicators.

Besides the strategic plan, I will provide a separate report documenting the results from the retreat as a Word document and as a PowerPoint presentation for internal and external use. Drafts of these documents will be reviewed by the Steering Team before submitting the final versions.

"Compared to other strategic planning processes I was involved in, yours stood out as being extremely efficient and effective!"

Dr. Peter Kurczynski, Chief Scientist, NASA, Cosmic Origins Program Advisory Group

I. Making Strategic Plans Easier to Execute

The strategic planning literature points out that often strategic plans fail during execution. While there are a number of reasons for this, one is worth mentioning: Some strategic plans contain vague objectives that do not state clearly what has to be accomplished, by whom, and by when.

I help clients tackle this problem by helping them write a strategic plan that is *easier to execute*. By stating strategic objectives as tangible accomplishments or work outputs, it is clear what must be accomplished. During the plan-writing phase, I will coach the Steering Team to create an accomplishment-based strategic plan.

J. Proposed Project Fees

I propose the following costs for the project. Meeting times include preparation.

Retreat Preparation	Hours	Total	Fees
Draft retreat agenda	1		
Kickoff with a Steering Team	2.5		
Board member planning calls, incl. scheduling	4		
Board member survey and report	5		
Finalize retreat agenda	1		
		13.5	\$4,050
Retreat Facilitation			
One full day	9	9	\$2,700
Retreat Facilitation			
Transcribe retreat flipcharts	1.5		
Meet with Steering Team to clearly state objectives, review timelines and assign staff to objectives	2.5		
Prepare a comprehensive written report summarizing key themes, decisions, and next steps.	4		
Deliver a presentation-ready version of the report suitable for public sharing and internal use.	3		
Conduct a post-retreat debrief meeting with key township staff to review outcomes, clarify next steps, and discuss implementation strategies.	3		
Include a visual or tabular summary of strategic priorities with assigned responsibilities, timelines, and measurable indicators.	1		
		15	\$4,500
Total Proposed Project Fees			\$11,250

Budget Considerations

- At the request of the Township, I will be happy to provide services beyond the scope outlined in this proposal.
- It will be my pleasure to negotiate the above budget if services identified in this proposal will not be needed.

K. References

Ashley Glass

Trustee

Kalamazoo Township

glassa@ktwp.org

Developed strategic plans in 2015, 2017, and 2022. Ms. Glass participated in 2022.

Jim Mallery

Village Manager

Village of Vicksburg

269-649-1919

jmallery@vicksburgmi.org

Developed strategic plans in 2023 and 2025

Dr. Carla M. Koretsky

Dean, College of Arts and Sciences

Western Michigan University

(269) 387-4372

carla.koretsky@wmich.edu

Developed strategic plans for the college in 2016 and 2023

Craig Williams, A.A.E.

Airport Director

Kalamazoo / Battle Creek International Airport

(269) 388-3668

cawill@kalcounty.com

Developed strategic plans in 2020 and 2025

PETER C. DAMS, Ph.D.

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pdams@damsandassociates.com

EDUCATION

Ph.D. PSYCHOLOGY – APPLIED BEHAVIOR ANALYSIS

Western Michigan University, Kalamazoo, Michigan

Emphasis: Organizational Behavior Management and Behavioral Systems Analysis

Dissertation Title: “A Systems Approach to Designing an Internship Model that Benefits the Sponsoring Organization”

GPA: 4.0

M.S. BEHAVIOR ANALYSIS

University of North Texas, Denton, Texas

Thesis Title: “The Effect of Defect Probability During Training on Inspection Accuracy in a Quality Control Simulation”

GPA: 4.0

B.S. ARCHITECTURAL ENGINEERING

University for Applied Sciences, Oldenburg, Germany

PROFESSIONAL EXPERIENCE

DAMS & ASSOCIATES, INC.

Serving wonderful clients since 2005

Our mission is to provide practical assistance with lasting value for every client we are privileged to serve. Specific needs and circumstances vary, but our commitment to our clients’ success remains the same.

WESTERN MICHIGAN UNIVERSITY

Adjunct Associate Professor

Original appointment: 2012

Industrial-Organizational Psychology

Reappointed: 2015, 2018

CLIENT PORTFOLIO

Dozens of organizations have turned to Dams & Associates for professional guidance and change management services. They range from government agencies and nonprofits to large Fortune 500 corporations.

Public Sector

Allegan County CMH	Michigan Universities Self-Insurance Corporation
Calhoun County Board of Health	NASA-Cosmic Origins Program Advisory Group
CareWell Services Southwest (Region 3B Area Agency on Aging)	Network180 (Kent County CMH)
City of Battle Creek	Regional Prosperity Initiative - Southwest Prosperity Region
City of Portage	Riverwood Center (Berrien County Mental Health Authority)
City of Elgin, IL	State of Michigan
Community Mental Health & Substance Abuse Services of St. Joseph County	• Department of Human Services • State Historic Preservation Office
Kalamazoo / Battle Creek International Airport	Township of Kalamazoo Police Department
Kalamazoo Central County Transportation Authority	Village of Lawrence
Kalamazoo Community Mental Health and Substance Abuse Services (KCMHSAS)	Village of Vicksburg
Kalamazoo County Government	Washtenaw County Government
Kalamazoo County Transportation Authority	Washtenaw County Criminal Justice Collaborative Council
Kalamazoo Township	
Michigan Works!	

Corporate

Celink	Senior Care Partners PACE
Gordon Food Service	Southwest Michigan Behavioral Health
Kalsec, Inc.	Southwest Michigan First
Kushner & Company	Stryker Instruments
Meijer, Inc.	Stryker Medical
Midwest Fastener Corporation	The Studio
MPI Research	Western Michigan Aviation
Pfizer Global Manufacturing	

Education: Universities and Colleges

Ferris State University
Kalamazoo Valley Community College
Saginaw Valley State University
Shawnee State University
Western Michigan University
WMU Alumni Association

Education: Primary and Secondary

Great Start Collaborative
Greta Berman Arbetter Kazoo School
Kalamazoo Area Homeschool Association
Learning Network of Greater Kalamazoo
The Montessori School
Woodlawn Preschool

Arts and Culture

Battle Creek Junior Theatre	Kalamazoo Civic Theatre
Battle Creek Youth Orchestra	Kalamazoo Junior Symphony
Fontana Chamber Arts	Stulberg International String Competition
Fox Music Center	Michigan Festival of Sacred Music
Glass Art Kalamazoo	Vicksburg Arts

CLIENT PORTFOLIO – continued

Not for Profit / Community Initiatives

AccessVision	Kalamazoo Civic Theatre
Advocacy Services for Kids (ASK)	Kalamazoo Infant Mortality Community Action Initiative (with YWCA Kalamazoo)
Adler Aphasia Center	Kalamazoo Loaves & Fishes
Allegan Bible Church	Kalamazoo Neighborhood Housing Services
Allegan County United Way	Leila Arboretum Society
Alternatives Care Center	Michigan Association of Regions
Boys & Girls Clubs	Michigan Nonprofit Association
Broadband Task Force, Calhoun County	Neonatal Abstinence Syndrome Prevention and Treatment Project, Kalamazoo County
Catholic Family Services (now Catholic Charities)	Potawatomi Resource Conservation and Development Council
Cellblock to Classroom (C2C)	Poverty Reduction Initiative
Child Care Resources	Pretty Lake Camp Adventure Centre Farm
CityLinC Ministries	Prince of Wales Health Network (Alaska)
Community Healing Centers	Public Media Network
Community Homeworks	ReGen Next
GFM The Synergy Center	United Way of Greater Battle Creek
Grace Health Family Health Center	United Way of Greater Kalamazoo
Gryphon Place	Wings of Hope Hospice
HGA Support Services	YMCA of Greater Kalamazoo
Humane Society of South Central Michigan	World Behavior Analysis Day Alliance
Interfaith Strategy for Advocacy & Action in the Community (ISAAC)	
Kalamazoo Center for Youth and Community	

Behavioral Health

Alpine Learning Group (NJ)	Melmark, Inc. (MA, PA, NC/SC)
Behavior Interventions, Inc. (PA, NJ, DE)	Milestones Behavioral Services (CT)
Braintrust Behavioral Health (MI)	MRC Industries (MI)
Collaborative Autism Resources & Education (TX)	Positive Reinforcement (VA, WV, KY)
Community Living Options (MI)	REED Autism Services (NJ)
Garden Academy (NJ)	Residential Opportunities Incorporated (MI)
Great Lakes Center for Autism Treatment and Research (MI)	The Arc of Calhoun County (MI)
HGA Support Services (MI)	Therapeutic Pathways & The Kendall Centers (CA)
Kalamazoo Autism Center	Trading Spaces ABA (CT)
Kids Overcoming Inc. (KOI) (CA)	

State and International Organizations

Association of Professional Behavior Analysts	California Society for the Advancement of Behavior Analysis
Association for Positive Behavior Support	Council of Autism Service Providers
Behavior Analyst Certification Board	Florida Association for Behavior Analysis
Behavior Analyst Leadership Council	Massachusetts Association of Behavior Analysis
Behavioral Health Center of Excellence	World Behavior Analysis Day Alliance
California Association for Behavior Analysis	

PROFESSIONAL EXPERIENCE – continued

KALAMAZOO COUNTY GOVERNMENT

Kalamazoo, Michigan

Director, Organizational Development 2003 – 2004

Continuous Quality Improvement Coordinator 1999 – 2002

WESTERN MICHIGAN UNIVERSITY

Course Instructor, Psychology 100 (four sections) 1997 – 1998

DENTON STATE SUPPORTED LIVING CENTER

Denton, Texas

Instructional Designer and Training Specialist 1995 – 1996

Behavior Therapist 1993 – 1995

D.M.S. ARCHITECTS

San Angelo and Forth Worth, Texas

Project Architect and CADD Manager 1987 – 1993

PROFESSIONAL RECOGNITION

Adjunct Professor, Western Michigan University (since 2012)
Invited presenter, Academic Leadership Academy (since 2009) and New Academic Administrators Seminar Series (2011), Western Michigan University
Invited professional colloquium, Western Michigan University (2009)
Selected into the Kellogg Action Lab College of Consultants (2007)
Certified Small Business, Kalamazoo Regional Chamber of Commerce (2006)
Instrumental in obtaining performance excellence awards for Kalamazoo County Government (Leadership, 2001; Strategic Planning, 2000; Southwest Michigan Quality Council)
Elected to Executive Council, Association for Behavior Analysis (1997 – 1999)
Who's Who in American Colleges and Universities (1995)
Graduate Teaching Fellow, University of North Texas (1994-1995)
Phi Beta Delta, Honor Society for International Scholars (1992)

COMMUNITY LEADERSHIP

Association for Behavior Analysis International: Executive Council (1997 – 1999)
Journal of Organizational Behavior Management: Guest Reviewer
Kalamazoo Area Homeschool Association, Inc.: Chairman of the Board (2008 – 2010)
Kalamazoo Area Tutoring Association: Board member 2017 – 2020; President (2018-2020)
Kalamazoo ONE place Nonprofit Consultant & Trainer Network, Co-Chair (2009 – 2010)
Kalamazoo Regional Chamber of Commerce, Ambassador Chair (2007 – 2008)
Kalamazoo Regional Chamber of Commerce, Public Policy Chair (2008 – 2009)
MRC Industries: Campaign Cabinet (2009 – 2010)
Nonprofit Alliance: Consultant Design Team (2007 – 2010)
The ARK Shelter of Kalamazoo: Pro-bono consulting (2007)
Western Michigan University: Guest Lecturer - Nonprofit Leadership; Dept. of Psychology

PROFESSIONAL AFFILIATIONS

Association for Behavior Analysis International
Association of Professional Behavior Analysts
Behavior Analysis Association of Michigan
International Society for Performance Improvement
Organizational Behavior Management Network

PRESENTATIONS & WORKSHOPS

Developing Your True North: Strategic Planning for Airport Business Success

Presented at the annual conference of the Michigan Association of Airport Executives, Bellaire, MI, September 9, 2025. This session was co-authored and co-presented with Craig Williams, AAE, Director, Kalamazoo/Battle Creek International Airport, and Larry Bowron, Aviation Practice Leader, OHM Advisors.

Strategic Planning: A Top-level Systems Intervention

Invited presentation, Organizational Performance Improvement Conference, Kalamazoo, MI, April 12, 2025.

Rebooting Your Company Culture: Establishing and Maintaining Culture Using a Strategic Planning Framework

Invited presentation, Michigan Autism Conference, Kalamazoo, MI, October 11, 2024.

Seven Things Leaders Should Know About Strategic Planning

Invited presentations, Association for Professional Behavior Analysts (APBA) Leadership Conference, September 14, 2024.

Strategic Planning 101

Invited presentation, Michigan Autism Conference, Kalamazoo, MI, October 12, 2023.

Strategic Planning for Non-Profit Board Members

Moderator and panelist. The Boston Club. March 21, 2023

10 Things Every Business Leader Should Know About Strategic Planning and

Strategy Execution: Tips for Making Strategic Plans More Executable

Invited presentations, Michigan Autism Conference, Kalamazoo, MI, October 8-9, 2022.

Making Strategic Plans More Executable with Performance Thinking®: A Progress Report

Invited session, Summer Institute of the Performance Thinking® Network, Bainbridge Island, WA, June 15, 2022.

Strategic Planning: What it is and how to get the most out of it

Invited breakout session, Council of Autism Service Providers (CASP) Annual Conference, Portland, OR, May 2, 2022.

7 Tips for Making Strategic Plans More Executable

Webinar, Behavior Analysis Leadership Council, May 16, 2022.

Making Strategic Plans More Executable.

Webinar with Dr. Carl Binder; The Performance Thinking® Network, February 16, 2022.

A Power Tool for the Leader's Toolbox: The Total Performance System. Academic Leadership Academy, Western Michigan University, 2013 – current.

PRESENTATIONS & WORKSHOPS – continued

More Power Tools for the Leader's Toolbox: Compelling Missions and Clear Goal Statements.
Academic Leadership Academy, Western Michigan University, 2014 - current.

Strategic Planning: Creating a Solid Foundation for New Autism Service Providers
and

Strategic Planning: Critical Investment in Long-term Client Outcomes and Business Health
Invited presentations, Michigan Autism Conference, Kalamazoo, MI, October 8-9, 2020.

The Covid-19 Recovery Roadmap: 3 Proven Steps for ABA Leaders to Achieve Sustainability in Times of Uncertainty.

