

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

October 12, 2021

Refer to www.oshtemo.org home page for Virtual Meeting Information

**REGULAR MEETING
6:00 P.M.
AGENDA**

1. Call to Order
2. Roll Call & Remote Location Identification
3. Pledge of Allegiance
4. Public Comment on Non-Regular Session Items

WORK SESSION ITEMS

5. Annual Discussion with Road Commission of Kalamazoo County
6. Other Updates & Business

BREAK (Time Permitting) – 7:05 P.M.

REGULAR SESSION ITEMS – 7:15 P.M.

7. Consent Agenda
 - a. Approve Minutes September 28th, 2021
 - b. Receipts & Disbursements Report
 - c. Section 54.60 Outdoor Lighting Standards Amendment – Second Reading
 - d. Fire Department Lexipol Policies (Continued)
8. Consideration for Planning
 - a. 5g Code Development Consultant Agreement
 - b. Planning Fee Schedule Update
 - c. Planning Consultant Agreement
9. Consideration of 2022 Budget – Set Public Hearing for November 9th, 2021
10. Consideration of 2022 Capital Improvement Plan & 2023-2027 Illustrative Capital Plan
11. Consideration of 2022 Southwest Michigan Building Authority Budget
12. Consideration of Purchasing Policy Amendments
13. Request to Enter Into Closed Session to Discuss Opinion of Counsel
14. Consideration of USDA Sewer Bond Petition Signatures
15. Other Township Business & Question Updates
16. Public Comment
17. Board Member Comments
18. 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 8:00 am- 5:00 pm, and on Friday 8:00 am-1:00 pm. 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		
<u>Supervisor</u>		
Libby Heiny-Cogswell	216-5220	libbyhc@oshtemo.org
<u>Clerk</u>		
Dusty Farmer	216-5224	dfarmer@oshtemo.org
<u>Treasurer</u>		
Clare Buszka	216-5260	cbuszka@oshtemo.org
<u>Trustees</u>		
Cheri L. Bell	372-2275	cbell@oshtemo.org
Kristin Cole	375-4260	kcole@oshtemo.org
Zak Ford	271-5513	zford@oshtemo.org
Kizzy Bradford	375-4260	kbradford@oshtemo.org

Township Department Information			
<u>Assessor:</u>			
Kristine Biddle	216-5225	assessor@oshtemo.org	
<u>Fire Chief:</u>			
Mark Barnes	375-0487	mbarnes@oshtemo.org	
<u>Ordinance Enf:</u>			
Rick Suwarsky	216-5227	rsuwarsky@oshtemo.org	
<u>Parks Director:</u>			
Karen High	216-5233	khigh@oshtemo.org	
Rental Info	216-5224	oshtemo@oshtemo.org	
<u>Planning Director:</u>			
Iris Lubbert	216-5223	ilubbert@oshtemo.org	
<u>Public Works:</u>			
Marc Elliott	216-5236	melliott@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 5487 3984**

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 5487 3984#**

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



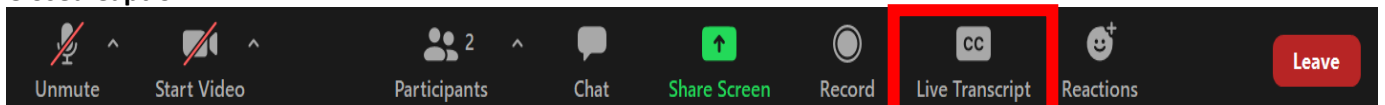
Using the icons at the bottom of the Zoom screen, you can (some features will be locked to participants during the meeting):

- 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”.



September 15, 2021

Mtg Date: September 28, 2021

To: Oshtemo Charter Township Board

From: Iris Lubbert, AICP, Planning Director

Subject: Second Reading: Section 54.60 Outdoor Lighting Standards

Objective:

Consideration of an amendment to Section 54.60 Outdoor Lighting Standards for Second Reading and adoption. The First Reading of the proposed ordinance amendment occurred on September 28, 2021 at which the Township Board approved the first reading and moved for second reading unanimously.

Background:

Section 54.60 regulates outdoor lighting standards which includes specific parameters for both wall mounted and pole mounted lights. The section that regulates wall mounted lighting allows wall lights to 1. illuminate a walkway or entrance into the building or 2. decoratively illuminate the façade.

Recently the Zoning Board of Appeals reviewed a variance request from Section 54.60 for a commercial site to use pole lighting standards for wall mounted lights illuminating the loading docks on the back of a building. The argument presented was primarily that the site needed that level of lighting on the rear of the building and a pole light at this location would create an unnecessary and dangerous obstacle for trucks to maneuver around. After discussion the Zoning Board of Appeals unanimously voted to approve the variance request and to send a request to the Planning Commission to consider an amendment to the ordinance to better address lighting for loading docks.

Staff presented the Zoning Board of Appeals request along with a drafted amendment to the Planning Commission at their regular August 12th meeting. After discussion and revisions, the Planning Commission unanimously motioned to forward the amendment to a Public Hearing. A Public Hearing for the proposed text was held on September 9th, 2021. During the Public Hearing no public comment was received. The Planning Commission unanimously motioned to forward the proposed amendment to the Township Board for consideration with a recommendation of approval.

Proposal:

The proposed amendment to Section 54.60 would allow wall lights to be treated like pole lights when used to illuminate loading docks.

Attachments: Proposed 54.60 Text Amendment Document - proposed changes are shown in red

54.60 Outdoor Lighting Standards

B. Pole-Mounted Lighting

1. All pole-mounted luminaires shall be affixed horizontally and angled parallel to the ground.
2. No more than two luminaires shall be allowed per pole.
3. Luminaire height of 15 feet or less shall not exceed 12,000 lumens per luminaire and shall be spaced a minimum of 30 feet apart.
4. Luminaire height greater than 15 feet and not exceeding 25 feet shall not exceed 20,000 lumens per luminaire and shall be spaced a minimum of 40 feet apart.
5. Luminaire height exceeding 25 feet shall be subject to approval by the reviewing body. The applicant must prove, to the reviewing body's satisfaction, that pole heights exceeding 25 feet are needed to ensure public health, safety, and welfare. If permitted, such lighting shall not exceed 40,000 lumens per luminaire and shall be spaced a minimum of 50 feet apart.

C. Building-Mounted Lighting

1. Pedestrian walkways and doorways
 - a. Mounted height shall not exceed 14-feet in height.
 - b. Each luminaire shall not exceed 8,000 lumens and shall be spaced so the lighting for pedestrian walkways does not exceed 2.0 foot-candles and entryways do not exceed 6.0 foot-candles.
2. Luminaires used for the sole purpose of illuminating a building façade:
 - a. May be up to 1.5 foot-candles averaged over the building façade.
 - b. Shall be located on the building.
 - c. Light generated from said fixtures shall be downward directed and appropriately shielded so that no light is emitted beyond the building façade.
 - d. Shall strictly adhere to the reduced lighting clause outlined in 54.60(A)(7).
3. Luminaires used for illuminating loading and unloading operations for any commercial, industrial, or other use shall be regulated using the same standards as B. Pole-Mounted Lighting of this Section.
4. Architectural features. The use of architectural features on the building, such as a canopy, which prevent the projection of light beyond the architectural feature may satisfy the intent of this Section and allow the use of noncut-off fixtures, subject to the approval of the reviewing body.

OSHTEMO CHARTER TOWNSHIP ORDINANCE NO. ____

Adopted: _____

Effective: _____

OSHTEMO CHARTER TOWNSHIP ORDINANCE

An Ordinance to amend the Oshtemo Charter Township Zoning Ordinance No. Article 54, lighting, Section 54.60: Outdoor Lighting Standards. This Ordinance repeals all Ordinances or parts of Ordinances in conflict.

THE CHARTER TOWNSHIP OF OSHTEMO
KALAMAZOO COUNTY, MICHIGAN
ORDAINS:

SECTION I. AMENDMENT OF ZONING ORDINANCE ARTICLE 54, LIGHTING, Section 54.60: OUTDOOR LIGHTING STANDARDS, PARAGRAPH C. Compiled Article 54, Section 54.60(C) is hereby amended to read as follows:

ARTICLE 54: LIGHTING

54.60 OUTDOOR LIGHTING STANDARDS

B. Pole-Mounted Lighting

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5. Luminaire height exceeding 25 feet shall be subject to approval by the reviewing body. The applicant must prove, to the reviewing body's satisfaction, that pole heights exceeding 25 feet are needed to ensure public health, safety, and welfare. If permitted, such lighting shall not exceed 40,000 lumens per luminaire and shall be spaced a minimum of 50 feet apart.

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 - b. Shall be located on the building.
 - c. Light generated from said fixtures shall be downward directed and appropriately shielded so that no light is emitted beyond the building façade.
 - d. Shall strictly adhere to the reduced lighting clause outlined in 54.60(A)(7).
3. Luminaires used for illuminating loading and unloading operations for any commercial, industrial, or other use shall be regulated using the same standards as B. Pole-Mounted Lighting of this Section.
4. Architectural features. The use of architectural features on the building, such as a canopy, which prevent the projection of light beyond the architectural feature may satisfy the intent of this Section and allow the use of noncut-off fixtures, subject to the approval of the reviewing body.

SECTION II. EFFECTIVE DATE. All Ordinances or parts of Ordinances inconsistent with this Ordinance are hereby repealed. This Ordinance shall take effect upon publication after adoption in accordance with State law.

DUSTY FARMER, CLERK
OSHTEMO CHARTER TOWNSHIP

Training Policy

203.1 PURPOSE AND SCOPE

It is the policy of this department to administer a training program that will provide for the professional growth and continued development of its members. By doing so, the Department will ensure its members possess the knowledge and skills necessary to provide a professional level of service that meets the needs of the community.

203.2 POLICY

The Department seeks to provide ongoing training and encourages all members to participate in advanced training and formal education on a continual basis. Training is provided within the confines of funding, the requirements of a given assignment, staffing levels, and legal mandates.

Whenever possible, the Department will use courses certified by the Michigan Fire Fighter's Training Council (MFFTC), Michigan Occupational Safety and Health Administration (MIOSHA), Michigan State Police (MSP), U.S. Department of Homeland Security, or other accredited entities.

203.3 OBJECTIVES

The objectives of the training program are to:

- (a) Enhance the level of emergency services to the public.
- (b) Increase the technical expertise and overall effectiveness of department members.
- (c) Provide for continued professional development of department members.
- (d) Reduce risk and enhance safety.

203.4 TRAINING PLAN

A training plan will be developed and maintained by the Training Officer. It is the responsibility of the Training Officer to maintain, review, and update the training plan on an annual basis, ensuring that all mandated training is achieved (MCL 29.369). All training records will be maintained in accordance with established records retention schedules (Mich. Admin. Code, R 408.17411).

203.5 TRAINING NEEDS ASSESSMENT

The Training Officer will conduct an annual training needs assessment. The needs assessment will be reviewed by command staff. Upon approval by the Fire Chief, the needs assessment will form the basis of the training plan for the following year (Mich. Admin. Code, R 408.17411).

Training Records

613.1 PURPOSE AND SCOPE

The purpose of this policy is to establish procedures for accumulating and maintaining records of all training provided by the Department and all training received by individual department members. This policy shall apply to all training received but particularly training that is mandated by an external force such as a law, statute, or regulation.

613.2 POLICY

It is the policy of the Oshtemo Fire and Rescue Department to maintain comprehensive records of all training provided by the Department and all training received by department members. The Training Officer or the authorized designee shall be responsible for creating and maintaining training records. All members of the Department are responsible for assisting the Training Section in documenting training activities by signing course rosters, submitting certificates of completion from outside training, or providing other means of training documentation.

Training records may be documented utilizing either hard copies stored in a traditional filing system or via electronic files. All electronic training records will be redundantly stored using department-approved secure electronic file storage systems.

613.3 MASTER TRAINING CALENDAR

The Training Section will create and maintain an annual master training calendar for the Department. This calendar will document all department-provided, regularly scheduled training opportunities. The master training calendar should be a living document, reflecting any changes made in the actual training schedule or actual training opportunities provided throughout the year. The training opportunities in the master training calendar should include but are not limited to:

- (a) All federal or state mandated training. Examples include courses that address sexual harassment prevention, heat illness prevention, medical records privacy, personal protective equipment, bloodborne pathogens, CPR, and hearing protection.
- (b) All federal or state mandated training drills, manipulative drills, skills or equipment testing, including annual audiograms and fit testing for approved masks and respirators.
- (c) All Michigan Occupational Safety and Health Administration (MIOSHA) training provided by the Department.
- (d) Specific training and certification for “all-hazards” positions, based on the Incident Command System (ICS), the National Incident Management System (NIMS), or other NIMS-compliant incident management system.
- (e) All NIMS, ICS, and NIMS-compliant incident management system courses.
- (f) All Emergency Medical Services (EMS) pre-hospital care, continuing education courses, or programs provided by the Department.

Oshtemo Fire and Rescue Department

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- (g) Any training opportunity scheduled through the Training Section and intended to be provided division-wide to each of the Divisions.
- (h) Any training opportunity utilizing instruction from outside the Department.
- (i) Any interagency cooperative training program or activity.
- (j) Any regularly scheduled skills, drills, or job performance training and testing evolutions.

Copies of each year's master training calendar will be maintained and retained in the Training Section files based on department-established records retention schedules.

613.4 DIVISION TRAINING RECORDS

The Training Officer shall be responsible for maintaining records of all training provided by all Divisions of the Department (Mich. Admin. Code, R 408.17411). All Divisions are required to submit documentation for each training session offered. The information in each record shall include but is not limited to:

- (a) The course title.
- (b) An outline of the subject matter and specific details of any information mandated by federal or state code, MIOSHA or MDHHS regulation, or other requirement.
- (c) The dates the course was provided to members.
- (d) The instructor names, qualifications, and/or certifications.
- (e) Copies of course curriculum, course duration, information sheets, or other course content provided to students.
- (f) Copies of course evaluations submitted by students.
- (g) Attendance records for each course session, including each member's name or other identifier.

613.5 INDIVIDUAL TRAINING RECORDS

The Training Section will create and maintain an individual training file for each member of the Department. The training files will be kept separate from the department's personnel files. The member training files should be used to document a member's training courses and training-related programs and activities.

The training files shall not be used to store any work-performance records, member conduct records, member disciplinary records, or any other documentation that is not specifically training-related. Information entered into the member training files will be a permanent part of that record. No training information or entries will be removed from the file unless the record is found to be factually incorrect or erroneously entered into that member's training file. Each member's training file will be part of that member's permanent record of activity while employed by the Department.

When a member ends employment with the Department, that member's training file will be archived and maintained for a minimum of seven full calendar years following the member's

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separation from service or in accordance with the department's established records retention schedule.

Members of the Department shall be provided access to their individual training file upon request (Mich. Admin. Code, R 408.17411). A member may request to review his/her training file either verbally or in writing. The Training Section should facilitate those requests as soon as practicable but in all cases within 21 days of the member's request to review his/her file. Members may not remove any document or information from the training file without the express approval of the Training Officer. Members may not add any documents or entries to their training file without the approval of the Training Officer or other approved member of the Training Section staff. Members shall be allowed to photocopy or otherwise reproduce images of any entries in their individual training file.

Member training files should be organized to readily allow for the retrieval of specific training subject documentation, particularly in regard to documentation of any mandated training subject compliance.

Member training files should contain documentation of all work- or job-related licensing and certification that the member earns, achieves, or is awarded. Information regarding member progress toward or application for licensing and certification should also be stored in the member training files. Examples include National Wildfire Coordinating Group (NWCG) coursework, NWCG position task books and certifications, NIMS certifications, ICS certifications, MIOSHA certifications, and MDHHS pre-hospital care provider continuing education coursework, licensing, and certification records (paramedic and Emergency Medical Technician).

613.6 TRAINING RECORDS FROM PREVIOUS EMPLOYERS

Members of the Department may submit training records from previous employers to the Training Section for inclusion in their individual training file. The Training Section staff will evaluate any submitted training records obtained during previous employment and will add any pertinent information to the member's training file as appropriate. New members should submit to the Training Section copies of any licenses, certifications, and coursework that are pertinent to their position with the Oshtemo Fire and Rescue Department.

The Training Section staff may request that new members obtain and submit copies of any previous employer training files for inclusion in their Oshtemo Fire and Rescue Department training file.

613.7 RELEASE OF FORMER MEMBER TRAINING RECORDS

Upon written request, the individual training file of any former Oshtemo Fire and Rescue Department member may be copied and released to either the former member or to a third party upon receipt of a signed written request from the former member of the Department. The written request should include the past member's full name, approximate dates of employment with the Department, and date of separation from employment with the Department. In the event that the former member is requesting that copies of his/her file be sent directly to a third party, the written

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request should include a statement authorizing the Oshtemo Fire and Rescue Department to release copies to the named third party.

Emergency Power

1101.1 PURPOSE AND SCOPE

The purpose of this policy is to establish a process for identifying emergency power needs or relocation plans for critical facilities and/or equipment. The Department provides critical emergency services to the community and must be able to respond to incidents with fully functioning equipment, regardless of commercial power failures.

1101.2 POLICY

It is the policy of the Oshtemo Fire and Rescue Department to provide emergency power sources at its facilities where necessary.

1101.3 RESPONSIBILITIES

The Fire Chief or the authorized designee shall develop a plan to:

- (a) Identify critical resources and the equipment necessary for the department's mission and determine the department's needs for emergency power.
- (b) Equip facilities and/or equipment identified as crucial to the mission of the Department with electrical generators, uninterruptible power sources or other means of sustaining critical business components in the event of a loss of commercial power.
 1. All emergency power sources selected shall be in compliance with all building codes, environmental codes and Michigan Occupational Safety and Health Administration (MIOSHA) rules and regulations governing the use of such equipment.
- (c) In the event that an alternative source of power for critical equipment cannot be found, relocate the equipment to reduce the risk of having inoperative equipment.

1101.4 PROCEDURE

The following aspects of maintaining and operating emergency power sources for fire stations and other facilities should be identified in the plan:

- Specific apparatus, equipment, computers or systems that should be served by the emergency power at each facility
- Permit requirements associated with the type of equipment proposed in the plan
- Identification of the person responsible for periodically testing and maintaining the proposed equipment
- Fueling procedure for any generator fuel tanks in the proposed system
- Details of any fuel service contracts

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- Identification of the person responsible for ensuring the tanks are full at all times and for refilling the tanks during/following a protracted event
- Identification of the person responsible for annually procuring a maintenance contract for the proposed equipment
- Identification of the vendor and how the vendor is contacted, during and after regular business hours
- Details of the record-keeping system for testing and maintenance of the proposed equipment
- Contingency plans for a failure of the backup system
- If there is no contingency plan for the backup system, identification of alternatives to the critical equipment or apparatus needed to accomplish the mission



October 7, 2021

Mtg Date: October 12, 2021

To: Oshtemo Charter Township Board

From: Iris Lubbert, AICP, Planning Director

Subject: Consideration for Planning: 5G Code Development Consultant Agreement; Consultant Agreement for Professional Planning Services; Planning Fee Schedule update.

Objective:

The Township Board is requested to authorize entering into an agreement for consultant services with McKenna for 5G Code Development (and whether to include a Broadband portion), and for Professional Planning Services and to amend the budget as indicated. No new money is requested as funds already in the 2021 budget that are not anticipated to be expended would be utilized. The Township Board is also requested to consider adopting an updated Planning Fee Schedule. The updated fee schedule as proposed will cover the cost of consultant development reviews.

Background/Proposal:

5G Code Development Consultant Agreement: 5G is the fifth-generation technology standard for broadband cellular networks. It is a new type of communication tower that is also often linked to driverless cars. Federal regulations have required that municipalities allow for these special towers. The zoning ordinance needs to be updated if the Township wants to have control over where and how these towers are placed. The development of a 5G ordinance has been identified as the Planning Commission's number one priority for ordinance projects.

To develop this ordinance staff sent out an RFP. Two proposals were received. McKenna's proposal was the most appropriate and comprehensive for a total cost of \$15,500. The development of the 5G Ordinance would include seven steps: 1) creating an inventory of existing facilities and wireless communication services, 2) review of existing township ordinances and policies, 3) creation of public outreach materials, 4) determination of target upgrade sites, 5) drafting of the 5G Ordinance, 6) discussion and revision, and 7) Public Hearing and adoption. A description of each step is provided on pages 47 and 48 of McKenna's attached proposal; the fee for the proposed 5G Ordinance is broken down on page 52. The project would span eight months.

NOTE: Optional Broadband add-on: Staff also requested that an option be provided for McKenna to further evaluate existing broadband within the Township – the result of which would be a Broadband Policy aimed at advocacy and grant writing to obtain public and private funding to build out new infrastructure. It should be noted that Kalamazoo County and a number of Townships are working with WE UpJohn Institute with a goal to commence a broadband study which would include Oshtemo. It may be advantageous to wait until after this study to complete this work. However, the information from this optional add-on would be advantageous and help supplement the work to be completed throughout the County. Including this option would raise the overall project cost by \$3,000, for a total of \$18,500.

Consultant Agreement for Professional Planning Services: As the Township continues to grow, the number of inquiries and applications for site plan reviews, site plan amendments, variances, rezonings, and building

permit reviews submitted to the Planning Department continues to increase. Using data from timesheets, our full-time Zoning Administrator is currently spending just under half of his time on public inquiries. The Parks Director, who has graciously offered to work as a Zoning Administrator for approximately 10 hours a week, is spending an average of 20 hours a week on Planning Department tasks. Even with her help, we are just able to keep on top of the day-to-day workload. I have been informed that our Parks Director will phase out of the Planning Department soon, noting that the workload is much more than she had anticipated. In order to keep up with time sensitive development demands and maintain the department's other functions, assistance is needed. These consultant services would be utilized to assist the Planning Department as needed to accomplish the pressing application work so that other code and master planning work can be accomplished.

An RFP was sent out requesting Professional Planning Consultant services, specifically for assistance with development reviews. The scope of requested services outlined in the RFP is provided below. Two proposals were received; McKenna's local office in the City of Kalamazoo made them the ideal candidate.

1. Develop and maintain a clear understanding of Township ordinances and promote the adopted plans.
2. Review, research and make written recommendations on site plans, special land uses, subdivisions, land divisions, plats, site condominiums, P.U.D.s, re-zonings, and other related matters prior to action by the Planning Commission, Zoning Board of Appeals, and/or Township Board.
3. Attend virtual Internal Development Review meetings and provide development review feedback to applicants and the Planning Director per the Townships Development Review Schedule.
4. Compose thorough staff reports to be included in the appropriate meeting packets.
5. At both virtual and in person Planning Commission, Zoning Board of Appeals, and/or Township Board meetings provide verbal and detailed written reports and advisories, as appropriate, on Township business in matters of planning, zoning, plus guidance and assistance on state legislation, appropriate procedures, regulations and design principles.
6. Larger projects, such as major Zoning Code Amendments, technical training for Boards and Commissions, or updates to the Township's Master Plan, Parks and Recreation Plan, Corridor Improvement Authority Establishment, or similar projects, would be governed by separate mutually-agreed-upon Scopes of Work and budgets.

Planning Fee Schedule update: Both staff and McKenna are in agreement that the costs associated with the review of development applications should fall on the project applicant/developer and not taxpayers. As such, McKenna provided a detailed list of review fees, found on pages 49-51 of their proposal, that could be incorporated into the Township's fee schedule. Using the fees outlined by McKenna and taking into account other current costs (ex. mailings for public notices) staff drafted an update to the fee schedule.

It should be noted that the Planning Fee Schedule has not been reviewed or fully updated in over a decade, and thus this consultant recommendation and subsequent staff review is timely. The proposed changes to the fee schedule are a reflection of the actual cost of staff time for development reviews and are comparable with neighboring Township fee schedules. A comparison chart is provided – please note that some municipalities have opted to subsidize those costs as an economic development incentive. If adopted, the updated fee schedule is estimated to cover the full cost of development reviews.

Information attached: McKenna Development Review Services Proposal, Planning Fee Schedule (Amended), Comparison chart of current and proposed planning fees, Budget Amendment Request

MCKENNA



PROPOSAL TO PROVIDE

Professional Planning Services

OSHTEMO CHARTER TOWNSHIP,
KALAMAZOO COUNTY, MICHIGAN



SEPTEMBER 2, 2021

Communities for real life.



MCKENNA

September 2, 2021

Iris Lubber, AICP, Planning Director
Oshtemo Charter Township
7275 West Main Street
Kalamazoo, MI 49009

Subject: Professional Planning Services Proposal

Dear Ms. Lubbert:

Thank you for taking the time to speak with me about the many exciting prospects for Oshtemo Township! We understand there is a lot at stake in the Township; including regulations for 5G, implementing the Maple Hill mixed-use area, developing prudent regulations for the cannabis industry, creating neighborhoods services and affordable housing, a Master Plan and Zoning Ordinance update, and more! Through all of this, McKenna can be an extension of your planning department's capacity. We specialize in providing the right amount of support, at the right time, to make sure Township residents, business owners, and officials receive excellent services with fiscal efficiency.

Oshtemo is one of our state's premier communities, and - as a result - there are intense demands on the Municipal Services Department and Planning Services Division to produce technically excellent responses to development applications on tight timelines. Additionally, Township leaders and residents have come to expect design excellence in all facets of public and private developments and capital improvements. Put simply, the Township is busy and is at a point where it requires supplementary professional services to maintain its exemplary community planning functions. In response to the Township's Request for Proposals, we are happy to submit this proposal.

OUR PHILOSOPHY

McKenna's Oshtemo Township team includes successful planning professionals. I will serve as the Teams project manager and we will service the Township from our Kalamazoo Office. Our team is comprehensive in experience and expertise and affords the Township great options in terms of on-site services, plan review, design, and coordination. We will work with the Township to:

1. Provide quality, experienced advice for the Township's future planning needs.
2. Serve the Township on an "as-needed" basis, able to nimbly accelerate or pull back our services and assignments based on your direction and level of work.

WHY OUR TEAM?

The McKenna team featuring myself, Chris Khorey, AICP, Danielle Bouchard, Carrie Leitner, and Kyle Mucha, AICP have extensive experience in establishing and administering planning and zoning functions, document design, data analysis using ESRI – ArcPro, public engagement and a plethora of other innovative methods including but not limited to:

- Establish clear and concise procedures.
- Develop a clear understanding of Township ordinances.
- Prepare for and attend Planning Commission, Zoning Board of Appeals, Board of Trustees and other meetings at your request.

KALAMAZOO

151 South Rose Street
Suite 920
Kalamazoo, Michigan 49007

O 269.382.4443
F 248.596.0930
MCKA.COM

Communities for real life.



- Attending internal design and review meetings to discuss project scopes, timelines and development standards.
- Maintain close communication and timely follow-through with the Planning Director, Planning Commission, applicants, and other Township Officials as deemed necessary.
- Conduct field surveys, prepare thoughtful, detailed technical reviews and recommendations based on Township codes, thorough research and sound planning, zoning, and design principles.
- Produce high-quality graphics and GIS mapping to assist you in communicating your development goals to Township officials and citizens.
- Stay at the forefront of innovative methods of planning and zoning and share such methods with elected and appointed officials.
- Provide cutting-edge regulatory recommendations that are clear, concise, fair and effective in maintaining the desired character of Oshtemo Township.

HIGHEST QUALITY SERVICE

McKenna will provide the highest quality service and innovation through all our work. We are excited to help you enhance the Oshtemo Township experience with superior planning. Please call me at (248) 596-0920 if we can answer any questions.

Respectfully submitted,

McKENNA

Paul Lippens, AICP
Vice President



Professional Planning Services

OSHTEMO TOWNSHIP, KALAMAZOO COUNTY, MICHIGAN

PREPARED SEPTEMBER 2, 2021 BY

MCKENNA
151 S. Rose St.
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Executive Summary



APPROACH

McKenna’s professional community planners and zoning administrators will serve Oshtemo Township’s elected and appointed officials, administration, and stakeholders. We will provide efficient, effective, and community-sensitive planning assistance to support Oshtemo Township’s exemplary character and high expectations.

OSHTEMO TOWNSHIP TEAM

Planning Services – McKenna

- Paul Lippens, AICP – Project Manager
- Danielle Bouchard – Project Planner
- Kyle Mucha, AICP – Project Planner
- Chris Khorey, AICP – Housing and 5G Specialist
- Carrie Leitner – Art Director + Graphic Design, and Related Support

FEE ELEMENTS

Proposed fees are found are provided each category within the Township’s Request for Proposals.

We have proposed competitive pricing to maximize our team’s usefulness to Oshtemo’s Planning Services Division.

If there are elements of this proposal or fee structure that are inconsistent with the Township’s needs or budget expectations, we are able to make adjustments if mutually agreeable.

Professional Qualifications



McKenna’s downtown Kalamazoo office, across from Bronson Park. Our work spaces reflect McKenna’s commitment to our people, our communities, sustainable design, and the rich technology heritage of the Midwest.

McKenna’s team of talented planning, design and building professionals help municipal leaders develop and maintain communities for real life. From street festivals, neighborhood parks, and storefronts, to parking spots, coffee shops, and farmers’ markets, we want your community to thrive. McKenna provides planning, zoning, building, landscape architecture, community and economic development, and urban design assistance to cities, villages, townships, counties, and regional agencies, as well as select private clients, based on skilled and effective public engagement. Our success can be measured by the built improvements to hundreds of McKenna client communities, and by our 43-year record of client satisfaction and on-time, on-budget delivery.

McKenna currently provides project services to more than 85 communities and private land investors in the Midwest. Anticipating and responding to change is a major distinction of McKenna’s practice. Our innovation and depth of experience is a resource for public and private decision-makers; we are a corporation of 20-plus planners, building code experts, urban designers, and landscape architects formed under the laws of Michigan on May 2, 1978.