Invited webinar, Behavior Analysis Leadership Council, August 11, 2020.

The Rapid Recovery Roadmap: A Virtual Planning Process for Getting Your Business Back on Track after COVID-19

Webinar, ASAH, May 28, 2020.

Webinar, California Association for Behavior Analysis, May 8, 2020.

Webinar, Behavior Analysis Leadership Council Business "Leadership Forum for New Business Leaders," Fourth Annual Conference, April 25, 2020.

Out of the Crisis: Developing a Rapid Recovery Roadmap to Help You Get Back on Track After COVID-19

Webinar, Behavioral Health Center of Excellence Virtual Academy, April 21 2020

The TPS on a Napkin: A Practical OBM Job Aid for ABA Practitioners

Association for Behavior Analysis International (ABAI) 45th Annual Convention, Chicago, IL, May 2019.

Workshop: Strategic Planning for ABA Service Agencies

Association of Professional Behavior Analysts (APBA) 9th Annual Convention, Atlanta, GA, April 11-13, 2019.

Strategic Planning Part 1: The Basics

Strategic Planning Part 2: Advice and Tools for DIYers

Council of Autism Service Providers (CASP) Annual Conference, Scottsdale, AZ, January 14-15, 2019.

Invited Memorial Address

65th German POW Memorial Service, Fort Custer National Cemetery, Battle Creek MI, November 18, 2018.

Expanding Your Reach: Preparing Your Organization for Growth with Strategic Planning.

Behavior Analyst Leadership Council (BALC) Second Annual Conference, New Haven, CT. March 16, 2018.

PRESENTATIONS & WORKSHOPS – continued

Using Behavioral Systems Analysis to Improve the Performance of Organizations, Processes, and People. Business Leadership Forum, Behavior Analyst Leadership Council (BALC) Second Annual Conference, New Haven, CT. March 15, 2018.

What's Missing from Behavioral Systems Analysis: A Look at External Strategic Planning Consulting. OBM Professional Seminar, Department of Psychology, Western Michigan University. February 16, 2018.

Introduction to Organizational Behavior Management, Systems Thinking, and Strategic Planning. Melmark Expert Speaker Series for Behavior Analysts, Berwyn, PA, November 2, 2017.

Measures of Success.
Dean's Council and Academic Leadership Council, Ferris State University, December 3, 2014.

Creating a Culture of Positive Reinforcement: Practical Leadership Tools for Creating and Sustaining Desired Performance. MPI Research, Kalamazoo, June 4-5, 2014.

Applying Behavioral Systems Analysis to Strategic Planning. Annual Convention of the Association for Behavior Analysis International, May 2014, Chicago, IL.

Using Systems Thinking to Create a Strategy-focused HR Organization. Annual conference of the Michigan Council of the Society for Human Resource Management (MISHRM), Grand Rapids, MI, October 2013. Presentation was given twice at the conference.

Strategic Planning: A How-to Workshop for Today's Performance Consultants. Industrial/Organizational Graduate Student Organization, Western Michigan University, Kalamazoo, MI, 2013.

Systems Thinking: A Powerful Leadership Tool for Planning Effectively. Academic Leadership Academy, Western Michigan University, 2012.

The Practice of Consulting: Tips for Future Practitioners. Lecture, Advanced I/O Seminar. Western Michigan University, 2012.

Applying Systems Thinking for Anxiety-free Strategic Planning. Academic Leadership Academy, Western Michigan University, 2011.

Leadership and Systems Thinking: Unleashing the Power of Planning at all Levels of Your Organization. Invited presentation. New Academic Administrators Seminar Series, Office of the Provost, Western Michigan University, 2011

Understanding Organizations as Systems: Practical Applications of Organizational Systems Theory. Guest lectures, Nonprofit Leadership Program, Western Michigan University, 2006-2011.

Systems Thinking and Strategic Planning: Made for Each Other. Academic Leadership Academy, Western Michigan University, 2010.

PRESENTATIONS & WORKSHOPS – continued

Improving Organizational Leadership and Decision-Making Through Systems Thinking.
Academic Leadership Academy, Western Michigan University, 2009.

Flying Solo: Applying Behavioral Systems Analysis to a Small Consulting Firm and Its Clients.
Colloquium. Western Michigan University, October 2009.

Strategic Planning for Busy Organizations. Encore presentation, Day Conference of the
Kalamazoo Human Resource Management Association (KHRMA), Kalamazoo, MI, May 2008.

Strategic Planning for Busy Organizations. Annual conference of the Michigan Council of the
Society for Human Resource Management (MISHRM), Kalamazoo, MI, September 2007.

A Strategic Planning Model for County Departments. With D. Nitz. Annual conference of the
Michigan Association of Counties, Harbor Springs, MI, August 2002.

Consulting Interns: A Cost-effective Approach to Continuous Quality Improvement. With R.
D. Terronez. Annual conference of the MI Association of Counties, Gaylord, MI, August 2001.

Systems Thinking: What Is It and How Can I Do It? With D. M. Brethower. Annual
convention of the Association for Behavior Analysis, Chicago, IL, May 1999.

Systems Thinking (and Systems Doing). Annual convention of the International Society for
Performance Improvement, Long Beach, CA, April 1999. With D. M. Brethower.

PUBLICATIONS

Improving Human-Service Organizations through Process Mapping: A Tutorial for Practitioners
Luke, M. M., Dams, P. and Lichtenberger, S. N. (2024). *Behavior Analysis in Practice (online)*.
Association for Behavior Analysis International.

Strategic planning. Chapter in *Organizational Guidelines: Best Practices for Organizations Providing Evidence-Based Services to Individuals With Autism Spectrum Disorder*. Council of Autism Service Providers (2022).

Kick-starting Systems Change: The Best-Worst Exercise. *OBM Network News Online*, 24(1).
Invited article (2010).

The Relevance of Motivation for Human Performance Technology Practitioners. *Performance Improvement Quarterly*. Accepted for publication pending revision.

Kalamazoo County Receives Performance Excellence Award for CQI Strategy. With R. D. Terronez. *County Administrator*, 1, 2, 5 (April 2001).

Book Review: Performance-based Instruction: Linking Training to Business Results by Dale M. Brethower and Karolyn A. Smalley. *Performance Improvement*, 38(9), 42-46. (1999)

Systems Thinking (and Systems Doing). *Performance Improvement*, 38(1), 37-52. With D. M. Brethower (1999).

Providing Effective Interventions May not be Enough: The Importance of Cost Analyses in the Behavioral Health System. *Behavior and Social Issues*, 7(2), 141-152. (1998)

Students Teaching Behavior Analysis: What's In It For Me? *Teaching Behavior Analysis News*, 3(3), 3. (1995)

Computers and Architecture. *Texas Architect*, 40, 72-75. (1990)

Keeping Drawing Data Up to Date. *Cadence Magazine*, 5, 106. (1990)



Strategic Plan 2022

Dams & Associates, Inc.
Experience the power of planning

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Introduction

Charter Township of Kalamazoo remains committed to fostering a vibrant, thriving, and welcoming community. To that end, the current board, staff, and township manager spent several days in July and August of 2022 updating our 2017 Strategic Plan. The full Strategic Planning Committee comprised staff leadership, the township manager, and the board of trustees. The full committee met on July 19 and 20 to review the previous plan and provide input. Following the July 19 and 20 discussions, a subcommittee was convened to revise the document. The Strategic Planning Subcommittee consisted of Supervisor Martin, Manager Mitchell, Trustee Leuty, and Trustee Glass. With the professional assistance of Peter Dams of Dams & Associates, the subcommittee held three writing sessions to revise objectives related to the following four goals we will focus on for the next two years:

1. Vibrant and Strong Neighborhoods
2. Strong Community Engagement and Identity
3. Effective Operations and Collaborations
4. Astute Financial Leadership

Kalamazoo Township strives to use good qualitative and quantitative data to govern our decisions. With a population consistently hovering around 21,000 for the last three decades, the township has seen a slight increase in population as of 2020 estimates. It currently rests at just over 22,000 people living in four unique neighborhoods, Lakewood, Northwood, Eastwood, and Westwood.

According to censusreporter.org (2022), our current median age is 35, with approximately 69% of residents under 50. In the last few years, we have seen increasing property and home values, young homeownership, and families with children. This data, combined with staff and board input, formed these priorities that we invite you to work with us on for the next two years. None of these goals are meant to be accomplished by one person alone, and we are committed to engaging the community in any strategies we implement. We will continue to engage the community throughout the implementation of this living plan.

**In service and solidarity,
Your Manager, Staff, and Board of Trustees**



Our Guiding Principles

Our Vision

We envision Kalamazoo Charter Township with enhanced

- Community identity and engagement
- Diversity, inclusion, and equity
- Respect for all human rights
- Openness and welcome to all populations
- Economic opportunity
- Intergovernmental collaboration

Our Mission

The mission of Kalamazoo Township is to provide government services that promote a safe, healthy, accessible, and economically viable community to live, work, learn, and play.

Our Core Values

As members of Kalamazoo Charter Township, our values guide our governance and our interactions with residents, visitors, and each other. We commit to being:

Ethical

Serving our community honestly, fairly, and justly

Respectful

Honoring the value of everyone we interact with

Transparent

Practicing openness in our decisions and actions

Responsive

Providing optimal service proactively and effectively

Competent

Continually building knowledge to best serve the people

Economical

Prudent with our community's precious financial resources

Our Strategic Framework

The strategic framework shows that the vision can only be achieved if Kalamazoo Township executes against the strategic goal and strategies.



Our Goals and Strategies

Goal 1: Vibrant strong community and neighborhoods		
Strategic Objectives	Target Date	Owner
1. Board and staff have an enhanced understanding of diversity and inclusion	Mar 2023	Dexter Mitchell
2. Township beautification plan to create a better-looking township	Mar 2023	Dexter Mitchell
3. Decision whether to create a corridor improvement authority with a TIF district	Mar 2023	Don Martin
4. Police officers who are assigned to community policing (to improve relationship with the community to lower crime in the future)	Jun 2023	Bryan Ergang
5. Encourage the creation of new neighborhood associations and support existing neighborhood associations in all neighborhoods	Mar 2024	Don Martin
6. Collaborate with organizations to address affordable housing	Ongoing	Dexter Mitchell and Mark Miller

Goal 2: Strong community identity and engagement		
Strategic Objectives	Target Date	Owner
1. Develop a process for creating and/or participating in community events inside and outside of the Township (e.g., one event/neighborhood/year)	Jun 2023	Communications Committee
2. Internal and external communication plan that addresses	Jun 2023	Communications Committee
a. Consistent branding		
b. Reflects the Township's diversity		
c. Social media strategy		
d. Collect email addresses and cell phone numbers to enable free communication to residents		
e. Enhance webpage to provide more online information and services		
Note: 50% of homes were sold in the last ten year.		

Goal 3: Efficient and effective operations and collaborations

Strategic Objectives	Target Date	Owner
1. Evaluation of township manager's performance on an annual basis	Dec 2022	Board
2. Facility needs assessment (draft)	Dec 2022	Dexter Mitchell
3. Staff members who report morale is high a. Conduct an annual staff retreat to build morale b. Conduct a bi-annual morale survey	Mar 2023	Dexter Mitchell
4. Decisions whether to hire additional positions: a. HR b. Parks c. Communications	Mar 2023	Board
5. A comprehensive technology plan	Jun 2023	Rick Shaink
6. Wage analysis study in 2023	Jun 2023	PAC
a. Update Employee Handbook and the Policy Manual	Jun 2023	PAC
b. Master review calendar	Mar 2023	Ashley Glass
c. Streamline processes		
7. Succession plan	Oct 2023	Dexter Mitchell
8. Decision whether to have full-time elected officials	Oct 2023	Board
9. Policy and operations review	Ongoing	PAC
10. Communicate desired stakeholder involvement per stakeholder analysis (p. 24)	Ongoing	Dexter Mitchell

Goal 4: Financial stewardship		
Strategic Objectives	Target Date	Owner
1. Annual review of service fee structure to reflect actual cost of providing services	Mar 2023	Nancy Desai
2. Financial reports that meet board's oversight needs	Ongoing	Board
a. Evaluate current reports		
3. Identify and pursue appropriate local, state, and federal grant opportunities	Ongoing	Dexter Mitchell
a. Develop a plan to identify opportunities to work with area resources to assist in researching and writing grants (e.g., Western Michigan University, Kalamazoo Community Foundation)		Board / Dexter Mitchell

Implementation Schedule

This schedule may be adjusted based on emerging priorities and budget amendments.

Strategies Sorted by target date	2022	2023				2024	Owner
		Q1	Q2	Q3	Q4		
3.1. Evaluation of township manager's performance on an annual basis	Dec 22						Board
3.2. Facility needs assessment (draft)	Dec 22						Dexter Mitchell
1.1. Board and staff have an enhanced understanding of diversity and inclusion		Mar 23					Dexter Mitchell
1.2. Township beautification plan to create a better-looking township		Mar 23					Dexter Mitchell
1.3. Decision whether to create a corridor improvement authority with a TIF district		Mar 23					Don Martin
3.3. Staff members who report that the morale is high		Mar 23					Dexter Mitchell
3.4. Decisions whether to hire additional positions: HR, Parks, Communications		Mar 23					Board
3.6.b. Master review calendar		Mar 23					Ashley Glass
4.1. Annual review of service fee structure to reflect actual cost of providing services		Mar 23					Nancy Desai
1.4. Police officers who are assigned to community policing			Jun 23				Bryan Ergang
2.1. Develop a process for creating and/or participating in community events inside and outside of the Township			Jun 23				Communic. Committee
2.2. Internal and external communication plan			Jun 23				Communic. Committee
3.5. A comprehensive technology plan			Jun 23				Rick Shaink

Strategies Sorted by target date	2022	2023				2024	Owner
		Q1	Q2	Q3	Q4		
3.6. Wage analysis study in 2023			Jun 23				PAC
3.6.a. Update Employee Handbook and the Policy Manual			Jun 23				PAC
3.7. Succession plan					Oct 23		Dexter Mitchell
3.8. Decision whether to have full-time elected officials					Oct 23		Board
1.5. Encourage the creation of new neighborhood associations and support existing neighborhood associations in all neighborhoods						Mar 24	Don Martin

Ongoing Objectives

1.6. Collaborate with organizations to address affordable housing	Dexter Mitchell and Mark Miller
3.9. Policy and operations review	PAC
3.10. Communicate desired stakeholder involvement per stakeholder analysis (p. 24)	Dexter Mitchell
4.2. Financial reports that meet board's oversight needs	Board
4.3. Identify and pursue appropriate local, state, and federal grant opportunities	Dexter Mitchell

Next Steps and Implementation

- Communicate the Strategic Plan to staff and external key stakeholders – clearly and often.
- Have internal conversations on how staff and elected officials can contribute to the mission and vision and live the core commitments.
- Develop and implement detailed tactical action plans as needed.
- Track progress and identify data trends.
- Focus on strategy throughout the year through strategy-based staff and board meeting agendas and annual progress reports.
- Regularly report updates and results to all key stakeholders.
- Use process and outcome metrics for continuous improvement toward service excellence.
- Celebrate success!
- Regularly review, validate, and update the strategies.