HEADQUARTERS

235 East Main Street
Suite 105
Northville, MI 48167
O 248.596.0920
F 248.596.0930
E info@mcka.com

DETROIT

1938 Franklin Street
Suite 203
Detroit, MI 48207
O 313.888.9882
F 248.596.0930
E info@mcka.com

GRAND RAPIDS

124 E. Fulton Street
6th Floor, Suite B
Grand Rapids, MI 49503
O 616.226.6375
F 248.596.0930
E info@mcka.com

KALAMAZOO

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Areas of Service

Community Planning

- Master Plans (Cities, Villages, Townships, Counties and Regions)
- Strategic Planning Facilitation
- Neighborhood Preservation Plans
- Redevelopment Plans
- Corridor Plans
- Downtown Plans
- Growth Management Plans
- Park and Recreation Plans
- Capital Improvements Programs
- Community and Fiscal Impact Analysis
- Waterfront Planning
- Open Space Planning
- Historic Preservation Plans
- Transportation and Parking Plans
- GIS Analysis and Alternative Testing
- Access Management



Economic Development

- Public/Private Partnerships
- Brownfield Redevelopment Planning
- Downtown Redevelopment Action Plans
- Corridor Redevelopment
- Tax Increment Finance Plans
- Grant Applications
- Redevelopment Project Management
- Market Studies: Retail, Commercial, Residential, Industrial, Institutional
- Redevelopment Financing Assistance
- Land Assembly/Eminent Domain Assistance

Building Department Administration

- Zoning Administration
- Building Code and Zoning Enforcement
- Building Inspection
- Electrical, Mechanical and Plumbing Inspections
- Property Maintenance and Housing Inspection
- Landscape Construction Observation
- Code Enforcement
- Compliance with State
- Department Management Plans

Parks and Recreation

- Parks and Recreation Master Plans
- Park Design (neighborhood, community, regional)
- Ball Field Planning and Design
- Park and Recreation Facilities Design
- Bikeway and Trail Planning and Design
- Grant Applications
- Public Participation
- Universal and ADA Accessibility
- Park and Recreation Furnishings

On-Site Management Services

- Zoning and Planning Administration
- Tax Increment Finance Authority Management
- Downtown Development Authority Administration
- CDBG Administration
- Housing Rehabilitation
- Project Management – Capital Improvement Projects
- Redevelopment Project Administration
- Community Development Administration
- Economic Development Administration

Development Codes

- Zoning Ordinance
- Zoning Ordinance and Resolution Review and Preparation
- Continuing Advisory Services to Elected and Appointed Officials, Planning and Zoning Commissions, and Boards of Appeal
- Subdivision and Condominium Regulations
- Form-Based Codes
- Environmental Regulations – Wetlands, Woodlands
- Expert Witnessing and Court Testimony on Zoning
- Sign Regulations
- Annexation Advisory Assistance
- Sex-Oriented Business Regulations and GIS Testing
- Open Space Regulations
- Planning and Zoning Code Training Seminars
- On-Site Zoning Administration

Complete Streets and Transportation Planning

- Complete Streets Policy Development
- Complete Streets Design Guidelines
- Complete Streets Procedure and Implementation
- Corridor Plans
- Streetscape Plans
- Bicycle & Pedestrian Plans
- Bicycle Parking Plans
- Bicycle Sign Plans
- Bike Share Feasibility Studies
- Intersection Design & Crossing Plans
- Zoning and Regulatory Review
- User Maps and Wayfinding Studies
- Transportation Master Plans
- Site Plan Review of Transportation Facilities
- Circulation Studies Vehicles and Pedestrian
- TOD Studies
- Education and Training
- Transportation and Parking Plans
- Access Management
- Parking Studies

Public Participation (NCI Certified)

- Charrettes
- Hands-on Workshops
- Focus Groups
- Roundtable Discussions
- Surveys (telephone, online, direct mail)
- Public Hearings
- Open Houses
- Interactive Citizen Advisory Committees
- Youth Outreach
- Community Walks and Bike Rides
- Pop-Up / Storefront Workshops
- Consensus Building
- Participatory Decision-Making
- Interviews (one-on-one, intercept)
- Community Preference Surveys

Community Development

- HUD CDBG Administration
- Analysis of Impediments to Fair Housing
- Environmental Review Records
- Consolidated Plans
- Elderly Housing Assistance
- Five Year and Annual Action Plans
- CDBG Program Planning and Applications
- Housing Rehabilitation Administration
- Market Studies – Market Rate, Elderly and Assisted Housing
- Housing Market Studies (MSHDA approved)

Urban Design

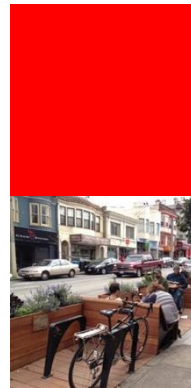
- Community Design Plans
- Placemaking Strategies
- Parks, Greens, Commons and Plaza Design
- Streetscape Design
- Site Planning
- Community Character Planning
- Historic Park Design
- Computer Visualization (before/after)
- Design Review
- Site Evaluation and Selection
- Design Manuals
- Neo-Traditional Design (TND)
- Urban Form Pattern Books
- Mixed Use (residential, retail, office, public, institutional) Design
- Public Art

Sustainability Plans

- Sustainability Indicators Analysis, Evaluation Criteria, and Program Improvements
- Develop Neighborhood Stabilization Plans
- Green Infrastructure Plan for Community's Public Property
- Walkable/Bikeable Audits and Implementation Plans
- Community Master Plan, Strategic Plan, or Capital Improvement Plan
- Plan for Low Impact Development (LID) Components
- Local Planning and Zoning
- Access Management Plans for Transportation Corridors

Landscape Architecture

- Residential Development Plans (single family detached/attached; multi-family, elderly, mixed use, townhouses) Conventional & Cluster
- Site Analysis and Design
- Site Layout and Planning
- Construction Drawings and Construction Observation
- Landscape Architecture (MSHDA-approved)
- Arborist Services (tree surveys and maintenance plans)
- Greenways and Trail Planning and Design
- Native Plant Landscapes
- Wayfinding, Signs, and Interpretive Stations
- Environmental Performance Standards
- Public Art Development
- Public Space Design – Greenways, Bikeways, Streetscapes
- Wetlands, Woodlands, Groundwater, Aesthetic, and Vista Protection Regulations
- Sustainable Landscape Design



Oshtemo Team



We selected a team of seasoned, responsive, and trustworthy professionals to assist the Township with premier community planning and landscape architecture expertise. Our full roster of planning and landscape architecture professionals are available to the Township as needed.

PAUL LIPPENS, AICP, NCI, EXECUTIVE VICE PRESIDENT PROJECT MANAGER

We propose Paul Lippens as Project Manager for the Township, responsible for overall product/project quality, attending meetings in addition to or in the place of the Project Planner on an as-needed basis, and providing oversight and project guidance assistance on an as-needed basis.

Paul specializes in planning and design of non-motorized and multimodal transportation systems, using strategies that reflect the values of people and their communities. He has led systems planning and design projects in Michigan, Illinois, and Indiana, and served as the lead and supervising planner on dozens of bicycle and pedestrian plans and studies. His interests examine interconnections between transportation design, living ecosystems, and economies. Previously the Director of Planning at Active Transportation Alliance in Chicago, Paul is the primary author of “Complete Streets, Complete Networks: a Manual for the Design of Active Transportation,” winner of the APA-Illinois 2012 award for best practices. He also worked with the Chicago Department of Transportation and the Cook County Highway Department on “Complete Streets” policy implementation. Paul has engaged audiences and lectured on multimodal system design and policy implementation at national, regional and local conferences in Los Angeles, Chicago, and Toronto. He has guest lectured at DePaul University and at the University of Illinois at Chicago, where he served as Adjunct Professor in 2014 and recently presented on non-motorized planning and design at the Michigan Association of Planning Educational Conference at Mackinac Island.

Paul holds a Master of Urban Planning from the Taubman College at the University of Michigan and Bachelor of Arts in creative writing and music composition from Hampshire College.

**DANIELLE BOUCHARD, SENIOR PLANNER
PROJECT PLANNER**

Danielle Bouchard will serve as Project Planner for Oshtemo Township's planning services and will provide planning support to Mr. Mucha on plan review and other planning services, as directed by the Township. Danielle has experience in comprehensive planning, parks and recreation planning, environmental planning, land use planning, grant research, writing and administration, Geographical Informational Systems (GIS) mapping and zoning administration.

Danielle holds a Bachelor's degree in Urban and Regional Planning and Geographic Information Systems from Eastern Michigan University. Additionally, Danielle will be on support standby should a proposed project require additional staff resources.

**KYLE MUCHA, AICP, ASSOCIATE PLANNER
PROJECT PLANNER, MAPPING AND SPATIAL ANALYSIS**

Mr. Mucha will be one of the Project Planners, the day-to-day contact for Township Officials. Kyle has a wide plethora of experience with municipal government, having worked for Departments of Parks and Recreation, Community Development and Utilities within Kalamazoo and Berrien County. Kyle is also a native to Kalamazoo County, having spent over 26 years in the area.

Kyle holds a Masters of Arts in Geography from Western Michigan University and a Bachelor's of Science in Social Science from Grand Valley State University. Kyle is a member of the Michigan Association of Planning, American Planning Association, American Institute of Certified Planners (AICP) and also serves on the steering committee for the Water Planning Network, a division of the American Planning Association. Kyle also serves his community in Vicksburg as a member of the Planning Commission/Downtown Development Authority.

**CHRIS KHOREY, AICP, SENIOR PRINCIPAL PLANNER
HOUSING AND 5G SPECIALIST**

Chris Khorey, AICP, a West Michigan native, has experience regarding management of work tasks, public meetings and workshop facilitation, and day-to-day project guidance. Mr. Khorey has used his strength in creating implementable plans based on a coherent community vision to create parks and recreation plans, master plans, wind and solar ordinances and a variety of other project specific plans across Michigan. He also has a wide range of experience with zoning ordinance reforms and creations for villages and Townships across the state.

**CARRIE LEITNER, ART DIRECTOR
GRAPHIC DESIGN AND DOCUMENT DESIGN**

McKenna's Art Director, Carrie Leitner, is on the Oshtemo team to provide any requested graphic design and document design support.

Ms. Leitner will assist in the preparation of graphics and document layout for the Zoning Ordinance. Carrie's extensive graphic design expertise will ensure the document's appearance is polished and exceeds standard expectations.

Carrie has over 20 years of experience specializing in brand identity, advertising, brochures, direct mail, annual reports, book layouts, packaging and display art, such as banners, trade show booths, signage, vehicle graphics, and packaging. She has formal web development training and has handled numerous web projects from start to finish, including planning, designing and implementing. Carrie is also a fine artist with an excellent understanding of composition, balance, and color, and has a trained eye for detail.

Carrie holds a Bachelor of Fine Arts from The University of Michigan, is an accomplished sketch artist, and has also completed a series of web development and usability courses through Washtenaw Community College.

References and Experience

The following are select clients and references for whom McKenna has provided the services identified in the table below. Additional project examples are enclosed at the end of the document.

COMMUNITY AND CONTACT	SELECT SERVICES PROVIDED BY MCKENNA
<p>Kalamazoo Charter Township, MI Dexter Mitchel Township Manager</p> <p>1720 Riverview Drive, Kalamazoo, MI 49004 (269) 381-8085</p>	<ul style="list-style-type: none"> • Township Planner • Development and Zoning Review Services • 2022 Master Plan Update • Zoning Ordinance Amendments • 2018 Zoning Ordinance Update
<p>Van Buren Township, MI Matthew Best Director of Public Services</p> <p>46425 Tyler Road Belleville, MI 48111 (734) 699-8913</p>	<ul style="list-style-type: none"> • Township Planner since 1998 • Zoning Ordinance • Parks and Recreation Planning • Downtown Plan and Market Analysis • Walkability Audit • Overlay Zoning
<p>Plymouth Charter Township, MI Kurt Heise Supervisor</p> <p>9955 N. Haggerty Road Plymouth, MI 48170 (734) 354-3201</p>	<ul style="list-style-type: none"> • Township Planner during 1990s / 2000s and again since 2017 • Natural Features/Woodlands Preservation • Brownfield Redevelopment Authority • Downtown Development Authority • Planning and Zoning • Business Retention
<p>Lyon Township, MI Ms. Patti Carcone Treasurer</p> <p>58000 Grand River Avenue New Hudson, Michigan 48165 (248) 437-2240</p>	<ul style="list-style-type: none"> • Township Planner since 1987 • Development Reviews • Village Center Planning • New Hudson Form Based Code • Master Plan • Grants/CDBG Administration

WIRELESS TELECOMMUNICATIONS EXPERIENCE

Over the past 10 years, McKenna has assisted the following communities with wireless telecommunications issues, including the intersection of wireless deployment and local zoning, as well as the impact of State and Federal laws on local control.

- Almena Township, Van Buren County
- Kalamazoo Charter Township, Kalamazoo County
- City of Holland
- Delhi Charter Township, Ingham County
- Frenchtown Charter Township, Monroe County
- Village of South Rockwood
- Leroy Township, Ingham County
- Village of Webberville
- London Township, Monroe County



Team Member Resumes



M. Paul Lippens, AICP, NCI

VICE PRESIDENT, DIRECTOR KALAMAZOO STUDIO

EDUCATION

Master of Urban Planning
Taubman College
University of Michigan

Bachelor of Arts
Hampshire College

HONORS

Award for Excellence in Transportation Planning for "Realize Cedar: Urban Design Framework"
Delhi Charter Township (Ingham County), MI, Michigan Association of Planning

Award for Excellence in Transportation Planning for "Bike/Walk Livonia: A Future Transportation Plan"
City of Livonia, MI, Michigan Association of Planning

Implementation Award, 2013
Illinois American Planning Association

Best Practices Award, 2012
Illinois American Planning Association

PROFESSIONAL EXPERIENCE

Complete Streets Policy and Implementation

Award winning author of the Complete Streets, Complete Networks Design Manual, which combines the physical planning of infrastructure with an institutional understanding of project management, funding and prioritization. The manual provides guidance on the implementation of complete streets policy and presents a structure for evaluating street design, mode prioritization, network optimization and placemaking. Also coauthored the Complete Streets Chicago: Design Guide - Chicago's, Complete Streets v2.0.

Bicycle and Pedestrian Plans and Safety

Led award winning bicycle and pedestrian planning in Livonia, Delhi Township, Frenchtown Township, and Paw Paw (Michigan) Evanston, Midlothian, Palos Heights and Winfield (Illinois) and Lowell (Indiana), as well as sub regional bike plans in Chicago suburbs. Studied sidewalk gaps, and recommended bike lanes, sharrows, trails, and protected bikeways. Improved crossing safety and intersection design for people walking, biking, and taking transit. Made network recommendations which considered traffic vehicular volume, roadway configuration, MMLOS, destinations, delay, directness, and public perception.

Trail Planning and Access Studies

Lead planner and designer for the Fort Wayne Downtown/South Central Area Connectivity Plan. Planned a network of non-motorized transportation options to support neighborhood residential development, equity, and accessibility to regional amenities. The network is highlighted by an urban greenway linear park loop. A greenway extends the current Rivergreenway system as an armature linking neighborhoods with shared recreational, cultural and commercial resources. Additionally, led design and access studies on the Des Plaines River Trail, the Illinois Prairie Path, and Chicago's world famous Lakefront Trail.



PROFESSIONAL EXPERIENCE

Multi-Modal Transportation System Planning and Design

Led multi-modal planning projects in Indianapolis and Carmel, Indiana, which initiated transportation systems to integrate bicycle, pedestrian and transit modes in a network of streets that form typology-specific corridors. Designed system to encourage development of a place-based transportation, principally pulling land use analysis, housing and neighborhood planning, economic development potential, and green infrastructure into the plan to assure a comprehensive approach to add value to residents.

Signs and Wayfinding Systems

Created wayfinding and identity signs in relation to urban design projects in Terre Haute, West Baden Springs, and French Lick, Indiana and bicycle sign systems in Midlothian, Palos Park, Berwyn, Schaumburg, and Mount Prospect, Illinois. These projects included the design of the graphic pieces and the coordination of sign manufacturing and wayfinding campaign plus an interpretive sign campaign for the National Road Scenic Byway Trail in Terre Haute, Indiana. Managed the installation of MUTCD approved bicycle wayfinding signs in several Chicago suburbs.

Comprehensive and Subarea Planning

Led Master Plan efforts for Garden City, Portland, Midlothian Township, Inkster, Paw Paw, Tecumseh, and Commerce Township. Engagement techniques included steering committees, local business interviews, field intercept surveys, focus groups and charrettes. Identified four goal areas by public process to guide the downtown economy, place, sustainability, and transportation. Additional planning examples include the Oak Park, IL Comprehensive Plan, the Evanston IL, Main Street Station Area TOD study, and a Downtown Vision Plan for Terre Haute, IN.

Housing and Energy Efficiency

Created development visions for energy efficient affordable housing projects for the City County Department of Community Development. Created maps to illustrate affordable housing distribution comparative to low-moderate income census tracts. Evaluated feasibility and impacts of straw bale affordable housing development including a site plan, budget/cost estimates, and energy efficiency analysis comparing life cycle costing of straw bale with traditional development. Created an economic analysis of the feasibility of utilizing under-performing public land holdings to create more affordable housing.

Environmental Planning

For Ann Arbor's "State of the Environment Report," created illustrations of environmental policy issues affecting the City, including, maps of the watersheds, floodplains, lighting usage, contaminant sources and sites; conducted data analysis and prepared illustrative graphs to address goals for phosphorus reduction and energy use. Developed Mitigation Plan that assessed flood impacts on neighborhoods and a comprehensive land use approach to floodplains with additional work on water protection activities and hazard mitigation planning.

Urban Design

Led the Indianapolis East 10th Street Urban Design and Gateway Plan to improve the pedestrian environment and promote walkable access and crossing areas. The plan defines parking and parking management for businesses and residences, as well as the creation of bicycle facilities. Plan recommends improved bus shelters and bus pull-offs and intersection traffic management and improved vehicular traffic flow. Developed design alternatives for balanced multimodal transportation, and corridor/district placemaking, as well as destination functions; district identity elements; and public open space with design recommendations, construction budgets and implementation strategies.

Community Development

Managed the preparation of a Five-Year Consolidated Plan for a multi-jurisdictional HUD grant Consortium, including all project management and public engagement tasks. Responsible for document preparation, including submittal of Consolidated Plan using the eCon Planning Suite via HUD's Integrated Disbursement and Information System (IDIS).

Ordinance and Regulatory Review

Developed a Flood Mitigation Ordinance which involved public engagement, research of best practices, new ordinance drafting, and the evaluation of land use, infrastructure, and economic impacts. The project was vetted thoroughly with the Planning Commission, including public presentations.



MEMBERSHIPS

American Institute of Certified Planners
American Planning Association

Michigan Association of Planning
Congress for New Urbanism

CERTIFICATIONS

National Charrette Institute
Charrette Systems and Management and Facilitation

ACTIVITIES & PUBLIC SERVICE

Adjunct Professor of Urban Planning & Policy
University of Illinois Chicago (2013)

Board of Directors
Transportation Riders United (TRU)
(January 2014 to Present)

Planning Commissioner
City of Ypsilanti, MI (2006-2007)

SELECT PRESENTATIONS

"Planning for Tomorrow's Mobility"
MTPA Annual Conference, Grand Rapids 2017

"Decoding Complete Streets"
MAMC Annual Conference, Kalamazoo, 2017

"Hey Ho, Let's Go: Bike 2.0"
MAP Annual Conference, Kalamazoo, 2016

"Bike 2.0, Getting There From Here"
MML Annual Convention, Mackinac Island, 2016

"Promoting Your Community's Assets Through Wayfinding"
MAP Annual Conference, Detroit, 2015

"Decoding Complete Streets"
MAP Annual Conference, Mackinac, 2014

"Removing the Silos: Integrating Land Use & Transportation in Local Plans"
APA-CMA Conference, Chicago, 2013

"Complete Streets Implementation"
APA National Conference Session, Chicago, 2013

"The Boulevards and Beyond"
APA National Conference Session, Chicago, 2013

"Complete Streets: Tools to Move from Idea to Practice"
Tuesdays at APA/Chicago, Chicago, 2012

"Lessons in Completing Streets"
Complete Streets Forum, Toronto, 2012

"Complete Streets Implementation in Chicagoland"
APA National Conference Session, Los Angeles, 2012

"Creating Effective Bicycle Signage Systems"
The Change Institute, Rosemont, Illinois, 2010



Christopher D. Khorey, AICP

SENIOR PRINCIPAL PLANNER
WEST MICHIGAN MANAGER

EDUCATION

Master of City and Regional Planning
University of Pennsylvania

Bachelor of Arts
University of Notre Dame

HONORS

Award for Excellence in Student Publications
University of Pennsylvania

MEMBERSHIPS

American Institute of Certified Planners
American Planning Association
Michigan Association of Planning
Congress of New Urbanism

PROFESSIONAL EXPERIENCE

Community Planning, Master Plans

Performs all facets of community-wide master planning processes including data analysis, public participation, community visioning, and implementation strategy. Applies innovative master planning strategies for open space preservation, downtown redevelopment, historic preservation, and commercial corridor redevelopment. Integrates regional thinking into local community planning. Implements master plan visions in communities across Michigan.

Market Analysis

Completes successful market analyses—including target market analyses, for residential, commercial, recreation needs, and office development—in suburban communities, older industrial cities, and small towns. Applies financial modeling, population projections, housing demand analysis, and retail gap analysis; employs statistical innovation and research techniques to unearth the nuances of demand for housing types.

Zoning

Prepares zoning ordinance and map amendments, including form-based codes and lean zoning, for a wide variety of communities; provides day-to-day guidance regarding zoning to officials from farming townships to dense urban cores; performs on-site administration of zoning ordinance in dense community with historic downtown.

Redevelopment Planning and Management

Develops neighborhood plans for CDBG target areas. Creates vision for redevelopment and investment in legacy neighborhoods and communities.

Facilitation and Public Engagement

Creates and executes public engagement strategies to address key stakeholders and community members in a variety of projects, in both growing communities and older urban neighborhood. Prepares illustrative and descriptive materials for formal presentation at meetings with public officials, community stakeholders, real estate investors, and the academic community.



PROFESSIONAL EXPERIENCE

Development Review

Provides ongoing development review services and technical advice and recommendations to approval agencies for cities, villages, and townships including site plan, special land use, subdivision, variance, and rezoning for residential, commercial, industrial, mixed use, and planned unit developments.

Wireless Services

Specializes in wireless telecommunications planning and regulation, including review services, drafting and approval of revised wireless regulations; assistance on assessments, leases and proposed buyouts.

Parks and Recreation Planning

Completes Parks and Recreation Master Plans meeting MDNR requirements for a wide range of communities throughout Michigan. Targets grant programs for parks improvements and provides ongoing services to a Parks and Recreation Commission undergoing the implementation of their plan. Engages the public in the parks and recreation planning process through visioning sessions, online surveys, and presentations at public hearings.

Neighborhood Stabilization and Land Banking

Conducted analysis of land bank program in declining industrial city, investigating efficiency and effectiveness of program in reducing blight and spurring redevelopment.

Transportation

Provided consulting assistance on safety and operations for transit agencies in several major metropolitan areas; coordinates planning processes and grant applications for transportation enhancements, non-motorized pathways, and streetscapes.

PUBLICATIONS

"Smart Decline or False Hope? Evaluating the Genesee County Land Bank in Flint, Michigan."
University of Pennsylvania, May, 2010



Kyle Mucha, AICP

ASSOCIATE PLANNER

EDUCATION

Master of Geography
Western Michigan University

Bachelor of Science in Social Science
Grand Valley State University

PROFESSIONAL EXPERIENCE

Planning

Manages complex planning and semi-urban design projects, providing preliminary direction to business and residential developers. Coordinates and assist with day-to-day planning needs of municipal government, including conducting site plan reviews, drafting zoning amendments, preparing planning reports, and presenting to planning commissions and governing bodies. Provides feedback and communication to applicants regarding proposed developments as it relates to best practices in planning.

Zoning

Reviews and revises zoning ordinances as needed to effectuate master plan goals and recommendations, responds to the changing needs of municipalities, and addresses emerging land use issues. Ensures compliance with zoning regulations ranging from single family residential districts to large industrial developments. Ensures proposed projects and continued development of sites meets existing zoning regulations.

Citizen Engagement

Facilitates initial discussions with members of the public regarding conceptual developmental ideas. Coordinates with residential and business leaders on projects that have a wide range of potential impacts on the community. Actively engages residents, business owners and community leaders to provide input on ordinance and development proposals.

Redevelopment Planning

Coordinates with municipality officials regarding each step of the redevelopment process including identification of sites, feasibility studies, conceptual site plan design, and zoning. Collaborates with property owners, municipal staff, residents, and other stakeholders to build consensus around project vision and implementation. Developed several marketing materials to entice prospective development leaders to consider the viability of a given site to meet business needs and requirements.

Geographic Information Systems (GIS)

Analyzes spatial data through mapping software (ESRI – ArcMap & ArcPro). Designs digital maps with geographic data and other data sets to assist the public, boards, commissions and policy makers in making decisions based on data visualization.

Ordinance Compliance

Oversees ordinance regulations and enforcement for municipalities as it relates to community quality, blight elimination, zoning standards, neighborhood improvement. Reviews community enhancement ordinances across multiple municipal jurisdictions and make recommendations for improvements. Coordinates site inspections with other municipal departments as it pertains to ordinance violations.

MEMBERSHIPS

American Institute of Certified Planners
American Planning Association
American Planning Association
– Water Planning Network, Steering Committee

Michigan Association of Planning
Grand Valley State University Alumni Network

SELECT PRESENTATIONS

“Parks! The Demand For Change” - American Association of Geographers, National Conference



Danielle Bouchard

SENIOR PLANNER

EDUCATION

Bachelor of Science (with honors)
Urban and Regional Planning with Minor in Geographic Information Systems
Eastern Michigan University

PROFESSIONAL EXPERIENCE

Mapping/Geographical Information Systems

Developed property site maps. Researched, updated, and developed mapping applications for non-motorized transportation plan. Inventoried and developed mapping for farmland preservation projects.

Zoning Administration and Continuing Planning Services

Served as the planner and zoning administrator for communities throughout Michigan, including rural Townships, small towns, and large suburbs.

Transportation Planning

Developed a county-wide multi-modal transportation plan. Implemented and managed various non-motorized transportation projects. Developed an informational marketing website framework with corresponding interactive story maps for non-motorized transportation projects. Administered State grant award for regional non-motorized transportation project. Researched and developed framework for public transit study. Researched and developed reporting on metropolitan planning organization transportation planning processes.

Grant Writing, Administration, and Fundraising

Developed and processed annual Michigan Department of Transportation grants for various regional programs. Researched grant opportunities and submitted applications to fund a variety of projects. Processed and administered Michigan Department of Natural Resources Trust Fund grants. Secured a multitude of private sector donations. Planned and implemented speaker training events for planning professionals. Secured volunteers for community projects.

Environmental Planning and Sustainability

Created comprehensive water conservation plan. Assisted in implementation of various environmental advocacy projects in the City of Detroit.

MEMBERSHIPS

Michigan Association of Planning
American Association of Planning



Carrie Leitner

ART DIRECTOR

EDUCATION

Bachelor of Fine Arts in Graphic Design
University of Michigan

Internet Professional Curriculum Courses
Washtenaw Community College

SOFTWARE EXPERTISE

Highly proficient in Adobe Creative Suite (InDesign, Illustrator, Photoshop) and Microsoft Office (Word, Powerpoint).

PROFESSIONAL EXPERIENCE

Document Design and Layout - Plannin9 and Zonin9

Designed and produced simple and complex layouts for documents including community master plans, zoning ordinances, and urban design plans.

Downtown and Retail Corridor Branding

Created brands and identities for private firms and Michigan downtowns and corridors. Developed multiple concepts for elaboration in a range of styles. Branding included downtown logos, document design, banners, brochures, and way-finding signage.

Art Director Municipal Projects

Created initial design and messaging concepts for a multitude of high profile municipal clients, capital campaigns and annual giving initiatives.

Image Editing and Production

Edited complex photographic and illustration graphics using Photoshop and Illustrator for zoning ordinances and master plans. Managed elaborate projects including color correction, recreation plan renderings, and branding for municipal electrical energy use education.

Illustration and Visualization - Zoning, Planning, and Design

Produced graphic ideas quickly and successfully which conveyed the clients' vision. Rendered detailed zoning graphics, facade improvements, and corridor and neighborhood visualization using Adobe Photoshop.

Website Design and Implementation for Public Engagement

Planned website architecture to clearly deliver content for stakeholder use under simplified navigation. Formatted websites to include municipal documents for public review and comments.

Hand Renderings and Art Work

Created privately-commissioned portraits in pencil and charcoal. Created the first annual Charlevoix (MI) Venetian Festival poster in oil pastel. Appeared in the Charlevoix Waterfront Art Fair exhibiting pen and watercolor paintings of local street scenes and building sketches. Rendered several site and landscape concept plans with pen and marker.



Work Samples



Memorandum

TO: Kalamazoo Charter Township Planning Commission

FROM: Paul Lippens, AICP, Vice President
Danielle Bouchard, Senior Planner

SUBJECT: Site Plan Review – Dollar General 803 West Mosel Ave.

DATE: May 18, 2021

The applicant, Westwind Construction, is proposing to construct a Dollar General retail store located at the corner of West Mosel Avenue and Woodward Avenue. The site is currently owned by Nowak and McNally Joint Venture and is comprised of three (3) parcels: 06-09-210-010, 06-09-210-020, and 06-09-210-032. All parcels are zoned C-1, Local Commercial.

OVERVIEW

The applicant is proposing to construct a 10,526 square foot Dollar General retail store located at the corner of West Mosel Avenue and Woodward Avenue. The proposed Dollar General retail store is located on approximately 1.64 acres (the size of all three parcels combined). The site's existing conditions include an asphalt parking lot as well as an area of concrete on the east side of the parcel.

PROPOSED IMPROVEMENTS

The proposal includes a 10,526 square foot Dollar General retail store. Additionally, the proposal includes landscape improvements fronting Mosel Avenue and Woodward Avenue. The applicant is proposing an underground irrigation system for landscape maintenance.



The proposed site access plan includes a total of two points of ingress and egress, one located on Mosel Avenue and the other located on Woodward Avenue. Both ingress/egress points are approximately 31 ft. wide. The parking plan includes 39 parking spaces located primarily on the eastern portion of the site. The applicant is proposing to remove the existing asphalt and concrete areas located on the site.

The site plan also includes an enclosed dumpster located on the west side of the store, screened by shaded trees fronting Woodward Avenue.



USE OF THE PROPERTY

Currently, the property is vacant. The proposed use of the property is a commercial retail store. Per the C-1, Local Commercial District (Section 17.02), retail businesses that supply merchandise on the premises for persons residing in nearby residential areas are permitted. Therefore, it is deemed that the proposed Dollar General retail store complies with the permitted uses for the C-1, Local Commercial District.

We understand that, the southernmost parcel, -032 was previously zoned R-2, Single and Two Family Residential. We understand that the parcel was rezoned to C-1. This review is based on the understanding that this rezoning was completed.

EXISTING AND SURROUNDING CONDITIONS AND ZONING DISTRICTS

The surrounding properties to the north and west of the site are zoned I-1, Light Industrial and I-2, General Industrial. The properties to the south are zoned C-1, Local Commercial and R-2, Single and Two Family Residential. It is not likely that the proposed retail use will cause any adverse effects to surrounding properties.

SITE PLAN REVIEW

Schedule of Regulations: Section 25.02

Regulation Type	C-1 Local Commercial District Requirements	Dollar General Site Plan Conditions	Compliance with Ordinance Standards
Minimum Lot Area	10,890 sq. ft.	71,438 sq. ft.	Yes
Minimum Lot Width	70 ft.	332.3 ft.	Yes
Maximum Stories	2	1	Yes
Maximum Building Height	30 ft.	18 ft.	Yes
Front Yard Setback	25 ft.	34 ft.	Yes
Side Yard Setback	25 ft. (each)	80 ft. (east) 83 ft. (west)	Yes
Rear Yard Setback	25 ft.	25 ft.	Yes
Maximum Lot Coverage	60%	15%	Yes

Off-Street Parking

Section 4.01.D.5 of the Township Zoning Ordinance requires 1 parking space per every 200 square feet of useable floor area for “General Retail Sales”. The useable floor area of the proposed Dollar General retail store is approximately 8,778 sq. ft. Therefore, 44 parking spaces are required. The proposed Dollar General retail store site plan notes 37 parking spaces including 2 barrier free spaces.

*The parking plan shows a shortage of 7 parking spaces to meet Ordinance standards. Section 4.01.D, Schedule of Required Parking, notes that, “Applicants are encouraged to minimize the amount of parking provided in order to minimize excessive areas of pavement, which negatively impact aesthetic standards and contribute to high volumes of storm water runoff. **The Planning Commission may modify the numerical requirements for off-street parking, based on evidence that another standard would be more reasonable, because of the level of current or future employment and/or level of current or future customer traffic.**”*



Additionally, Section 4.01 (D) (8) E.2 requires a minimum drive aisle width of 24 ft. the proposed parking lot includes a drive aisle width of 26 ft. Each parking stall is 18.5 ft deep by 9 ft. wide, also in compliance with Ordinance standards.