The Strategic Planning Process

This section of the Strategic Plan documents the planning process
and the results of the planning activities from the
July 19-20, 2022, retreat.

This record may be used to refresh the
strategies and to orient new staff and elected officials.

Planning Participants

We thank these participants for giving their time and expertise.

Donald D. Martin*	Supervisor
Sherine M. Miller	Treasurer
Mark E. Miller	Clerk
Ashley Glass*	Trustee
Steven C. Leuty*	Trustee
Clara Robinson	Trustee
Lisa Moaiery	Trustee
Dexter A. Mitchell*	Manager
Bryan Ergang	Chief of Police
David J. Obreiter	Fire Chief
Nancy Desai	Director of Finance
David Becker	Assessor

* Denotes member of the Steering Team



Strategic Accomplishments 2017 – 2022

The following strategies have been completed and are now part of the ongoing Township operations (Tier 2 operational priorities).

Goal 1: Vibrant strong community and neighborhoods

1. Develop a schedule for regular board member visits to businesses
2. Conduct an internal review of ordinances related to blight and make recommendations as needed with priorities and timelines
3. Develop recommendations for the creation of TIF districts, DDAs, and Corridor Improvement Authorities
4. Institute proactive community policing to prevent crime
5. Collaborate more with Southwest Michigan First
6. Increase awareness of and measure progress towards sustainability
7. Create a Township Climate Action Plan
8. Present options for improving the enforcement of ordinances related to blight
9. Attract more businesses
10. Educate residents and businesses on area resources

Goal 2: Strong community identity and engagement

1. Develop a process for creating and/or participating in community events inside and outside of the Township (e.g., one event/neighborhood/year)
2. Create and publish an annual event calendar
3. Provide regular opportunities for police and community to interact
4. Increase social and recreational opportunities to attract businesses
5. Create a "Trustee for a Day" program
6. Support neighborhood associations more intentionally
7. Provide relevant Township information to the neighborhood associations
8. Attending neighborhood association meetings/functions and report back to board

Goal 3: Efficient and effective operations and collaborations

1. Develop a process for conducting staff evaluations. The process should include external wage analysis study and pay scale review for employees
2. Implement a document management system
3. Create standard operating procedures to capture institutional knowledge, including task analyses
4. Regularly review job descriptions for all staff positions
5. Complete implementation of present Master Plan
6. Complete implementation of the Parks and Recreation Master Plan
7. Develop a Township dashboard of measures of success
8. Develop the next five-year Township Master Plan
9. Conduct an annual joint meeting with the Board of Trustees, Road Commission, Planning Commission, and the ZBA
10. Implement best practices as suggested by the MTA and other professional resources
11. Continue to pursue open communication with federal, state, county, and local elected officials and municipalities
12. Continue implementation of the Non-motorized Transportation Plan
13. Strengthen the morale in all Township departments
14. Conduct regular formal anonymous engagement surveys

Goal 4: Diverse and inclusive neighborhoods and governmental services

1. Broaden the scope of advertising job and committee opportunities with the Township
2. Youth academy with the Township's police and fire departments to get underrepresented youths interested in public safety careers (e.g., mentoring)
3. Develop a plan for working towards a police department that mirrors our community

Goal 5: Financial stewardship

1. Evaluate current financial reports to determine whether they meet board's oversight needs
2. Implement an aggressive road maintenance schedule
3. Develop a long-term maintenance plan for water and sewer
4. Explore collaboration opportunities with other municipalities
5. Hold quarterly meetings with Finance Administrator
6. Continue to seek solutions regarding water and sewer rates

Planning Calendar

Date	Event	Participants
April 15, 2022	<u>Kick-off Meeting</u> • Prepare planning retreat • Determine with 2017 objectives to continue	Steering Team
July 19-20	<u>Strategic Planning Retreat</u> • Affirm guiding principles • Review strategic accomplishments • Getting to know your personal style • Conduct SWOT and gap analyses • Brainstorm strategies to close gaps	Board of Trustees Leadership Staff
August 09	<u>Create the Strategic Plan #1</u> • Review retreat results • Draft crisp objectives	Steering Team
August 16	<u>Create the Strategic Plan #2</u> • Set target dates and identify owners	Steering Team
August 23	<u>Create the Strategic Plan #3</u> • Check draft plan against planning activities and make final adjustments • Review next steps: Rollout and implementation	Steering Team
	Dams & Associates submits draft plan	
	Board of Trustees reviews and adopts the final plan	

SWOT Analysis

Strengths, Weaknesses, Opportunities, and Threats

Strengths	Weaknesses
- Your current capabilities - Capitalize upon these strengths to fulfill the mission and move toward the vision	- Your current opportunities for improvement - If not addressed in the strategic plan, weaknesses could impede fulfillment of mission and progress toward vision.
Opportunities	Threats
Identify trends that can become advantages for fulfilling your mission and vision.	The strategic plan's goals and objectives must address threats so they do not impede progress toward your mission and vision.

After identifying major strengths and weaknesses, participants determined whether the trends and their impacts identified at the first planning retreat presented potential opportunities or threats to achieving your mission and vision.

Trends were defined as *(future) external events that may have a positive or negative impact on the organization's operation and services.*

Trends in the following four separate but overlapping environments and their *direct impact* on your internal operations were identified.

Social & Demographic



Economic



Political & Regulatory



Technological



These environments need to be continuously assessed and monitored.

Strengths

Participants' perception of the Township's *current* strengths and weaknesses.

Strengths 2022	Weaknesses 2022
• Hard-working employees • Customer service • Flexibility in solving problems within departments • Good financial standing • Good planning for Township needs • Citizens who participate • Quality safety services • Stable tax base	• Staff turnover • Low morale by staff • Trust in working together • Multiple expectations of staff • Communications to citizens • Outdated buildings • Lack of space • Unclear chain of command • Not enough funds for bigger projects • Lack of staff limits operational capacity

Strengths 2017	Weaknesses 2017
• Road infrastructure • Committed and engaged elected officials • Citizen involvement • Strong staff – skills, commitment • Not running a deficit • Township government is closest to the people • Variety of ideas, fresh eyes • Strong professional police and fire services • Diversity of housing stock • Centrally located within the county • Three options of school districts in the Township • Hospitals • Treating all four neighborhoods with equity • Transparency	• Residents and visitors don't know when they enter the Township • Residents don't know whether they live in the Township • Housing blight • Decaying housing stock – including commercial buildings • Lack of business investment • Lack of ability to get on/off 131 • Lack of proactive communication strategies (e.g., social media) • Low investment in parks – not enough parks • No venue for outdoor events • Low voter turnout • No community building • Four separate communities: No center or downtown • Running out of cemetery space • Poor relationship with MDOT • Bad street lights / non-LED street lights

SWOT Analysis: Opportunities

Opportunities are defined as trends and impacts that can become advantages for fulfilling your mission and vision. Opportunities do not have to be specifically addressed by the strategic plan's strategies, but strategies should be built upon these strengths.

Social & Demographic Trends	Impact on Kalamazoo Township
1. COVID > many people don't feel accountable for breaking the law	Demand for outside activities Work from anywhere
2. Aging population	Changing workplace support requirements Need for elder housing Need for walkable neighborhoods
3. Young people moving into the Township	Need for outdoor spaces Expectations for services Void (lack of knowledge) regarding the community

Economic Trends	Impact on Kalamazoo Township
1. Increasing entrepreneurship – Work From Home (WFH) businesses	Need for WFH ordinances and zoning Active support needed for non-traditional businesses Changing culture in the Township
2. Labor movement (wages, desire for more free time)	Need for green spaces and walkability

Technology Trends	Impact on Kalamazoo Township
1. Wide adoption of technology (e.g., Zoom meetings)	Expectations of broadband service Computer training for staff Changes in policies and procedures
2. Digital divide between older and younger residents	Continue services for the older residents (e.g., in person, mailings)

SWOT Analysis: Threats

Threats are defined as trends whose impact on the organization cannot be addressed without further intervention. Unaddressed threats can severely limit your ability to deliver results. Your strategic plan must address these threats so they do not impede progress toward your mission and vision.

Social & Demographic Trends	Impact on Kalamazoo Township
1. COVID > many people don't feel accountable for breaking the law	Operations affected in general Impact on public safety (people don't feel accountable for breaking the law) Stress for service jobs who cannot work from home (WFH)
2. Homelessness and drug use	No locations for people to go Hospitals overburdened More demand for public safety
3. Businesses close due to lack of staff > vacant spaces	More people out on the streets More demand for public safety
4. Climate change (fires, power outages)	More demand for public safety Resiliency planning (in progress)
5. Work-life balance	Different workplace expectations from younger generation Residents expect 8-5 services in person
6. Increased car ownership	Clogged parking Lower quality of life Safety concerns

Threats - continued

Economic Trends	Impact on Kalamazoo Township
1. Increasing income and wealth inequality	Mismatch between housing and resources Need to support people
2. Inflation and high gas prices	Increased costs to operate Longer times between repairs of assets (e.g., car repair) Long lead times (e.g., fire trucks) Increasing wages Smaller geographic talent pool Have to do more with less
3. Increased need for new revenue and millages	More opposition Budget constraints Impact staff time
4. Labor movement (wages, desire for more free time)	Attract workers is difficult (housing, quality workers) Higher wages
5. Recycling and waste removal	Impact on residents High need for communication to explain recycling

Threats - continued

Political & Regulatory Trends	Impact on Kalamazoo Township
1. Increasing preemption at the federal and state levels	Less local control More unfunded mandates
2. Rise of anti-democratic forces → More divisions and conflict	Staff have to deal with conflict Elections are being challenged
3. Mistrust / fake news	Staff have to explain a lot more which reduced productivity
4. Decriminalization of drug use → Increased homelessness	Increasing need for behavioral health services Uncertainty how to fund support services for residents
5. Upcoming elections	Uncertain impacts

Technology Trends	Impact on Kalamazoo Township
1. Increasing energy cost	Increased transportation costs Increased infrastructure costs
2. Wide adoption of technology (e.g., Zoom meetings)	Expectations for immediate responses Increased need for cybersecurity Increased infrastructure costs
3. Technology use	Loss of relationships between staff and residents ("community feel")

Challenges, Gaps, and Barriers

During the gap analysis, participants identified challenges, gaps, and barriers that could impede progress toward Kalamazoo Township's vision to the fullest extent possible.

Gaps are listed in the order discussed, not in the order of priority. Items within each category reflect participants' perceptions. The purpose of this activity was to show consensus and alignment with respect to the top gaps and barriers. *Therefore, duplicate or similarly worded items may reflect contributions from different participants.*

Vibrant strong community and neighborhoods	Strong community identify and engagement	Efficient and effective operations and collaborations
Connecting communities on non-contiguous land Create a welcoming Twp Economic and social opportunities/incentives to attracts residents and businesses Attracting more businesses	Weak community engagement Expectations 😊 versus reality 😞 Branding to identify our "neighborhoods"/community Reaching people Increase external communications and information Collaborate Not enough community engagement	Modernization of communication standards Modernization of technology standards Staff turnover Culture Morale Turnover / Hiring Establish means to increase trust and respect between employees Better communication needed to increase employee morale, welfare, and production Lack of staff to deliver quality services
Diverse and inclusive neighborhoods and government services	Financial Stewardship	
Affordable housing shortage	Township budgetary constraints Fiscal constraints	Retain and recruit staff Trust Building limitations Internal and external communication Working with staff Modernization of workflow parameters Communication transparency Communication Capacity Staffing shortages

Gap Analysis 2017

Identity and Engagement	Collaboration and Infrastructure	Funding and Financial Management
Community engagement Township identity Lack of community identity (K-Twp brand) Lack of resident awareness of township government Community identify township? Neighborhood associations Twp identity Exterior signage Understanding equity Open communication Improved community communication strategy (social media) Public Media Network not utilized enough Communication with every resident	Intergovernmental community Limits to collaboration Transportation Partnerships Maintaining infrastructure (conserving assets) Infrastructure Blight and brownfields	Limited financial resources to meet goals Decreasing revenue to meet goals likely Funding Money \$
		Board Priorities
		Board members losing focus (between terms) Limited time to deal with important issues (tyranny of the urgent) Goal setting
	Law Enforcement	Economic Development
	Pro-active (vs. re-active) policing (community policing) Police	Need for new / more industries and jobs Jobs

Desired Stakeholder Involvement

Stakeholders are defined as *individuals, groups, or organizations who can exert substantial influence over your operations and outcomes.*

To be optimally effective in working with your stakeholders, we identified the *desired* level of their involvement.

Your strategic goals and objectives must help you attain this desired level of stakeholder involvement and make it an integral part of your operations.

Our Stakeholders	Desired Level of Involvement
Southwest Michigan First	• Prepare open rural land and brownfields for development
Kalamazoo County Government	• Free up ARPA funds • Make CDBG funds spending decisions with Kalamazoo Township at the table • Hire a climate action coordinator as a shared position • Involve Kalamazoo Township more actively in brownfield development
Kalamazoo County Road Commission	• Be an Act 51 partner for non-motorized plan (e.g., sidewalks) • Communicate changes early (e.g., speed limits) • Ensure a common goal (?)
Kalamazoo Regional Water and Wastewater Commission	• Work on wastewater agreement with the City • Implement the water contract
ISAAC	• Work with other municipalities on quality housing ordinances • Include Kalamazoo Township in gun violence discussions
Surrounding municipalities	• Communications strategy for collaborative opportunities

Strategy Execution Support Tools

To support the execution of your strategic plan, we are providing the following tools.

Worksheet for Implementing Objectives

Date Updated:	Enter date here
----------------------	------------------------

Goal:	
--------------	--

Strategic Objective:	
-----------------------------	--

Owner		Project Team	1.	4.
Target Date			2.	5.
			3.	6.

Criteria for Good	
How you will know the objective has been accomplished well?	
1.	
2.	
	3.

Implementation Plan Use work outputs for project milestones	Project Milestones	Target Date	Compl.
	1.		
	2.		
	3.		
	4.		
	5.		
	6.		
	7.		

Implementation Tracking Form

Kalamazoo Township Implementation Tracking Form	Date	Owner	Status	Current Update
Goal 1: Vibrant strong community and neighborhoods			automatic coloring	
1. Board and staff have an enhanced understanding of diversity and inclusion	Mar-23	Dexter Mitchell	2	
2. Township beautification plan to create a better-looking township	Mar-23	Dexter Mitchell	3	
3. Decision whether to create of a corridor improvement authority with a TIF district	Mar-23	Don Martin	1	
4. Police officers who are assigned to community policing (to improve relationship with the	Jun-23	Bryan Ergang		
5. Encourage the creation of new and support existing neighborhood associations in all ne	Mar-24	Don Martin		
6. Collaborate with organizations to address affordable housing	Ongoing	Dexter Mitchell and Mark Miller		
Goal 2: Strong community identity and engagement				
1. Develop a process for creating and/or participating in community events inside and outs	Jun-23	Communications Committee		
2. Internal and external communication plan that addresses	Jun-23	Communications Committee		
Goal 3: Efficient and effective operations and collaborations				
1. Evaluation of township manager's performance on an annual basis	Dec-22	Board		
2. Facility needs assessment (draft)	Dec-22	Dexter Mitchell		
3. Staff members who report that the morale is high	Mar-23	Dexter Mitchell		
4. Decisions whether to hire additional positions: HR, Parks, Communication	Mar-23	Board		
5. A comprehensive technology plan	Jun-23	Rick Shaink		
6. Wage analysis study in 2023	Jun-23	PAC		
a. Update employee and elected officials handbook	Jun-23	PAC		
b. Master review calendar	Mar-23	Ashley Glass		
7. Succession plan	Oct-23	Dexter Mitchell		
8. Decision whether to have full-time elected officials	Oct-23	Board		
9. Policy and operations review	Ongoing	PAC		
10. Communicate desired stakeholder involvement per stakeholder analysis (p. 24)	Ongoing	Dexter Mitchell		
Goal 4: Financial stewardship				
1. Annual review of service fee structure to reflect actual cost of providing services	Mar-23	Nancy Desai		
2. Financial reports that meet board's oversight needs	Ongoing	Board		
3. Identify and pursue appropriate local, state, and federal grant opportunities	Ongoing	Dexter Mitchell		

Contact Information



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SEPTEMBER 2025



Strategic Planning Proposal for Oshtemo Charter Township

**QUEST MANAGEMENT
VALPARAISO, IN
+219-508-2562
DEAN.SCHROEDER@VALPO.EDU**

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September 18, 2025

Oshetemo Charter Township
Attention: David Kobb
dkobb@oshtemo.org

Dear Mr. Kobb:

Please find included in this document our proposal in response to your RFP for a Strategic Planning Facilitator. We have been engaged in this type of work for quite some time and have a history of success with a widely diverse group of clients. Our goal is to deliver a high-quality planning experience customized for your group and the Township's needs. The outcome of your strategic planning exercise will be a document with a realistic and actionable plan.

Our availability for taking on this project later this year or early next is currently flexible. If you have any questions, please feel free to contact us.

Sincerely,

Dean M. Schroeder, PhD
Elizabeth Beres, PMP
Quest Management



Dean M. Schroeder

Author · Speaker ·
Consultant · Educator



Elizabeth Beres

Project Manager ·
Educator · Consultant

Expertise

➔ Strategic Planning

Dr. Dean Schroeder earned a PhD in Strategic Management from the University of Minnesota and has been teaching, researching, and consulting in the field for over three decades. He has facilitated many strategic planning and organizational transformation workshops, including working with SMEs and NGOs. Elizabeth Beres (BME, MBA, PMP) is the Principle Managing Consultant for Projects and Processes, LLC and had led or facilitated planning sessions with a number of clients including a local Fortune 300 company. Ms. Beres and Dr. Schroeder have worked together many times.

Attached with this proposal we are including a 16-page strategic plan document that was the outcome of a facilitation conducted together by Ms. Beres and Dr. Schroeder. The names have been redacted, and this document is shared with the permission of the client. The client was a \$20M-\$25M high-end architectural millwork company with about 65 employees. The scope of the project was greater than what we believe Oshtemo needs, as it involved more background work, extensive financial analysis, and small-group "listening sessions" with all employees. However, the overall structure and planning of their event is analogous to what we propose for Oshtemo.

About Us

➡ Dean M. Schroeder

Dr. Dean M. Schroeder is an author, educator, and consultant recognized for his work helping organizations improve management outcomes. His latest book, *Practical Innovation in Government: How Front-Line Leaders are Transforming Public-Sector Organizations*, co-authored with Alan Robinson, has been recognized as one of the most important books published on continuous improvement in government. His previous book, *The Idea-Driven Organization*, was selected as the featured book on leadership by the *Washington Post* and was recognized as one of the year's best books on Leadership by *USA Book News*. In a consulting capacity, Dr. Schroeder has worked with many leading organizations in North America, Europe, and Asia, and has personally led organizational turn-arounds and transformational initiatives in four companies.

Dr. Schroeder holds a bachelor's degree in Mechanical Engineering from the University of Minnesota, a Masters of Business Administration from the University of Montana, and a PhD from the University of Minnesota in Strategic Management. He has published 4 books, over a hundred articles (many in the top journals in his field), and has served on four boards. He currently is a Senior Research Professor at Valparaiso University. For more information on Dr. Schroeder, please visit his website at dmschroeder.com.

➡ Elizabeth Beres

Having worked for more than a decade within the corporate world of Fortune 200 companies, Liz now leverages her specialized knowledge in project management, process improvement, and strategic planning to support a broader variety of organizations. For the past five years, she has successfully worked with a diverse client base including both large corporations as well as individual professionals alike. She is particularly known for her skills in facilitating small group problem-solving.

Liz's academic foundation includes a Bachelor's degree in Mechanical Engineering and a Master of Business Administration from Valparaiso University, where she now serves as an Adjunct Professor. This comprehensive education is complemented by advanced professional certifications, including her status as a certified Project Management Professional (PMP) and a Lean Six Sigma Black Belt. Furthermore, her commitment to strategic leadership extends to her role as Board President for a Montessori school, where she guides the organization in fulfilling its educational mission.

- ➡ Business Strategy
- ➡ Continuous Improvement
- ➡ Data and Results Driven
- ➡ Education
- ➡ Project Management



Our Approach

This is *your* plan. We provide the framework for the process and the facilitation needed to create the plan. We help you to identify the key issues and facilitate robust discussion while managing conflicting perspectives. The goal is to drive toward agreement on actions that need to be taken and to ensure they are achievable. Then we document. To make certain you “own” the decisions and document, we strive for high transparency and healthy engagement.

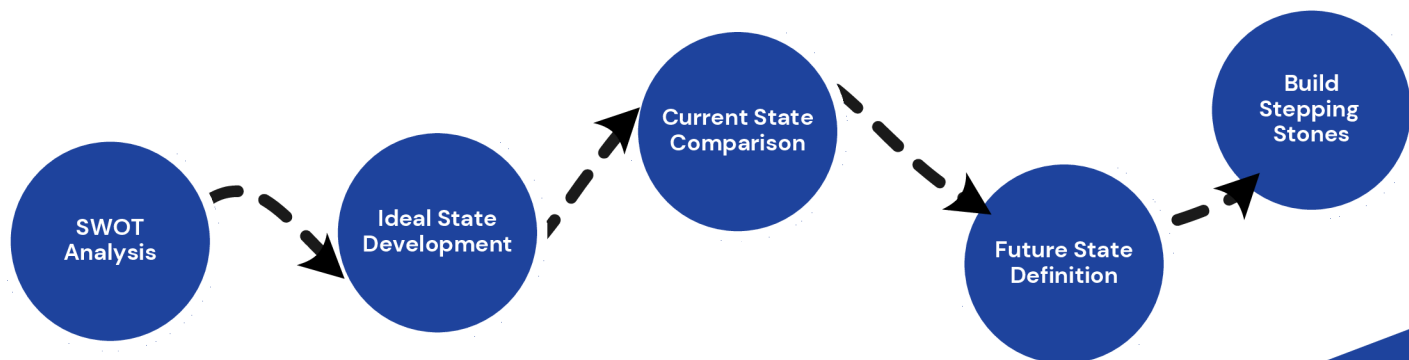
Methodology

➤ Discovery

- To understand the overall context, we will initially review all documentation you are able to provide.
- We have found the most effective method of surveying, when working with groups of your size, involves open ended conversations with each of the participants. We propose scheduling individual 30 minute virtual interviews with each participant. This robust type of surveying allows us to identify a fuller range of goals, issues, and constraints.

➤ Facilitation

- Our facilitation method is structured to enable the group to align, decide, and build their unique strategy.
- We start by aligning on the organization's current strengths, weaknesses, opportunities, and threats. We then guide the group to understanding what they truly want to achieve. Comparing that with the current situation, we can then understand what needs to be changed. From there, the team is able to create a clear set of realistic goals and objectives. Walking away from the workshop, the team will know what they are trying to achieve, and how to successfully get there.



➤ Reporting

- After the event, we consolidate all of the workshop documentation. You will receive a comprehensive report, as well as a summary slide deck.
- We will present these items in a final handoff meeting where we will also be available for any questions.
- We are always available for follow-up consultations.

Facilitation Pricing

➔ Discovery

The key to an outstanding workshop, is the preparation that goes into it.

\$5,000

- Gather and review required documents
- Schedule and conduct seven individual survey interviews
- Prepare and customize the workshop based on your particular needs

➔ Facilitation

Guiding and focusing the group through the methodology so the team can create their own personalized strategic plan.

\$5,000

- Conduct the SWOT analysis
- Develop the Ideal State
- Compare Ideal State to Current State
- Define the Future State
- Build out clear, actionable next steps to start executing your strategy

➔ Reporting

Bringing everything all together so your team can take off running.

\$5,000

- Transcribe and organize all documentation from the workshop
- Pull together all items into a cohesive Strategic Plan document
- Create a shareable higher-level slide deck of the Strategic Plan
- Share the reports with the team in a final meeting

Total Cost: ~~\$15,000~~

**Personal Referral
20% Reduction**

Your Price: \$12,000

References



Jonathan Buell, CEO
President & CEO at Wright
Architectural Millwork Corp.
JonB@wrightmw.com

Dean and Liz have repeatedly consulted with Wright Architectural Millwork on several engagements, including a successful leadership transition and the development of a comprehensive, team-specific strategic plan.



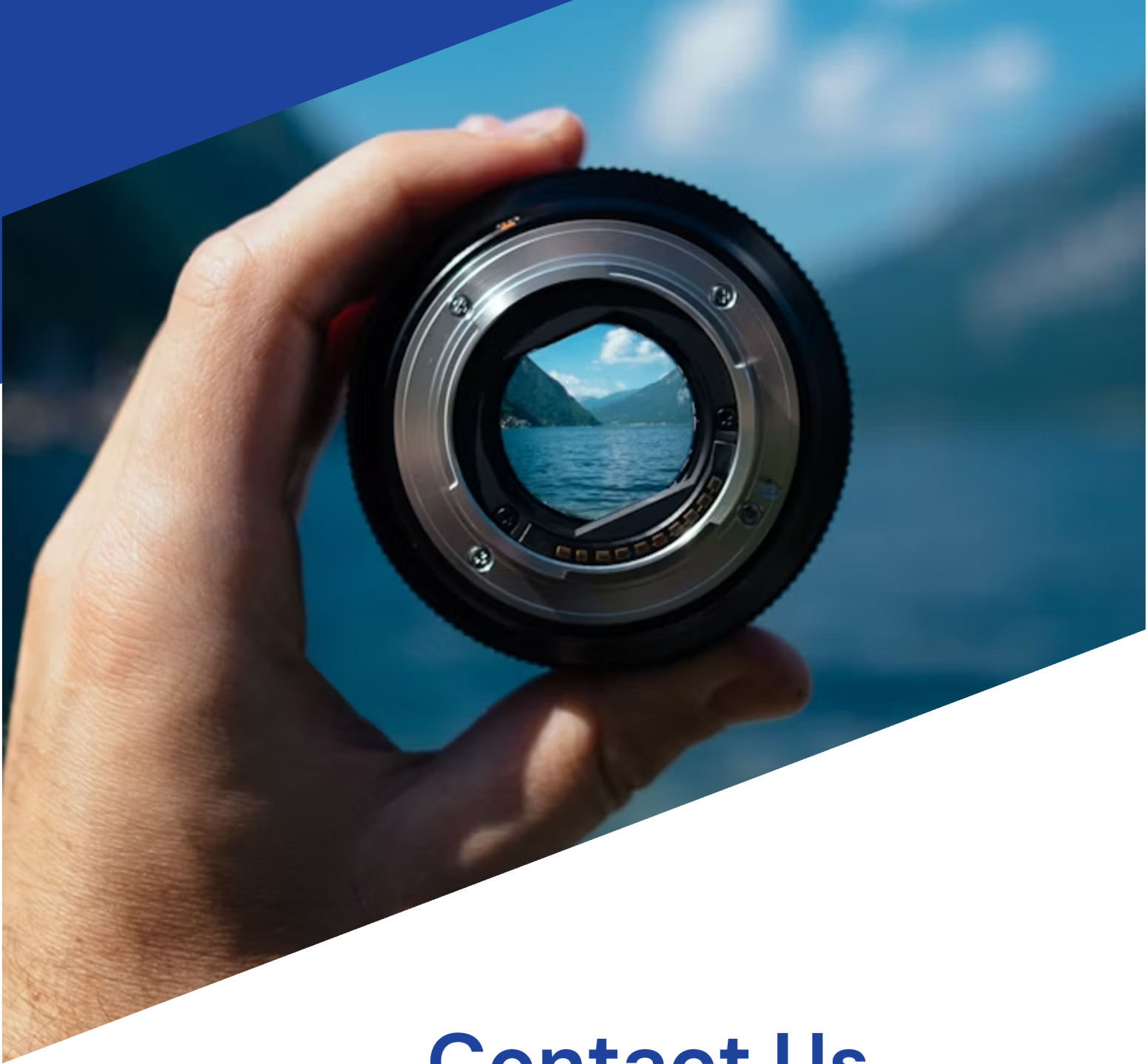
Dr. Alan G Robinson
Author, Educator,
Consultant and Speaker
agr@isenberg.umass.edu

Dean and Alan have a history of working together on consulting and training initiatives to support businesses. In addition they have co-authored multiple business books including their bestseller, *Ideas are Free*



Dr. Larry Schanker
Executive Director at
Brookview Montessori School
larry@brookviewschool.org

Liz currently serves on the Board of Directors and as a strategic advisor for Brookview Montessori School, where she is assisting with the development and execution of their strategic plan.