It is also recommended that the site plan include bike parking in a highly visible and accessible area on the site, while being located at least 3 feet from walls, poles, landscaping, drive aisles, and primary pedestrian routes.

Parking Lot Landscaping

The Ordinance requires 30 sq. ft. of interior landscaping per parking space for any lot having more than 10 parking spaces. The proposed landscaping plan includes 1,020 sq. ft. of parking lot landscaping. Section 5.02.F.4 requires one (1) deciduous tree per every 10 parking spaces. The proposed parking lot landscaping plan includes 4 trees.

The proposed parking lot landscaping plan is calculated based on the 37 parking spaces provided in the site plan. Should the Planning Commission require the additional 7 parking spaces, the parking lot landscaping plan will also need adjustment.

Landscaping to Adjacent Roads

The site has 227 ft. of frontage on West Mosel Avenue.

1 shade tree/evergreen per 40 linear feet of frontage:	7 trees required	7 shown
1 ornamental tree per 100 linear feet of frontage:	3 ornamental trees required	3 shown
8 shrubs per 40 linear feet of frontage:	56 shrubs required	56 shown

The site has 107 ft. of frontage on Woodward Avenue.

1 shade tree/evergreen per 40 linear feet of frontage:	3 trees required	3 shown
1 ornamental tree per 100 linear feet of frontage:	2 ornamental trees required	2 shown
8 shrubs per 40 linear feet of frontage:	22 shrubs required	22 shown

Greenbelt

Section 5.01.E, Summary of Minimum Landscaping Requirements notes that a greenbelt may be reduced to 9 feet wide provided additional screening wall is provided. The proposed site plan includes a wood fence and 9-foot-wide greenbelt along the south side of the site and southwest side of the side. This complies with Ordinance standards.

Front Yard Berm

Front yard berms shall not exceed three (3) feet in height. Berms located in the front yard of non-residential properties shall adhere to the provisions set forth for Landscaping Adjacent to Roads. Those provisions are noted above. Front yard berm requirements have been met.

Lighting

Exterior lights shall not exceed 0.5 footcandles at the property line. The proposed photometric and lighting plan is sufficient.

Signage

No signs are proposed as part of this site plan. Should the applicant request signage, a separate administrative approval shall be obtained from the Kalamazoo Charter Township Planning and Zoning Administrator.



Trash Disposal

Section 2.22 outlines the requirements for trash removal and collection. Provision 2.22.C notes, "Dumpsters shall be permitted in the side or rear yard provided that no Dumpster shall extend closer to the front of the lot (both street frontages shall be considered "front" on corner lots) than any portion of the principal structure."

Given that the site is a corner lot, the frontage on Woodward Avenue shows the dumpster in front of the principal building. The dumpster shall be relocated to the required rear or side yard of the site, while still being compliant with the setback requirements for the C-1 District (25 ft.).

BUILDING AND SITE DESIGN

The proposed Dollar General store is comprised of smooth/textured CMU with pre-finished metal wall panels and parapet over the main store entrance. The sides of the building are a proposed metal wall panel. The proposed building design does not include any windows other than for entry/exit.

Although it is not required by the Township Ordinance, it is recommended that the site design include additional windows on the north side of the proposed building facing West Mosel Avenue for enhanced curb appeal. The windows should consist of transparent, non-reflective glass.

Additionally, to further the goals of Kalamazoo Charter Township to create and maintain a walkable community, it is recommended that sidewalks are included along West Mosel Avenue and Woodward Avenue to encourage and ease walkability in and around the site.

RECOMMENDATIONS

As noted above, there are several revisions we recommend to ensure conformance with Township regulations. We recommend the following revisions be made to a revised site plan prior to consideration of a motion to approval by Planning Commission. When these revisions are complete, we would recommend the case being placed on an agenda for Planning Commission consideration.

1. The applicant obtains lot combination review and approval from the Kalamazoo Charter Township Planning and Zoning Department and Assessing Department.
2. The number of parking spaces is deemed acceptable by the Kalamazoo Charter Township Planning Commission.
3. Bike parking is added pursuant to Ordinance standards in Section 4.01.C.5.
4. The site plan is amended to include a sidewalk fronting West Mosel Avenue and Woodward Avenue to ease and encourage pedestrian circulation.
5. The dumpster enclosure is relocated as to not be positioned in front of the principal building on the west side of the site fronting Woodward Avenue.
6. All other applicable reviews and approvals from Township Engineers and Fire Marshal are obtained.

Please feel free to reach out to Paul Lippens at plippens@mcka.com or Danielle Bouchard at dbouchard@mcka.com if you have any questions regarding this review.



Memorandum

TO: Kalamazoo Charter Township Planning Commission
FROM: Paul Lippens, AICP, Vice President
 Danielle Bouchard, Senior Planner
SUBJECT: **2609 Burdick – Special Land Use Review**
DATE: August 13, 2021

The applicant, PMT Cultivation Inc., is requesting a site plan review and public hearing for a proposed change of use to add Adult Use growing to the site. Currently, operations located at 2609 N. Burdick include the growing and cultivation of marihuana for medicinal purposes. On June 4, 2020, the Kalamazoo Charter Township Planning Commission approved a special land use for a Class A (not more than 500 plants) medical marihuana grow facility located on the site. A subsequent site plan was approved by the Planning Commission on July 2, 2020.

SUMMARY OF REQUEST

The applicant is requesting approval for a Class C Adult Use Marihuana Grow License facility to add to the existing Class A Medical Marihuana Grow Facility License. If approved, the Class C License will permit a maximum of 2,000 plants. The Class A License currently permits a maximum of 500 plants. Therefore, if the proposed special land use is approved by Planning Commission, the site will permit a total of 2,500 plants.

An adult use marijuana grower (subject to Article 8, Section 8.02 WW.4) is a permitted use in the I-2 District, subject to special land use approval.

STANDARDS FOR GRANTING SPECIAL LAND USE APPROVAL

Pursuant to Section 26.03.C., of the Township’s Zoning Ordinance, the following standards apply for granting special land use approval:

1. Compatibility with Adjacent Uses

The proposed special land use shall be designed, constructed, operated and maintained to be compatible with uses on surrounding land. The site design of the proposed special land use shall minimize the impact of site activity on surrounding properties. In determining whether this requirement has been met, consideration shall be given to:

- a. *The location and screening of vehicular circulation and parking areas in relation to surrounding development.*

An eight (8) foot tall fence located on the perimeter of the site is proposed. Adequate screening from adjacent properties, most notably, the adjacent fire station, is sufficient provided that landscaping requirements have been met.

- b. *The location and screening of outdoor storage, outdoor activity or work areas, and mechanical equipment in relation to surrounding development.*



The proposed site does not include outdoor activity or work areas that which the location will cause incompatible uses with the surrounding land uses. Proposed outdoor mechanical equipment, such as the CO2 tank, is planned to be located in the rear of the site.

- c. *The hours of operation of the proposed use. Approval of a special land use may be conditioned upon operation within specified hours considered appropriate to ensure minimal impact on surrounding uses.*

The applicant shall provide details on the proposed hours of operation for the site.

- d. *The bulk, placement, and materials of construction of the proposed use in relation to surrounding uses.*

The bulk, placement, and materials of construction are harmonious with the industrial nature of the surrounding properties and N. Burdick corridor.

- e. *Proposed landscaping and other site amenities. Additional landscaping over and above the requirements of this Ordinance may be required as a condition of approval of a special land use.*

A landscaping plan, noting the proposed tree/shrub number, type, and caliper (in tabular format) for the site has not been received at this time (see site plan review letter dated August 13, 2021). The Planning Commission may find that additional landscaping may be required as a condition for site plan approval. However, once the landscaping plan meets Ordinance standards, it is anticipated to be sufficient for the site and proposed use.

2. Compatibility with the Master Plan

The proposed special land use shall be consistent with the general principles and objectives of the Township's Master Plan.

The property is currently zoned and planned for industrial uses.

3. Public Services

The proposed special land use shall be located so as to be adequately served by essential public facilities and services, such as highways, roads, police and fire protection, drainage systems, water and sewage facilities, and schools, unless the proposal contains an acceptable plan for providing necessary services or evidence that such services will be available by the time the special land use is established.

The subject site is adequately served by roads and essential utilities. We will defer to the Township Fire Marshal for fire safety compliance review and comment.

4. Impact of Traffic

The location of the proposed special land use within the zoning district shall minimize the impact of the traffic generated by the proposed use. In determining whether this requirement has been met consideration shall be given to the following:

- a. *Proximity and access to major thoroughfares.*



- The site has approximately 132 feet of frontage on N. Burdick Street. Being an industrial corridor, it is not anticipated that the road infrastructure will endure additional or expedited deterioration as a result of the change of use on this site.
- b. *Estimated traffic generated by the proposed use.*
Traffic is not estimated to increase as a result of the adult use grow operation, as it is not open to the public.
 - c. *Proximity and relation to intersections.*
The site is located approximately 200 feet south from the intersection of N. Burdick and W. Mosel Avenue.
 - d. *Adequacy of driver sight distances.*
Driver site distances are adequate for the proposed use given the width of the proposed driveway and flat topography on the site.
 - e. *Location of and access to off-street parking.*
Off-street parking is planned to be located on the northeast portion of the site. A total of 8 spaces are provided. A site plan review letter dated August 13, 2021 notes that the Planning Commission shall determine if the proposed number of spaces meets the need of the proposed use, given that the applicant is requesting a lesser number of spaces than required by Ordinance.
 - f. *Required vehicular turning movements.*
Vehicular turning movements have not been provided to the Township.
 - g. *Provisions for pedestrian traffic.*
A 5-foot-wide sidewalk is proposed along N. Burdick.

5. Detrimental Effects

The proposed special land use shall not involve any activities, processes, materials, equipment, or conditions of operation, and shall not be located or designed so as to be detrimental or hazardous to persons or property or to public health, safety, and welfare. In determining whether this requirement has been met, consideration shall be given to the level of traffic, noise, vibration, smoke, fumes, odors, dust, glare, and light.

Provided that the applicant complies with all Ordinance requirements and State laws pertaining to marijuana establishments, it is not anticipated that the proposed special land use will cause any detrimental effects to public health, safety, or welfare.

6. Economic Well-Being of the Community

The proposed special land use shall not be detrimental to the economic well-being of those who will use the land, residents, businesses, landowners, and the community as a whole.



It is not anticipated that the proposed special land use will cause any detrimental effects to the economic well-being of those who will use the land, residents, businesses, landowners, and the community as a whole.

7. Compatibility with Natural Environment

The proposed special land use shall be compatible with the natural environment and conserve natural resources and energy.

The special land use is compatible with the natural environment in that the site has previously been utilized for industrial purposes. We recommend the applicant further describe any actions taken place to conserve natural resources and energy on the site, if any.

PROVISIONS APPLICABLE TO MARIJUANA FACILITIES

Section 8.02.WW. notes supplementary provisions related to adult use marijuana retailers and/or growers, processors, transporters, testing facilities, and/or microbusinesses. The following regulations apply:

1. General regulations: *An Adult Use marijuana retailer, grower, processor, transporter, testing facility and/or microbusiness in accordance with the provisions of state law, may be permitted through the issuance of a special use permit pursuant to Article 26 Section 26.03 in the specified zone(s), provided that:*

a. Any uses or activities found by the state of Michigan or a court with jurisdiction to be unconstitutional or otherwise not permitted by state law may not be permitted by the Township. In the event that a court with jurisdiction declares some or all of this article invalid, then the Township may suspend the acceptance of applications for special use permits pending the resolution of the legal issue in question.

At this time, all proposed uses and activities proposed for the site are in compliance with State laws.

b. For a special use permit the Adult Use marijuana retailer, grower, processor, transporter, testing facility and/or microbusiness must be licensed by the State of Michigan and then must be at all times in compliance with the laws of the State of Michigan including but not limited to the Michigan Regulation and Taxation of Marijuana Act, Initiated Act 1 of 2018 (MCL 333.27951 – 333.27967 et seq.); and all other applicable rules promulgated by the State of Michigan.

The applicant must provide proof of all applicable licenses from the State approving an adult use grow operation to the Township for file.

c. The use or facility must be at all times in compliance with all other applicable laws, codes and ordinances of the Township as well as the State of Michigan Fire Code as amended/updated, and the State Building Code. The provisions of the current NFPA-1 related to marijuana facilities are hereby incorporated by reference as if fully restated herein. NFPA 1 of 2018 is available at the office of the Township Fire Marshal and at the office of the Township Attorney for reference as may be necessary. The Township Fire Marshal shall review all applications for compliance with the current marijuana rules in the most recent NFPA-1 and any and all other applicable fire codes facilities rules.

Please see the corresponding site plan review for additional detail on Ordinance compliance. We defer to the Township Fire Marshal for review and comment regarding fire safety compliance.

d. The Township may suspend or revoke a special use permit based on a finding that the provisions of the special use standards in this section, all other applicable provisions of this zoning ordinance, and/or the terms of the special use permit and approved site plan are not met.



e. An Adult Use marijuana retailer, grower, processor, transporter, testing facility and/or microbusiness, shall not be permitted as a home occupation, home-based business or accessory use nor may they include accessory uses except as otherwise provided in this ordinance.

The proposed special land use application does not include operations to be conducted as a home occupation or home-based business. This is in compliance with Ordinance standards.

f. Signage requirements for marijuana facilities, unless otherwise specified, are as provided in the Article 7.00 Signs.

At this time, a sign package has not been submitted to the Township for review. A sign application is required to be approved by the Township prior to any placement of a sign on the site.

2. Application and Approval: *After receiving the application for the grant of a special land use permit for Adult Use marijuana retailer, grower, processor, transporter, and/or testing facility, accompanied by the required plans, specifications and permit fees, the Planning Commission shall hold a public hearing and review the application following the procedures required for special land use uses set forth in Section 26.03.*

Following such hearing, said Planning Commission shall grant or deny the application and set forth its reasons for its decision.

a. Annual Review and Rescission. *In making any decision, the Planning Commission shall have the right and authority to impose such additional conditions and safeguards as it deems necessary for the protection of the health, safety and general welfare of the neighborhood and of the adjoining residents and property owners. The Planning Commission shall provide for a periodic review of the proposed operations to ascertain compliance with the conditions and limitations imposed upon the same. It shall be empowered to renew or extend a special land use permit where all standards and conditions are complied with and may revoke or refuse to renew a permit where noncompliance exists. No permit shall be revoked or not renewed until the operator has been given written notice of any violation forming the basis of such revocation or denial of renewal and not less than thirty (30) days have elapsed to correct the said violation. All permits shall be reviewed by the Planning Commission annually.*

The operator shall be required to pay an annual fee to cover the cost of inspections and additional meetings of the Planning Commission as may be established by the Township Board.

To date, applicable fees have been paid to the Township. However, it should be noted at the site is subject to periodic review as applicable. Special land use operation renewal may be revoked or extended by decision of the Planning Commission.

b. Liability Insurance. *All operators shall be required to carry personal injury and property damage insurance while the Adult Use marijuana facility exists, in the amount of not less than \$1,000,000.00 (one million dollars) for each person or property injured or damaged and not less than \$2,000,000.00 (two million dollars) for injury or damage to more than one person or one person's property arising out of one occurrence. Such insurance shall cover injury or damage occurring upon the site of the operations as well as upon properties adjoining thereto, as a result of conditions or activities existing upon the site. The policy of insurance provided herewith shall name the Township as an additional insured. A copy of the policy shall be filed with the Township Clerk.*

The applicant has submitted a certificate of liability insurance to the Township. This is in compliance with Ordinance standards.



3. Adult Use Marijuana Grower, Processor, Transporter, and/or Testing Facility shall be subject to the following standards:

a. Location. *A building occupied by an Adult Use Marijuana Grower, Processor, Transporter, Testing Facility, and/or Microbusiness may be permitted to operate at a location shared with a Medical Marijuana facility.*

The subject site has been previously approved for medical grow operations. This is in compliance with Ordinance standards.

b. Indoor Activities. *All activities of an Adult Use Marijuana facility, including all transfers of marijuana, shall be conducted within the structure and out of public view. Lighting within a building used for growing Adult Use marijuana shall not be visible outside of the building.*

All growing operations are anticipated to be conducted complete indoors. Please see our site plan review dated August 13, 2021 for additional details on the proposed exterior lighting plan.

c. Other Activities. *Marijuana and tobacco products shall not be smoked, ingested, or otherwise consumed in the building space occupied by the Adult Use Marijuana business.*

No evidence suggests that any marijuana products have been consumed on site.

d. Physical Appearance. *The exterior appearance of the structure shall remain compatible with the exterior appearance of structures already constructed or under construction within the immediate area, and shall be maintained so as to prevent blight or deterioration or substantial diminishment or impairment of property values within the immediate area.*

Given the industrial character of N. Burdick, findings suggest that the warehouse exterior of the building located on the subject site is compatible with surrounding buildings and overall character of the area.

e. Buffer Zones.

(i). An Adult Use marijuana business shall not be located within a 1,000-foot radius of a pre-existing:

(1) Property occupied by a public or private elementary, or secondary school building providing education in kindergarten or any of grades 1 through 12; NOTE: Does not include home schools.

(2) Public library.

(ii). An Adult Use marijuana business shall not be located within a 500-foot radius of any property occupied by:

(1) A public playground;

(2) A public park;

(3) Public housing;

(4) A religious institution;

(5) A public or private, vocational school, college, junior college, or university;

(6) A state licensed child care center or preschool;



(7) Any public swimming pool, public or private youth activity facility, public outdoor recreation area (except trails), or public recreation facility;

(8) A youth center;

(9) A juvenile or adult half-way house;

(10) Correctional facility or rehab center;

(11) Property zoned R-1, R-2, RM-1, RM-2, RM-3, or MHP.

(iii). *Measurement of Buffers.* For purposes of measuring the buffer distance, the buffered area identified in i. 1 and 2, and ii. 1-11 above shall be called the “protected use”. The distance shall be measured from the zoning district setback line of the above uses (i. 1 and 2, and ii. 1 through 10) to the portion of the building, delineated with a firewall, housing the Adult Use marijuana facility, except for (11) which shall be from the property line of the residential uses to the portion of the building, delineated with a firewall, housing the Adult Use marijuana facility. For existing buildings on the protected use property which are lawfully nonconforming by reason of setback, the measurement shall be taken from the setback line regardless of nonconformity to the building housing the medical marijuana facility.

(iv). *Measurement of Municipal Boundary Buffers.* A building where an Adult Use marijuana facility is located shall not be located within 250 feet of the Township border with another municipality except where any adjoining property in the adjacent community is zoned for any similar use.

(v). *See buffer diagram B-1 of this Ordinance.*

All required buffer zones are in compliance with Ordinance standards.

f. Odor. *It is the intent of this ordinance that no odor shall be detectable outside of any building where marijuana is present. As used in this subsection, building means the building, or portion thereof, used for marijuana growing, processing, testing, transport storage or sales.*

(i). *The building shall be equipped with an activated carbon filtration system for odor control to ensure that air leaving the building through an exhaust vent first passes through an activated carbon filter.*

(ii). *The filtration system shall consist of one or more fans and activated carbon filters. At a minimum, the fan(s) shall be sized for cubic feet per minute (CFM) equivalent to the volume of the building (length multiplied by width multiplied by height) divided by three. The filter(s) shall be rated for the applicable CFM.*

(iii). *The filtration system shall be maintained in working order and shall be in use. The filters shall be changed a minimum of once every six (6) months or as manufacturer recommended.*

(iv). *Negative air pressure shall be maintained inside the building.*

(v). *Doors and windows shall remain closed, except for the minimum length of time needed to allow people to ingress or egress the building.*

(vi). *An alternative odor control system is permitted if the special use permit applicant submits and the municipality accepts a report by a mechanical engineer licensed in the State of Michigan demonstrating that the alternative system will control odor as well or better than the activated*



carbon filtration system otherwise required. The municipality may hire an outside expert at the applicant's expense to review the alternative system design and advice as to its comparability and whether in the opinion of the expert it should be accepted.

Details on the proposed mechanisms for odor control on the site have not been received at this time.

g. Security Cameras. *If used, security cameras shall be directed to record only the subject property and may not be directed to public rights-of-way as applicable, except as required to comply with licensing requirements of the State of Michigan.*

Approximately 11 security cameras are planned to be installed on all sides of the building. The cameras on the east side of the building shall not be directed to public right-of-way on N. Burdick.

h. Waste Management Plan. *The applicant shall establish a waste management plan at a minimum in compliance with state regulations.*

A waste management plan has been submitted to the Township by the applicant on August 3, 2021 and appears to be sufficient for the proposed use. We suggest the applicant sign and date the waste management plan for the Township to keep on record.

i. Safety Compliance Facilities. *A Safety Compliance Facility shall not be located in the same facility as nor under the same ownership as a marijuana: grower, processor, retailer or microbusiness.*

A safety compliance facility is not located within the same facility, or under the same ownership, as the subject site. This satisfies Ordinance requirements.

j. Subsequent Construction. *If after a marijuana facility has been approved, a protected use is located within the buffer zone, that use does not gain protected use status from the existing marijuana facility and additional marijuana facilities may be located on the previously approved marijuana facility parcel.*

RECOMMENDATIONS

There are several recommended conditions proposed from the review team. We recommend the approval of the proposed special land use for a Class C Adult Use Marijuana Grow License with a maximum of 2,000 plants, in addition to the previously approved Class A Marijuana Grow License with a maximum of 500 plants, totaling a not-to-exceed amount of 2,500 plants by the Planning Commission subject to the following considerations:

1. The applicant must revise the site plan approval and demonstrate compliance with all applicable site plan conditions and special land use requirements as set forth by the Kalamazoo Charter Township Planning Commission, including comments above on lighting, landscaping, and turning movements.
2. The applicant must submit details and/or plans for odor control on the site, including proposed locations for any carbon filtration system or other type of odor control device.
3. The applicant signs and dates the proposed waste management plan for the Township to keep on file.

Respectfully Submitted,

Paul Lippens, AICP
Vice President

Danielle Bouchard
Senior Planner



MCKENNA

May 26, 2021

Planning Commission
City of Grandville
3195 Wilson Avenue SW
Grandville, MI 49418

**Subject: Alderwood – Residential Planned Unit Development Preliminary Plan Review #1
3560 Ivanrest Avenue SW
Application Dated April 27, 2021; Received by McKenna Associates May 18, 2021**

Dear Commissioners:

The applicant, Westview Capital, proposes to build a residential neighborhood at 3560 Ivanrest Avenue, a 35.24 acre parcel of land that currently contains one single family home. The applicant is proposing a Residential Planned Unit Development (PUD) under Article 11 of the Zoning Ordinance.

The proposed development includes 81 single family homes on the 35.24 acres of land, or 2.3 units per acre.

The proposed neighborhood would be split into two parts – 28 of the homes would site condominiums on public roadways, while the other 53 would be condominiums, located on private roads and, presumably, with communal maintenance of the yards.

The application in front of the Planning Commission is the “Preliminary Plan” described in Section 11.12 of the Zoning Ordinance. In this phase of the PUD process, the Planning Commission reviews the overall project for compliance with Article 11. If the Preliminary Plan is approved, the process moves on to the Final PUD Approval, in which the applicant submits a detailed Site Plan, as well as a PUD Agreement to govern the build-out of the site.

REVIEW COMMENTS

Article 11 of the Zoning Ordinance details the requirements for Planned Unit Developments, as well as the criteria the Planning Commission should use when determining whether to approve a Planned Unit Development. Our comments on those criteria follow:

1. **Qualifying Conditions (Section 11.5).** The following requirements must be met for any PUD application to be approved.
 - a. **Must be at least Five Acres in Area.** In some cases, this requirement can be reduced to two acres. However, because the lot in question is 35.24 acres, this requirement is met.
 - b. **Ownership and Control.** A PUD application must be made by the property owner, a lessee, or another person with a legal interest in the property and written consent of the owner. PUD’s must also be under unified ownership during the application process. A signed letter of authorization from the property owners, Ron Dill and Noreen Chapman, has been included in the application packet.
 - c. **Public Utilities.** PUDs must be served by public water and sewer. There are water and sewer lines under Ivanrest Avenue. New connections will be made to serve the neighborhood.
 - d. **Access.** PUDs must have at least 66 feet of access on a public roadway. The site has 1,054 feet of frontage along Ivanrest Avenue.



- e. **Recognizable and Substantial Benefits.** These are criteria that the Planning Commission should use to determine whether the PUD should be approved. Because these are subjective/discretionary criteria, we will address them in the section on “Standards of Review.”
 - f. **Consistency with the Master Plan.** We will also address this criteria under “Standards of Review.”
 - g. **Districts Eligible.** Land in a Form Based Zoning District is not eligible for a PUD. The land in question is currently zoned R1-A, and therefore is eligible to be considered for a PUD.
2. **Requirements Applying to All PUD Types (Section 11.6).** The following requirements must also be met for the PUD to be approved.
- a. **Dimensional Requirements and Regulatory Flexibility.** The dimensional requirements of the current zoning district (in this case, R1-A) shall be in effect unless the Planning Commissions approves a modification. All modifications must be listed in the PUD Agreement during the Final PUD Approval phase. At this point, however, the Planning Commission should review the proposed dimensions to determine if they are a) consistent with the R1-A District or b) potentially approvable as modifications.

The following dimensions are proposed:

	R1-A District	Proposed PUD	Comments
Minimum Lot Size	11,200 sf	7,800 sf	We recommend that this reduction in minimum lot size be approved. 11,200 sf lots would mean approximately 4 units per acre. The proposed density is actually 2.3 units per acre – lower than would be allowed under the R1-A District without the PUD. The smaller lot sizes allow the developer to preserve 15.58 acres of wetlands and flood plains along Buck Creek.
Minimum Lot Width	80 feet	65 feet	Like the reduced minimum lot size, the reduced minimum lot width allows the developer to preserve natural space and ecosystems. We recommend that the reduction be approved.



	R1-A District	Proposed PUD	Comments
Minimum Front Setback	30 feet	30 feet (public streets) 20 feet (interior private streets) 50 feet (Condo Unit 1 from Ivanrest)	<u>We recommend that the Planning Commission require the 30 foot setback in the R1-A District to remain in place on the private streets. We see no reason for the condo units to have smaller front yards simply because they are on private streets.</u>
Minimum Side Setback (One)	8 feet	7 feet	This setback reduction is necessary due to the reduce lot width.
Minimum Side Setback (Total of Two)	22 feet	14 feet	<u>This proposal functionally eliminates the requirement that at least one side setback be larger than the minimum. R1-A requires, at a minimum, one setback of 8 feet, and one setback of 14 feet. We recommend a reduction to a total of 19 feet (7 feet and 12 feet). We understand that this means some of the wider home designs will not fit on the smaller lots.</u>
Minimum Rear Setback	25 feet	25 feet	The homes that back onto Ivanrest (Lots 1, 2, 3, and 4) are proposed to have a 30 foot minimum rear setback, based on the site plan provided, but that distance is not included in the written narrative. <u>We recommend that the 30 foot setback from Ivanrest be included in the PUD Agreement.</u>



- b. **Open Space.** PUDs are required to include common open space meeting the following criteria:
- i. **Must be at least 15% of the land included in the PUD.** The proposed open space is 44.2% of the PUD.
 - ii. **Must have a contiguous area of at least 20,000 square feet and a maximum width to depth ratio of 3:1.** The proposed open space meets these criteria.
 - iii. **Stormwater Detention, Water, Rights-of-Way, Parking Lots, and Required Setbacks, and Bufferyards are not permitted to be counted as open space.** The applicant did not count anything on that list as open space. The applicant does propose to create new wetlands as part of the stormwater management system, but we recommend that those be allowed to count as part of the required open space.
 - iv. **Protection in Perpetuity.** The open space must be protected in perpetuity through a formal means, to be approved by the City. The applicant proposes that the open space be maintained permanently by the homeowner's association that will also maintain the private roads and the common green space with the condominium portion of the project. This is acceptable in principal, although we will need to review the Master Deed and By-Laws to ensure the specific system for maintenance by the homeowner's association is acceptable.
 - v. **Must preserve significant Natural Features.** The northern proposed open space would preserve wetlands, woodlands, and flood plains surrounding Buck Creek, as well as protecting the creek itself from runoff and erosion. The southern proposed open space would preserve woodlands.
 - vi. **Must be accessible to the residents of the development.** The southern open space is only accessible from Alder Drive or as an unofficial "back yard" for condo units 24-29. However, we recommend that that be considered acceptable, since the southern open space is mainly designed to preserve the wooded back yard of the homes on Willow Creek Drive.

The northern open space is the jewel of the proposed neighborhood, and should have robust access for all residents. We applaud the inclusion of proposed trails through the open space area, as well as the multiple points of access to the trails. However, we have the following recommended additions to the trail network:

- A connection should be made between the trail and the Ivanrest sidewalk, near where the trail curves east and is no longer running parallel to Ivanrest. While we understand that the trail will be a private amenity maintained by the homeowner's association, the lack of a connection between the trail and the sidewalk will result in "desire paths" of dead grass and damaged shrubs as people find their own way from Ivanrest to the trail. This will pose a long-term maintenance problem for the homeowner's association. Instead, a short trail connection would eliminate the need for "desire paths."
- A new path spur should be added between condo units 10 and 11, connecting to the main path approximately it intersects the spur to Buck Creek. The two proposed connection points between the trails and the roadways are far from each other, and



an additional access point would be beneficial. Since the open space already extends between condo units 10 and 11, there is a natural place for a third access point.

- vii. **Connects with Open Spaces within and adjacent to the development.** Part of the site is included in the City's Parks and Recreation Plan as part of the Buck Creek Greenway, a series of preserved parks and natural spaces along Buck Creek. Specifically, as shown on the map below, the northern portion of the proposed Alderwood is designated as a "potential conservation easement," featuring "potential easements or acquisition" along the creek itself. (The Alderwood site is designated by the red box). The preservation of the open space in perpetuity by the homeowner's association would fit the vision for a "conservation easement" in this area. An easement to allow public access along the trails would also be welcome, although we understand that the trails will be privately maintained.





- c. **Signs.** Signage has not been included in the preliminary plan submission. Therefore, we assume the applicant is not requesting any departures from Article 17 of the Zoning Ordinance.
 - d. **Condominium Approval.** Approval of the Condominium runs concurrently with the PUD approval. As part of the Final PUD Approval, the Master Deed and By-Laws will be required to be submitted for approval.
3. **Requirements for Residential PUDs (Section 11.7).** The following requirements apply to Residential PUDs.
- a. **Must be located in a conventional residential district.** This requirement is met – the site is currently zoned R1-A.
 - b. **Must only include uses allowed (by right or by special land use) in the conventional residential districts.** The requirement is met. The PUD only contains single family homes and preserved open space.
 - c. **Residential Density.** The number of dwelling units shall not exceed the density permitted in the existing zoning district, unless approved through the “density bonus” process described in Section 11.7.C.2. The density bonus does not apply in this case, because the proposed PUD includes 2.3 units per acre, below the 4 units per acre that the R1-A district allows.
 - d. **Non-Flexible Dimensional Requirements.** The following requirements cannot be altered through the PUD Agreement.
 - i. **Maximum lot coverage of buildings and structures: 35%** This requirement must be met during the ultimate build-out of the development, and will apply not only to the homes, but also to accessory structures built on the site condominium lots by the eventual owners. We recommend that this requirement be included in the PUD agreement and the By-Laws for the homeowner’s association, in order to ensure that it is adequately enforced in the future.
 - ii. **All buildings and structures must be located at least 25 feet away from any zone district boundary.** The site abuts zoning districts other than R1-A in two places. In the northwest corner, across Buck Creek, is R1-C zoning – but no buildings are within 25 feet of that area.

In the southwest corner, adjacent to Site Condominium Lot 5, is R2-A zoning. Lot 5 is irregularly shaped and is pointed at the rear. That means, based on the definition of “rear lot line” in the Zoning Ordinance, the lot line adjacent to the R2-A Zoning is a *side* lot line, with only a 7 foot required setback. We recommend that a special provision for Lot 5 be included in the PUD Agreement, stating that the minimum setback from the southern lot line, abutting the R2-A zoning, shall be 25 feet.
 - iii. **The minimum floor area of the underlying zoning district must be met.** The minimum floor area in R1-A is 1,100 square feet. All proposed home models included in the Preliminary Plan submission meet that requirement. We recommend that this requirement be included in the PUD agreement and the By-Laws for the homeowner’s association, in order to ensure that it is adequately enforced in the future.
4. **Standards of Review (Section 11.14).** Following are the subjective/discretionary criteria that the Planning



Commission must use when determining whether to approve a PUD. We have provided our analysis to assist the Planning Commission in their decision making.

- a. **Does the proposal comply with the intent and purpose of Article 11, and meet all qualifying conditions?** The proposal meets all objective qualifying conditions. Below is our analysis of the “Recognizable and Substantial Benefit” criteria.
- **Preservation of Significant Natural Features.** The preservation of the wetlands, woodlands, and flood plains near Buck Creek furthers an important City preservation goal, and provides a long-term positive for residents of Alderwood and other nearby neighborhoods.
 - **Complementary Mix of Uses.** Since the proposal is a Residential PUD in the R1-A Zoning District, we recommend that the Planning Commission consider single family homes and preserved open spaces as a sufficient “mix” of uses.
 - **Extensive Open Space and Recreational Amenities.** The preserved open space and proposed trails meet this criteria.
 - **Open Space that Links to Adjacent Greenway Corridors.** The proposal furthers the City’s Buck Creek Greenway vision by preserving, in perpetuity, wetlands, woodlands, and flood plains surrounding Buck Creek.
 - **Preservation of Historic Buildings and Site Features.** The existing home on the site will be demolished. However, the preservation of that home was not a City goal, and it is not registered as “historic” with any entity.
 - **Improvements to public streets and other public facilities that mitigate traffic and/or other development impacts.** We applaud the developer’s decision to use the Alder Drive stub street to connect to the Calvin Crest neighborhood. That connection will reduce the traffic impact on Ivanrest by allowing Calvin Christian students living in Alderwood to walk, bike, or drive to the school through the neighborhood. It also provides a way for motorists to reach the neighborhoods to the south without using Ivanrest.

However, it does all that without encouraging cut-through traffic. Alder is a dead end south of Willow Creek Drive, meaning that traffic will divert and disperse once it leaves Alderwood. Further, while there is a series of connected neighborhoods reaching all the way south nearly to 44th Street, those neighborhoods do not connect to any thoroughfare other than Ivanrest – so all traffic in those neighborhoods is presumably generated by the homes themselves (except in the immediately vicinity of the Calvin Christian schools). Finally, there is no reason to use that interconnected neighborhoods as a “shortcut”, because driving from Alderwood to the southernmost connection to Ivanrest (Pine Meadow Drive) requires *nine* turns, making Ivanrest clearly preferable.

- **Accommodating Pedestrian and Transit Oriented Development.** The nearest transit service is Rapid Route 8, at the corner of Ivanrest and Prairie. There is already a public sidewalk leading to that bus stop, and little the applicant can do to improve the transit connection.



However, from a pedestrian standpoint, we strongly recommend that sidewalks be added to the private streets. The proposed neighborhood has several walking destinations, including Calvin Christian Schools, the trails in the preserved open space, and Calvin Crest Park. Further, most of the homes in the neighborhood will find it more convenient to enter the trails at the access point near Condo Unit 16 (or our recommended added access point near Condo Units 10/11), rather than the access point near Ivanrest. This will lead to pedestrian traffic within the private roads. For all of those reasons, the private roads should have sidewalks.

- **Coordinated Development of Multiple Small Parcels.** This criteria does not apply in this case.
 - **Removal of Blight.** This criteria does not apply in this case.
 - **Consistency with the Master Plan.** The Master Plan calls for the site to be developed with “Low Density Residential”, which the Master Plan defines as 1-6 units per acre. The proposed development falls within that range. As mentioned previously, the Parks and Recreation Plan calls for the land along Buck Creek to be preserved, as is proposed in this application.
- b. **Streets are properly located and designed and safely relate to the surrounding network.** As noted previously, we applaud the connected network of streets that, at the same time, discourages cut-through traffic.

Other than the Alder Drive extension, the proposed roads do not have names. While road naming is not part of the approval process, we note that one road begins running south from Alder Drive, curves east, crosses Alder Drive, curves north, curves west, curves south, and connects to Alder Drive. We recommend that this road, despite being one continuous loop, have at least two different names (perhaps one north of Alder Drive and one south of Alder Drive) to avoid Alder Drive intersecting with the same road three times.

- c. **Site Circulation and Parking must be designed to ensure safety and convenience, as well as harmonious relationships with existing and prospective development on adjacent land.** We see no concerns in this regard.
- d. **Land uses must be functionally, efficiently, and compatibly arranged on the site, and relate well to adjacent uses.** Generally, we have no concerns with the overall layout. We do note that several homes along Willow Creek Drive, which currently have no rear neighbor and back up to woods, will now have rear neighbors. Site Condominium Lots 10-13 are particularly close to the neighboring lots. A small landscaped buffer zone, maintained by the homeowner’s association, in the rear yard of the lots, would help mitigate the impact on the neighbors, and would take pressure off the eventual owners of those relatively small lots to maintain a robust back yard buffer.

Further, Site Condominium Lots 1-5 back onto Ivanrest Avenue. They would also benefit from a small landscaped buffer zone, maintained by the homeowner’s association, in the rear of their lots.

- e. **Public spaces must be of a size, configuration, and location to maximize access and visibility.** While the open space will not be public, it will be a communal amenity for Alderwood residents. As described previously, we applaud the layout of the open space, aside from our recommendation to add one additional access point for the trail system.
- f. **There must be sufficient sewer and water capacity.** The City Engineer will comment on this criteria.



- g. **Potential impacts related to air quality must be addressed.** Although the new homes will add automobile traffic to the general area, that is not a sufficiently large air quality concern to disrupt the approval of the PUD.
- h. **Potential noise impacts related to the PUD and its associated traffic must be addressed.** The proposal is single family homes, which will create more noise and traffic than the existing woods, but the Master Plan envisions development on the site, and the noise and traffic generated from residential are not as hazardous as those generated by other uses.
- i. **The PUD must be compatible with the character of surrounding properties and not interfere with surrounding private and public property.** The proposal is single family homes and preserved open space, in proximity to single family homes. It is a compatible use and design.
- j. **The design of the PUD must be urban in character and emphasize walking and pedestrian access.**
Our recommendation regarding sidewalks on the private streets is further emphasized by this criteria.
- k. **Other Concerns.** All of our concerns and comments have been adequately addressed above.

RECOMMENDATION

Overall, our analysis suggests that the proposal meets the requirements and approval criteria for a Residential Planned Unit Development. However, we do have the following recommended revisions to the Preliminary Plan, and we recommend that these revisions be made prior to Preliminary Plan Approval:

1. The minimum front setback for the condo units should be increased to 30 feet.
2. The minimum "total of two" side setback should be increased to 19 feet.
3. A connection should be made between the trail running parallel to Ivanrest and the sidewalk along Ivanrest.
4. An additional trail spur should be added between Condo Units 10 and 11, as described in this letter.
5. Sidewalks should be added to the private streets.
6. Landscaped buffer zones should be added in the rear of Site Condo Lots 1-5 and 10-13.

Additionally, we have the following considerations for the eventual PUD Agreement and Master Deed/By-Laws:

1. The 30 foot setback from Ivanrest for Site Condo Lots 1-5 should be included in the PUD Agreement.
2. The 35% maximum lot coverage should be included in the PUD Agreement, and referenced in the By-Laws.
3. The 25 foot setback from the southern lot line of Site Condo Lot 5 should be included in the PUD Agreement.
4. The 1,100 minimum floor area requirement should be included in the PUD Agreement, and referenced in the By-Laws.
5. The landscape buffer zones described above should be common elements, maintained by the homeowner's association.
6. Road names should be chosen to ensure that the looping road network does not result in one road intersecting Alder Drive three times.

Please do not hesitate to contact us with any questions.

Respectfully submitted,



McKENNA ASSOCIATES

Christopher Khorey, AICP
West Michigan Manager



Communities for real life.

What we did:

PLANNING

- Township Planner
- Development and Zoning Review Services
- Master Planning
- Zoning

Planning Services

KALAMAZOO CHARTER TOWNSHIP,
KALAMAZOO COUNTY, MICHIGAN

The Charter Township of Kalamazoo, located in Kalamazoo County, has more than 22,000 residents. It is a developing community with an attractive location for both small- and large-scale businesses, including but not limited to industrial facilities, commercial facilities, and mixed-use development. In addition to the existing development located within the Township, expansion continues. To promptly service this new development in not only a timely manner, but also in full compliance with Township Ordinance standards, the Township Planning Department required planning review services to meet the needs of business owners and residents.

McKenna was contracted to perform planning assistance for the Township, with an emphasis on the needs of residents, preserving the character of the Township, and encouraging high-quality development. Our planners work with the Planning Department to perform residential, commercial, and industrial site plan review for new constructions, special land uses, changes of use, and building additions. Our planners actively engage with applicants to ensure compliance with applicable Township standards and regulations while maintaining an open-line of communication with multiple Township departments.



Unified Development Ordinance

CITY OF HOLLAND, MICHIGAN

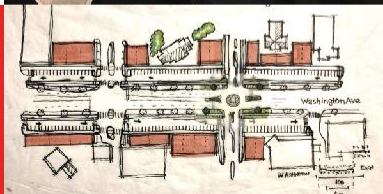
The City of Holland is a historic and well-maintained community, with waterfront, neighborhood business districts, legacy industrial areas, and one of Michigan’s most successful downtowns.

In spite of its strengths, the City’s zoning ordinance was originally written in 1943 and amended—but never fully rewritten—dozens of times since. Recognizing that a code commensurate with the community’s expectations was overdue, Holland leaders engaged McKenna to engage in a comprehensive rewrite. Part of this important effort was to incorporate not only zoning regulations, but also the City’s subdivision ordinance and other development-related standards; accordingly, the codes were renamed the Unified Development Ordinance.

McKenna and City staff engaged in a comprehensive public outreach program, including a week-long charrette, neighborhood meetings, online surveys, stakeholder engagement, and a series of public hearings held around the City.

The ordinance included a number of innovative elements, including:

- A form-based code for the downtown and select corridors and neighborhood business districts.
- A “greenfield” district to ensure that undeveloped sites on the edge of the city would be built out in an urban format.
- A “redevelopment” mixed use district for legacy industrial areas in the core of the City.
- An airport overlay, consistent with MDOT and FAA regulations, to ensure development near the airport would not be incompatible with aviation.
- A progressive landscaping section rooted in sustainability.





MCKENNA

Communities for real life.

What we did:

PLANNING

- Master Planning
- Public Engagement
- Land Use Planning
- Neighborhood Planning

Master Plan

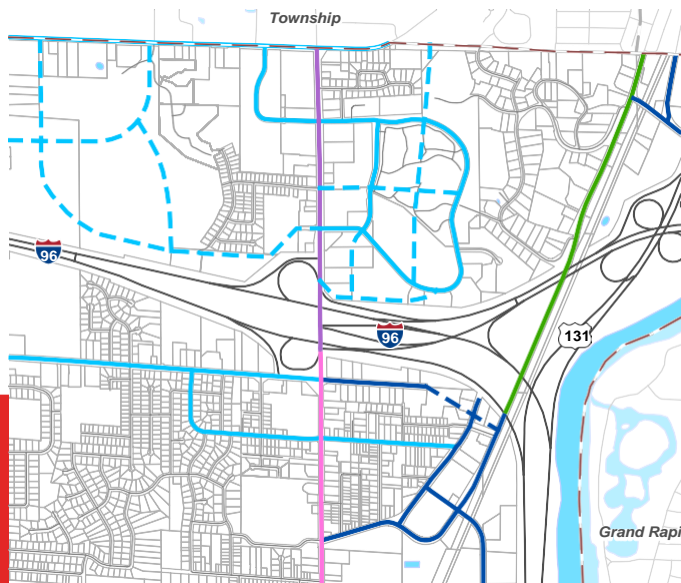
CITY OF WALKER, MICHIGAN

The City of Walker, a large suburban community wrapping north and west of Grand Rapids, had a long history of comprehensive and detailed land use planning. Following its 1998 Master Plan, it undertook a series of sub-area plans. However, by 2019, it was time for a new comprehensive vision.

Along with our partners at Prein&Newhof, McKenna understood that the City’s various neighborhoods had different needs and visions for themselves. So we separated the City into four districts—Alpine, Standale, South Walker, and Northwest Walker – and conducted individualized public engagement, which led to a deep understanding of each neighborhood and how best to address challenges and maximize existing assets.

Then, McKenna and City staff stitched together the four plans like a jigsaw puzzle, creating a vision that worked on a City-wide level, but also addressed individual neighborhood concerns.

Walker 2020
 MASTER PLAN | CITY OF WALKER, MI





MCKENNA

Communities for real life.

What we did:

DESIGN

Placemaking and Public Spaces
Urban Design

PLANNING

Master Planning
Economic Development
Neighborhood Planning
Public Engagement

Livonia Vision 21, the City's Comprehensive Master Plan

CITY OF LIVONIA, MICHIGAN

McKenna partnered with the City of Livonia to develop a truly action-oriented, community driven plan that would build on years of progressive municipal planning. The primary focus for this comprehensive master plan, Livonia Vision 21, was to identify priority steps for the next three (3) years that would continue to secure Livonia for the next 100-years.

Livonia Vision 21 is not only the City's comprehensive policy document directing future decisions for land use, transportation, neighborhoods, infrastructure and open space, among other topics. It is also a community plan that resulted from McKenna's robust public engagement program and was strengthened by the involvement of community members throughout 2018.

Throughout the planning process, there were numerous opportunities for stakeholders to offer ideas and reactions with the 16 member appointed steering committee, administration and elected officials. Community engagement opportunities included online surveys, public meetings, presentations, and workshops. Exercises with the public focused on future land use, mobility, visual preference surveys, and missing middle housing and were designed to facilitate conversation about the most important aspects of the community. Outreach efforts also included an intense, two-day charrette in which three special planning areas for the City were creatively redesigned.

With significant public input, the Livonia Vision 21 Plan positions Livonia for continued success and confirms the aspirations of residents, businesses and stakeholders.



LIVONIA V21
STARTS NOW





Ongoing Planning Consultant Services

CITIES, VILLAGES, AND TOWNSHIPS THROUGHOUT THE MIDWEST

Whether to manage fluctuations in workload, meet difficult timelines, bring in specialized skills, or any number of reasons, communities have long turned to McKenna to provide continuing Planning Department management services.

When you choose McKenna for ongoing planning consultant services, often including zoning administration, you choose a team that is visionary, purposeful, and approachable. As your partner you will find us to be responsible, focused on impact, loyal, and committed to quality.

McKenna's Planning Department staffing and management services include:

MANAGEMENT SERVICES

- Attend and lead during Planning Commission, Zoning Board of Appeals, and Council/Board meetings.
- Provide guidance and assistance regarding local and State legislation, procedures, regulations and planning, zoning and design principles.
- Coordination of community planning activities with other local, county, state, and regional agencies.

REVIEW SERVICES

- Assist applicants through the review process, leading them from concept to permit.
- Review development proposals for compliance with local codes, ordinances, and best practices.

FREQUENT SPECIAL PROJECTS

- Master plans
- Downtown/corridor plans
- Park and recreation plans
- Development codes (zoning, form-based, land development, design, and others)
- Economic development/redevelopment
- Community development

MCKENNA PARTNERS

Since 1979, McKenna has provided trusted planning, zoning, and design services on a day-to-day basis for communities across Michigan, Ohio, Indiana, and Illinois. Michigan communities to whom we are proud to have provided ongoing planning consultant services include:

Buena Vista Charter Township, <i>Saginaw County</i>	Lyon Charter Township, <i>Oakland County</i>
Clawson	Oshtemo Charter City, <i>Kalamazoo County</i>
Dearborn Heights	Oxford
Eastpointe	Plymouth Charter Township, <i>Wayne County</i>
Ecorse	River Rouge
Fenton	Rochester
Flat Rock	Van Buren Charter Township, <i>Wayne County</i>
Franklin	Walled Lake
Fraser	Webberville
Garden City	Westland
Grosse Pointe	White Lake Township, <i>Oakland County</i>
Harper Woods	Williamston
Hazel Park	Ypsilanti
Kalamazoo Charter Township, <i>Kalamazoo County</i>	
Lake Angelus	

At McKenna, we help make communities for real life. From street festivals, traffic calming, roundabouts, downpours, downspouts, and storefronts, to parking spots, coffee shops, and farmers markets, we want you to thrive. No matter the obstacles, no matter the scope, we get down in the weeds with you to plan, design, and build your municipality into a perfectly livable community.



Solutions and Timelines



SERVICES MATCHED TO THE TOWNSHIP

Recognizing Oshtemo Township’s mixture of rural and suburban character types, McKenna’s team will work with the Township’s elected and appointed officials and administration to provide community-sensitive, efficient, effective, and customer friendly zoning & planning assistance. Our approach brings tested planning principles and “right sized” services so the Township continues a path of progressive and sustainable development without disrupting what makes Oshtemo a beloved place by residents.

We “take our clients’ lead” while maintaining a high service level of and technical proficiency. While we have the capabilities to provide a comprehensive and highly active level of service to our clients, it is imperative that the McKenna team’s professionals adopt our communities’ attitudes and behaviors toward new development or reinvestment projects. Lastly, we are not satisfied until our clients are satisfied. We keep working until you get the exemplary service you deserve.

UNDERSTANDING OF OSHTEMO’S NEEDS

The Township’s Request for Proposals (RFP) for professional planning services is straightforward and clear. Local units of government are in need to professional, consistent support and the Oshtemo team has an understanding of just the types of assistance it requires to make sure that development applications and approvals are appropriately paced, and that quality of review and inspection is consistent and fair.

Later sections of this proposal contain the personnel and fee details for the Scope of Work detailed on Page 4 of the RFP, as follows.

PLANNING SERVICES

McKenna's planning, zoning, and community design services are immediately accessible to Township staff and officials, property owners, and investors via phone Monday through Friday, by email, or in-person, as desired and agreed upon. Members of our team are industry leaders in conducting efficient and effective public processes, leading to compelling and comprehensive plans with a strong implementation focus.

1. On-Site Staffing Services

McKenna's planners and zoning administrators are expert in supporting municipal planners by providing on-site staffing services in a variety of communities, including neighboring Kalamazoo Charter Township. We take our lead from the client and are as hands-on or "behind the scenes" as requested and expected. Simply put, your direction will be exactly our mission while we respectfully and unobtrusively support Oshtemo's site while working from Township Hall.

McKenna's Project Managers are selected because they have demonstrated care for their clients, the leaders, residents, and investors of Michigan communities. Oshtemo's proposed Project Managers, Danielle Bouchard and Kyle Mucha, AICP, will work closely with Township staff to deliver a consistent and accurate message to people looking to do business in the Township.

2. Plan Review Services

One of McKenna's core competencies is performing plan review services on behalf of dozens of Michigan communities. McKenna's professional staff will review submitted development applications for consideration by the Planning Commission, Zoning Board of Appeals, and Township Board in a timely manner and at your staff's direction. These may include applications for zoning text or map amendments, site plans, subdivisions, special use permits, variances or planned unit developments, etc.

We are not just "plan checkers". Our job is to facilitate the development process and treat both the public and applicants/investors as customers. We will advocate for the Township's interests in a helpful, courteous, and professional manner. Our follow through is as comprehensive as our reviews.

3. Other Planning Services

As part of our routine service to client communities, McKenna provides all types of "wrap around" activities to support local governments, including corresponding and speaking with applicants; attending public meetings; performing field and other research to support the community's planning and zoning priorities; and any other related and requested service. In addition to our planning and zoning team members, we've included credentials for mapping and graphic design support.

Attending Township meetings is perhaps the most high-profile assignment within this work category; our professionals are accustomed to performing "under pressure" during public meetings. When requested to attend meetings, we will:

- Confer with the Township's designated contact/manager of our services or their designated representative prior to the meeting.
- Provide guidance and assistance during the meeting regarding local and state legislation, procedures, regulations and planning, zoning, and design principles (as called upon by the Chair or directed by our manager).
- Regularly share planners' reports on planning, zoning and development issues, which may affect the Township, if requested by the manager of our work.

AMERICAN PLANNING ASSOCIATION CODE OF PRACTICE

McKenna Project Managers apply the following “Technical Standards of Professional Practice” of the American Planning Association (APA):

1. Meet standards of care.
2. Maintain adequate documentation.
3. Be responsible for technical competence.
4. Possess, maintain and upgrade qualifications specific to project.
5. Avoid errors of commission and omission.
6. Practice due diligence.
7. Present reliable information and disclose substantial deficiencies.
8. Perform required investigation.
9. Explain cause and effect relationships.
10. Consider rational alternatives.
11. Avoid misleading communication.
12. Substantiate findings and recommendations.

ETHICS AND PROFESSIONAL CONDUCT

McKenna project managers follow the Code of Ethics and Professional Conduct of the American Institute of Certified Planners.

The firm’s services are primarily planning and zoning. To us, planning is not a sideline or a loss leader.

Providing planning and zoning services is our job, our passion, and we take pride in it!

5G ORDINANCE DEVELOPMENT

As requested in the RFP, McKenna will use our experience in local regulation of wireless telecommunications and our understanding of State and Federal laws regarding wireless infrastructure buildout to complete a 5G Ordinance for the Township.

As an optional service, McKenna can add a broadband analysis and policy to this process, as described below.

The process will include the following steps:

- 1) **Inventory of Existing Facilities and Wireless Communications Service.** We will work with Township Staff, property owners, and industry representatives to gain a detailed understanding of the current locations of wireless facilities, and the 4G coverage (or any existing 5G coverage) provided by those facilities. *During this phase, if the Township decides to incorporate broadband service into this process, McKenna would review publicly available data on broadband coverage, including interfacing with the Kalamazoo County team that is conducting a County-wide analysis.*
- 2) **Review of Existing Township Ordinances and Policies.** Our team will review the Township’s existing zoning and other ordinances to determine the current policies with regard to wireless telecommunications. This review will determine whether any portions of the Ordinances are in violation of State or Federal law, and well as determining any inefficiencies or aspects that are contrary to the Township’s goal of rolling out high quality 5G service without significant impacts on community character. We will particularly focus on the current regulations on “small cells”, which are a relatively new technology with protections in State Law.
- 3) **Public Outreach Materials.** McKenna’s graphic design team will create graphically rich and engaging materials to be provided (online and through the mail) to Oshtemo residents to explain the shift to 5G technology and how the Township is working to bring improved service while protecting community character. The materials would include a survey asking residents about the quality of their wireless service, and their opinions on wireless facility location and design in their neighborhood. *During this phase, if the Township decides to incorporate broadband service into this process, McKenna would incorporate questions on broadband coverage into the 5G survey.*

- 4) **Determination of Target Upgrade Sites.** Based on the existing facilities and coverage, McKenna will determine parts of the Township where new or upgraded facilities would be most beneficial. These will then be cross referenced with Township-owned land, public rights-of-way, and other siting options with limited impacts on community character. *During this phase, if the Township decides to incorporate broadband service into this process, McKenna would also determine targeted upgrade areas for broadband.*

- 5) **Drafting of 5G Ordinance.** McKenna will draft the new 5G Ordinance, which will be designed to do the following:
 - a. Allow the seamless upgrade of existing facilities to 5G, with limited Township bureaucracy.
 - b. Incentivize new facilities locating at the Target Upgrade Sites.
 - c. Streamline approval processes to speed to deployment of 5G technology.

- 6) **Optional Broadband Policy.** *The deliverable for broadband, if requested, would be a written Township policy, rather than an Ordinance. Since broadband infrastructure runs in public rights-of-way, along telephone lines or underground, it is not subject to Township zoning. Therefore, the Township Broadband Policy would be aimed at advocacy and grant writing to obtain public and private funding to build out new infrastructure. It would not be a regulatory ordinance.*

- 7) **Discussion and Revisions.** McKenna will review the 5G Ordinance (*and, optionally, the Broadband Policy*) once with staff, once with the Planning Commission, and once with the Township Board to confirm it meets Township priorities. We will make any necessary revisions after each meeting.

- 8) **Public Hearing and Adoption.** McKenna will present the new 5G Ordinance at the required Planning Commission public hearing, as well as at the Township Board meeting where the Ordinance will be adopted. *The Broadband Policy can be adopted at the same Township Board meeting, but would not require a Planning Commission public hearing unless the Township desires to hold one.*

5G ORDINANCE DEVELOPMENT TIMELINE

TASK	MONTH							
	1	2	3	4	5	6	7	8
1. Existing Facilities and Service	1							
2. Existing Township Ordinances and Polices		2						
3. Public Outreach Materials			3					
4. Target Upgrade Sites				4				
5. Drafting Ordinance								
6. Discussion and Revisions					5	6,7		
7. Adoption								8, 9

MEETINGS (TIMING NOTED ABOVE)

- | | |
|--|--|
| 1. Staff Meeting: Existing Facilities and Service | 5. Staff Meeting: Draft Review |
| 2. Staff Meeting: Existing Township Ordinances and Polices | 6. Planning Commission Meeting: Draft Review |
| 3. Staff Meeting: Public Outreach Materials Logistics and Strategy | 7. Township Board Meeting: Draft Review |
| 4. Staff Meeting: Target Upgrade Sites | 8. Planning Commission Meeting: Public Hearing |
| | 9. Township Board Meeting: Adoption |

Detailed Cost Proposal

Our proposal is designed to allow the Township to choose the services that Oshtemo deems necessary. We would be happy to help with as much or as little as the Township needs.

Following are lump sum rates for each type of development review service. Additional services can be provided at our hourly rates on the following page.

As noted in the larger projects, such as major Zoning Code Amendments, technical training for Boards and Commissions, or updates to the Township’s Master Plan, Parks and Recreation Plan, Corridor Improvement Authority Establishment, or similar projects, would be governed by separate mutually-agreed-upon Scopes of Work and budgets.

Review Fees

Please find below a sample fee schedule for planning and zoning reviews. McKenna’s zoning review services would be paid for through application fees, so we recommend establishing a fee schedule that covers these amounts, plus an additional amount for Township administration. Fees for revised reviews (when application was not approvable following the first submission) will be 50% of the original fee.

REVIEW TYPE	FEE TYPE		
	Lump Sum	Fixed Base Fee + Additional Fee	Hourly Rate
Subdivision (Plat) Review			
For conventional, manufactured home, commercial, or industrial subdivision			
• Pre-application review	\$500		
• Preliminary plat review tentative approval		\$850 + \$10 per lot	
• Preliminary plat review final approval		\$500 + \$10 per lot	
• Final plat review		\$500 + \$10 per lot	
Site Plan Reviews			
• Residential Review		\$800 + \$10 per dwelling unit / lot	
• Non-Residential		\$800 + \$75 per acre	

REVIEW TYPE	FEE TYPE		
	Lump Sum	Fixed Base Fee + Additional Fee	Hourly Rate
Planned Unit Development			
• Concept plan review		\$700 + \$1,000 escrow	
• Site plan review		\$800 + \$75 an acre + \$1,000 escrow	
• PUD standards review (same as rezoning)		\$700 + \$50 per acre + \$400 escrow	
Special Exception Use		\$700 + \$50 per acre	
Rezone Application Review		\$700 + \$50 per acre	
Conditional Rezone Application Review			*
Land Division / Consolidation		\$300 + \$75 per new parcel	
Historic District / Architectural Comm Review	\$500		
Dimensional (Nonuse) Variance Review	\$500		
Street and Alley Vacation	\$400		
Review of Woodlands / Wetland Plans (includes Field Inspection)			*
Site Traffic Impact Study			*
Master Deed or Similar Document Review	\$500		
Pre-Application or Other Applicant Meetings			*
Revisions			
For each written technical review and recommendation provided by the Consultant because of resubmission of a revised plan	50% of original fee		
Resubmission after 90 days or major revisions	100% of original fee		

* Per Professional Fee Schedule

Hourly Rates for Meetings and Additional Services

Please note that the fees below only apply to services not specifically offered for a lump-sum price in this proposal.