Contact Us



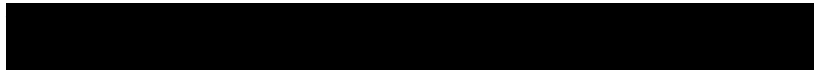
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2023 Strategic Plan

12/10/2022

Overview

Over the last five years [REDACTED] has experienced a number of landmark changes. The founding leadership team/owners sold the company and reformed it as a 100% ESOP corporation; the workforce has been unionized; and [REDACTED] has experienced growth and record profit margins. The company has survived the ravishes of the Covid pandemic and this year, with the retirement of the remaining founder, promoted [REDACTED] to the position of president & CEO and constituted a new leadership team. As [REDACTED] enters a new phase in its history, the company is facing an uncertain economy, the highest inflation in half a century, and unprecedented supply chain challenges.

At the time of the strategic planning process, the market is strong, and it appears there will be ample work for the next year. The primary challenges are related to consistently delivering that work at profitable levels and realigning the way the company operates to reflect the values of the new leadership and engage more fully [REDACTED] employee owners. Consequently, in this document more focus is put on internal operation than on the external environment.

The Planning Process

The assessment portion of the strategic planning process took place over several weeks in late October and early November and included the following:

- 1) A planning workshop was conducted over an afternoon and the following morning. The workshop was attended by nine individuals, including the leadership team, managers, and several key staff members. Topics included the current state of the company, what type of company the manager/owners wanted to create, and what improvements would be needed to become that organization.
- 2) The following week ninety-minute discussions were held with six groups of front-line employee owners. This included all employees with the exception of their managers.
- 3) Also that following week, discussions were held on a variety of topics with the appropriate members of the leadership team. Specific needs for various areas of [REDACTED] were identified. These areas included marketing, finance and capital needs, ESOP, and HR.

Following the assessment portion of the planning process, a draft of the plan was compiled, which was then reviewed, edited, and built upon by the President/CEO and his management team.

Key Management Workshop Findings

The observations, insights, and decisions made during the management workshop form the basis for much of the action agenda listed in this document. The highlights are listed in this section.

SWOT

Strengths

- (8.5 votes) Meeting client needs/schedule, on time delivery, responsive, manage complicated work, etc.
- (4.5 votes) Experience (core team)
- (4 votes) Financial stability, Accounting, consistent work/sales
- (3.5 votes) Ability to react to last minute changes, adaptability, dig in to get things done
- (3.5 votes) Quality and accuracy of product, custom work, good drawings, etc.

Weaknesses

- (11 votes) Training, employee retention/satisfaction
- (8 votes) Communication, structure of jobs, sharing of information
- (3 votes) Lack of planning, looking ahead/big picture
- (2.5 votes) The divide between the office and shop, lack of understanding people's rolls/responsibilities, Me First, victim mentality, what am I not getting
- (2 votes) Delegating, ask a lot of the few, use of resources, too lean

Opportunities

- (10 votes) Transfer knowledge of experienced employees, training, interdepartmental understanding, promote from within, improve the way we do things
- (5 votes) Leverage ESOP potential, ESOP community/immerse the employees, create an employee culture (100% participation), ESOP Culture top to bottom
- (4 votes) Better communication, identify what the barriers are between shop and office and break them down
- (3 votes) Empower employees to "steer the ship," don't just rely on others - empower yourself
- (3 votes) job growth, Internal employee job satisfaction, want/need to succeed

- (2 votes) More client face-to-face, think outside the box, niche market to exploit, marketing, identify alternate revenue streams (like buy-out opportunities)

Threats

- (8 votes) Negativity, stubborn not willing to advance, here to collect a paycheck, lack of commitment, starting not to care, company culture going the wrong way
- (7 votes) Demanding client relations, communication, not staying in customer's good graces
- (7 votes) Overloaded with work, lack of personnel, employee turnover, losing valuable key employees, knowledge leaving
- (4 votes) Recession, volatility of the marketplace, economy, lack of work, poor profits, not staying on budget

Vision and Core Values

The discussion about the company's vision involved a comparison between what the company is now with what managers wanted it to be. Currently it is viewed as well-loved and both utilitarian and dependable, but in need of improvements as many of its systems and processes do not work smoothly and problems crop up too frequently.

The vision was to create an organization that was more forward-thinking, operated smoothly, and incorporates all the appropriate new technologies. A company that was strong, versatile, and clearly recognized for its excellence.

In terms of the values used to make decisions, [REDACTED] has published core values that are both part of the employee handbook and are posted on the wall in the hallway between the office and plant. While everyone agreed with their general elements, and several participants were able to cite most of the values, they were viewed as relatively generic – as if they were written by management without front-line input.

Front-line Sessions

Six sessions were held with groups of front-line owners – mostly grouped by department. These 90-minute discussions were essentially abbreviated versions of the management workshop with a departmental – rather than company-wide – focus. While each meeting had distinct outcomes, they also had common elements including:

- Many of the groups seem to have a high-level outline of a process within the group... but they all execute it a different way
- Managers are “in the weeds” doing the detailed work instead managing/leading the group/process
- Every group WANTS to do high quality work but feels like they aren’t given the TIME to give it their best quality
- The lack of integrated systems or a place to go for information sharing, job processing, etc. is having a ripple effect on communication and productivity
- In the workshop sessions, the employee-owners have thought, shared, and have seen the hope of what could be. Their biggest concern is that they don’t see anything done with the information collected and improvements are not made
- Everyone WANTS to own/improve but needs an example to follow. They need the time/resources/help/structure/“permission” to make things better
- Almost all the teams mentioned having increased volumes/workload with no additional people resources added and are (or are worried about) burning out
- Many teams mentioned that it is almost a requirement to have much of the “tribal knowledge” in order to do a job well, efficiently, or even to do it at all

Action Agenda

Human Resources

The most identified weakness/opportunity in the management workshop was hiring, training, and retaining new employees. Currently, the paperwork side of the HR functions are handled by the accounting department, which is largely overburdened. Hiring and training are largely decentralized and handled by various managers.

Action Items

- Create a new position as Human Relations manager and staff it with a qualified professional.
- Develop training and development plans for every level of the organization – individual development plans for each manager and leader, and skills development plans for each position in the shop and office.
- Develop a clear recruiting strategy and onboarding process.
- Staff up to the point where managers can manage and not be relied upon for doing the work of their staff.
- Develop and launch an initiative to refresh [REDACTED]'s core values by involving the entire workforce in their creation. Try to include values unique to [REDACTED].

ESOP

██████ has been an ESOP for several years and is still learning its way through the process. It has yet to take full advantage of what it means to be employee owned. A primary goal is to become a stronger, more engaging employee-owned company.

- Change ESOP professional associations with both new Trustee and TPA. The goal is to get high quality, more responsive and more guidance on ESOP issues.
- Be more consistent with annual ESOP meetings.

Operations

The goal is to improve the company's overall operating performance and consistency. This involves a focus on improving technology, training, communication, and processes.

Action Items

- Accelerate investments in systems and capital equipment. In addition to ongoing systems upgrades, manufacturing equipment upgrades include:

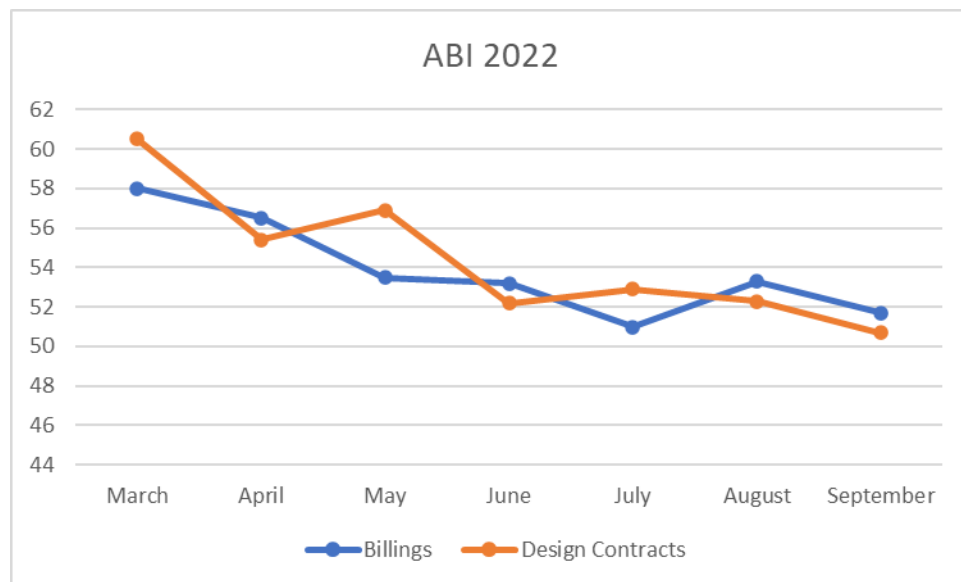
2023	Building Reconfiguration to facilitate a New Edge Bander
2024	Convert to a water-Based Finishing System
2025	Automated Material Handling System
2027	Update Panel Saw and 2 CNC Units

- Set up work practices that continuously improve systems, processes and communication, and rapidly identify and solve problems.
- Establish culture of engagement where problem solving and improving practices is the norm. This involves both training and providing forums for improvement activity including:
 - Bi weekly (or weekly) improvement meetings with the management team.
 - Weekly front-line meeting in each group to engage front-line owners in problem identification and problem solving in their areas of responsibility.

Markets, Marketing, and Sales

The market in our traditional areas of work has been surprisingly strong coming out of the recent Covid pandemic. From what we have learned from our customers and others in the industry, it is expected to remain so through 2023. This is largely confirmed by the Architecture Billing Index (ABI), which provides a quick look at expectations in the commercial building markets 9 to 18 months in the future. ABI numbers over 50 represent expanding work ahead relative to the previous year, while those under 50 represent less work. The September index was 51.7 for Billings and 50.7 for Design Contracts, which represents slow growth expected for the year ahead. Both indexes have been dropping from levels close to 60 earlier in the spring. (See Exhibit 1) The high index numbers in the spring were likely due to a recovery bounce coming out of the worst of the pandemic.

Exhibit 1 – Architecture Billing Index for the Last Six Months



The sales and marketing functions at [REDACTED] have traditionally been taken care of by estimating and project management, with estimating seeking out and responding to opportunities to bid on work and project

management spending a great deal of time interacting with customers and building relationships. Our sales approach has developed over time to be based upon building and maintaining relationships with clients. Overall, this structure has been working well.

Actions Agenda

- ***Re-Branding*** – [REDACTED] is an ESOP with a new generation of leaders. Efforts to update or reposition the company's image will be undertaken.
- ***Update Website*** – The current website contains dated information. While we do not expect to get new customers through the website, it is the first place people wanting information about [REDACTED] normally look. This includes new customers, employees of existing customers we have not worked with, and potential WAM employees checking into the company. The site needs to be updated to reflect who we are today and to be more interesting to potential new hires.
- ***Social Media*** – Create a modest social media presence to complement the website.
- ***Improve Communication with Architects and Contractors*** – As part of our rebranding initiative, we will develop a communication plan for both contractors and architects. This will include occasional email newsletters (perhaps quarterly), very visual in nature, that include examples of recent work. We will also create a virtual tour of our operations that can be accessed by architects, customers, and even potential employees.

Five-Year Cash Needs Projection

Cash needs will play a particularly critical role for the next five years for two reasons. First, large quarterly payments on the principal portion of the “Sellers’ Notes” begin 12/31/2023 and continue for five years. Second, capital investments will be needed for both new and replacement production equipment.

Assumptions: This five-year cash analysis is limited to internally generated funds from net profit and depreciation, and cash needed for capital expenditures and scheduled dept repayment. This “marginal” sources-and-uses approach to cash analysis assumes other cash needs are captured as normal business activity in the company’s income statement. Additionally, the analysis assumes financial practices will remain relatively unchanged, including the payment of supplier invoices on time or early to take advantage of discounts, no further bank loans will be taken out, etc.

Funds Needed

Exhibit 2 - Principal Payments on Loans

	WB C '20	Series A	Series B	Total/yr
2023	342,563	24,250	137,440	504,253
2024	356,076	97,000	549,760	1,002,836
2025	370,122	97,000	549,760	1,016,882
2026	384,721	97,000	549,760	1,031,481
2027	399,897	97,000	549,760	1,046,657
2028		72,750	412,320	485,070

NOTES

- 1) The WB bank loan principal amounts are based on an amortization schedule for \$2.5M note at 3.875 APR for seven years.
- 2) The sellers’ notes principal payments are taken from the schedule developed by [REDACTED] and presented at the November 3, 2022, BOD meeting.

Exhibit 3 - Projected Capital Requirements for Equipment and Upgrades

Equipment	Estimated Cost	Annual Total
2023		
Building Reconfiguration	100,000	
New Edge Bander	300,000	
Misc. & System Upgrades	20,000	
		\$420,000
2024		
Water-Based Finishing System	150,000	
Misc. & System Upgrades	20,000	
		\$170,000
2025		
Automated Material Handling	800,000	
Misc. & System Upgrades	20,000	
		\$820,000
2026		
Misc. & System Upgrades	20,000	
		\$20,000
2027		
Panel Saw	250,000	
CNC(1)	250,000	
CNC(2)	100,000	
Misc. & System Upgrades	20,000	
		\$620,000

NOTES

- 3) Capital equipment costs were estimated by [REDACTED].
- 4) An additional \$20K per year was added to fund operating systems upgrades and other misc. capitalizable investments.

Internal Sources of Funds

The primary internal source of funds is company profits. Projections were made based on revenue assumptions of both \$22M and \$18M, and net profit levels of 3%, 5%, 8%, and 10%.