Professional Classification	Rate Per Hour*	
President	\$150	<p>* Rates include the following overhead: Accounting, Advertising and Promotion, Books, Publications and Maps, Business Entertainment, Charitable Contributions, Computers, Furniture and Fixtures, Graphics Supplies and General Insurance, Interest, Legal, Licenses, Meals, Memberships and Subscriptions, Office Equipment, Office Space and Parking, Office Supplies, Postage (Except Overnight), Professional Dues, Software, Taxes and Telephone.</p> <p>These rates do not include photography, outside reproduction, document or materials purchases, which are invoiced additionally. Rates also do not include reimbursable costs for travel, courier, overnight mail, etc. Mileage will be invoiced at the Federal mileage rate.</p> <p>These hourly rates are valid through December 31, 2021, after which they may change per classification by a percentage equal to the increase in the Consumer Price Index for the prior 12 months per U.S. Department of Labor, Bureau of Labor Statistics.</p>
Executive or Senior Vice President	\$140	
Vice President	\$135	
Director	\$130	
Senior Principal or Manager	\$125	
Principal	\$120	
Senior	\$110	
Associate	\$100	
Assistant	\$90	
Consultation, preparation for, and sitting as expert witness in legal matters.	\$200	

Fee Proposal for 5G Ordinance and Optional Broadband Policy

TASK	ITEMIZED FEE
1. Existing Facilities and Service	\$2,500
<i>Optional Inclusion of Broadband</i>	\$1,000
2. Existing Township Ordinances and Policies	\$1,500
3. Public Outreach Materials (<i>No Additional Fee to Include Broadband Questions</i>)	\$3,000
4. Target Upgrade Sites	\$2,500
<i>Optional Inclusion of Broadband</i>	\$1,000
5. Drafting 5G Ordinance	\$2,000
<i>Optional Broadband Policy</i>	\$1,000
6. Discussion and Revisions (<i>No Additional Fee if Broadband Discussed at Same Meeting</i>)	\$2,500
7. Public Hearing and Adoption (<i>No Additional Fee if Broadband Discussed at Same Meeting</i>)	\$1,500
	Total (5G Only): \$15,500
	Total (5G + Broadband): \$18,500

OSHTEMO TOWNSHIP PLANNING FEES

Proposed update 10/7/2021

Item	Fee
General Fees	
Pre-Application Review	\$500
Meeting Fee: If a Planning Commission, Zoning Board of Appeals, and/or Township Board meeting is required this fee is charged per meeting.	\$500
Resubmissions of revised plans	50% of original fee outlined below (not including escrow)
Resubmissions of revised plans after 90 days or major revisions	100% original fee outlined below (not including escrow)
Development Reviews	
Site Plan Review (commercial/office/industrial)	\$800 + \$75 per acre + \$1,000 escrow
Site Plan Review (residential)	\$800 + \$10 per lot/unit + \$1,000 escrow
Site Plan Review for Cell Towers*	\$1,000
Site Plan Amendment	
Minor (Administrative: construction, relocation or screening walls, fences, waste receptacles, lights, and poles)	\$100
Minor (Administrative: other)	\$400 + \$500 escrow
Major (commercial/office/industrial)	\$800 + \$75 an acre + \$1,000 escrow
Major (residential)	\$800 + \$10 per lots/unit + \$1,000 escrow
Special Exception Use	\$700 + \$50 per acre + \$400 escrow
Special Exception Use Amendment (within 6 months of prior approval)	\$400 + \$50 per acre + \$400 escrow
Plat or Site Condominium	
Step 1 - Preliminary Plan Review – Tentative Approval	\$850 + \$10 per lot + \$1,000 escrow
Step 2 – Preliminary Plan Review – Final Approval	\$500 + \$10 per lot + \$4,500 escrow
Step 3 – Final Plat Review	\$500 + \$10 per lot + \$1,000 escrow
PUD/Open Space Community/Open Space Preservation Residential Development	
Step 1 - Concept Plan	\$1,400 + \$50 an acre + \$1,000 escrow
Step 2- Site Plan	\$1,500 + \$75 an acre + \$1,000 escrow
Amendment to Concept Plan	\$500 + \$400 escrow
Zoning Board of Appeals	
Variance Request	\$500 + \$400 escrow
Ordinance Interpretation	\$200 + \$500 escrow
Signage	
New	\$75 + \$25 for each additional sign
Face Change	\$50 + \$25 for each additional sign
Temporary	\$25 per sign
Agricultural Directional	\$10 per sign

Temporary Outdoor Events	
New (one day)	\$150
New (multiple day)	\$400 + \$400 escrow
Pre-Approved Resubmittal (multiple day)	\$50
Zoning/Master Plan Amendments	
Rezoning	\$700 + \$50 per acre +\$400 escrow
Master Plan Amendment	\$700 + \$1,200 escrow
Zoning Ordinance Text Amendment	\$1,000 + \$500 escrow
Other	
Zoning Verification Letter	\$100
Accessory Building Review (residential)	\$100
Temporary Residence Permit	\$100
Address Request Fee	\$40
Land Division of Parcels	\$150
Re-Description of Parcels, Lots, or Building Sites	\$100
Combination of Parcels, Lots, or Building Sites	\$100

Escrow accounts are intended to cover actual costs incurred by the Township for public notices, engineering, legal, landscape architecture, and any outside consultant fees. If costs exceed the escrow payment, additional funds will be required. Residuals will be returned to the applicant.

*Per FCC regulations, the charge for wireless communications facilities permits shall not exceed \$1,000 or actual costs, whichever is less.

Type of Application	Oshtemo Current	Portage	City of Kalamazoo	Kalamazoo Township	Texas Township	Oshtemo Proposed
Rezoning	Ag-R-2: \$1,000; All Other: \$1,500	\$1,130 for 1 st acre+\$80 for each additional	\$550	\$600 + \$1800 escrow	\$600 + \$1,500 Escrow (+900 with concurrent MP update)	\$700 + \$50 per acre+ \$400 escrow + 2x \$500 meeting fees
MP amendment	\$700+\$2,000 escrow	\$1,130 for first acre then 80 for each additional	\$750	\$600 + \$1800 escrow		\$700 + \$1,200 escrow + 2x \$500 meeting fees
PUD Concept Plan	\$700+\$1,000 escrow	\$570 per plan + rezoning fee Commercial: \$850	\$300		\$600+\$1,500 escrow	\$1,400 +\$50 an acre+ \$1,000 escrow + \$500 meeting fee
PUD Site Plan Review			\$550			\$1,500 + \$75 an acre + \$1,000 escrow + \$500 meeting fee
Special Use	\$400	\$340	\$375	\$600 + \$1,000 escrow	\$400 + \$500 escrow	\$700 + \$50 per acre + \$400 escrow + \$500 meeting fee
Special Use Amendment	\$400			\$600 + \$1,000 escrow		\$400 + \$50 per acre + \$400 escrow + \$500 meeting fee
Site Plan Review	\$600 for one structure + \$100 for each additional structure + \$1,500 escrow	Varies by use + sq of building Ex. industrial: \$455+\$6 per \$500 sqft of gross	\$500	\$600 + \$1000 escrow	\$600 + \$1,500 escrow	\$800 + \$10 per lot/unit or \$75 per acre + \$1,000 escrow+\$500 meeting fee

		floor area exclusive of basement space				
Site Plan amendment (minor - admin)	\$250 + \$500 escrow			\$300 + \$1800 escrow		\$400 + \$500 escrow
Site Plan amendment (major)	\$350 + \$1,000 escrow		\$350	\$600 + \$3600 escrow		\$800 + \$10 per lot/unit or \$75 per acre \$1,000 escrow + 500 meeting fee
Plat or Site Condo (step 1)	\$30 per lot + \$1,500 escrow	Plat: \$400 +\$20 per lot Condo: \$455 + \$23 per lot	\$550	\$1080+2000 escrow	\$600+\$1500 escrow	\$850+\$10 per lot+\$1,000 escrow + 2x \$500 meeting fees
Plat or Site Condo (step 2)	\$30 per lot + \$5,000 escrow	Plat:\$600+\$20 per lot Condo: \$680+\$23 per lot	\$550		\$600+TBD escrow	\$500+\$10 per lot + \$4,500 escrow 2x \$500 meeting fees
Plat or Site Condo (step 3)	\$15 per lot + \$1,500 escrow	Plat:\$600+\$35 per lot Condo: \$680+\$40 per lot	\$550		\$600+500 Escrow	\$500+\$10 per lot+\$1,000 escrow+ 2x \$500 meeting fees
Variance Request	\$500	\$340	\$300	\$600+\$500 escrow	\$900	\$500+\$400 escrow+ \$500 meeting fee
Zoning Ordinance Text amendment	\$1,000 + \$500 escrow	\$850	\$550	\$600 + \$1800 escrow	\$600+\$1,500 escrow	\$1,000 + \$500 escrow + 2x \$500 meeting fees
Pre application				\$100 per hour (conference during office hours) + potential additional fees		\$500

Signs	New: \$75 Temp:\$25 Alt:\$50	Per application New sign \$110 Temp:\$55 Alt:\$55	New sign: \$75 Temp: 50 Alt:50	Sign permit 110 Temp sign 100	Application Fee: \$75 Per Sign Fee: \$25	New: \$75 Temp:\$25 Alt:\$50 Per Sign more than 1 Fee: \$25
Temporary outdoor event	New (md):\$400 New (one day): \$150 Pre approved: \$50	Business Special Event: \$110 per application		??Entertainment annual: \$120 ??Temporary use – less than 30 days \$180 -more than 30 days \$360		New (md):\$400 + \$400 escrow+\$500 meeting fee New (one day): \$150 Pre approved: \$50

City of Kalamazoo: <https://www.kalamazoocity.org/cpdfeeschedule/file> (appears to start on page 8)

Portage: <https://www.portagemi.gov/DocumentCenter/View/158/Fee-Schedule-for-Planning-and-Zoning-PDF>

Kalamazoo Township: http://www.ktwp.org/Portals/16/Planning%20Zoning/Fee%20Schedule%20-%20updated%20september%208%202021.pdf?ver=zQWxskUb-3HKDCdML3_9pg%3d%3d

Texas Township (prices listed under application) <http://www.texastoeacwnship.org/planningzoningdevelopment/>

BUDGET AMENDMENT REQUEST

(Requesting funds for a line item in addition to the approved budget)

Date: _____

Department Head Name: _____

Fund Name: _____


Amount

Additional Funds Request for: _____
(description and GL number) _____

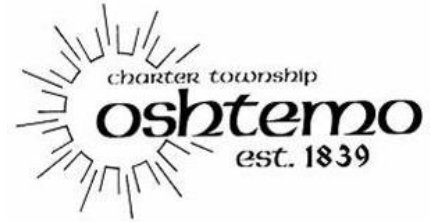
Funds requested from: _____
(description and GL number) _____

Explanation of request:

Supervisor/Clerk/Treasurer Review:
(pending or date reviewed)



Board Authorization:
(pending or date authorized)



Memorandum

Date: 8 October 2021
To: Township Board
From: Josh Owens, Assistant Supervisor
Subject: Oshtemo Charter Township – 2022 Annual Budget

Objective

Township Board consideration to set a public hearing on November 9th, 2021 for the 2022 annual detailed budget.

Background

The 2022 Budget was developed through discussion with Staff and the Township Board at public meetings starting in May and continuing into October. The Budget is compiled and provided for public review in mid-October.

2022 Budget & Capital highlights include:

- Local Roads
 - Local Road Maintenance and PAR Program Match with KCRC (\$710K)
- Police Protection
 - Kalamazoo County/KCSO Contract – 2 Sergeants; 9 Deputies, providing an increase of (2) Deputies (\$1.4M)
 - Facility upgrades (\$100K)
- Fire & EMS Services
 - Third, and final, phase of portable radio replacement (\$49K)
 - Fire Station 1 Roof Replacement/Fire Stations Maintenance (\$106K)
 - PPE washer for turnout gear at Station 1 (\$13K)
 - PPE dryers for turnout gear Station 1 & 2 (\$22K)
- Information Technology
 - Switch upgrades phase 2 for Fire Station 1 and Township Offices (\$18K)
 - Township website replacement (\$17K)
 - Phone system upgrade with hardware (\$21K)
- Sewer
 - SAW Maintenance/Repairs (\$159K)
- Cemeteries, Buildings & Grounds
 - Township Hall roof replacement (\$140K)
 - Township Hall carpet replacement phase 1 (\$30K)
 - Maintenance facility structure and modifications (\$350K)
- Parks
 - Tennis and basketball repair and paint (\$15K)

- Disc golf basket replacement (\$5K)
 - Old Township Hall painting (\$20K)
- Street Lighting
 - Continued LED Conversions (\$50K)
- TIF Districts
 - Downtown Development Authority Stadium Drive sidewalk through DDA area (\$600K)
 - South Drake Corridor Improvement Authority (SoDA) annual reimbursement to Township for Drake Rd. path (\$30K)
- Planning
 - Master Plan update (\$40K)
- American Rescue Plan Act Fund
 - Infrastructure (\$100K)
 - Broadband baseline assessment (\$5K)

Oshtemo Charter Township Detailed 2022 Budget Request

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
GENERAL FUND ESTIMATED REVENUE						
101-001-40100		Carryover		1,577,754		700,000
	600,000	<i>Loan to DDA (3 year repayment)</i>				
101-001-40300		Current Real Property Tax	800,020	797,874	886,600	823,038
		<i>Current Levy .96</i>				
101-001-40700		Delq P.P. Tax		2,500		20,000
101-001-43000		Payments in Lieu of Taxes	4,546	2,000	13,350	3,000
101-001-44500		Other Tax Related Revenue	86,999	2,000	2,346	2,000
101-001-44600		Penalties/Interest Taxes	30,257			
101-001-44700		Property Tax Admin Fee	387,332	371,000	395,962	395,588
101-001-45200		Animal Licenses	200	200		
101-001-45300		Manufactured Home Comm Fees	13,039	5,000	5,315	5,000
101-001-45400		Hawkers/Peddlers	80	100	30	100
101-001-47500		Miscellaneous			26,535	
101-001-47600		Reimburse Revenue	16,870	21,500	(1,909)	
101-001-47700		SRS-Right of Way	17,555	18,000	16,621	18,000
101-001-48000		Federal Grant	19,844			
101-001-57400		SRS-Sales Tax Statutory	63,950	35,000	38,372	78,277
101-001-57500		SRS-Sales Tax Constitutional	1,921,293	1,800,000	1,063,398	2,009,198
101-001-57600		Other Grants	38,513	55,000		230,000
	30,000	SoDA Reimb for Drake Path				
	200,000	1st of 3 annual DDA loan payments				
101-001-60300		FOIA/Subpoena Payment	906	2,500	471	2,500
101-001-60500		Cable Fees	168,385	165,000	78,123	165,000
101-001-60700		Election Reimbursement		10,000		
101-001-61400		Planning Escrow	(78)			
101-001-61500		Planning Fees	27,025	30,000	24,490	30,000
101-001-61700		Metal Recycling Revenue	2,576	3,000	2,747	3,000
101-001-61800		Sidewalk Permit/Inspection	8,310	1,500	1,035	1,500
101-001-63400		Grave Openings	19,584	20,000	12,930	20,000
101-001-64300		Sales of Lots	12,700	10,000	14,880	10,000
101-001-64500		Monument Installations	5,309	4,000	7,645	5,000
101-001-66500		Interest Earned	37,571	14,000	2,186	2,500
101-001-69900		SMBA Facility Fee	20,250	21,000	21,000	22,000
TOTAL ESTIMATED REVENUE			3,703,036	4,968,928	2,612,127	4,545,701

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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TRANSFER TO OTHER FUNDS

101-110-96510		Transfer to Sewer		250,000		
101-110-96525		Transfer to Cemetery	5,000	5,000		5,000
101-110-96550		Transfer to Other Funds				600,000
		DDA loan (Stadium south side walk construction 2022)				
101-110-96560		Transfer to Parks Fund	325,000	250,000		250,000
TOTAL GENERAL FUND TRANSFERS TO OTHER FUNDS			330,000	505,000		855,000

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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SUPERVISOR'S OFFICE APPROPRIATIONS

101-171-70200		Salaries	221,036	204,819	145,459	198,116
		<i>Supervisor (1 FTE)</i>				
		<i>Assistant Supervisor (1 FTE; 90%)</i>				
		<i>HR/Benefit Coordinator (1 FTE)</i>				
		<i>Admin Assistant (.92; 20%)</i>				
101-171-71500		Payroll Taxes - FICA	16,325	15,669	10,533	15,156
101-171-72200		Pension Plan	17,429	16,385	(2,815)	15,849
TOTAL SUPERVISOR'S OFFICE			254,790	236,873	153,177	229,121

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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CLERK'S OFFICE APPROPRIATIONS

101-173-70200		Salaries	123,057	118,482	83,286	117,795
		<i>Clerk (1 FTE)</i>				
		<i>Deputy Clerk</i>				
		<i>Assistant Clerk (80% Clerk, 20% General)</i>				
		<i>Admin Assistant (.92 FTE; 20%)</i>				
101-173-71500		Payroll Taxes - FICA	8,840	9,064	6,001	9,011
101-173-72200		Pension Plan	7,787	9,479	385	9,424
TOTAL CLERK'S OFFICE			139,684	137,025	89,672	136,230

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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TREASURER'S OFFICE APPROPRIATIONS

101-174-70200		Salaries	98,372	90,030	71,234	97,358
		<i>Treasurer (1 FTE)</i>				
		<i>Assistant Treasurer (.92 FTE; 60%)</i>				
		<i>Deputy Treasurer</i>				
101-174-71500		Payroll Taxes - FICA	7,190	6,788	5,075	7,448
101-174-72200		Pension Plan	5,811	7,098	922	7,789
101-174-73000		Postage	5,221	7,500	2,910	
TOTAL TREASURER'S OFFICE			116,594	111,416	80,141	112,595

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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TRUSTEES APPROPRIATIONS

101-175-70200		Salaries	23,530	36,000	18,660	50,000
101-175-71500		Payroll Taxes - FICA	1,800	2,880	1,428	4,000
TOTAL TRUSTEES			25,330	38,880	20,088	54,000

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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ELECTIONS APPROPRIATIONS

101-191-71500		Payroll Taxes - FICA	159	100		
101-191-72200		Pension Plan	88	100		
101-191-72800		Supplies	20,177	8,000	375	15,000
	15,000	<i>Absentee envelopes, precinct supplies, secrecy sleeves, ID cards, master cards</i>				
101-191-73000		Postage	31,691	13,550	(582)	20,000
101-191-80800		Precinct Workers	49,588	24,500	(400)	40,000
101-191-82670		Facility Rental Fees	1,000	1,000		750
101-191-90300		Legal Notices	(1)	200		
101-191-97000		Capital Outlay-Equipment	3,325			1,000
TOTAL ELECTIONS			106,027	47,450	(607)	76,750

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
INFORMATION TECHNOLOGY APPROPRIATIONS						
101-201-70200		Salaries/Clerical	42,200	56,000	38,585	57,600
		<i>IT Coordinator (1 FTE; 80%)</i>				
101-201-71500		Payroll Taxes - FICA	3,051	4,284	3,474	4,406
101-201-72200		Pension Plan	3,058	4,480	318	4,608
101-201-72800		Supplies	2,145	3,000	732	5,000
	5,000	<i>Cables, Keyboards, Monitors, Mouse devices, WFH Support</i>				
101-201-80500		Computer Support	98,506	167,640	129,160	148,855
	21,600	<i>BS&A Annual Support</i>				
	5,000	<i>Encode Ordinance Hosting</i>				
	1,300	<i>Apex Software</i>				
	3,180	<i>BS&S Building Seats</i>				
	62,400	<i>Secant Cloud Services</i>				
	1,375	<i>Web Page (Annual Hosting, Support, and Training)</i>				
	3,600	<i>GIS Licensing (3 Concurrent Seats)</i>				
	500	<i>Community Center Wi-Fi</i>				
	8,000	<i>Laserfiche</i>				
	11,000	<i>Fiber Optic dedicated Line (EVC) transport service and Internet</i>				
	12,400	<i>Printer Services (Central and Desktop)</i>				
	15,000	<i>Phone Services (current phone system, partial year plus upgrade system)</i>				
	500	<i>Technology Equipment Recycling</i>				
	3,000	<i>Adobe Support (14 Concurrent Licenses)</i>				
101-201-90000		Cell Phone			73	1,100
101-201-96200		Miscellaneous			1,788	
101-201-97000		Capital Outlay	6,993	42,750	9,027	52,500
	10,000	<i>Computer Replacements</i>				
	2,000	<i>New Hire Computers</i>				
	18,000	<i>Switches Upgrades (Station 1 & Township Hall)</i>				
	17,000	<i>Web Site Upgrade</i>				
	5,500	<i>Phone System Upgrade</i>				
TOTAL INFORMATION TECHNOLOGY			155,953	278,154	183,157	274,069

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
ASSESSING DEPT APPROPRIATIONS						
101-209-70200		Salaries	118,883	121,322	86,807	121,493
		<i>Assessor (1 FTE)</i>				
		<i>Assistant to Assessor (1 FTE)</i>				
101-209-70300		Board of Review Salaries	2,730	3,000	2,340	
101-209-71500		Payroll Taxes - FICA	9,055	9,324	6,613	9,294
101-209-72200		Pension Plan	9,662	9,744	(1,436)	9,719
101-209-72800		Supplies	1,095	1,000	237	1,000
101-209-73000		Postage	6,601	7,250	6,414	
101-209-80700		Contracted Appeals	67,881	60,000	68,236	70,000
101-209-82000		Engineering Fees	12,792	20,000	9,562	20,000
101-209-82600		Legal Fees	29,043	20,000	14,460	36,000
101-209-87000		Mileage		800		800
101-209-90300		Legal Notices	865	1,200	(613)	1,200
101-209-95800		Education/Dues	1,412	5,000	120	5,000
101-209-97000		Capital Outlay-Equipment	7,776	11,000	3,416	11,000
	8,000	<i>BS&A Programming Services</i>				
	2,500	<i>Pivot Point Software/Assessing Mobile Technology</i>				
	500	<i>Misc.</i>				
TOTAL ASSESSING DEPT			267,795	269,640	196,156	285,506

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
CEMETERIES, BLDGS, GROUNDS APPROPRIATIONS						
101-218-72800		Supplies	243	1,500		1,500
101-218-75100		Vehicle Maintenance	13	3,000	30	3,000
101-218-75300		Grounds Maint Equipment	939	2,500	419	2,500
101-218-75700		Tools & Supplies	139	1,500	75	1,500
101-218-76000		Facility Supplies	1,098	4,900	3,601	4,300
	3,500	<i>Parts and Supplies used in Maintenance of Facilities</i>				
	800	<i>LED projects</i>				
101-218-76600		Expendable Supplies	2,580	3,000	432	3,000
101-218-80500		Contracted Snow Removal		1,000		1,000
101-218-80600		Contracted Lawn Maintenance	9,600	12,500	6,800	12,500
101-218-80800		Contracted Grave Openings/Foundations	20,059	20,000	18,934	20,000
101-218-86800		Fuel, Oil & Grease	373	1,500	310	1,500
101-218-92000		Water	1,537	2,000	777	2,100
101-218-92100		Electric	17,013	23,000	11,738	24,400
101-218-92300		Heat	2,520	4,000	2,052	4,250
101-218-93100		Maintenance Services	17,877	28,700	11,924	29,373
	4,000	<i>Trash Services</i>				
	200	<i>Irrigation System Close</i>				
	740	<i>Security System Monitoring</i>				
	990	<i>Security Video Service</i>				
	2,230	<i>Window Cleaning</i>				
	1,500	<i>Carpet Cleaning</i>				
	8,400	<i>Facility Cleaning Service</i>				
	200	<i>Annual Fire Extinguisher Certification</i>				
	302	<i>Annual Fire Suppression System Testing</i>				
	840	<i>Generator Servicing</i>				
	552	<i>Pest Control</i>				
	552	<i>Septic Systems Servicing</i>				
	8,867	<i>Systems Repairs</i>				
101-218-97400		Capital Outlay	2,852	624,389	9,922	621,000
	350,000	<i>Maintenance Facility Structure and Modifications</i>				
	10,000	<i>Asphalt Maintenance</i>				
	20,000	<i>Cemetery Maintenance</i>				
	60,000	<i>Twp Office, Public Restrooms Sanitary Sewer Connections (Connections and Fee)</i>				
	30,000	<i>Replacement Hall Carpet</i>				
	140,000	<i>Roof Replacement Township office</i>				
	7,000	<i>Township Chairs (Ph 2)</i>				
	4,000	<i>Security Cameras</i>				
TOTAL CEMETERIES, BLDGS, GROUNDS			76,843	733,489	67,014	731,923

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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FINANCE & LEGAL APPROPRIATIONS

101-223-82500		Accounting & Audit Fees	49,456	62,500	50,646	62,500
	14,500	<i>Annual Audit & Single Audit</i>				
	48,000	<i>Accounting Consulting Services (prepare financial stmnts, month end, etc.)</i>				
101-223-82600		Legal Fees	58,314	50,000	35,517	50,000
TOTAL FINANCE & LEGAL			107,770	112,500	86,163	112,500

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
INSURANCE & BONDS APPROPRIATIONS						
101-234-71600		Health & Life Insurance	261,896	214,900	188,005	261,500
	235,000	<i>Health Insurance</i>				
	3,500	<i>Life Insurance</i>				
	9,000	<i>ST/LT Disability</i>				
	1,800	<i>HRA/FSA Admin Fees</i>				
	3,200	<i>Long Term Care</i>				
	9,000	<i>In Lieu of</i>				
101-234-72500		Retiree Health Care	75,605	75,600	(74,834)	80,000
	80,000	<i>Full Time Employees Defined Contribution Plan</i>				
101-234-91100		Worker's Compensation	7,137	12,000	7,366	12,000
101-234-91200		General Insurance	44,466	50,000	28,743	50,000
	50,000	<i>Liability/Vehicles/Property</i>				
TOTAL INSURANCE & BONDS			389,104	352,500	149,280	403,500

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
GENERAL TWP OPERATIONS APPROPRIATIONS						
101-249-70200		Salaries	98,284	103,062	66,744	109,910
		<i>Maintenance Director (1 FTE; 60%)</i>				
		<i>General Maintenance (1 FTE; 45%)</i>				
		<i>General Maintenance (1 FTE; 45%)</i>				
		<i>Admin Assistant (.92 FTE; 20%)</i>				
		<i>Admin Assistant (.92 FTE; 60%)</i>				
		<i>Assistant Clerk (1 FTE; 20%)</i>				
101-249-70400		In Lieu Of Insurance	7,677		5,058	
101-249-71500		Payroll Taxes - FICA	7,467	7,984	5,080	8,408
101-249-72200		Pension Plan	7,284	7,972	(854)	8,793
101-249-72800		Supplies	10,266	11,000	(269)	11,000
101-249-72900		Petty Cash	300			
101-249-73000		Postage	12,920	15,000	11,370	37,500
	37,500	<i>Planning \$2000, PWs \$1500, Treas \$7500, General \$19,000, Assessing \$7500</i>				
101-249-75100		Vehicle Maintenance		1,500	66	1,500
101-249-80800		Contracted Services	69,220	55,344	36,026	2,400
	2,400	<i>Maintenance - Hazardous Communication</i>				
101-249-85300		Telephone	5,923	7,000	4,479	
101-249-86800		Fuel, Oil & Grease	190	800	538	800
101-249-87000		Mileage	270	500	241	500
101-249-87200		New Hire Expenses	9,724	6,000	7,392	8,000
101-249-90300		Legal Notices	18,063	18,000	8,659	18,000
101-249-93300		Equipment Maintenance	12,261	12,400	6,898	
101-249-95600		Household Hazard Waste	17,696	20,000	13,244	20,000
101-249-95700		Public Education	14,914	45,000	12,030	45,000
	35,000	<i>Newsletter & Other Communications</i>				
	10,000	<i>Community Survey</i>				
101-249-95800		Education/Dues	13,913	20,000	20,253	20,000
101-249-95900		Trash Collection	46,082	51,000	34,291	53,500
	52,000	<i>Township Trash Day Operations</i>				
	1,500	<i>Township Trash Day Staffing</i>				
101-249-96100		BOR/MTT Refunds	9,511	6,000	6,554	10,000
101-249-96200		Miscellaneous			(52,606)	
101-249-96300		Contingency Items	422	1,962		
101-249-97600		Capital Outlay	41,942			
TOTAL GENERAL OPERATIONS			404,329	390,524	185,194	355,311

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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LEGAL DEPT APPROPRIATIONS

101-250-70200		Salaries	269,252	232,500	170,747	205,260
		<i>Attorney (1 FTE)</i>				
		<i>Paralegal Administrative Assistant (.8 FTE)</i>				
101-250-71500		Payroll Taxes - FICA	16,411	16,404	12,007	14,409
101-250-72200		Pension Plan	21,656	18,600	(3,156)	16,421
101-250-72800		Supplies	1,720	1,000	255	1,000
101-250-83000		Departmental Billings	(90,414)	(99,000)	(65,840)	(84,800)
101-250-87000		Mileage		500		500
101-250-95500		Law Library/Archives	14,049	12,000	7,765	12,000
101-250-95800		Education/Dues	699	1,000	1,167	1,400
101-250-97000		Capital Outlay	363	600	160	600
TOTAL LEGAL DEPT			233,736	183,604	123,105	166,790

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
PUBLIC WORKS DEPT APPROPRIATIONS						
101-506-70200		Salaries	85,014	77,636	53,966	63,678
		<i>Public Works Director (1 FTE; 30%)</i>				
		<i>Public Works Project Manager (1 FTE; 30%)</i>				
		<i>Public Works Technical Specialist (.38 FTE 30%)</i>				
		<i>Public Works Technical Specialist (.38 FTE 70%)</i>				
101-506-71500		Payroll Taxes - FICA	6,249	8,485	3,849	4,871
101-506-72200		Pension Plan	7,333	5,730	(2,880)	5,094
101-506-72800		Supplies	117	500		500
101-506-73000		Postage	221	1,500	1,550	
101-506-82000		Engineering Fees	239	5,000	2,511	65,000
	5,000	<i>General Civil Engineering</i>				
	10,000	<i>GIS Services</i>				
	10,000	<i>N Ave 9th to 11th (NM/coord w/RCKC project)</i>				
	20,000	<i>Parkview 11th to 12th (NM/coord w/RCKC project)</i>				
	20,000	<i>Parkview 9th to 11th (NM/coord w/RCKC project)</i>				
101-506-82600		Legal Fees	12,660	5,000	3,120	6,000
101-506-87000		Mileage	827	500	668	1,500
101-506-95200		Road Project Costs	362,072	240,000	245,604	
101-506-95300		Storm Sewer Costs		15,000		7,500
101-506-95800		EDUCATION/DUES		2,000		2,000
101-506-97600		Capital Outlay	992,851	943,760	292,769	60,000
	40,000	<i>NM Maintenance Inventory & Asset Management Plan</i>				
	20,000	<i>Repairs & Network Connections (Infill)</i>				
101-506-97600.NMDRDR		Non-Motorized Drake Rd				1000
101-506-97600.NMDRSA		Non-Motorized Drake Safety Grant				5000
101-506-97600.NMDRTA		South Drake Phase 2 TA				6000
101-506-97600.NMKLAV		Non-Motorized Facility KL Ave				145000
101-506-97600.SWGMD		Sidewalk, Green Meadow				2000
101-506-97600.SWMHD		Sidewalk, Maple hill and Croyden				2000
TOTAL PUBLIC WORKS DEPT			1,467,583	1,305,111	601,157	377,143

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
PLANNING DEPT APPROPRIATIONS						
101-805-70200		Salary	118,445	133,369	94,316	125,497
		<i>Planning Director (1 FTE)</i>				
		<i>Zoning Administrator (1 FTE)</i>				
		<i>Admin Assistant (.92 FTE; 20%)</i>				
101-805-70300		SALARY-PC/ZBA	8,300	14,380	5,285	15,000
101-805-71500		Payroll Taxes - FICA	9,174	10,203	7,587	9,601
101-805-72200		Pension Plan	7,403	10,670	1,125	10,040
101-805-72800		Supplies	251	1,000	24	500
101-805-73000		Postage	32	2,000		
101-805-80100		GIS Expense	1,964	14,000	5,037	14,000
101-805-80800		Consultants	13,462	29,000	5,175	80,000
	20,000	<i>General Planning Consultant Services</i>				
	40,000	<i>Master Plan Update</i>				
	10,000	<i>Code Amendments</i>				
	10,000	<i>Recorder of Minutes</i>				
101-805-82000		Engineering Fees	696	3,000	310	2,000
101-805-82600		Legal Fees	15,909	32,000	21,030	32,000
101-805-87000		Mileage		300		300
101-805-90300		Legal Notices	13,754	15,000	6,188	15,000
101-805-95800		Education/Dues	1,969	5,340	1,796	5,300
TOTAL PLANNING DEPT			191,359	270,262	147,873	309,238

GENERAL FUND TOTAL ESTIMATED REVENUE

4,545,701

GENERAL FUND TOTAL ESTIMATED APPROPRIATIONS

4,479,676

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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PARKS FUND ESTIMATED REVENUE

107-751-40100		Carryover		121,800		25,000
107-751-46000		Donations - Restricted	14,000	10,000		10,000
107-751-46100		Donations - Unrestricted	5,437		6,239	5,000
	5,000	<i>Soccer and tennis lesson income</i>				
107-751-46200		Grant Revenues	95,205	13,650		
107-751-47200		Rental Fee - Grange	740	3,000	1,565	3,000
107-751-47300		Rental Fee - Oshtemo Community Center	3,290	5,500	2,625	5,500
107-751-47400		Rental Fee - Twp Park Pavilion	2,190	6,000	8,740	8,500
107-751-47500		Rental Fee - Flesher Pavilion	3,455	4,000	6,940	6,500
107-751-47600		Rental Fee - Flesher Gazebo	625	500	445	500
107-751-47700		Rental Fee - Drake Farmstead		2,000	300	2,000
107-751-66500		Interest Earned	136	13,300	83	14,500
107-751-67500		Transfer from General Fund	325,000	250,000		250,000
TOTAL ESTIMATED REVENUES			464,864	429,750	26,937	330,500

PARKS FUND APPROPRIATIONS

107-756-70210		Salaries	69,721	77,953	65,766	109,673
		<i>Parks Director (1 FTE)</i>				
		<i>Maintenance Director (1 FTE; 30%)</i>				
		<i>General Maintenance (1 FTE; 35%)</i>				
		<i>General Maintenance (1 FTE; 35%)</i>				
		<i>Seasonal Maintenance</i>				
		<i>Seasonal Maintenance</i>				
107-756-71500		Payroll Taxes - FICA	5,156	5,963	4,895	8,390
107-756-72200		Pension Plan	4,665	5,697	144	8,150
107-756-72800		Program/Marketing Supplies	140	3,000	432	1,000
107-756-75100		Vehicle Maintenance		2,600	15	2,600
107-756-75300		Grounds Maint Equipment	1,587	4,500	2,439	4,500
107-756-75700		Tools & Supplies	173	300	104	300
107-756-76000		Facility Supplies	724	6,300	4,909	4,300
	3,500	<i>Parts and Supplies used in Maintenance of Facilities</i>				
	800	<i>LED projects</i>				
107-756-76600		Expendable Supplies	2,401	4,000	1,682	5,000
107-756-80500		Contracted Snow Removal		1,000		1,000
107-756-80800		Consultant	4,360	80,600	50,309	16,000
	5,000	<i>Drake KL neighborhood park (community outreach, schematic design)</i>				
	5,000	<i>Fruit Belt Trail east connection (community outreach, analysis of options, cost comparisons)</i>				
	3,000	<i>Communications and marketing plan for parks facilities</i>				
	3,000	<i>MNRTF Development Grant application assistance</i>				
107-756-82500		Accounting & Audit Fees	1,850	3,000	2,050	3,000
107-756-82600		Legal Fees	1,860	2,000	3,300	2,000
107-756-85300		Telephone	1,889	2,500	1,640	2,000
107-756-86800		Fuel, Oil & Grease	1,166	1,500	1,160	1,700

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
107-756-92000		Water	1,431	2,000	1,068	2,100
107-756-92100		Electric	5,566	8,700	3,774	9,200
107-756-92300		Heat	4,636	6,500	4,078	7,900
107-756-93100		Maintenance Services	17,718	26,015	15,267	32,861
	1,050	<i>Elevator Inspection Services</i>				
	1,050	<i>Fire Alarm System Monitoring</i>				
	5,300	<i>Systems Repairs</i>				
	3,360	<i>Trash Collection</i>				
	2,268	<i>Porta Jons</i>				
	1,436	<i>Window Cleaning</i>				
	400	<i>Carpet Cleaning</i>				
	13,600	<i>Cleaning Services</i>				
	150	<i>Irrigation System Close</i>				
	300	<i>Annual Fire Extinguisher Certification</i>				
	700	<i>Generator Servicing</i>				
	1,006	<i>Pest Control</i>				
	1,700	<i>Flesher Landscape Service</i>				
	320	<i>Grange Termite Remediation</i>				
	221	<i>Septic Systems Servicing</i>				
107-756-95800		Education/Dues	861	1,200	300	1,200
107-756-97400		Capital Outlay/Improvements	125,244	114,000	21,492	99,400
	2,000	<i>Planting & tree maintenance</i>				
	10,000	<i>Parking lot maintenance</i>				
	3,500	<i>Playground safety surface</i>				
	2,700	<i>Rain garden and wildflower maintenance - KNC</i>				
	5,000	<i>Drake Farmstead Park (DFP) prairie maintenance and seed along new Croyden sidewalk</i>				
	2,000	<i>DFP invasive species management with KNC</i>				
	4,000	<i>DFP pole lights along trail</i>				
	6,000	<i>DFP acoustic improvements in carriage barn</i>				
	2,000	<i>DFP surveillance cameras with Wi-Fi</i>				
	10,000	<i>DFP gutters</i>				
	1,200	<i>DFP driveway permit and apron upgrades</i>				
	1,000	<i>DFP park signs at Drake and Croyden</i>				
	1,000	<i>Grange Hall paint lower level</i>				
	500	<i>Grange Hall park sign</i>				
	5,000	<i>Township Park replace disc golf baskets</i>				
	15,000	<i>Township Park tennis and basketball repair and paint</i>				
	1,500	<i>Flesher Field low mow test area with KNC</i>				
	1,000	<i>Flesher Field trail improvements and connection to Fruit Belt</i>				
	5,000	<i>Oshtemo Community Center (OCC) gutters and heat tape</i>				
	20,000	<i>Old Township Hall scrape and paint exterior</i>				
	1,000	<i>Fruit Belt Trail short term safety and access improvements</i>				
107-756-97700		Capital Outlay/Equipment	33,509	54,800		
107-756-98000		Capital Outlay/Oshtemo Comm Center				2,500
	2,500	<i>Repaint Community Center Sign</i>				

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
107-756-98100		Capital Outlay/Drake House	300	3,000		3,000
TOTAL PARKS FUND			284,957	417,128	184,824	327,774

PARKS FUND TOTAL ESTIMATED REVENUE
PARKS FUND TOTAL ESTIMATED APPROPRIATIONS

330,500
327,774

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
CEMETERY TRUST FUND REVENUE						
151-001-66500		Interest Earned	5		4	
151-001-67500		Transfer from General Fund	5,000	5,000		5,000
TOTAL CEMETERY TRUST FUND			5,005	5,000	4	5,000

CEMETERY TRUST FUND REVENUE
CEMETERY TRUST FUND APPROPRIATIONS

5,000

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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LOCAL ROAD FUND REVENUE

204-000-40300		Current Real Property Tax				1,000,000
204-001-66500		Interest Earned				500
TOTAL LOCAL ROAD FUND						1,000,500

LOCAL ROAD FUND APPROPRIATIONS

204-506-70200		Salaries/Clerical				18,562
		<i>Public Works Director (1FTE; 10%)</i>				
		<i>Public Works Project Manager (1 FTE; 10%)</i>				
		<i>Public Works Technical Specialist (.38 FTE; 10%)</i>				
		<i>Public Works Technical Specialist (.38 FTE; 10%)</i>				
204-506-71500		Payroll Taxes - FICA				1,420
204-506-72200		Pension Plan				1,485
204-506-82100		Professional Fees				25,000
	20,000	<i>Road Economic Development Plan</i>				
	5,000	<i>Parkview/Atlantic Intersection Improvements</i>				
204-506-82500		Accounting & Audit Fees				1,000
204-506-97600		Capital Outlay				710,000
	710,000	<i>Road Preventive Maintenance (plus \$240k RCKC PAR match dollars = \$950K)</i>				
TOTAL LOCAL ROAD FUND						757,467

LOCAL ROAD FUND TOTAL ESTIMATED REVENUE

1,000,500

LOCAL ROAD FUND TOTAL ESTIMATED APPROPRIATIONS

757,467

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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FIRE FUND - OPERATIONS ESTIMATED REVENUE

206-001-40100		Carryover		22,000		
206-001-40200		Current Property Tax Levy	2,453,087	2,613,722	2,670,406	2,630,714
		<i>82% of 3.75 SAD</i>				
206-001-40900		Act 198 Tax Collection				1
206-001-43000		Payments in Lieu of Taxes				48,975
		<i>Evergreen North, Aaron Glenn, Hope Woods, Pinehurst</i>				
206-001-47500		Miscellaneous	305		13,167	
206-001-47700		FALSE FIRE ALARM FINES	126		13,089	2,500
206-001-48000		Federal Grant	25,000			
206-001-61000		Other Services Provided	3,400			
206-001-66500		Interest Earned	6,083	5,000	700	1,000
TOTAL ESTIMATED			2,488,001	2,640,722	2,697,362	2,683,190

FIRE FUND ADMINISTRATION APPROPRIATIONS

206-336-70200		Salaries	950,527	961,116	684,851	1,018,963
		<i>Fire Chief, Deputy Chief, Assistant Chief, Training Officer (4 FTE)</i>				
		<i>24 Hour Firefighters (12 FTE)</i>				
		<i>Admin Assistant (1 FTE)</i>				
		<i>IT Coordinator (1 FTE; 20%)</i>				
206-336-70300		Overtime	61,714	62,110	47,003	70,628
206-336-70310		Other Overtime	22,205	48,000	36,865	56,570
206-336-70400		In Lieu Of Insurance	3,789	2,340	3,366	5,850
		<i>Employee Health Insurance In Lieu of (5)</i>				
206-336-71500		Payroll Taxes - FICA	76,597	81,949	56,965	87,681
206-336-71600		Health & Life Insurance	146,361	140,218	91,134	140,627
	129,699	<i>Health, Dental & Vision</i>				
	2,749	<i>Life Insurance</i>				
	1,380	<i>Long Term</i>				
	6,004	<i>Disability</i>				
	795	<i>HRA & FSA Admin Fees (\$10 per month per person)</i>				
206-336-72200		Pension Plan	68,327	85,698	(4,814)	90,238
206-336-72500		Clothing Allowance	12,328	22,029	8,258	23,589
	9,600	<i>Full Time members (See CBA)</i>				
	4,308	<i>New Interns - 3</i>				
	2,140	<i>POC Promoted to full FF Status</i>				
	855	<i>DO Promoted to PEO - 3</i>				
	500	<i>FF Promoted to officer - 1</i>				
	3,500	<i>Repairs & Discretionary</i>				
	2,126	<i>Replacement FTE position - 1 Chief</i>				
	560	<i>Class A Dress Uniforms - 1</i>				
206-336-72600		Retiree Health Care	57,600	57,600	(57,600)	61,200
	61,200	<i>\$3,600 annually x 17 FTEs</i>				
206-336-72850		Food Allowance		6,000	6,192	6,000

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
	6,000	<i>\$500 per 24-hour FTE's x 12. (See CBA)</i>				
206-336-82500		Accounting & Audit Fees	22,580	6,000	2,850	6,000
206-336-82600		Legal Fees	71,593	20,000	3,380	30,000
	10,000	<i>Internal Legal Dept.</i>				
	20,000	<i>External Legal</i>				
206-336-87000		Mileage		500		500
206-336-95900		Continuing Education	23,601	55,440	15,875	75,026
	45,186	<i>Dept wide training - general and advanced skills</i>				
	3,790	<i>Professional Development - Officers</i>				
	19,975	<i>Certifications.: Fire Inspector (4) & Fire Investigator (3)</i>				
	6,075	<i>Professional Development - Training & Safety Section</i>				
206-336-96100		Hazmat Fees	1,400	1,400		1,400
	1,400	<i>Countywide Annual Membership to Receive coverage - Maintain the team.</i>				
206-336-96300		Admin Contingency		88,117		31,884
TOTAL FIRE ADMINISTRATION			1,518,622	1,638,517	894,325	1,706,156

FIRE FUND OPERATIONS APPROPRIATIONS

206-340-70500		Fire Pay - On Call	324,025	375,000	218,121	375,000
	366,000	<i>Payroll for Paid On-Call (POC) Program. Sta. Staffing, training, responses...</i>				
	9,000	<i>Resident Intern Stipend: \$250 per mo x 12 x 3 positions.</i>				
206-340-71500		Payroll Taxes - FICA	4,877	5,440	2,878	5,438
	5,438	<i>1.45 % of all wages</i>				
206-340-71800		Fire Dept Maintenance	203		(486)	
206-340-72200		Pension Plan	30,600	37,500	21,358	37,500
	37,500	<i>10% of all wages</i>				
206-340-72800		Supplies	8,010	9,000	1,227	9,000
206-340-72900		Petty Cash		500		500
206-340-75500		EMS Supplies	4,438	16,034	9,500	13,573
	13,573	<i>Expendable items and supplies (bandaging, B/P cuffs, Suction units, iGels, AED batteries...</i>				
206-340-75700		Tools & Supplies	949	3,000	600	3,000
206-340-76000		Training Supplies	4,829	1,102	156	1,700
	1,700	<i>Materials for simulations and props.</i>				
206-340-76100		Public Education		2,970	1,032	4,588
		<i>Educational & PR materials (plastic fire helmets, coloring books, pamphlets...)</i>				
206-340-76600		Equipment	2,499	4,800	1,688	5,020
		<i>SCBA & TIC batteries, flashlights, repair broken hand tools...</i>				
206-340-80900		Computer Operations	114,083	92,601	25,006	75,685
	7,200	<i>Annual desktop rotational replacement - 4 @ \$1,800</i>				
	20,900	<i>Support for various software programs (Emergency Reporting, Lexipol, Aladtec, Bryx...)</i>				
	16,800	<i>Aanalytics</i>				
	1,000	<i>Repairs to technology equipment</i>				
	5,040	<i>Mobile technology (Road Safety)</i>				
	1,960	<i>Printers for both stations</i>				
	195	<i>Secondary alerting system (Active 911)</i>				
	1,680	<i>Hulu into both stations (\$140 per month)</i>				

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
	4,000	CTS Telephone Services				
	3,510	Training Tracking Software (Vector Solutions) purchase & maint. 1st year				
	4,000	Unspecified repairs				
	4,400	BS&A Software - Dept. contribution				
	5,000	GIS work for SOC and MABAS mapping. \$85 x up to 60 hours				
206-340-85100		Radio Maintenance		7,600	1,268	5,500
	1,500	Pager batteries, belt clips & knobs				
	2,000	Unspecified repairs (Antennas, base radios, UPS units...)				
	2,000	Unspecified repairs (Portable & mobile radios)				
206-340-85300		Telephone	8,484	14,000	7,869	10,640
	900	AT&T First Net for designated officers (Handbook appendix G: 50% of cost pd by individual)				
	300	Monthly rebate for those who use their own phone (Handbook appendix G)				
	3,240	AT&T First Net mobility for vehicles				
	4,200	Phone and Fiber optic dedicated lines (CTS)				
	2,000	Phone system related repairs				
206-340-86700		Vehicle Operations	107,600	116,991	73,579	114,320
	12,500	Annual PM services - Large Fire Apparatus (5)				
	5,120	PM service, 2 per year - Small Vehicles				
	1,750	Annual pump test certifications				
	2,800	Annual Aerial Ladder Testing				
	1,260	Annual Ground Ladder Testing - 392 feet				
	3,500	Annual Hose Testing - 16,000 feet				
	90	Annual weights				
	1,000	Required tire replacement due to age: Unit #502				
	1,000	Required tire replacement due to age: Unit #573				
	1,000	Required tire replacement due to age: Unit #572				
	2,800	Required tire replacement due to age: Unit #513 rears				
	500	Required tire replacement due to age: Utility cargo trailer				
	1,000	Required tire replacement due to age: Trench Trailer				
	80,000	Unscheduled repairs to all vehicles				
206-340-86800		Fuel	20,103	30,000	20,958	30,000
206-340-87100		Physical Exams	22,498	26,800	240	27,200
	6,600	24-hour shift personnel (12 @ \$550)				
	2,200	Day Staff (4 @ \$550)				
	13,750	POC's (25 @ \$550)				
	2,200	Resident Interns (4 @ \$550)				
	450	Annual flu inoculations				
	2,000	Other injuries or testing.				
206-340-87200		New Hire Expenses	2,581	5,060	(556)	3,700
	2,100	Entry Medical Exam (6 @ \$350)				
	600	Background Investigation (6 @ \$100)				
	500	Psych Exam (1 @ \$500)				
	500	Undesignated				
206-340-91200		General Insurance	99,196	126,927	118,499	120,343

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
	20,114	<i>Vehicles, Liability & Property</i>				
	21,000	<i>Volunteer Package</i>				
	79,229	<i>Workers Compensation (FD pays 90%, Twp pays 10%)</i>				
206-340-92100		Electric	(471)			
206-340-92300		Heat	(93)			
206-340-93300		Equipment Maintenance	13,271	16,640	1,550	13,030
	3,240	<i>SCBA Annual Testing</i>				
	750	<i>General SCBA repairs</i>				
	1,600	<i>Annual testing: Holmatro hydraulic tools</i>				
	1,300	<i>Hydraulic tool repairs - estimated</i>				
	1,320	<i>Air compressor quarterly air quality testing</i>				
	1,000	<i>TIC Repairs - Est.</i>				
	3,000	<i>Repairs: Air monitors, saws, hand tools, fans, blowers...</i>				
	220	<i>Refurbishment of TIC batteries</i>				
	600	<i>SCBA batteries</i>				
206-340-96100		BOR/MTT Refunds-Operations Fund	12,340	12,000	11,334	
206-340-96300		Operations Contingency	452			
TOTAL FIRE FUND OPERATIONS			780,474	903,965	515,821	855,737

FIRE FUND MAINTENANCE APPROPRIATIONS

206-341-70200		Fire Maintenance Salaries	12,934	15,468	10,026	21,826
		<i>Maintenance Director (1 FTE; 10%)</i>				
		<i>General Maintenance (1 FTE; 20%)</i>				
		<i>General Maintenance (1 FTE; 20%)</i>				
206-341-71500		Payroll Taxes - FICA	880	1,183	695	1,670
206-341-72200		Pension Plan	483	1,124	387	1,746
206-341-72800		Supplies				500
206-341-75100		Vehicle Gas & Maintenance	8	1,500	30	1,500
206-341-75300		Grounds Maint Equipment	366	700	724	1,200
206-341-75700		Tools & Supplies	53	300	34	300
206-341-76000		Facility Supplies	2,415	10,000	2,658	10,500
	3,800	<i>Parts and supplies used in Maintenance of Facilities</i>				
	600	<i>Replacement Television</i>				
	1,500	<i>Replacement Beds (2)</i>				
	1,500	<i>Recliners (2)</i>				
	1,300	<i>Couch</i>				
	1,300	<i>Refrigerator</i>				
	500	<i>Unspecified Repairs</i>				
206-341-76600		Expendable Supplies	3,463	4,000	1,448	4,000
		<i>Supplies expended through use. Paper Goods, Toilet Paper, Cleaning Chemicals, Ice Melt, Garbage Bags, etc...</i>				
206-341-86800		Fuel, Oil, and Grease	481	650	461	845
206-341-92000		Water	2,425	2,500	1,431	2,600
206-341-92100		Electric	30,129	33,000	24,769	35,000
206-341-92300		Heat	10,419	12,600	8,119	13,400
206-341-93100		Maintenance Services	23,621	24,215	14,800	26,210

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
	1,607	Trash Collection				
	967	Fire Alarm Monitoring				
	1,436	Window Cleaning				
	1,200	Carpet Cleaning				
	2,400	Cleaning Service				
	150	Irrigation System Shutdown				
	700	Annual Fire Suppression / Back flow Valve Testing				
	1,000	Generator Servicing				
	1,090	Pest Control				
	400	Termite Remediation				
	3,860	Septic System / Sand Trap Servicing				
	10,600	Systems Repair				
	800	LED Projects				
TOTAL FIRE FUND MAINTENANCE			87,677	107,240	65,582	121,297

FIRE FUND ADMIN/OPERATIONS/MAINT TOTAL ESTIMATED REVENUE
FIRE FUND ADMIN/OPERATIONS/MAINT TOTAL ESTIMATED APPROPRIATIONS

2,683,190
2,683,190

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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POLICE FUND ESTIMATED REVENUE

207-001-40100		Carryover		13,750		136,762
207-001-40200		Current Property Tax Levy	1,383,525	1,416,383	1,461,165	1,420,000
		<i>2.8% Inflation Factor</i>				
207-001-45200		Liquor License Fees	25,115	22,000	21,437	22,000
207-001-65000		Ordinance Violations-8th District Court	19,036	20,000	10,078	15,000
207-001-65100		General Ordinance Violations	1,340	2,000	700	2,000
207-001-65300		FALSE POLICE ALARM FINES	15,067		34,746	
207-001-65400		False Security Alarm Fines			4,100	
207-001-65600		Parking Violations	1,390		75	
207-001-65700		Rental Housing Inspection Applications	600	2,000		2,000
207-001-66500		Interest Earned	10,383	2,000	1,111	2,000
TOTAL POLICE FUND			1,456,456	1,478,133	1,533,412	1,599,762

POLICE CONTRACT ADMIN APPROPRIATIONS

207-310-70200		Salary/Contract Administrator		1,000		7,010
		<i>Assistant Supervisor (1 FTE; 10%)</i>				
207-310-71500		Payroll Taxes - FICA				536
207-310-72200		Pension Plan				561
207-310-80200		Protection Contract - KC	883,232	1,329,000	93,124	1,396,000
	290,000	<i>Sergeants (2)</i>				
	861,000	<i>Deputies (7) including Traffic Officer</i>				
	245,000	<i>Deputies (2) Additional 2022</i>				
207-310-80600		IT Services				1,200
207-310-82500		Accounting & Audit Fees	2,450	5,000	2,800	5,000
207-310-82600		Legal Fees-8th District Court	15,203	12,500	3,360	10,000
207-310-96100		BOR/MTT Refunds	12,482	12,000	11,314	15,000
207-310-97000		Capital Outlay	820	1,750		101,000
	1,000	<i>Radar Speed Trailer Maintenance</i>				
	100,000	<i>Facility Upgrade</i>				
TOTAL POLICE CONTRACT ADMIN			914,187	1,361,250	110,598	1,536,307

PARKING VIOLATIONS ENFORCEMENT APPROPRIATIONS

207-320-71500		Payroll Taxes - FICA		400		
207-320-72200		Pension Plan		500		
207-320-72800		Supplies		500		
207-320-80900		Parking Enforcement Officers		5,000		5,000
207-320-82600		Legal Fees-Parking Enforcement		300		300
207-320-87000		PEO Mileage		1,000		1,000
TOTAL PARKING VIOLATIONS ENFORCEMENT				7,700		6,300

GEN ORDINANCE ENFORCEMENT APPROPRIATIONS

207-330-70200		Salaries	28,874	37,681	26,966	37,661
		<i>Ordinance Enforcement Officer (1 FTE; 50%)</i>				

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
		<i>Ordinance Enforcement Officer (.5 FTE; 50%)</i>				
207-330-71500		Payroll Taxes - FICA	2,197	2,883	2,041	2,881
207-330-72200		Pension Plan	1,149	3,014	1,098	3,013
207-330-72800		Supplies	432	2,500	1,109	3,600
	1,000	<i>Misc. Hauling, mowing, etc.</i>				
	500	<i>Uniforms, PPE</i>				
	1,500	<i>Signage & Barriers</i>				
	600	<i>Truck Internet</i>				
207-330-82600		Legal Fees	5,595	6,000	5,472	10,000
TOTAL GEN ORDINANCE ENFORCEMENT			38,247	52,078	36,686	57,155

POLICE FUND TOTAL ESTIMATED REVENUE
POLICE FUND TOTAL ESTIMATED APPROPRIATIONS

1,599,762
1,599,762

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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FIRE FUND EQUIPMENT REVENUE

211-001-40100		Carryover		169,850		
211-001-40200		Current Property Tax Levy	388,904	276,747	282,749	278,546
		<i>9% of Fire SAD Levy</i>				
211-001-43000		Payments in Lieu of Taxes				5,185
211-001-47500		Miscellaneous	800		900	900
211-001-66500		Interest Earned	8,202	3,500	608	600
211-001-67300		Sales-Fixed Assets	138,241			
TOTAL FIRE FUND EQUIPMENT			536,147	450,097	284,257	285,231

FIRE FUND EQUIPMENT APPROPRIATIONS

211-344-76600		Personal Protective Equipment	19,125	46,975	24,075	40,625
	3,125	<i>Standard replacement from normal wear or expiration (NFPA 1851)</i>				
	16,250	<i>New POC members (5x\$3,250)</i>				
	14,400	<i>Phased 2nd set of PPE for all members (6 x \$2,500)</i>				
	4,000	<i>Repairs or replacement of damaged PPE</i>				
	2,850	<i>Expendable PPE Components (gloves, hoods, flashlights, key fobs...)</i>				
211-344-82500		Accounting & Audit Fees	1,950	2,500	2,050	2,500
211-344-97600		Vehicle	197,181	120,000		
211-344-98000		Capital Outlay/Equipment	68,289	128,622	71,722	118,425
	48,750	<i>Phase 3 of 3 to replace expired portable radios. 13 units x \$3,750</i>				
	15,000	<i>3 new road safety systems: Placed in apparatus #551, 552 & 512</i>				
	7,425	<i>Replacement pagers: \$459 ea x 15</i>				
	1,250	<i>Rope rescue equipment hardware update</i>				
	10,000	<i>Updated Electric fans. Larger CFM. 2 @ \$5,000</i>				
	1,000	<i>Lumber and fasteners for Trench Trailer</i>				
	13,000	<i>PPE Washer for Sta. 5-1 (+ \$1,000 for install)</i>				
	22,000	<i>PPE Dryer for Sta. 5-1 & 5-2 (+\$1,000 ea for install)</i>				
211-344-98100		Capital Outlay/Facilities	125	143,000	639	106,000
	13,000	<i>Water Softeners</i>				
	20,000	<i>Repair walls and windows both stations</i>				
	60,000	<i>Roof replacement station 1</i>				
	8,000	<i>Replace building fire alarm - Station 2</i>				
	5,000	<i>Replace building fire alarm - Station 3</i>				
TOTAL FIRE FUND EQUIPMENT			286,670	441,097	98,486	267,550

FIRE FUND EQUIPMENT TOTAL ESTIMATED REVENUE
 FIRE FUND EQUIPMENT TOTAL ESTIMATED APPROPRIATIONS

285,231
 267,550

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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FIRE FUND CAPITAL ESITMATED REVENUE

212-001-40200		Current Property Tax Levy	149,578	184,498		187,573
		<i>6% of 3.75 Fire SAD levy</i>				
212-001-43000		Payments in Lieu of Taxes				3,457
212-001-66500		Interest Earned	690		256	500
TOTAL FIRE FUND CAPITAL			150,268	184,498	256	191,530

FIRE FUND CAPITAL APPROPRIATIONS

212-344-82500		Accounting & Audit Fees	100			100
TOATL FIRE FUND CAPITAL			100			100

FIRE FUND CAPITAL TOTAL ESTIMATED REVENUE

191,530

FIRE FUND CAPITAL TOTAL ESTIMATED APPROPRIATIONS

100

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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STREET LIGHT FUND REVENUE

219-001-40100		Carryover				35,000
219-001-40200		Current Property Tax Levy	159,882	159,000		165,000
219-001-66500		Interest Earned	230		47	500
TOTAL STREET LIGHT FUND			160,112	159,000	47	200,500

STREET LIGHT FUND APPROPRIATIONS

219-506-82500		Accounting & Audit Fees	500	800	250	800
219-506-92600		Street Lighting	131,945	140,000	95,688	145,000
219-506-97600		Capital Outlay / Upgrade		18,200	18,132	50,000
TOTAL STREET LIGHT FUND			132,445	159,000	114,070	195,800

STREET LIGHT FUND CAPITAL TOTAL ESTIMATED REVENUE
STREET LIGHT FUND CAPITAL TOTAL ESTIMATED APPROPRIATIONS

200,500
195,800

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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SEWER HARDSHIP REVOLVING FUND REVENUE

246-001-66400		Interest on Investments	888		213	300
246-001-67500		Transfer from Other Funds	300,000	300,000		300,000
TOTAL SEWER HARDSHIP REVOLVING FUND			300,888	300,000	213	300,300

SEWER HARDSHIP REVOLVING FUND APPROPRIATIONS

246-265-97800		Miscellaneous		50,000		50,000
TOTAL SEWER HARDSHIP REVOLVING FUND				50,000		50,000

SEWER HARDSHIP REVOLVING FUND TOTAL ESTIMATED REVENUE
SEWER HARDSHIP REVOLVING FUND TOTAL ESTIMATED APPROPRIATIONS

300,300
50,000

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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SoDA FUND ESTIMATED REVENUE

247-001-40100		Carryover		1,000		500
247-001-40300		Current Real Property Tax	63,522	40,000	40,555	40,000
247-001-66500		Interest Earned	848	500	9	
TOATL SoDA FUND ESTIMATED			64,370	41,500	40,564	40,500

SoDA FUND ESTIMATED APPROPRIATIONS

247-728-82500		Accounting & Audit Fees	500	1,000	950	500
247-728-82600		Legal Fees	690	500	420	500
247-728-93300		Repairs/Maintenance	259	7,500		7,500
247-728-96100		BOR/MTT	35,944			
247-728-97500		Capital Outlay/Obligated Projects	30,000	30,000		30,000
TOTAL SoDA FUND			67,393	39,000	1,370	38,500

SoDA FUND TOTAL ESTIMATED REVENUE
SoDA FUND TOTAL ESTIMATED APPROPRIATIONS

40,500
38,500

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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BUILDING FUND REVENUE

249-001-40100		Carryover		52,950		52,555
249-001-66400		Interest on Investments	3,564		212	
TOTAL BUILDING FUND			3,564	52,950	212	52,555

BUILDING FUND APPROPRIATIONS

249-371-70200		Salaries/Clerical	28,873	37,681	26,949	37,661
		<i>Ordinance Enforcement Officer (1 FTE; 50%)</i>				
		<i>Ordinance Enforcement Officer (.5 FTE; 50%)</i>				
249-371-71500		Payroll Taxes - FICA	2,197	2,883	2,061	2,881
249-371-72200		Pension Plan	3,191	3,014	(936)	3,013
249-371-82500		Accounting & Audit Fees	4,400	4,200	4,650	5,000
249-371-82600		Legal Fees		2,000		2,000
249-371-95800		Education/Dues		1,000		2,000
249-371-97600		Capital Outlay		1,750		
TOTAL BUILDING FUND			38,661	52,528	32,724	52,555

BUILDING FUND TOTAL ESTIMATED REVENUE

52,555

BUILDING FUND TOTAL ESTIMATED APPROPRIATIONS

52,555

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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AMERICAN RESCUE PLAN ACT FUND REVENUE

297-001-48000		Federal Grant				1,213,632
297-001-66500		Interest Earned				1,000
TOTAL AMERICAN RESCUE PLAN ACT FUND						1,214,632

AMERICAN RESCUE PLAN ACT FUND APPROPRIATIONS

297-000-70200		Salaries/Clerical				6,067
		<i>Public Works Project Manager (1 FTE; 10%)</i>				
297-000-71500		Payroll Taxes - FICA				464
297-000-72200		Pension				485
297-000-73000		Postage				884
297-000-82100		Professional Fees				1,000
297-000-82500		Accounting & Audit Fees				1,100
297-000-97600		Capital Outlay				105,000
	5,000	<i>Broadband baseline data</i>				
	100,000	<i>Infrastructure</i>				
TOTAL AMERICAN RESCUE PLAN ACT FUND						115,000

AMERICAN RESCUE PLAN ACT FUND TOTAL ESTIMATED REVENUE
 AMERICAN RESCUE PLAN ACT FUND TOTAL ESTIMATED APPROPRIATIONS

1,214,632
 115,000

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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SEWER FUND REVENUE