Exhibit 4 - Profitability Projections

Revenue Assumptions	% Profit On Rev.	Net Profit per yr.
22,000,000	3	\$660,000
22,000,000	5	\$1,100,000
22,000,000	8	\$1,760,000
22,000,000	10	\$2,200,000
18,000,000	3	\$540,000
18,000,000	5	\$900,000
18,000,000	8	\$1,440,000
18,000,000	10	\$1,800,000

The depreciation amounts are based upon Dean Schroeder's best approximation from historical depreciation levels, remaining depreciation on existing assets, projected new capital investments, and assuming – on average – a ten-year straight line depreciation schedule. This is an imprecise but reasonable depiction of depreciation expenses.

Exhibit 5 - Projected Depreciation

	Depreciation
2023	150,000
2024	165,000
2025	260,000
2026	250,000
2027	305,000
2028	285,000

Net Cash Situation

Although a variety of different scenarios were analyzed, only those of an average annual revenue of \$18M and \$22M at 5% and 3% net profits are provided in the exhibits below. This is sufficient to illustrate the minimum performance levels needed to conservatively provide the needed funds. Cash needs are from Exhibits 2 & 3, available fund from Exhibits 4 & 5.

Exhibit 6 – Fund Levels - \$18M in revenue and 5% Net Profit

	Cash Needs	Available Funds	Annual Excess/Gap	Cumulative Excess/Gap
2023	924,253	1,050,000	125,747	125,747
2024	1,172,836	1,065,000	-107,836	17,911
2025	1,836,882	1,160,000	-676,882	-658,971
2026	1,051,481	1,150,000	98,519	-560,452
2027	1,666,657	1,205,000	-461,657	-1,022,109
2028	505,070	1,185,000	679,930	-342,179

Exhibit 7 – Fund Levels - \$22M in revenue and 5% Net Profit

	Cash Needs	Available Funds	Annual Excess/Gap	Cumulative Excess/Gap
2023	924,253	1,250,000	325,747	325,747
2024	1,172,836	1,265,000	92,164	417,911
2025	1,836,882	1,360,000	-476,882	-58,971
2026	1,051,481	1,350,000	298,519	239,548
2027	1,666,657	1,405,000	-261,657	-22,109
2028	505,070	1,385,000	879,930	857,821

Exhibit 8 - Funds Levels - \$18M in revenue and 3% Net Profit

	Cash Needs	Available Funds	Annual Excess/Gap	Cumulative Excess/Gap
2023	924,253	690,000	-234,253	-234,253
2024	1,172,836	750,000	-267,836	-702,089
2025	1,836,882	800,000	-1,036,882	-1,738,971
2026	1,051,481	790,000	-261,481	-2,000,452
2027	1,666,657	845,000	-821,657	-2,822,109
2028	505,070	825,000	319,930	-2,502,179

Exhibit 9 - Funds Levels - \$22M in revenue and 3% Net Profit

	Cash Needs	Available Funds	Annual Excess/Gap	Cumulative Excess/Gap
2023	924,253	810,000	-114,256	-114,256
2024	1,172,836	825,000	-347,836	-462,092
2025	1,836,882	920,000	-916,882	-1,378,974
2026	1,051,481	910,000	-141,481	-1,520,455
2027	1,666,657	965,000	-701,657	-2,222,112
2028	505,070	945,000	439,930	-1,782,182

Conclusion

The company currently has over \$3M in cash and a very strong accounts receivable to accounts payable ratio. If a minimum average revenue of \$18M with at least 4% net profit can be maintained, there should be little trouble meeting all financial liabilities related to repaying the principles on outstanding loans and investing in needed capital equipment. Short of this level performance, other tactics will be needed that could include delaying capital improvements, more aggressively collecting accounts receivable, stretching out accounts payable, restructuring debt, or borrowing working capital funds from the bank.

Submitted for review by:



2025 Strategic Planning Proposal



Submitted for review to:

David Kobb

Operations Coordinator

TB Meeting, October 28, 2025

Packet Page 99

Last Revised 10/28/2025

September
2025

COVER LETTER

Dear Mr. Kobb and members of the Oshtemo Charter Township Board,

People Forward® is delighted to submit our proposal to facilitate your upcoming Township Board strategic planning retreat. We understand this retreat is an opportunity not just to set goals, but to bring the Board together around a shared vision, clarify priorities, and strengthen collaboration so the Township can continue serving residents with transparency, fiscal responsibility, and long-term impact.

With demonstrated expertise in fostering inclusive, actionable retreat experiences, we are well-prepared to guide a process that ensures all voices are heard, focuses discussions on what matters most, and results in a clear, practical roadmap. Our work has been recognized by leaders across our region for its impact on both organizational clarity and team alignment. Dan Pontius, CEO of MRC Industries, shared the following feedback from a strategic planning session earlier this year:

Monica Lloyd is the gold standard for strategic planning facilitation! Our team at MRC Industries has had the privilege of working with Monica Lloyd multiple times, and she has consistently exceeded expectations. Most recently, Monica led us through a comprehensive strategic planning process that resulted in a clear, actionable roadmap for our organization's future.

From the beginning, Monica took the time to collect and analyze data, ensuring our planning sessions were informed and productive. She is a neutral and inclusive facilitator, creating a safe and collaborative space where every participant felt heard and valued. Her ability to manage group dynamics, ask insightful questions, and encourage innovative thinking allowed us to have deep, meaningful discussions and achieve consensus on our key priorities.

Monica's sessions were anything but boring, her energy, structured process, and excellent presentation skills kept the team engaged and inspired throughout. Most importantly, she guided us to tangible outcomes, helping translate ideas into a strategic plan with clear goals, action steps, and accountability measures.

We wholeheartedly recommend Monica to any organization looking for a strategic planning partner. She exemplifies the qualities of the best facilitators: neutrality, strong communication, expert group management, and a results-oriented approach. Thanks to Monica's leadership, we have a plan that aligns our mission, motivates our team, and positions MRC for long-term success.

We are ready to partner with you in creating a meaningful and productive retreat that reflects your commitment to transparent governance, community engagement, and a forward-looking strategy. Our approach is designed to help the Board move from discussion to alignment, and from alignment to action, producing outcomes that are both measurable and sustainable. We stand ready to schedule planning calls promptly upon selection.

Sincerely,

Monica Lloyd
President and Chief People Officer
People Forward
monica@peopleforward.us

269-290-0284
TB Meeting, October 28, 2025

Introduction

Oshtemo Charter Township is at a pivotal stage in its growth and development. Once primarily agricultural, the Township has become a rapidly growing suburban community of nearly 24,000 residents, marked by both opportunity and complexity. Population growth, land use pressures, and infrastructure demands are reshaping the Township, while issues such as income disparity, environmental sustainability, and preserving community character remain central considerations.

Recognizing the importance of clear direction, the Township Board has issued an RFP for facilitation of a strategic planning retreat. This retreat will provide a critical space for Board members to come together, reflect on current realities, and define priorities that balance growth with preservation, fiscal responsibility with community needs, and governance with transparency.

The desired outcome is a shared vision and actionable priorities that guide decision-making, strengthen collaboration among elected officials, and reinforce public trust in the Township's leadership.

Scope of Work - Summary

The strategic planning process will include:

1. **Pre-Planning Preparation:** This phase focuses on aligning with the planning champion and gathering insights from leadership, faculty, and key stakeholders through document review, a pre-planning survey, and focus groups to ensure sessions are grounded in relevant data and perspectives.
2. **Strategic Planning Sessions:** Through a series of planning sessions, identified participants will collaborate to assess the current state, identify key priorities, and define actionable objectives that will shape the future direction and important work of the department.
3. **Post-Planning Deliverables:** Following the sessions, a comprehensive strategic plan will be developed featuring a fully branded stakeholder-facing document, an action and accountability workbook, and a communication plan to support effective execution and long-term success.

Key Terms

Selected Participants: Those taking part, making decisions, and setting course in the facilitated strategic planning session(s).

Stakeholders: Those closest to the work or impacted by the work who have valuable insights to share as a part of the pre-planning discovery process.

Scope of Work - Detailed

Preparation & Alignment (Week 1):

1. Initial discovery meeting with strategic planning champion/POC.
 - i. Group Mapping
 - a) Stakeholders (largest group)
 - b) Core Planning Team (board retreat participants)
 - c) Steering Committee (optional based on complexity)
 - ii. Pre-planning action alignment
 - iii. Dates and timelines finalized
 - iv. Engagement and communication plan prepared
2. Review of relevant documents (mission, vision, previous strategic plans, financials, performance metrics, etc.).
3. Development of a pre-planning survey for key stakeholders to capture insights, challenges, opportunities and ideas.
4. Focus group logistics & alignment.
 - i. Dates
 - ii. Attendees
 - iii. Location
 - iv. Focus and flow

Pre-Planning Data Gathering & Summarizing (Weeks 2-4):

1. Launch stakeholder survey (week 2)
2. Conduct focus groups (weeks 2 & 3)
3. Synthesize survey and focus group data for planning session (week 4)

Continued on next page...

Scope of Work - Detailed (continued)

Strategic Planning (Weeks 5-6 pending participant schedules):

1. Format Options:
 - i. Three 4-hour sessions OR two 6-hour sessions
 - a) Steering Committee meetings as needed
2. Participants: Oshtemo Township Board
3. High-Level Agenda Overview:
 - i. Welcome & Framing the Conversation
 - a) Overview of objectives, agenda, and expected outcomes.
 - b) Review of pre-planning insights and key organizational data.
 - ii. Mission & Vision Alignment
 - a) Discuss and validation of mission and vision.
 - iii. Environmental & SWOT Analysis
 - a) Identify strengths, weaknesses, opportunities, and threats.
 - iv. Strategic Goals & Objectives
 - a) Determine strategic goals for the next 3-5 years.
 - b) Define and align on final strategic goals.
 - c) Brainstorm strategic objectives
 - v. Prioritization & Action Planning
 - a) Decide on strategic objectives to support the strategic goals
 - b) Timeline creation considering required effort and capacity

Post-Planning Deliverables (Weeks 7-8):

1. Fully branded strategic plan (electronic document), including at minimum:
 - i. Executive summary
 - ii. Defined strategic goals
 - iii. Mission and vision reaffirmation
 - iv. Stakeholder insights
 - v. Key strategic objectives
 - vi. Actions and next steps
2. Plan reviewed by Board or Steering Committee.
3. Plan refinement and finalization.
4. Implementation & accountability workbook with milestone tracking.
5. Communication plan to engage stakeholders and drive alignment.

Investment

\$20,000 (detailed below)

- 50% deposit due at acceptance of agreement.
- Balance invoiced at delivery of strategic plan.

Execution Framework

The strategic planning engagement will take place over 8 weeks, roughly in late fall of 2025, following the execution framework below:

WHAT	WHEN	COST	HOW <i>(all bullets facilitated by People Forward® unless noted otherwise.)</i>
PREPARATION & ALIGNMENT	Week 1	\$500	• 1-2 Meetings. Virtual or in-person. ~60-90 minutes each.
PRE-PLANNING DATA GATHERING & SUMMARIZING	Weeks 2-4	\$4,000	• Communication draft prepared with survey link. • Communication sent via email by Planning Champion/POC • Focus groups x 2. Scheduled for 90 minutes. Virtual or in-person. • Focus group insights and stakeholder survey data compiled and summarized with digital support and smart tools. • Strategic planning documents prepared for Core Planning Team.
STRATEGIC PLANNING	Weeks 5-6	\$10,000	• In person, interactive meeting(s) with mixed facilitation methods including presentation, printed materials, large group work, small group work, affinity mapping, and action planning. 12 hours. • Steering committee alignment/decisions as needed. ~2 hours.
POST PLANNING DELIVERABLES	Weeks 7-8	\$5,500	• All strategic planning session data and decisions compiled into a comprehensive strategic plan document ~10-14 pages. • Initial plan sent to POC and reviewed by steering committee. • Feedback provided asynchronously or ~30-minute meetings. • Plan finalized and delivered with action workbook. • Communication templates and timeline for plan rollout provided.

Please Note: The schedule is intentionally paced to drive progress, with flexibility to support a thoughtful and complete engagement throughout the process. Timelines can be adjusted as needed within reason to meet the scheduling needs of all involved parties. Getting key sessions on the calendar will be a top priority once the engagement is confirmed.

Partnership

A facilitator/consultant is a resource and partner. Active participation, including honest sharing, stakeholder engagement, and timely scheduling is essential for demonstrating commitment and developing a comprehensive and cohesive plan. Prompt responsiveness enhances efficiency and builds momentum, ensuring the partnership is effective and impactful.

Success Criteria

We will drive progress together through:

- **Open and Transparent Communication:** Open communication is crucial for an effective strategic planning. We must engage with curiosity, intentionality, and transparency to maximize impact.
- **Commitment to Action and Follow-Through:** Successful outcomes require a commitment of both parties to uphold deliverables. Consistent follow-through and accountability are essential for achieving the desired outcomes.
- **Regular Review and Adaptation:** Realistic expectations of progress and outcomes with ongoing evaluation of what's working, emerging challenges, and adjustment to approach as needed. This real-time, iterative process ensures the planning remains relevant and effective.

Disclaimer

As part of this engagement, People Forward® will provide services for your company including but not limited to fractional HR deliverables, situation guidance, and coaching. While we bring extensive HR expertise to this work and have worked with many employment attorneys over the years to shape our expertise, please note we are not attorneys, and do not provide legal advice. By proceeding with these services and our partnership, you agree to hold People Forward® and its owners, employees, and expert subcontractors harmless from any legal claims or liabilities that may arise in connection with the use or implementation of deliverables or guidance adopted into practice by your organization at your own will.

Acceptance

Please sign indicating your acceptance of the scope of work, above statements, investment, and payment timelines outlined in this proposal.

☐ Facilitated Strategic Planning with Deliverables (\$20,000)

Accepted by: _____ Date Accepted: _____

Title: _____

ABOUT US



We provide organizations a clear path to talent optimization and alignment with a people-forward approach. Drawing upon a rich blend of data analytics, industry benchmarks, and practical C-Suite experience, we guide leaders through tailored solutions, equipping them to navigate their distinct objectives with poise and presence.

Meet Monica Lloyd



As the founder of People Forward®, Monica Lloyd brings over 20 years of experience in organizational development, leadership strategy, and workforce transformation. Known for her grounded, people-forward approach, Monica partners with companies to spark clarity, unlock potential, and drive meaningful progress from the inside out. Her expertise spans industries and leadership levels, and her work is rooted in both evidence-based practices and real-world insight. When you work with Monica, you gain a strategic thought partner who delivers with excellence, builds trust quickly, and leaves your team stronger, more aligned, and ready to move forward with confidence.

References

Dan Pontius

Chief Executive Officer
MRC Industries
dpontius@mrcindustries.org

Laura Dinehart

Dean, College of Education and Human Development
Western Michigan University
laura.dinehart@wmich.edu

Rebekah Kik

Deputy City Manager
City of Kalamazoo
kikr@kalamazoocity.org

Balancing Vision with Action

Oshtemo Township's strategic planning retreat requires more than facilitation. It calls for a partner who can balance the big picture with the practical steps that make strategy stick. People Forward® brings that balance by designing a process that is structured, inclusive, and oriented toward outcomes that last.

Skilled Facilitation

Our approach centers on the essentials of effective facilitation:

- Ensuring all voices are heard and valued
- Drawing out diverse perspectives across the room
- Keeping discussions focused, productive, and on track
- Capturing the essence of the Board's direction in a way that can guide future action

These skills are not theoretical. They reflect a career spent aligning strategy to organizational objectives, helping leadership teams move from discussion to clarity, and ensuring outcomes are both actionable and measurable.

Executive-Level Expertise

This work is grounded in the leadership of Monica Lloyd, founder of People Forward®, whose career as a Chief Human Resources Officer brings a unique lens to strategic planning. As a CHRO, Monica sat at the intersection of strategy, people, and process, aligning leadership teams, shaping organizational priorities, and building the systems to sustain them. She knows firsthand how to translate ambitious goals into structures that work, how to engage people in the process, and how to ensure accountability over time.

A Proven Combination

The combination of guiding teams to clarity and alignment, and executive-level expertise in weaving people and process into strategy, ensures Oshtemo Township's retreat will not only generate meaningful dialogue but also produce outcomes that can be implemented with confidence and clarity.

Talent Strategy

"I cannot speak highly enough about the exceptional work Monica helped us accomplish in our organization. Her insight and expertise were **instrumental in driving significant positive changes** throughout our workforce, leading to reduced **turnover and increased trust**. She guided us through complex challenges, co-created our employer brand, and helped design innovative strategies that **transformed our HR practices**, creating more **alignment with our organizational goals**. I appreciate how Monica thinks about people strategy and her ability to influence change. She is certainly **an invaluable partner**."

- Qiana Harrison, Chief Executive Officer
Senior Care Partners P.A.C.E

Executive Sessions

"We have been a challenging team to work with in the past. We have been through tough times that negatively impacted our morale and collaboration. Monica **was unafraid to support** this part of our team with tools for understanding and **positive pathways forward**. Her approach lifted everyone up and left us **ready to step in together** with a new perspective on the work to come."

- Jenny Doezeema, Vice President of Learning and Engagement
Kalamazoo Nature Center

"Monica did an **excellent training for our executive team** on the topic of change management. She was **engaging and informative**, providing meaningful insights and even challenging us when appropriate! She has tremendous, authentic energy and she **connected with everyone in the room**. Our team reviews of her material, her approach, and her understanding of people and organizations were **above and beyond my expectations**. I can't wait to have her back!"

- Denise Koning, JD, Director of Human Resources
Southeast Michigan Community Alliance

Leadership & Culture Development

"When I think of my experiences with Monica Lloyd, I think of the power of **positive leadership**. It's been a handful of years since Monica supported our organization, but my colleagues STILL talk of the things she taught them about people leadership – and that's powerful! Monica is an inspiration; she **creates an environment that is conducive to vulnerability** and building trust. She infuses humor, and real-life scenarios that **help people drop their guard and truly lean in**. Her passion and wisdom have contributed to a personal brand that others gravitate towards. In her work, Monica brought a **fresh view, and clear definitions** when she helped my organization define and build a healthy and prosperous culture. She is a fantastic facilitator, inclusive, and encourages thoughtful dialog to **help teams and leaders grow**. I highly encourage you to partner with Monica to build a high performing team!"

- Sharrie Yingling, Regional Director
Advia Credit Union

Self-Awareness Matters

Self-awareness stands as the cornerstone of effective leadership. Leaders who possess a deep understanding of themselves are better equipped to navigate challenges, make sound decisions, and most importantly, inspire their teams. We believe that by prioritizing self-awareness in leadership development, organizations enhance leader effectiveness and lay a solid foundation for sustainable success and organizational resilience.



Transformation is Iterative and Ongoing

True transformation entails a shift in mindset, practices, and behaviors that permeates throughout an organization. Attempting to achieve human-centered results through isolated events or quick fixes often yields temporary results at best. We believe transformational development is an iterative process that requires a commitment to experimentation, dialog, vulnerability, and accountability. Ultimately, the transformation journey becomes cyclical and creates an ongoing competitive advantage necessary in today's rapidly changing business environment.

People Fuel Performance

Organizational performance isn't solely about systems and processes—it's fueled by the people within. Recognizing your people as the driving force behind notable achievements, we value human capital not just as a mere resource, but as an appreciating asset. We believe that when individuals are understood and appreciated for their unique abilities and their work is aligned accordingly, it unlocks engagement and empowers them to breathe life into the space between strategy and results.

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Memorandum



Date: October 23, 2025
To: Township Board
From: Vanessa Street, Parks Director
Subject: **Fruit Belt Rail Trail – Construction Contract**

Objective

The Board authorize the Supervisor to enter into contract with Balkema Construction for the Fruit Belt Rail Trail project.

Proposed Motion

Motion: To authorize the Supervisor to enter into contract with Balkema Construction for the Fruit Belt Rail Trail project.

Background

The Fruit Belt Rail Trail project went out to bid in September and resulted in three companies submitting proposals for the construction project. Of those three companies, Balkema Construction was the lowest bidder, coming in under bid for the project. Per grant guidelines, the Department of Natural Resources Trust Fund division must approve the contractor selection before Oshtemo Township can award the contract. The contractor was approved by DNR on 10/22/25.

Please see the attached bid tab that includes the proposal amounts from three companies. Balkema Construction's bid for the project is \$670,992.

Core Value(s)

Fiscal Stewardship
Sustainability

**BID TABULATION****PROJECT:****FRUIT BELT RAIL TRAIL****East Segment, Central Segment, and West Segment****BIDS RECEIVED:**

4:00 PM, Thursday, September 25, 2025, at Oshtemo Township Hall, 7275 West Main Street, Kalamazoo, Michigan 49009.

Contractor	Balkema Construction	NexGen Excavating	Brenner Excavating
East Segment Bid Amount	\$301,460	\$360,000	\$417,921
Deduct Alternate #1	\$12,475	\$13,000	\$54,000
Central Segment Bid Amount	\$261,655	\$417,450	\$448,360
Deduct Alternate #1	\$6,761	\$5,450	\$70,200
West Segment Amount	\$107,877	\$155,200	\$202,090
Total Bid Amount	\$670,992	\$932,650	\$1,068,371
Unit Price #1	\$30.00	\$22.60	\$29.00
Unit Price #2	\$40.00	\$55.75	\$50.00
Bid Bond	Yes	Yes	Yes
Bid Signed	Yes	Yes	Yes

BID AWARD:

Will be awarded at the October 28, 2025 Township Board Meeting

Fruit Belt Rail Trail - Project Budget

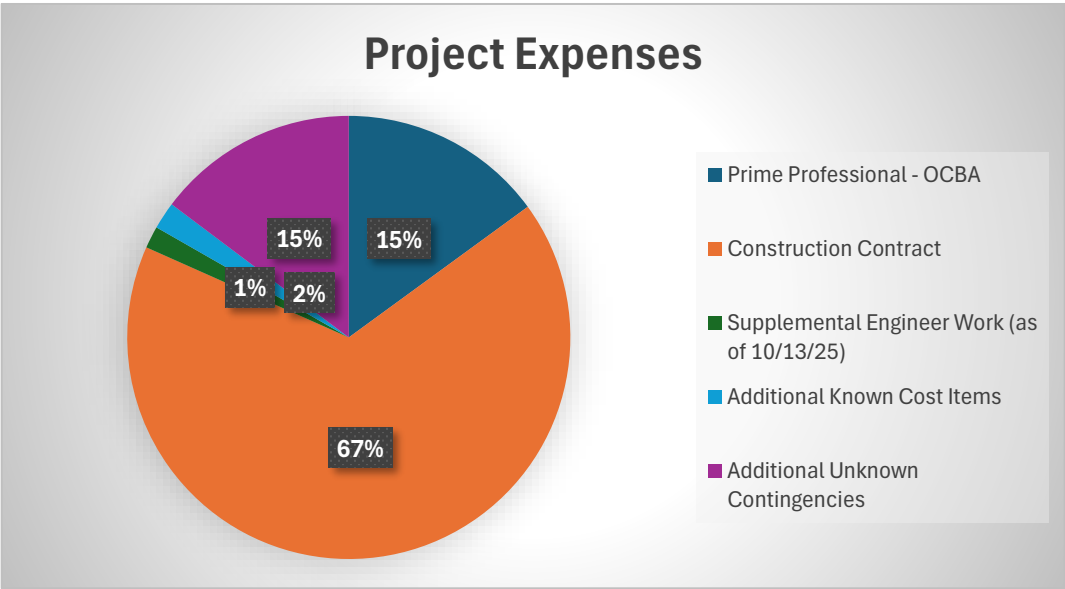
Grant Amount	711,000.00
Township Match	286,000.00
Friends Contributions	9,000.00
Total Project Amount	1,006,000.00

Prime Professional - OCBA	150,550.00	
Construction Contract	670,992.00	
Supplemental Engineer Work (as of 10/13/25)	16,173.00	Permits, surveys, materials testing, etc.
	837,715.00	

Remaining funds	168,285.00
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Additional Known Cost Items	20,000.00	owner provided items - bike repair station, signage, sign posts
Additional Unknown Contingencies	148,285.00	additional steep slope fencing, restoration work, property line fencing

Prime Professional - OCBA	150,550.00
Construction Contract	670,992.00
Supplemental Engineer Work (as of 10/13/25)	16,173.00
Additional Known Cost Items	20,000.00
Additional Unknown Contingencies	148,285.00



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Memorandum

Date: October 14th, 2025

To: Township Board

From: Alan Miller Ordinance Enforcement

Subject: First Reading reference Text Amendment to the non-motorized facilities/sidewalk ordinance No. 604



Objective

MOTION: I make the motion to approve for First Reading the Text Amendments to the non-motorized facilities/sidewalks ordinance Number 604, section 294.007-maintenance of sidewalks and non-motorized paths/facilities

Background

Subject: Recommendation to Amend Sidewalk/Snow Removal Ordinance

The need to amend our current Sidewalk and Snow Removal Ordinance arises from ongoing challenges faced by the Ordinance Enforcement Department, particularly during the winter season of 2024–2025.

This past winter highlighted a recurring issue with snow not being removed from public sidewalks in a timely manner, specifically in the high-traffic business area near W. Main Street and Maple Hill Drive. This area includes several apartment complexes, one of which houses senior residents, and is frequented by pedestrians accessing nearby retail centers, bus stops, and restaurants.

While residential areas did not present the same issue, the business corridor experienced persistent non-compliance from certain property owners, resulting in hazardous conditions for pedestrians. Under the current ordinance, enforcement action cannot begin until **48 hours after the last snow event**. As we all know, multiple snowfalls can occur within a 48-hour window, making it nearly impossible to enforce the ordinance effectively in real-time. Furthermore, the current enforcement process is inefficient:

- A citation is issued to non-compliant property owners.
- A court hearing must then be scheduled.
- If found responsible, a compliance order is issued through the legal office.
- This process can take **several weeks**—during which time the snow remains unaddressed and public complaints increase.

To resolve this, I am proposing an amendment to the ordinance that would:

- Allow Ordinance Enforcement to **notify the property owner immediately** upon violation.
- If the sidewalk is not cleared **within 24 hours** of the notice, the Township may engage a contractor to perform snow removal.
- The **cost of removal will be billed** directly to the property owner.

This amendment will significantly improve public safety and accessibility, especially for our **most vulnerable residents**, such as seniors and individuals with disabilities. It also ensures that high-traffic areas remain walkable and safe, supporting both public welfare and the vitality of our local business district.

This change reflects our ongoing commitment to maintaining a safe, accessible, and livable community for all Oshtemo residents.

Information Provided

Attached you will find the redline of the proposed text amendments and draft ordinance

Core Value(s)

Public Service, Professionalism

OSHTEMO CHARTER TOWNSHIP ORDINANCE NO. ____

Adopted: _____

Effective: _____

OSHTEMO CHARTER TOWNSHIP ORDINANCE

An Ordinance to amend the Oshtemo Charter Township Non-Motorized Facilities/Sidewalks (Ordinance No.604, as amended and to repeal all Ordinances or parts of Ordinances in conflict.

OSHTEMO CHARTER TOWNSHIP
KALAMAZOO COUNTY, MICHIGAN
ORDAINS:

SECTION I. AMENDMENT OF COMPILED SECTION 294.007, MAINTENANCE OF SIDEWALKS AND NON-MOTORIZED PATHS/FACILITIES, is amended as follows:

- B. Public Snow Removal - No person having the care, either as the owner or occupant, of a house, building or lot, parcel or building site shall permit any accumulation of snow to remain upon the sidewalk or non-motorized path/facilities in front of such house, building or lot for longer than 24 hours. When ice is formed on any sidewalk, the owner or occupant of the abutting premises shall immediately cause the same to be removed or treated to prevent a hazard.
- C. If a person neglects to remove an unreasonable accumulation of snow and/or ice upon a sidewalk or non-motorized path/facilities, as required, the Ordinance Enforcement Officer may cause the snow and/or ice to be removed as provided in Section XI. The cost of removing the unreasonable accumulation of snow and/or ice shall be charged and assessed to the property owner as provided in Section XI Penalties & Enforcement.
- D. Obstructions – (Section Change from C to D)
- E. Owner Caused Defects – (Section Change from D to E)
- F. Barricades – (Section Change from E to F)

SECTION II. AMENDMENT OF COMPILED SECTION 294.011, PENALTIES & ENFORCEMENT, is amended to add the following:

If a property owner refuses to comply with this ordinance, after the Ordinance Enforcement Officer provides notice to the property owner by personal service, or by posting notice, at the beginning of the annual snow fall, authorize entry onto the premises to remove the unreasonable accumulation of snow and/or ice. All expenses incurred in such snow and/or ice removal shall be paid by the owner(s) of such land. Additionally, an administration fee, the amount of which shall be determined by the Township Board

from time to time by resolution, shall be paid by the owner(s) of such land. The Township shall have a lien upon such land for such expense and fee, which may be enforced in the same manner as the enforcement of tax liens through entry upon the next tax roll of the Township and assessment as a general Township tax. Such expenses shall be subject to all interest and penalties provided for taxes due and collectible within the Township under the general tax laws of the State of Michigan. In addition to the foregoing, the Township may sue the owner(s) in an appropriate court of law for the collection of said debt.