490-000-40100		Carryover		92,700		150,919
490-000-65000		Mortgage/Contract/SAD/FF	24,374	250,000	268,743	50,000
490-000-66400		Interest on Investments	6,092	1,800	539	1,000
490-000-66600		Interest on Assessments	9,652	10,000		10,000
490-000-67900		Assessment Revenue	238,330	200,000		20,000
490-000-68000		Benefit Fees	379,455	330,000	204,977	150,000
490-000-68500		Surcharge	51,743	315,000	134,461	245,000
490-000-69600		Miscellaneous Revenue	209,253			
490-000-69900		Transfer In		250,000		
TOTAL SEWER FUND			918,899	1,449,500	608,720	626,919

SEWER FUND APPROPRIATIONS

490-000-70200		Salaries/Clerical	63,900	76,723	56,498	57,940
		<i>Public Works Director (1 FTE; 35%)</i>				
		<i>Public Works Project Manager (1 FTE; 30%)</i>				
		<i>Public Works Technical Specialist (.38 FTE; 35%)</i>				
		<i>Public Works Technical Specialist (.38 FTE; 15%)</i>				
490-000-71500		Payroll Taxes - FICA	4,699	5,869	3,856	4,432
490-000-72200		Pension Plan	2,796	6,138	2,294	4,635
490-000-80800		Audit Fees	3,150	3,500	2,905	3,500
490-000-81000		Legal Fees	1,590	7,800	8,730	8,000
490-000-82000		Engineering Fees	234,523	60,000	5,355	7,000
490-000-95700		Public Education				15,000
490-000-95800		Professional Fees	12,867	26,000	12,500	20,000
490-000-96300		Refunds to Developers		38,700	30,690	
490-000-96400		Construction Costs	56,323	131,000	48,309	158,500
	20,000	<i>Infrastructure Repairs & Improvements - Incident/ER Contingency</i>				
	11,000	<i>Lift Station Design (SAW)</i>				
	11,000	<i>Sewer Easement Maintenance (SAW)</i>				
	53,500	<i>Sewer Cleaning and CCTY Inspection (SAW)</i>				
	63,000	<i>Parkview Ave (11th to 12th; 11th to Stadium TBD)</i>				
490-000-96590		Transfer to USDA Sewer Phase 2		170,000		
490-000-96595		Transfer to Sewer Hardship	300,000	300,000		300,000
TOTAL SEWER FUND			679,848	825,730	171,137	579,007

SEWER FUND TOTAL ESTIMATED REVENUE
SEWER FUND TOTAL ESTIMATED APPROPRIATIONS

626,919
579,007

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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WATER FUND REVENUE

491-000-40100		Carryover		(61,598)		121,939
491-000-65000		Mortgage/Contract/SAD/FF	71,348	28,000	20,179	28,000
491-000-66400		Interest on Investments	17,519	10,000	1,293	1,500
491-000-66600		Interest on Assessments	6,157	4,000		4,000
491-000-67900		Assessment Revenue	20,727	30,000		
491-000-68000		Benefit Fees	89,992	70,000	45,585	70,000
491-000-68500		Surcharge	105,545	84,000	45,978	80,000
491-000-69600		Miscellaneous Revenue	257,581			
TOTAL WATER FUND			568,869	164,402	113,035	305,439

WATER FUND APPROPRIATIONS

491-000-70200		Salaries/Clerical	8,214	18,599	6,964	39,377
		<i>Public Works Director (1 FTE; 25%)</i>				
		<i>Public Works Project Manager (1 FTE; 20%)</i>				
		<i>Public Works Technical Specialist (.38 FTE; 25%)</i>				
		<i>Public Works Technical Specialist (.38 FTE; 5%)</i>				
491-000-71500		Payroll Taxes - FICA	636	1,063	453	3,012
491-000-72200		Pension Plan	408	1,112	283	3,150
491-000-80800		Audit Fees	3,150	3,400	2,800	3,400
491-000-82000		Engineering Fees	2,605	52,400	936	5,000
491-000-82600		Legal Fees	180	1,000	1,110	2,000
491-000-95800		Professional Fees	12,500	13,000	12,500	12,500
491-000-96200		Miscellaneous	2,554	1,000		
491-000-96400		Construction Costs	321,882	67,704	5,681	237,000
TOTAL WATER FUND			352,129	159,278	30,727	305,439

WATER FUND TOTAL ESTIMATED REVENUE
WATER FUND TOTAL ESTIMATED APPROPRIATIONS

305,439
305,439

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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RETIREE MEDICAL TRUST FUND ESTIMATED REVENUE

736-001-40100		Carryover		15,000		13,600
736-001-66500		Interest Earned	48,428		33,879	
736-001-67600		Contribution-Other Funds			7,541	
TOTAL RETIREE MEDICAL TRUST FUND			48,428	15,000	41,420	13,600

RETIREE MEDICAL TRUST FUND APPROPRIATIONS

736-234-72500		Insurance Premiums	7,772	15,000	1,217	10,000
736-234-80800		Administrative Costs				3,600
	3,600	<i>OPEB Consultant Full Valuation Report</i>				
TOTAL RETIREE MEDICAL TRUST FUND			7,772	15,000	1,217	13,600

RETIREE MEDICAL TRUST FUND TOTAL ESTIMATED REVENUE

13,600

RETIREE MEDICAL TRUST FUND TOTAL ESTIMATED APPROPRIATIONS

13,600

GL NUMBER	FOOTNOTE AMOUNT	DESCRIPTION	2020 ACTIVITY	2021 AMENDED BUDGET	2021 ACTIVITY THRU 12/31/21	2022 REQUESTED BUDGET
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DDA FUND REVENUES

900-001-40100		Carryover		676,434		200,000
900-001-40300		Current Real Property Tax	189,041	252,078	219,306	200,000
900-001-47500		Miscellaneous		35,000		600,000
		<i>Loan (for Stadium Sidewalk Construction; repay \$200k per year for 3 years; transfer from GF)</i>				
900-001-66500		Interest Earned	8,258	1,000	576	1,000
TOTAL DDA FUND			197,299	964,512	219,882	1,001,000

DDA FUND APPROPRIATIONS

900-728-70300		Salaries-Staff	2,000	2,000	1,500	2,000
900-728-72800		Supplies		500		500
900-728-73000		Postage	298	500		500
900-728-80100		Community Events	750	1,050	1,050	750
900-728-80800		Consultants		55,000		20,000
900-728-82500		Accounting & Audit Fees	1,850	3,000	2,350	2,000
900-728-82600		Legal Fees	593	2,000	120	2,000
900-728-90300		Legal Notices		500		500
900-728-92000		Water	801	1,200	434	1,200
900-728-92100		Electric	209	600	441	600
900-728-93300		Repairs and Maintenance	3,492	15,500	8,886	17,500
	2,000	<i>Banner rotation/storage</i>				
	12,500	<i>Lawn care & maintenance</i>				
	1,000	<i>Millard's Way snow removal</i>				
	2,000	<i>Stadium Dr Sidewalk snow removal</i>				
900-728-96200		Miscellaneous	7,949			
900-728-96250		Outdoor Decorations	5,000	5,000		5,000
900-728-97500		Capital Outlay/Obligated Projects	168,768	746,436	134,984	845,000
	10,000	<i>Facade improvement</i>				
	5,000	<i>OCC Wi-Fi</i>				
	30,000	<i>9th Street sidewalk</i>				
	600,000	<i>Stadium Sidewalk (south side)</i>				
	200,000	<i>Stadium Sidewalk (south side) loan payment (1st payment of 3 annually; \$200k minimum)</i>				
900-728-97600		Capital Outlay/Land Acquisition		60,000		60,000
	60,000	<i>Property Acquisition</i>				
900-728-97700		Emergency Assistance Program	82,500			
TOTAL DDA FUND			274,210	893,286	149,765	957,550

DDA FUND TOTAL ESTIMATED REVENUE

1,001,000

DDA FUND TOTAL ESTIMATED APPROPRIATIONS

957,550

ESTIMATED REVENUES - ALL FUNDS

14,396,859

ESTIMATED APPROPRIATIONS - ALL FUNDS

12,422,970

**2022 Capital Improvement Plan
2023-2027 Illustrative Capital Plan
October 13, 2021**

GENERAL FUND 101

	CAPITAL IMPROVEMENT PLAN		2023 - 2027 ILLUSTRATIVE CAPITAL IMPROVEMENTS PLAN				
	2022	2023	2024	2025	2026	2027	
REVENUES:							
Property taxes	\$ 1,243,626	\$ 1,256,100	\$ 1,268,700	\$ 1,281,400	\$ 1,294,200	\$ 1,307,100	
Licenses and permits	\$ 165,000	\$ 170,000	\$ 170,000	\$ 170,000	\$ 170,000	\$ 170,000	
Capital State & Other Grants - Roll Up Summary	\$ 230,000	\$ 375,700	\$ 1,275,000	\$ 500,000	\$ 600,000	\$ 600,000	
State grants/revenue sharing	\$ 2,105,475	\$ 2,126,500	\$ 2,147,800	\$ 2,169,300	\$ 2,191,000	\$ 2,212,900	
Interest and rentals	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	
Other	\$ 99,100	\$ 100,100	\$ 101,100	\$ 102,100	\$ 103,100	\$ 104,100	
Total Revenues:	\$ 3,845,701	\$ 4,030,900	\$ 4,965,100	\$ 4,225,300	\$ 4,360,800	\$ 4,396,600	
EXPENDITURES:							
Operating expenditures	\$ 2,620,121	\$ 2,698,700	\$ 2,779,700	\$ 2,863,100	\$ 2,949,000	\$ 3,037,500	
Building department operating expenditures	\$ 52,555	\$ 54,100	\$ 55,700	\$ 57,400	\$ 59,100	\$ 60,900	
Capital Expenditures:							
ROADWAY MAINTENANCE AND CAPITAL IMPROVEMENTS							
Skyridge/Burgundy Manor Traffic Calming	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
STORMWATER/DRAINAGE PROJECTS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
General Stormwater Facilities Investigations & Repairs	\$ 7,500	\$ -	\$ -	\$ -	\$ -	\$ -	
Maple Hill Dr Basin, County Petition w/System Upgrades	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
NON-MOTORIZED PROJECTS							
Drake Rd Shared Use Path (TAP), Green Meadow to W. Michigan Ave	\$ 6,000	\$ -	\$ -	\$ -	\$ -	\$ -	
Drake Road Shared Use Path (Safety Grant), Green Meadow to KL Ave	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	
Drake Road Shared Use Path (TAP) Stadium Dr to KL Ave	\$ 1,000	\$ 218,000	\$ -	\$ -	\$ -	\$ -	
Maple Hill Dr/Croyden Sidewalk - 5-ft, one side (east & south)	\$ 2,000	\$ -	\$ -	\$ -	\$ -	\$ -	
Green Meadow Dr Sidewalk, Drake to Rd Hill Rd, 6-ft, one side (north)	\$ 2,000	\$ -	\$ -	\$ -	\$ -	\$ -	
Fairgrove St Sidewalk, Mansfield St to Stadium Dr, 5-ft, one side (east)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Whitegate Lane/Michigan Ave Sidewalk (Powderhorn Dr to 11th St)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
N Ave 9th to 11th (facility TBD & coordinated with RCKC work)	\$ 10,000	\$ 75,000	\$ -	\$ -	\$ -	\$ -	
Parkview 11th to 12th (facility TBD & coordinated with RCKC work)	\$ 20,000	\$ 100,000	\$ -	\$ -	\$ -	\$ -	
Parkview 9th to 11th (facility TBD & coordinated with RCKC work)	\$ 20,000	\$ 250,000	\$ -	\$ -	\$ -	\$ -	
KL Avenue Shared Use Path (Cdrake Rd to 131 Bridge) Phase I	\$ 145,000	\$ 370,000	\$ 115,000	\$ -	\$ -	\$ -	
KL Avenue Shared Use Path (131 Bridge to Copper Beach Blvd) Phase II	\$ -	\$ -	\$ 1,900,000	\$ -	\$ -	\$ -	
KL Ave Shoulders (Autumns Way Blvd to 8th St)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
11th Street Shoulders (Parkview Ave to N Ave)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
11th Street 6' Sidewalk - East Side (Parkview Ave to N Ave)	\$ -	\$ 25,760	\$ 362,760	\$ -	\$ -	\$ -	
Fruit Belt Line Non-Motorized Trail (Design, Construction)	\$ -	\$ 300,000	\$ -	\$ -	\$ -	\$ -	
8th Street, KL Ave to W Main St, 6' Shared Use Path	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
9th St 6-ft Sidewalk, Meridian Ave to Quail Run Dr	\$ -	\$ -	\$ 70,600	\$ 776,000	\$ -	\$ -	
9th St 6-ft Sidewalk, Quail Run Dr to W. Main St	\$ -	\$ -	\$ -	\$ 75,400	\$ 830,000	\$ 830,000	
NON-MOTORIZED FUTURE PROJECTS (YEAR/FINANCING TBD)							
Chime and Erie St Sidewalks, Stadium Dr to 9th St (DDA)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Meridian Ave and Sunset Rd Sidewalks, Stadium Dr to 9th St (DDA)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
11th St 6-ft Sidewalk west side, Stadium Dr to KL Ave	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
11th St 6-ft Sidewalk, Parkview Ave to Stadium Dr	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
KL Avenue Shared Use Path (Copper Beech Blvd to 9th St)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Maintenance Inventory & Asset Mgmt Plan	\$ 40,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	
Repairs & Network closure	\$ 20,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	
INFORMATION TECHNOLOGY							
Computer Replacement	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	
New Hire Computers	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	
Employee Computers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Website Upgrade/Logo	\$ 17,000	\$ -	\$ -	\$ -	\$ -	\$ -	
Router/Switches Upgrade	\$ 18,000	\$ -	\$ -	\$ -	\$ -	\$ 18,000	
Phone System Upgrade	\$ 5,500	\$ -	\$ -	\$ -	\$ -	\$ -	
Network Attached Storage (NAS)	\$ -	\$ -	\$ 12,000	\$ -	\$ -	\$ -	
GENERAL PROJECTS							
Township Hall Carpet	\$ 30,000	\$ -	\$ -	\$ -	\$ -	\$ -	
Maintenance Facility; New Storage Building (2021) and Shop Bldg (2022)	\$ 350,000	\$ -	\$ -	\$ -	\$ -	\$ -	
Truck, Bobcat with Snow Blower and Trailer	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Lawn Equipment	\$ -	\$ 28,000	\$ -	\$ -	\$ -	\$ -	
Camry Replacement	\$ -	\$ 26,000	\$ -	\$ -	\$ -	\$ -	
Election Equipment: Tabulators (2022)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Facility LED upgrades, furnishings, sanitary, roof replacement, asphalt maintenance	\$ 221,000	\$ -	\$ -	\$ -	\$ -	\$ -	
Cemetery Maintenance and Upgrades	\$ 20,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	
Total Expenditures:	\$ 3,624,676	\$ 4,204,560	\$ 5,354,760	\$ 3,830,900	\$ 3,897,100	\$ 4,005,400	
OTHER FINANCING SOURCES (USES):							
To Cemetery Trust Fund	\$ (5,000)	\$ (5,000)	\$ (5,000)	\$ (5,000)	\$ (5,000)	\$ (5,000)	
To DDA	\$ (600,000)	\$ -	\$ -	\$ -	\$ -	\$ -	
To Parks Fund	\$ (250,000)	\$ (250,000)	\$ (250,000)	\$ (350,000)	\$ (350,000)	\$ (350,000)	
Total Net Other Financing Sources (Uses):	\$ (855,000)	\$ (255,000)	\$ (255,000)	\$ (355,000)	\$ (355,000)	\$ (355,000)	
FUND BALANCES:							
Net change in fund balance	\$ (633,975)	\$ (428,660)	\$ (644,660)	\$ 39,400	\$ 108,700	\$ 36,200	
Beginning fund balance - Restricted for Building Department	\$ 244,836	\$ 190,736	\$ 135,036	\$ 77,636	\$ 18,536	\$ (42,364)	
Beginning fund balance (Estimated)	\$ 3,068,622	\$ 2,488,747	\$ 2,115,787	\$ 1,528,527	\$ 1,627,027	\$ 1,796,627	
Ending Fund Balance:	\$ 2,679,483	\$ 2,250,823	\$ 1,606,163	\$ 1,645,563	\$ 1,754,263	\$ 1,790,463	
Ending fund balance as a % of operating expenditures	102%	83%	58%	57%	59%	59%	

PARK FUND 107

	CAPITAL IMPROVEMENT PLAN		2023 - 2027 ILLUSTRATIVE CAPITAL IMPROVEMENTS PLAN				
	2022	2023	2024	2025	2026	2027	
REVENUES:							
State grants	\$ -	\$ -	\$ 75,000	\$ 150,000	\$ 335,000	\$ 225,000	
Interest and rentals	\$ 40,500	\$ 43,000	\$ 44,000	\$ 45,000	\$ 46,000	\$ 47,000	
Other	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Grants and other revenues	\$ 15,000	\$ 10,000	\$ 85,000	\$ 10,000	\$ 10,000	\$ 10,000	
Total Revenues:	\$ 55,500	\$ 53,000	\$ 204,000	\$ 205,000	\$ 391,000	\$ 282,000	
EXPENDITURES:							
Operating expenditures	\$ 220,374	\$ 227,000	\$ 233,800	\$ 240,800	\$ 248,000	\$ 255,400	
Capital expenditures:							
EXISTING OSHTEMO PARKS							
Drake Farmstead Park - master plan implementation	\$ 31,200	\$ 15,000	\$ 15,000	\$ 15,000			
Drake House - OHS renovation projects	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	
Flesher Field - trail improvements in wooded area	\$ 2,500						
Flesher Field - master plan implementation			\$ 75,000	\$ -			
Flesher Field - refurbishment	\$ -	\$ -	\$ -	\$ 15,000			
Fruitbelt Trail - short term improvements	\$ 1,000	\$ -	\$ -	\$ -			
Fruitbelt Trail - construction, see General Fund							
Grange Hall - paint basement walls	\$ 1,500		\$ -				
Grange Hall Improvements - roof, ceiling, lighting, septic system						\$ 75,000	
Township Park - disc golf baskets, tennis/basketball court repair & restripe	\$ 20,000						
Township Park - refurbishment		\$ -	\$ -	\$ 15,000			
Community Center - gutters, roof replacement	\$ 5,000	\$ -	\$ 20,000	\$ -			
Old Township Hall - paint	\$ 20,000	\$ -	\$ -	\$ -			
PLANNED/FUTURE PARKS							
Fruitbelt Trail - 9th St. to east border - planning and public input	\$ 5,000						
Fruitbelt Trail - 9th St. to east border - acquisition			\$ 100,000				
Fruitbelt Trail - 9th St. to east border - construction					\$ 300,000		
Twp Park/Arboretum/Landfill/Wolf Tree Corridor/Natural Corridor Planning/Public Input		\$ 5,000		\$ -			
Open Space / Natural Corridor Acquisition - Phase 1	\$ -			\$ 200,000			
Neighborhood Park #1 - Drake / KL Avenue (Acquisition and Schematic Plan)	\$ -				\$ 150,000		
Neighborhood Park #1 - Drake / KL Avenue (Construction)	\$ -	\$ -				\$ 300,000	
Neighborhood Park #2 (Acquisition and Schematic Plan)	\$ -	\$ -	\$ -				
Neighborhood Park #2 (Construction)	\$ -	\$ -	\$ -	\$ -			
EQUIPMENT, MAINTENANCE, INVESTMENT							
Lawn Equipment		\$ 10,400	\$ -	\$ -			
Parking lot maintenance, playground surface renewal, tree trimming, etc.	\$ 18,200	\$ 18,000	\$ 18,000	\$ 19,000	\$ 19,000	\$ 20,000	
HVAC Repairs and Upgrades (Grange Hall, Drake Farmstead, Community Center)		\$ 10,000	\$ -	\$ -		\$ 10,000	
Kalamazoo Community Foundation Endowment	\$ -	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	
Total Expenditures:	\$ 327,774	\$ 338,400	\$ 514,800	\$ 557,800	\$ 770,000	\$ 713,400	
TRANSFERS:							
From General Fund	\$ 250,000	\$ 250,000	\$ 250,000	\$ 350,000	\$ 350,000	\$ 350,000	
Total Transfers:	\$ 250,000	\$ 250,000	\$ 250,000	\$ 350,000	\$ 350,000	\$ 350,000	
FUND BALANCE:							
Net change in fund balance	\$ (22,274)	\$ (35,400)	\$ (60,800)	\$ (2,800)	\$ (29,000)	\$ (81,400)	
Beginning fund balance (Estimated)	\$ 177,091	\$ 154,817	\$ 119,417	\$ 58,617	\$ 55,817	\$ 26,817	
Ending Fund Balance:	\$ 154,817	\$ 119,417	\$ 58,617	\$ 55,817	\$ 26,817	\$ (54,583)	

LOCAL ROADS FUND (NEW) 204

	Capital Improvement Plan	2023 - 2027 ILLUSTRATIVE CAPITAL IMPROVEMENTS PLAN				
	2022	2023	2024	2025	2026	2027
REVENUES:						
Property taxes	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ -
Interest	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500
PAR Funds from RCKC (pays construction portion; funds do not actually run through Twp)	\$ 240,000	\$ 240,000	\$ 240,000	\$ 240,000	\$ 240,000	\$ 240,000
Total Revenues:	\$ 1,240,500	\$ 240,500	\$ 240,500	\$ 240,500	\$ 240,500	\$ 240,500
EXPENDITURES:						
Operating expenditures	\$ 22,467	\$ 23,100	\$ 23,800	\$ 24,500	\$ 25,200	\$ 26,000
Capital expenditures:*						
Signal 9th St and W Main St - Mast Arm Upgrade			\$ 50,000			
8th St Reconstruction - KL Ave to W Main (TBD)				\$ 275,000		
Atlantic/Parkview Intersection Realignment	\$ 5,000	\$ 100,000				
Road Reconstruction (TBD)	\$ -	\$ 10,000,000				
Preventative Maintenance	\$ 950,000	\$ 500,000	\$ 500,000	\$ 500,000	\$ 500,000	\$ 500,000
Road Economic Development Plan	\$ 20,000	\$ 20,000				
Total Expenditures:	\$ 997,467	\$ 10,643,100	\$ 573,800	\$ 799,500	\$ 525,200	\$ 526,000
FUND BALANCE:						
Net change in fund balance	\$ 243,033	\$ (10,402,600)	\$ (333,300)	\$ (559,000)	\$ (284,700)	\$ (285,500)
Beginning fund balance (Estimated)	\$ 1,000,000	\$ 2,533	\$ (10,640,567)	\$ (11,214,367)	\$ (12,013,867)	\$ (12,539,067)
Ending Fund Balance:	\$ 2,533	\$ (10,640,567)	\$ (11,214,367)	\$ (12,013,867)	\$ (12,539,067)	\$ (13,065,067)

*Capital expenditure priorities TBD depending whether USDA sewer expansion areas occur in 2022

FIRE FUND - 206, 211, 212 Combined

	CAPITAL IMPROVEMENT PLAN		2022 - 2026 ILLUSTRATIVE CAPITAL IMPROVEMENTS PLAN				
	2022	2023	2024	2025	2026	2027	
REVENUES:							
Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Interest	\$ 2,100	\$ 2,100	\$ 2,100	\$ 2,100	\$ 2,100	\$ 2,100	
Other (miscellaneous)	\$ 55,833	\$ 55,500	\$ 61,000	\$ 56,500	\$ 60,000	\$ 57,500	
Other (special assessment fund 212)*	\$ 187,573	\$ 189,400	\$ 191,300	\$ 193,200	\$ 195,100	\$ 197,100	
Other (special assessment)*	\$ 2,914,445	\$ 2,943,600	\$ 2,973,100	\$ 3,002,800	\$ 3,032,800	\$ 3,063,200	
Total Revenues:	\$ 3,159,951	\$ 3,190,600	\$ 3,227,500	\$ 3,254,600	\$ 3,290,000	\$ 3,319,900	
EXPENDITURES:							
Operating expenditures	\$ 2,683,190	\$ 2,763,700	\$ 2,846,600	\$ 2,932,000	\$ 3,020,000	\$ 3,110,600	
Capital expenditures:							
Fire Station 1 New Station	\$ -	\$ -	\$ -	\$ 1,000,000	\$ 250,000	\$ 250,000	
Fire Station 1 & 2 Maintenance	\$ 101,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ -	
Fire Station 3 Maintenance	\$ 5,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	
Station Alerting System - Station 2	\$ -	\$ 20,000	\$ -	\$ -	\$ -	\$ -	
Auditing Fees	\$ 2,500	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	
Township Plow Trucks - Purchase Assistance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Bobcat with Snow Blower and Trailer (New)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Lawn Equipment	\$ -	\$ -	\$ 2,600	\$ -	\$ -	\$ -	
Engine 511 - 2008 Pierce (Refurbish)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Engine 513 - 1994 Pierce (Replace)	\$ -	\$ 778,000	\$ -	\$ -	\$ -	\$ -	
Aerial 542 - 2011 Smeal (Reburbish)	\$ -	\$ -	\$ 220,000	\$ -	\$ -	\$ -	
Command Car 590 - 2015 Tahoe (Replace)	\$ -	\$ -	\$ 60,000	\$ -	\$ -	\$ -	
Command Car 591 - 2018 Tahoe (Replace)	\$ -	\$ -	\$ -	\$ -	\$ 60,000	\$ -	
Truck 541 - 2011 Smeal Aerial (Refurbish)	\$ -	\$ -	\$ 220,000	\$ -	\$ -	\$ -	
Fire Equipment	\$ 118,425	\$ 108,400	\$ 5,000	\$ 29,150	\$ -	\$ 38,500	
Personal Protection Equipment	\$ 40,625	\$ 3,450	\$ 30,600	\$ 11,100	\$ 40,000	\$ 40,000	
Total Expenditures:	\$ 2,950,740	\$ 3,707,550	\$ 3,418,800	\$ 4,006,250	\$ 3,404,000	\$ 3,443,100	
FUND BALANCE:							
Net change in fund balance	\$ 209,211	\$ (516,950)	\$ (191,300)	\$ (751,650)	\$ (114,000)	\$ (123,200)	
Beginning fund balance (Estimated)	\$ 2,100,984	\$ 2,310,195	\$ 2,534,695	\$ 2,528,995	\$ 1,747,595	\$ 1,603,595	
Ending Fund Balance:	\$ 2,310,195	\$ 1,793,245	\$ 2,343,395	\$ 1,777,345	\$ 1,633,595	\$ 1,480,395	

*Reflects policy to allocate SAD as follows: 86% to 206 operations, 9% to 211 equipment, and 5% to 212 facilities capital

POLICE FUND 207

	CAPITAL IMPROVEMENT PLAN	2023 - 2027 ILLUSTRATIVE CAPITAL IMPROVEMENTS PLAN				
		2022	2023	2024	2025	2026
REVENUES:						
Licenses and permits	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000
Ordinance, parking and other violations	\$ 17,000	\$ 22,000	\$ 22,000	\$ 22,000	\$ 22,000	\$ 22,000
State grants	\$ 22,000	\$ 22,000	\$ 22,000	\$ 22,000	\$ 22,000	\$ 22,000
Interest and rentals	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000
Other (Assessment)	\$ 1,420,000	\$ 1,434,200	\$ 1,448,500	\$ 1,463,000	\$ 1,477,600	\$ 1,492,400
Total Revenues:	\$ 1,463,000	\$ 1,482,200	\$ 1,496,500	\$ 1,511,000	\$ 1,525,600	\$ 1,540,400
EXPENDITURES:						
Operating expenditures	\$ 1,498,762	\$ 1,543,700	\$ 1,590,000	\$ 1,637,700	\$ 1,686,800	\$ 1,737,400
Capital expenditures (facility upgrades)	\$ 101,000	\$ -				
Total Expenditures:	\$ 1,599,762	\$ 1,543,700	\$ 1,590,000	\$ 1,637,700	\$ 1,686,800	\$ 1,737,400
FUND BALANCE:						
Net change in fund balance	\$ (136,762)	\$ (61,500)	\$ (93,500)	\$ (126,700)	\$ (161,200)	\$ (197,000)
Beginning fund balance (Estimated)	\$ 1,651,877	\$ 1,515,115	\$ 1,453,615	\$ 1,360,115	\$ 1,233,415	\$ 1,072,215
Ending Fund Balance:	\$ 1,515,115	\$ 1,453,615	\$ 1,360,115	\$ 1,233,415	\$ 1,072,215	\$ 875,215

STREET LIGHT FUND 219

	CAPITAL IMPROVEMENT PLAN	2023 - 2027 ILLUSTRATIVE CAPITAL IMPROVEMENTS PLAN				
	2022	2023	2024	2025	2026	2027
REVENUES:						
Interest	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500
Other (Assessment)	\$ 165,000	\$ 166,700	\$ 168,400	\$ 170,100	\$ 171,800	\$ 173,500
Total Revenues:	\$ 165,500	\$ 166,700	\$ 168,400	\$ 170,100	\$ 171,800	\$ 173,500
EXPENDITURES:						
Operating expenditures	\$ 145,800	\$ 135,000	\$ 130,000	\$ 125,000	\$ 120,000	\$ 115,000
Capital expenditures:						
LED Conversion/Improvements	\$ 50,000	\$ 25,000	\$ 45,000	\$ 48,000	\$ 50,000	\$ 55,000
Total Expenditures:	\$ 195,800	\$ 160,000	\$ 175,000	\$ 173,000	\$ 170,000	\$ 170,000
FUND BALANCE:						
Net change in fund balance	\$ (30,300)	\$ 6,700	\$ (6,600)	\$ (2,900)	\$ 1,800	\$ 3,500
Beginning fund balance (Estimated)	\$ 35,049	\$ 4,749	\$ 11,449	\$ 4,849	\$ 1,949	\$ 3,749
Ending Fund Balance:	\$ 4,749	\$ 11,449	\$ 4,849	\$ 1,949	\$ 3,749	\$ 7,249

SODA FUND 247

	Capital Improvement Plan	2023 - 2027 ILLUSTRATIVE CAPITAL IMPROVEMENTS PLAN				
	2022	2023	2024	2025	2026	2027
REVENUES:						
Property tax captures	\$ 40,000	\$ 40,400	\$ 40,800	\$ 41,200	\$ 41,600	\$ 42,000
Interest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Revenues:	\$ 40,000	\$ 40,400	\$ 40,800	\$ 41,200	\$ 41,600	\$ 42,000
EXPENDITURES:						
Operating expenditures	\$ 8,500	\$ 8,800	\$ 9,100	\$ 9,400	\$ 9,700	\$ 10,000
Capital expenditures:						
Drake Road Nonmotorized Path (Payment)	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000
Total Expenditures:	\$ 38,500	\$ 38,800	\$ 39,100	\$ 39,400	\$ 39,700	\$ 40,000
FUND BALANCE:						
Net change in fund balance	\$ 1,500	\$ 1,600	\$ 1,700	\$ 1,800	\$ 1,900	\$ 2,000
Beginning fund balance (Estimated)	\$ 68,679	\$ 70,179	\$ 71,779	\$ 73,479	\$ 75,279	\$ 77,179
Ending Fund Balance:	\$ 70,179	\$ 71,779	\$ 73,479	\$ 75,279	\$ 77,179	\$ 79,179