SECTION III. EFFECTIVE DATE: This Ordinance shall take effect upon publication after adoption in accordance with State law. All Ordinances or parts of Ordinances in conflict herewith are hereby repealed.

DUSTY FARMER, CLERK
OSHTEMO CHARTER TOWNSHIP

294.007 - Maintenance of sidewalks and non-motorized paths/facilities.

Sec. VII.

B. Public Snow Removal - No person having the care, either as the owner or occupant, of a house, building or lot, parcel or building site shall permit ~~an unreasonable accumulation of snow or ice~~ any accumulation of ~~snow ice~~ to remain upon the sidewalk or non-motorized paths/facilities in front of such house, building or lot ~~for longer than 24 hours. for longer than 48 hours.~~ When ice is formed on any sidewalk, the owner or occupant of the abutting premises shall, ~~within 48 hours after the same has formed, cause the same to be removed~~ immediately cause the same to be removed or treated to prevent a hazard.

C. If a person neglects to remove an unreasonable accumulation of snow and/or ice upon a sidewalk or non-motorized pathway, as required, the Ordinance Enforcement Officer may cause the snow and/or ice to be removed as provided in Section XI. The cost of removing the unreasonable accumulation of snow and/or ice shall be charged and assessed to the property owner per Section XI Penalties & Enforcement.

D. Obstructions – (Section Change from C to D)

E. Owner Caused Defects – (Section Change from D to E)

F. Barricades – (Section Change from E to F)

294.011 ~~—~~ Penalties & Enforcement.

Sec. XI.

Add: If a property owner refuses to comply with this ordinance after the Ordinance Enforcement Officer provides notice to the property owner by personal service, or by posting notice, at the beginning of annual snow fall, authorize entry onto the premises to remove the unreasonable accumulation of snow and/or ice. All expenses incurred in such snow and/or ice removal shall be paid by the owner(s) of such land. Additionally, an administration fee, the amount of which shall be determined by the Township Board from time to time by resolution, shall be paid by the owner(s) of such land. The Township shall have a lien upon such land for such expense and fee, which may be enforced in the same manner as the enforcement of tax liens through entry upon the next tax roll of the Township and assessment as a general Township tax. Such expenses shall be subject to all interest and penalties provided for taxes due and collectible within the Township under the general tax laws of the State of Michigan. In addition to the foregoing, the Township may sue the owner(s) in an appropriate court of law for the collection of said debt.

OSHTEMO CHARTER TOWNSHIP ORDINANCE NO. ____

Adopted: _____

Effective: _____

OSHTEMO CHARTER TOWNSHIP ORDINANCE

An Ordinance to amend the Oshtemo Charter Township Non-Motorized Facilities/Sidewalks (Ordinance No.604, as amended and to repeal all Ordinances or parts of Ordinances in conflict.

OSHTEMO CHARTER TOWNSHIP
KALAMAZOO COUNTY, MICHIGAN
ORDAINS:

SECTION I. AMENDMENT OF COMPILED SECTION 294.007, MAINTENANCE OF SIDEWALKS AND NON-MOTORIZED PATHS/FACILITIES, is amended as follows:

- B. Public Snow Removal - No person having the care, either as the owner or occupant, of a house, building or lot, parcel or building site shall permit any accumulation of snow to remain upon the sidewalk or non-motorized path/facilities in front of such house, building or lot for longer than 24 hours. When ice is formed on any sidewalk, the owner or occupant of the abutting premises shall immediately cause the same to be removed or treated to prevent a hazard.
- C. If a person neglects to remove an unreasonable accumulation of snow and/or ice upon a sidewalk or non-motorized path/facilities, as required, the Ordinance Enforcement Officer may cause the snow and/or ice to be removed as provided in Section XI. The cost of removing the unreasonable accumulation of snow and/or ice shall be charged and assessed to the property owner as provided in Section XI Penalties & Enforcement.
- D. Obstructions – (Section Change from C to D)
- E. Owner Caused Defects – (Section Change from D to E)
- F. Barricades – (Section Change from E to F)

SECTION II. AMENDMENT OF COMPILED SECTION 294.011, PENALTIES & ENFORCEMENT, is amended to add the following:

If a property owner refuses to comply with this ordinance, after the Ordinance Enforcement Officer provides notice to the property owner by personal service, or by posting notice, at the beginning of the annual snow fall, authorize entry onto the premises to remove the unreasonable accumulation of snow and/or ice. All expenses incurred in such snow and/or ice removal shall be paid by the owner(s) of such land. Additionally, an administration fee, the amount of which shall be determined by the Township Board

from time to time by resolution, shall be paid by the owner(s) of such land. The Township shall have a lien upon such land for such expense and fee, which may be enforced in the same manner as the enforcement of tax liens through entry upon the next tax roll of the Township and assessment as a general Township tax. Such expenses shall be subject to all interest and penalties provided for taxes due and collectible within the Township under the general tax laws of the State of Michigan. In addition to the foregoing, the Township may sue the owner(s) in an appropriate court of law for the collection of said debt.

SECTION III. EFFECTIVE DATE: This Ordinance shall take effect upon publication after adoption in accordance with State law. All Ordinances or parts of Ordinances in conflict herewith are hereby repealed.

DUSTY FARMER, CLERK
OSHTEMO CHARTER TOWNSHIP

294.007 - Maintenance of sidewalks and non-motorized paths/facilities.

Sec. VII.

B. Public Snow Removal - No person having the care, either as the owner or occupant, of a house, building or lot, parcel or building site shall permit ~~an unreasonable accumulation of snow or ice~~ any accumulation of ~~snow ice~~ to remain upon the sidewalk or non-motorized paths/facilities in front of such house, building or lot ~~for longer than 24 hours. for longer than 48 hours.~~ When ice is formed on any sidewalk, the owner or occupant of the abutting premises shall, ~~within 48 hours after the same has formed, cause the same to be removed~~ immediately cause the same to be removed or treated to prevent a hazard.

C. If a person neglects to remove an unreasonable accumulation of snow and/or ice upon a sidewalk or non-motorized pathway, as required, the Ordinance Enforcement Officer may cause the snow and/or ice to be removed as provided in Section XI. The cost of removing the unreasonable accumulation of snow and/or ice shall be charged and assessed to the property owner per Section XI Penalties & Enforcement.

D. Obstructions – (Section Change from C to D)

E. Owner Caused Defects – (Section Change from D to E)

F. Barricades – (Section Change from E to F)

294.011 ~~—~~ Penalties & Enforcement.

Sec. XI.

Add: If a property owner refuses to comply with this ordinance after the Ordinance Enforcement Officer provides notice to the property owner by personal service, or by posting notice, at the beginning of annual snow fall, authorize entry onto the premises to remove the unreasonable accumulation of snow and/or ice. All expenses incurred in such snow and/or ice removal shall be paid by the owner(s) of such land. Additionally, an administration fee, the amount of which shall be determined by the Township Board from time to time by resolution, shall be paid by the owner(s) of such land. The Township shall have a lien upon such land for such expense and fee, which may be enforced in the same manner as the enforcement of tax liens through entry upon the next tax roll of the Township and assessment as a general Township tax. Such expenses shall be subject to all interest and penalties provided for taxes due and collectible within the Township under the general tax laws of the State of Michigan. In addition to the foregoing, the Township may sue the owner(s) in an appropriate court of law for the collection of said debt.

Memorandum & Request



Date: October 28, 2025
To: Township Board
From: Sharon Lowhim, P.E., Township Engineer
Subject: Adopt TCO (Traffic Control Order) No Parking Any Time on KL Ave

Objective

Provide an update to the Board on the proposed new signs along KL Avenue, between S. 9th Street and S. 11th Street, and request adoption of TCO to authorize their installation.

Proposed Motion: I move to adopt the TCO#25-01 on KL Avenue from S. 9th Street to S. 11th Street, effective October 29th, 2025, and approve a budget amendment as follows:

From:	GL# 207-301-97000 Capital Outlay	\$80.00
To:	GL# 207-301-97000 Capital Outlay	\$80.00

Background

A request has been submitted to establish a No Parking Any Time restriction along both sides of West KL Avenue shoulders, between S. 9th Street and S. 11th Street, to enhance safety for all road users. Refer to the attached investigation and determination sections of TCO#25-01 for further details.

Effective as of October 29th, 2025, No Parking Any Time will be enforced at all times on both sides of the shoulder of KL Avenue between S. 9th Street and S. 11th Street. Violators will be subject to fines and/or towing at the owner's expense.

The total cost of the project is \$580.00; signage supply and installation (see attached Rathco quote) and Road Commission of Kalamazoo County Permit Fees.

Attachments

Rathco Safety Supply Quote
TCO #25-01

Core Values

Public Service
Professionalism

Traffic Control Order Details

Order Number:	25-01
Date of Order:	October 29, 2025
Type of Control:	No Parking Any Time (R7-1)
Location:	W. KL Avenue, between S. 9th Street and S. 11 th Street.

Pursuant to Oshtemo Charter Township Ordinance No. 440, which adopted the Uniform Traffic Code and incorporated by reference pertinent provisions of the Michigan Vehicle Code, a traffic control order is hereby issued by Sharon Lowhim, P.E., Township Engineer, duly authorized as traffic engineer.

Issuance of this traffic control order was preceded by a study and investigation of traffic conditions on the following public road or roads in Oshtemo Township, Michigan: West KL, between South 9th Street and South 11th Street. See attached documentation: **Investigation and Determination.**

And after said investigation, it is hereby ordered and directed that the department of Public Works erect and maintain the No Parking Any Time Sign (s) in accordance with the Michigan Manual of Uniform Traffic Control Devices, said sign(s) to give notice of the following determination: No Parking Any Time.

Township Engineer/Traffic Engineer:	 _____ Sharon Lowhim, P.E Dated:
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Filing Information

This Traffic Control Order shall be filed with the County Clerk and shall become effective upon filing and erection of adequate signs.

Adopted at the regular meeting of Township Board on 10/28/2025.

Township Supervisor:	 _____ Cheri Bell Date:
Township Clerk:	 _____ Dusty Farmer Date:

Investigation

No Parking Any Time on either side of the shoulder of West KL Avenue, between South 9th Street and South 11th Street. This investigation looked at establishing a No Parking restriction along West KL Avenue between South 9th Street and South 11th Street to ensure the safe passage of vehicles and to facilitate the movement of emergency vehicles during peak traffic hours. This action is based on the following critical considerations:

- **Arterial Roadway with High-Speed Traffic:** This section of West KL Avenue is an arterial road with an Average Annual Daily Traffic (AADT) over 12,000 vehicles. The road has varying speed limits, with a posted speed of 45 mph at one end and 50 mph at the other end. The high speeds along this roadway require that the shoulder remains clear to ensure the safety of all road users.
- **Shoulders Serve Critical Functions:**
 - Emergency Stopping: Shoulders provide space for vehicles to safely stop in case of an emergency, such as a mechanical failure, flat tire, or medical emergency.
 - Recovery Area: If a driver inadvertently leaves the traveled portion of the road (for example, due to distraction or a minor collision), the shoulder provides a recovery area to safely return to the main roadway.
 - Emergency Vehicle Access: Emergency vehicles (police, fire, ambulance) often need access to roadways, and a clear shoulder helps them navigate through traffic quickly.

These functions, as outlined in the AASHTO Green Book (A Policy on Geometric Design of Highways and Streets), are critical for maintaining roadway safety and traffic flow. Parking on the shoulder obstructs these essential functions and creates significant risks for all road users.

- **Safety Risk of Parked Vehicles:** Vehicles traveling at speeds of 45-50 mph require significant distance to react to obstacles. In the event a driver needs to maneuver to avoid a collision, the shoulder of the road provides a critical area for correction. When the shoulder is blocked by a parked vehicle, it creates an immediate safety hazard. If a driver needs to leave the traveled way, they may collide with the parked vehicle, potentially leading to serious accidents or dangerous collisions at high speed.
- **Emergency Vehicle Access:** Emergency vehicles (police, fire, ambulance) often need access to roadways, and a clear shoulder helps them navigate through traffic quickly.

Determination

Effective October 29th, 2025 parking on the shoulders of West KL Avenue, between South 9th Street and South 11th Street, shall be prohibited at all times. The prohibition applies to both sides of the roadway. Violations will be subject to fines and/or towing at the owner's expense.



RATHCO SAFETY SUPPLY, INC
6742 LOVERS LANE
PORTAGE, MI 49002
OFFICE (269) 269-323-0153

DATE: 10/10/2025

**TO: OSHTMO TOWNSHIP
SHARON L.
PHONE:**

**FROM: RATHCO SAFETY SUPPLY, INC.
JUAN RUELAS
PHONE: 269-323-8966**

LOCATION: WEST KL AVE (B/T 9TH ST & 11TH ST)

SUBJECT: PERMANENT SIGN INSTALLATION (²~~6~~ LOCATIONS)

PERMANENT SIGNAGE (LUMP SUM) \$ 400.00

***** PRICE INCLUDES MOBILIZATION AND INSTALLATION OF THE FOLLOWING QUANTITIES:**

2 EACH	12" X 18" NO PARKING ANY TIME SIGNS
2 EACH	12' 3 # GALVANIZED U-CHANNEL POSTS
1 EACH	MOBILIZATION
2 EACH	SINGLE POST INSTALLATIONS
2 EACH	HANG SIGNS

***** QUOTE IS BASED ON EQUIPMENT BEING TAKEN TO JOB SITE ACCORDING TO TRAFFIC CONTROL SKETCH DESIGNED BY RATHCO SAFETY SUPPLY. ANY CHANGES AND/OR MODIFICATIONS OF THIS TRAFFIC CONTROL DESIGN MAY RESULT IN A MODIFICATION OF THIS QUOTE.**