ARPA FUND (NEW) 297

	Capital Improvement Plan		2023 - 2027 ILLUSTRATIVE CAPITAL IMPROVEMENTS PLAN				
	2022	2023	2024	2025	2026	2027	
REVENUES:							
Grants	\$ 1,213,632	\$ 1,213,632	\$ -	\$ -	\$ -	\$ -	
Interest	\$ 1,000	\$ 1,000	\$ 500	\$ 500	\$ 200	\$ -	
Total Revenues:	\$ 1,214,632	\$ 1,214,632	\$ 500	\$ 500	\$ 200	\$ -	
EXPENDITURES:							
Operating expenditures	\$ 10,000	\$ 10,200	\$ 10,404	\$ 10,612	\$ 10,824	\$ -	
Capital expenditures:							
Broadband Infrastructure (Baseline Data & Plan)	\$ 5,000	\$ 5,000	\$ 5,000	\$ -	\$ -	\$ -	
Infrastructure (TBD)	\$ 100,000	\$ 1,000,000	\$ 100,000	\$ 1,000,000	\$ 98,792	\$ -	
Total Expenditures:	\$ 115,000	\$ 1,015,200	\$ 115,404	\$ 1,010,612	\$ 109,616	\$ -	
FUND BALANCE:							
Net change in fund balance	\$ 1,099,632	\$ 199,432	\$ (114,904)	\$ (1,010,112)	\$ (109,416)	\$ -	
Beginning fund balance (Estimated)	\$ 1,150,000	\$ 1,035,000	\$ 1,234,432	\$ 1,119,528	\$ 109,416	\$ (0)	
Ending Fund Balance:	\$ 1,035,000	\$ 1,234,432	\$ 1,119,528	\$ 109,416	\$ (0)	\$ (0)	

SEWER FUND 490

	CAPITAL IMPROVEMENT PLAN		2022 - 2026 ILLUSTRATIVE CAPITAL IMPROVEMENTS PLAN				
	2022	2023	2024	2025	2026	2027	
REVENUES:							
Carryover	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Connection Fees: Parcel, F-Ft	\$ 50,000	\$ 200,000	\$ 200,000	\$ 200,000	\$ 200,000	\$ 200,000	
Benefit Fees (New Growth)	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000	
Assessment & Installment Payments	\$ 20,000	\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000	\$ 140,000	
Grants & other revenues	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Interest	\$ 11,000	\$ 11,000	\$ 11,000	\$ 11,000	\$ 11,000	\$ 11,000	
Surcharge on Sanitary Utility Billings (16%)	\$ 245,000	\$ 252,400	\$ 260,000	\$ 267,800	\$ 275,800	\$ 284,100	
Total Revenues:	\$ 476,000	\$ 753,400	\$ 761,000	\$ 768,800	\$ 776,800	\$ 785,100	
EXPENDITURES:							
Operating expenditures partial breakout	\$ 144,047	\$ 148,400	\$ 152,900	\$ 157,500	\$ 162,200	\$ 167,100	
Professional Services (Audit, Legal)	\$ 11,500	\$ 11,800	\$ 12,200	\$ 12,600	\$ 13,000	\$ 13,400	
Fees & Professional Services (KRWWC)	\$ 20,000	\$ 20,600	\$ 21,200	\$ 21,800	\$ 22,500	\$ 23,200	
Engineering	\$ 7,000	\$ 7,000	\$ 7,000	\$ 7,000	\$ 7,000	\$ 7,000	
Operating expenditures	\$ 196,675	\$ 187,800	\$ 193,300	\$ 198,900	\$ 204,700	\$ 210,700	
CAPITAL PROJECTS (YEAR/FINANCING TBD):*							
Capital Project - USDA Phase 1 (Fund 492)							
Capital Project - USDA Phase 2 (Fund 493)							
Capital expenditures:							
Sewer Repair & Improvement, Incident/ER Contingency	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000	
Asset Management (SAW projects)	\$ 75,500	\$ 302,600	\$ 1,076,100	\$ 235,200	\$ 324,500	\$ 414,000	
8th Street, KL Ave to W Main St (TBD)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Parkview Avenue (11th to 12th St; 11th to Stadium TBD)	\$ 63,000	\$ 1,150,000	\$ -	\$ -	\$ -	\$ -	
FUTURE PROJECTS (YEAR/FINANCING TBD):							
Chime Street	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Plainview Street	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Vienna Street	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Promenade Street	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Country Trail Homesites Plat & Penny Lane	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Expenditures:	\$ 355,175	\$ 1,660,400	\$ 1,289,400	\$ 454,100	\$ 549,200	\$ 644,700	
OTHER FINANCING:							
Bond proceeds (SAW)	\$ -	\$ -	\$ 1,408,000	\$ -	\$ -	\$ -	
Transfer - Sewer Hardship Fund (SF to Fund 246)	\$ (300,000)	\$ (300,000)	\$ -	\$ -	\$ -	\$ -	
Total Other Financing Sources:	\$ (300,000)	\$ (300,000)	\$ 1,408,000	\$ -	\$ -	\$ -	
FUND BALANCE:							
Net change in fund balance	\$ (179,175)	\$ (1,207,000)	\$ 879,600	\$ 314,700	\$ 227,600	\$ 140,400	
Beginning fund balance (Estimated)	\$ 1,632,727	\$ 1,453,552	\$ 246,552	\$ 1,126,152	\$ 1,440,852	\$ 1,668,452	
Ending Fund Balance:	\$ 1,453,552	\$ 246,552	\$ 1,126,152	\$ 1,440,852	\$ 1,668,452	\$ 1,808,852	

*Capital expenditure priorities TBD depending whether USDA sewer expansion areas occur in 2022

WATER FUND 491

	CAPITAL IMPROVEMENT PLAN	2022 - 2026 ILLUSTRATIVE CAPITAL IMPROVEMENTS PLAN				
	2022	2023	2024	2025	2026	2027
REVENUES:						
Connectons, Surcharges, Assessments & Benefit Fees	\$ 178,000	\$ 183,000	\$ 188,000	\$ 194,000	\$ 200,000	\$ 206,000
Interest	\$ 5,500	\$ 5,500	\$ 5,500	\$ 5,500	\$ 5,500	\$ 5,500
Other (Miscellaneous)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Revenues:	\$ 183,500	\$ 188,500	\$ 193,500	\$ 199,500	\$ 205,500	\$ 211,500
EXPENDITURES:						
Operating expenditures	\$ 68,439	\$ 70,500	\$ 105,800	\$ 107,925	\$ 111,163	\$ 113,400
Capital expenditures:*						
Fire Hydrant S 9th Street	\$ 217,000	\$ -	\$ -	\$ -	\$ -	\$ -
W Main St, 7th to 8th St, 12-inch (w/Phase 1 sewer)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11th St, N Ave to Parkview, 12-inch (w/Phase 2 sewer)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Frie & Gibbs Plat, 8-inch (w/Phase 2 sewer)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Engineering	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
W Main St, 2nd to 4th St; Big Rock Road, 12-inch w/PRS	\$ -	\$ -	\$ -	\$ 117,000	\$ 1,750,000	\$ -
Misc. Infrastructure Repairs & Improvements	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000
Total Expenditures:	\$ 305,439	\$ 90,500	\$ 125,800	\$ 244,925	\$ 1,881,163	\$ 133,400
FUND BALANCE:						
Net change in fund balance	\$ (121,939)	\$ 98,000	\$ 67,700	\$ (45,425)	\$ (1,675,663)	\$ 78,100
Beginning fund balance (Estimated)	\$ 1,628,978	\$ 1,507,039	\$ 1,605,039	\$ 1,672,739	\$ 1,627,314	\$ (48,349)
Ending Fund Balance:	\$ 1,507,039	\$ 1,605,039	\$ 1,672,739	\$ 1,627,314	\$ (48,349)	\$ 29,751

*Capital expenditure priorities TBD depending whether USDA sewer expansion areas occur in 2022

DDA FUND 900

	CAPITAL IMPROVEMENT PLAN	2023 - 2027 ILLUSTRATIVE CAPITAL IMPROVEMENTS PLAN				
	2022	2023	2024	2025	2026	2027
REVENUES:						
Property tax captures	\$ 200,000	\$ 202,000	\$ 204,000	\$ 206,000	\$ 208,100	\$ 210,200
Miscellaneous (Personal Property Loss)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interest	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000
Grants/Loan	\$ 600,000	\$ -	\$ -	\$ -	\$ -	\$ -
Total Revenues:	\$ 801,000	\$ 203,000	\$ 205,000	\$ 207,000	\$ 209,100	\$ 211,200
	\$ 668,834					
EXPENDITURES:						
Operating expenditures	\$ 52,500	\$ 54,100	\$ 55,700	\$ 57,400	\$ 59,100	\$ 60,900
Capital expenditures:						
Stadium Drive Shared Use Path	\$ 600,000	\$ -	\$ -	\$ -	\$ -	\$ -
Loan Repayment Stadium Path	\$ 200,000	\$ 200,000	\$ 200,000	\$ -	\$ -	\$ -
9th St Sidewalk	\$ 30,000		\$ -	\$ 100,000	\$ -	
Grants Loan Program	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
OCC Wifi	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -
Total Expenditures:	\$ 897,500	\$ 264,100	\$ 265,700	\$ 167,400	\$ 69,100	\$ 70,900
FUND BALANCE:						
Net change in fund balance	\$ (96,500)	\$ (61,100)	\$ (60,700)	\$ 39,600	\$ 140,000	\$ 140,300
Beginning fund balance (Estimated)	\$ 230,347	\$ 133,847	\$ 72,747	\$ 12,047	\$ 51,647	\$ 191,647
Ending Fund Balance:	\$ 133,847	\$ 72,747	\$ 12,047	\$ 51,647	\$ 191,647	\$ 331,947



Southwest Michigan Building Authority

Requested Budget for Fiscal Year 2022

January 1, 2022 to December 31, 2022

Approval History		
	Date Approved	Record of Vote
SMBA Board	2021-09-23	4 (Yes) - 0 (No), 1 Absent
Oshtemo Township Board		
Cooper Township Board		

Budget Timeline		
Date	Item	Status
2021-09-23	Requested Budget Presented to SMBA Board & Approved to Forward to Participating Local Units	Complete
2021-10-11	Budget Approved by SMBA Board Presented to Cooper Township Board	Pending
2021-10-12	Budget Approved by SMBA Board Presented to Oshtemo Township Board	Pending
2021-12-09	Budget Approved by Participating Local Units Adopted by SMBA Board	Pending

Our Mission:

To provide our customers with professional, prompt, and fiscally responsible services for building permitting, inspections, and code enforcement.

Office Manager's Letter

It is my pleasure to present for your consideration the draft budget for the 2022 fiscal year. The draft budget was prepared with the Authority's mission of fiscal responsibility at the heart of every decision.

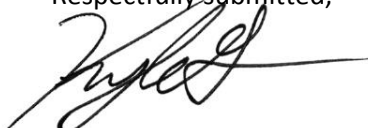
There are several items of note to which I would like to call the board's attention:

- 1. New GL Numbers.** The Authority worked with BS&A Software during the month of May 2021 to update our chart of accounts to be in compliance with the revised uniform chart of accounts published by the State. As a result, the fund and department numbers used by the Authority have changed. Additionally, several existing GL numbers have been split into discrete numbers to better capture financial activity. Specifically, permit inspection revenue has been split from the general permit revenue line, and the IT expense line has been split into the functional aspects of that line item.
- 2. Salaries.** Stemming from the effects of the COVID-19 pandemic, the Social Security Administration (SSA) is expected to announce a much larger Cost of Living Adjustment (COLA) than in previous years. Per the Salary Adjustment Policy, employees shall receive the higher of the SSA COLA or the inflation rate multiplier published by the State Treasury Department in addition to a merit increase based on performance review data. Typically, the COLA is not published by the SSA until the end of the year (after we will have adopted our budget). Therefore, the numbers used in calculating salary adjustments for staff are intended to be for budgetary purposes only. Official salary adjustment recommendations will be presented by the Office Manager following the publication of the COLA and inflation rate multiplier from the State, at which point any necessary budget amendments (positive or negative) can be authorized by the board.
- 3. GovOS / SeamlessDocs Contract.** The Authority entered into a contract with Kofile, makers of the GovOS / SeamlessDocs platform for the remainder of 2021 and through 2022. Staff are currently exploring alternate options as the platform has not met expectations. The contract cost for 2022 is currently budgeted for, but may be removed or reduced based on future negotiations with Kofile regarding early termination of contract. The current frontrunner for a replacement to SeamlessDocs is also budgeted for with the intention that it will replace SeamlessDocs in the near future.

Executive Summary

The 2022 requested budget represents a net decrease in revenues from the 2021 amended budget, and a net increase in appropriations from the 2021 amended budget. The requested budget results in a surplus of approximately \$25,000. The beginning fund balance for 2022 is projected to be \$771,462. The ending fund balance is projected to be \$796,458. The fund balance meets expenses for permits which have not been completed by the close of the fiscal year and may also be used for investments, capital improvements, etc.

Respectfully submitted,



Kyle Gibson
Office Manager
Southwest Michigan Building Authority

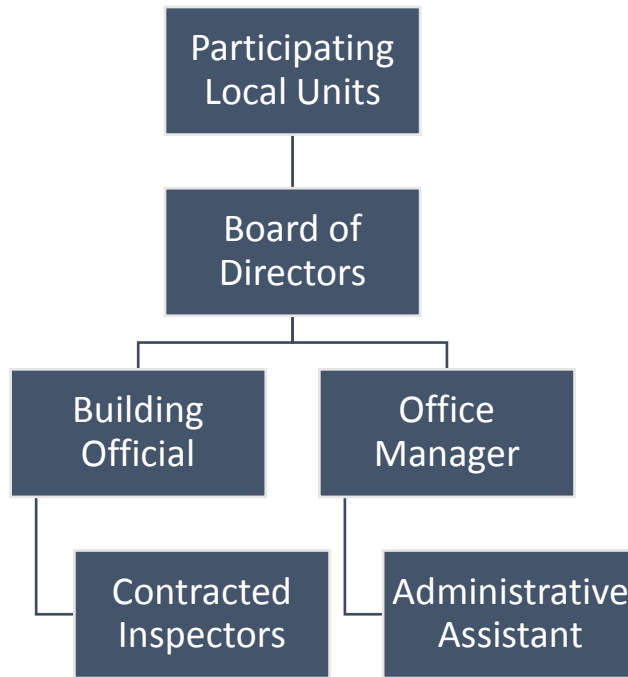
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Authority Board of Directors

Name	Position	Representing
Dusty Farmer	Chairperson	Oshtemo Township
Carol DeHaan	Treasurer	Cooper Township
Cheri Bell	Member	Oshtemo Township
Jeff Sorensen	Member	Cooper Township
Larry Stehouwer	Citizen Member At Large	Resident of Cooper Township

Organizational Chart



Fund Information

569 – Building Authority Fund (Enterprise Fund)

“The Building Authority Fund is used in counties, cities, and urban townships to account for the operation of public facilities by a building authority board established under the authority of 1948 PA 31, MCL 123.951 to MCL 123.965. The Michigan Department of Treasury requires this fund in those units that establish a building authority to operate public facilities. If a building authority is established to issue debt and construct facilities, without continuing operation, the appropriate Debt Service and Capital Project Funds must be established rather than this fund. The cash and investments of the Building Authority Fund are subject to the requirements of 1943 PA 20, MCL 129.91, and may be included in a pooled cash and investment account.”

The Authority only uses this single fund due to the small size of the entity.

(Text Source: *Michigan Department of Treasury Uniform Chart of Accounts for Local Units of Government*, Version 202011)

Activity (Department) Information

000 – A&L, Balance Sheet Accounts

For funds that do not need detailed activity information, the activity number can be replaced with three zeros. The Authority has elected to use this activity number for Asset & Liability / Balance sheet accounts that are not associated with expense activity or revenue per the Uniform Chart of Accounts.

272 – Revenue Accounts

This activity number is listed in the Uniform Chart of Accounts as “Open”, meaning that it can be used by the local unit of government as that unit sees fit within the overall category of the activity code. The Authority has elected to utilize this activity number to differentiate between revenue and expense activity.

273 – Building Authority Activity (Department)

“This Activity Number is found in the General Fund of local units of government and/or in the records maintained by a statutory building authority. Its use is mandatory for each building authority and by each unit making payments to such an authority. It reflects rental or lease payments made by a local unit to the authority. At the authority, it reflects administrative and operating expenditures, debt payments, and other applicable expenditures. It may also reflect revenue, such as rental or lease income, interest earned, etc.”

(Text Source: *Michigan Department of Treasury Uniform Chart of Accounts for Local Units of Government*, Version 202011)

Estimated Revenues

Department 000 – Asset & Liability, Balance Sheet Accounts

GL Number	Description	2020 Amended Budget	2021 Activity Through 9/15/21	2021 Amended Budget	2022 Requested Budget	2022 Requested Amt Change	2022 Requested % Change
569-000-99999	Carryover	0	0	0	0	0	0.00
Totals for Department 000		0	0	0	0	0	0.00

Department 272 – Revenue Accounts

GL Number	Description	2020 Amended Budget	2021 Activity Through 9/15/21	2021 Amended Budget	2022 Requested Budget	2022 Requested Amt Change	2022 Requested % Change
569-272-49100	Building Permits	325,000	190,079	200,000	200,000	0	0.00
569-272-49200	Electrical Permits	100,000	35,644	50,000	50,000	0	0.00
569-272-49300	Mechanical Permits	85,000	37,933	50,000	50,000	0	0.00
569-272-49400	Plumbing Permits	60,000	17,988	25,000	25,000	0	0.00
569-272-60701	FOIA Fees	0	143	200	250	50	25.00
Subscription FOIA Revenue					200		
569-272-62600	Building Services to Others	0	0	0	0	0	0.00
569-272-62701	Building Inspections	0	59,080	95,000	85,000	(10,000)	(10.53)
569-272-62702	Electrical Inspections	0	28,995	40,000	40,000	0	0.00
569-272-62703	Mechanical Inspections	0	30,740	45,000	45,000	0	0.00
569-272-62704	Plumbing Inspections	0	23,995	32,000	35,000	3,000	9.38
569-272-63000	Plan Review	45,000	50,859	60,000	70,000	10,000	16.67
569-272-66300	Bond Forfeitures and Bond Costs	1,000	0	0	0	0	0.00
569-272-66500	Interest on Investments	1,000	620	2,000	1,100	(900)	(45.00)
Mercantile Checking					720		
Advia CD					350		
GL # FOOTNOTE TOTAL:					1,070		
569-272-67300	Gain/Loss on Sale of Assets	0	0	0	0	0	0.00
569-272-67500	Miscellaneous	2,200	3,029	3,100	500	(2,600)	(83.87)
Totals for Department 272		619,200	479,105	602,300	601,850	(450)	(0.07)

Total Estimated Revenues

	2020 Amended Budget	2021 Activity Through 9/15/21	2021 Amended Budget	2022 Requested Budget	2022 Requested Amt Change	2022 Requested % Change
Totals Estimated Revenues	619,200	479,105	602,300	601,850	(450)	(0.07)

Estimated Appropriations

Department 273 – Building Authority Expense Activity

GL Number	Description	2020 Amended Budget	2021 Activity Through 9/15/21	2021 Amended Budget	2022 Requested Budget	2022 Requested Amt Change	2022 Requested % Change
569-273-70200	Salaries	145,000	111,420	162,508	176,000	13,492	8.30
	Building Official (Salaried)				80,266		
	Office Manager (Hourly, 37 FT, Budget 40 Hrs)				52,303		
	Administrative Assistant (Hourly, 37 FT, Budget 40 Hrs)				42,918		
	Hourly Employee Overtime (Sum of 5 hours @ OT rate / employee)				350		
	GL # FOOTNOTE TOTAL:				175,837		
569-273-70203	Building Board of Appeals	0	0	0	0	0	0.00
569-273-70204	Board Member At Large Stipend	450	180	390	360	(30)	(7.69)
	\$30 * 12				360		
569-273-71002	Health Insurance	42,000	35,752	43,000	45,000	2,000	4.65
	Blue Cross Blue Shield (Est. 4% Increase = \$3,722.85 / month)				45,000		
569-273-71003	Disability / Life Insurance	1,650	1,558	1,885	2,160	275	14.59
	\$180 * 12				2,160		
569-273-71004	Work Comp Insurance	2,500	2,140	2,500	2,500	0	0.00
	Workers Compensation				2,500		
569-273-71005	Payroll Taxes - FICA	11,600	8,420	12,432	13,464	1,032	8.30
	SocSec (6.2%) + Medicare (1.45%) = 7.65% of Salaries				13,464		
569-273-71006	HSA	4,500	7,072	7,300	7,270	(30)	(0.41)
	\$3500 Employer HSA Contribution per Employee				7,000		
	Basic Account Fees				270		
	GL # FOOTNOTE TOTAL:				7,270		
569-273-71009	Pension Plan	13,000	10,476	15,200	14,080	(1,120)	(7.37)
	4% Employer Contribution + up to 4% Employer Match = 8% of Salaries				14,080		
569-273-71101	In Lieu of Insurance	810	1,761	3,390	5,300	1,910	56.34
	Office Manager				5,300		
569-273-71102	Clothing Allowance	500	0	1,500	1,500	0	0.00

GL Number	Description	2020 Amended Budget	2021 Activity Through 9/15/21	2021 Amended Budget	2022 Requested Budget	2022 Requested Amt Change	2022 Requested % Change
\$500 Per Employee					1,500		
569-273-71103	Education / Membership Dues	4,000	3,059	4,000	3,500	(500)	(12.50)
Metro Building Inspectors Association Membership					130		
Code Officials Conference of Michigan (COCM) Membership, Spring + Fall Conference					515		
Home Builders Association of SW MI (HBA) Dues					615		
Treasurer's Bond					150		
MADCAD Code Library Access through LMCICC					700		
SHRM Annual Membership - Kyle Gibson					219		
GL # FOOTNOTE TOTAL:					2,329		
569-273-72700	Supplies	3,500	2,847	4,500	4,500	0	0.00
569-273-72800	Postage / Shipping	600	2,483	2,500	2,750	250	10.00
Postage for Expired Permit Notices, Checks, General Correspondence					2,000		
Shipping for Plan Reviews					750		
GL # FOOTNOTE TOTAL:					2,750		
569-273-72900	General Insurance	6,400	8,614	9,000	9,100	100	1.11
General Liability					950		
Umbrella					1,300		
Linebacker					3,000		
CyberSolutions					1,000		
Inland Marine					400		
Business Auto					2,300		
Govt. Crime / Fidelity ISO Package					130		
GL # FOOTNOTE TOTAL:					9,080		
569-273-80100	Building Inspector	10,000	6,600	10,000	10,000	0	0.00
Back-up for Building Official (\$50 * 25 PTO days * 8 inspections / day).					10,000		
569-273-80200	Electrical Inspector	38,500	32,050	40,000	40,000	0	0.00
569-273-80300	Mechanical Inspector	34,200	30,750	45,000	45,000	0	0.00
569-273-80400	Plumbing Inspector	41,000	23,550	32,000	35,000	3,000	9.38
569-273-80500	Plan Review	40,000	47,289	55,000	70,000	15,000	27.27

GL Number	Description	2020 Amended Budget	2021 Activity Through 9/15/21	2021 Amended Budget	2022 Requested Budget	2022 Requested Amt Change	2022 Requested % Change
569-273-80600	Consultants	0	0	0	0	0	0.00
569-273-80700	Accounting / Audit Fees	13,000	8,143	13,000	10,500	(2,500)	(19.23)
	Siegfried Crandall Audit				2,500		
	SeberTans Audit				3,000		
	Siegfried Crandall Accounting Support				5,000		
	GL # FOOTNOTE TOTAL:				10,500		
569-273-80800	Legal Fees	10,000	3,450	5,000	5,000	0	0.00
569-273-80900	IT / Infrastructure	22,600	16,932	22,500	22,500	0	0.00
	Aanalytics (\$1,761 / month)				21,200		
	Hotspot (\$70 / month)				840		
	Web Hosting (Annual)				300		
	Elementor Pro Website Plugin (Annual)				50		
	GL # FOOTNOTE TOTAL:				22,390		
569-273-80901	IT / Software	0	6,439	15,771	14,000	(1,771)	(11.23)
	BS&A Software (AP, CR, GL, PR, BD) (Estimate)				5,356		
	GovOS Studio (Formerly SeamlessDocs)				6,465		
	Adobe Acrobat Pro (2 * 203.88 / license)				408		
	HelloSign (Annual)				180		
	Cognito Forms (Pre-pay 1 yr for discounted rate)				1,334		
	GL # FOOTNOTE TOTAL:				13,743		
569-273-80902	IT / Support	0	540	600	500	(100)	(16.67)
569-273-85000	Telephone	5,700	4,816	6,300	4,260	(2,040)	(32.38)
	Cell Phone Reimbursement (Building Official, Office Manager, Administrative Assistant (50*3*12))				1,800		
	Telnet (Approximately \$205 / Month)				2,460		
	GL # FOOTNOTE TOTAL:				4,260		
569-273-86000	Vehicle Gas / Maintenance	5,500	1,950	3,000	3,000	0	0.00
	Car Wash Subscription (\$29.99 / Month)				360		
	Gas (Approx. \$155 / Month)				1,860		
	GL # FOOTNOTE TOTAL:				2,220		
569-273-86100	Mileage	1,500	112	500	500	0	0.00

GL Number	Description	2020 Amended Budget	2021 Activity Through 9/15/21	2021 Amended Budget	2022 Requested Budget	2022 Requested Amt Change	2022 Requested % Change
569-273-94000	Facility Rent	20,250	21,000	21,000	22,000	1,000	4.76
\$5,500 / Quarter					22,000		
569-273-95500	Miscellaneous	500	13	13	0	(13)	(100.00)
569-273-95600	Equipment / Maintenance	1,450	1,383	2,000	2,000	0	0.00
Ricoh Contract (~\$135/month)					1,620		
569-273-96401	Refund of Overpayment	25	0	0	0	0	0.00
569-273-96500	Bank Service Charges	500	421	660	660	0	0.00
Approx. \$55 / month					660		
569-273-96800	Depreciation Expense	0	0	0	0	0	0.00
569-273-97100	Capital Outlay	3,560	17,785	22,000	4,450	(17,550)	(79.77)
Estimated Cost to Update Code Library to 2021 Edition					4,000		
Air Purifiers (3 @ Approx. \$150)					450		
GL # FOOTNOTE TOTAL:					4,450		
569-273-97200	Capital Outlay - Vehicle	32,421	0	0	0	0	0.00
569-273-99300	Interest/Penalty IRS/State Withholdings	60	0	0	0	0	0.00
569-273-99900	Contingency	1,275	0	0	0	0	0.00
Totals for Department 273		518,551	419,005	564,449	576,854	12,405	2.20

Total Estimated Appropriations

	2020 Amended Budget	2021 Activity Through 9/15/21	2021 Amended Budget	2022 Requested Budget	2022 Requested Amt Change	2022 Requested % Change
Total Estimated Appropriations	518,551	419,005	564,449	576,854	12,405	2.20

Net of Estimated Revenues & Estimated Appropriations

	2020 Amended Budget	2021 Activity Through 9/15/21	2021 Amended Budget	2022 Requested Budget	2022 Requested Amt Change	2022 Requested % Change
Totals Estimated Revenues	619,200	479,105	602,300	601,850	(450)	(0.07)
Total Estimated Appropriations	518,551	419,005	564,449	576,854	12,405	2.20
Net of Revenues / Appropriations	100,649	60,100	37,851	24,996	(12,855)	(33.96)

Summary of Fund Balance

	2020 Amended Budget	2021 Activity Through 9/15/21	2021 Amended Budget	2022 Requested Budget	2022 Requested Amt Change	2022 Requested % Change
Beginning Fund Balance	540,604	711,362	711,362	771,462	60,100	8.45
Ending Fund Balance	641,253	771,462	749,213	796,458	47,245	6.31

Fund Balance Sheet (As of 9/15/2021)

GL Number	Description	Balance
Assets		
569-000-00100	Cash - Checking	603,697.46
569-000-00200	Cash - Savings	5.00
569-000-00300	Cash - Certificates of Deposit	152,940.40
569-000-00400	Cash - Imprest / Petty	250.00
569-000-01800	Building Receivable	0.00
569-000-12300	Prepays	0.00
569-000-14700	Accumulated Depreciation	(26,087.89)
569-000-14799	Capital Assets Equipment	60,360.85
Total Assets		791,165.82
Liabilities		
569-000-20200	Accounts Payable	5,482.00
569-000-22800	Due to State of Michigan	1,324.67
569-000-22900	Due to Federal Government	0.00
569-000-23700	Due to Pension Plan	0.00
569-000-23800	Due to HSA	0.00
569-000-25700	Accrued Payroll	1,897.77
569-000-26500	Performance Bonds	11,000.00
Total Liabilities		19,704.44
Fund Balance		
569-000-39000	Fund Balance	711,362.18
	Beginning Fund Balance	711,362.18
	Net of Revenues VS Expenditures	60,099.20
	Ending Fund Balance	771,461.38
	Total Liabilities and Fund Balance	791,165.82

OSHTEMO CHARTER TOWNSHIP

PURCHASING POLICY

Revised:

General Purpose:

The purpose of this purchasing policy is to ensure the efficient procurement of appropriate goods and services for use in the normal and routine operation of the Charter Township of Oshtemo. This policy ensures the accountability, transparency, and ethical behavior of Township purchasing representatives, yet supports an efficient process.

Summary Statement of Policy:

The policy is designed to serve as a guide for all purchases by Township employees and elected officials on behalf of Oshtemo Township.

Actual Policy as Written:

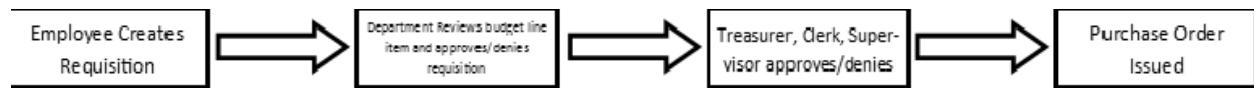
The Township Board of Trustees has the fiduciary oversight, and the Supervisor is the purchasing agent, for all purchases. All purchases are ultimately the responsibility of the Township Supervisor and the Board of Trustees. Department Heads, and assigned employees shall be responsible for purchasing goods and services for their departments/area, such as for certain standard supplies and services. All purchases must be budgeted for, and properly documented, in accordance with this policy. Other than those specifically listed, this policy does not afford anyone the ability to make purchases in excess of what has been budgeted for their specific department budget. Purchasers shall not consider appropriations contained in the budget as a mandate to expend funds, nor does the budget constitute authorization to commit the Township to purchases, as such authorization originates from the provisions in this policy. This purchasing policy is based on dollar thresholds. The practice of separating the work of vendors into separate invoices to circumvent the policy is prohibited. The intention of this policy is to give Department Heads latitude to keep operations moving and for Department Heads to keep the ~~Personnel Director~~Supervisor apprised of operations and purchases.

Purchases should be awarded to the lowest responsible bidder. Consideration shall be given to: quality of goods/services; conformity with specifications; suitability to the requirements of the township; delivery of goods; and past performance of vendor. The Township shall attempt to purchase the highest quality goods and services in the best interest of the Township. In this process, the Township shall serve as an equal opportunity purchaser, favoring local vendors only when all other factors are equal.

Department Heads shall conduct monthly review of funds assigned to them and ~~is~~are responsible for reporting any variance to the Supervisor or his or her designee. Designees of any Official will be reported to the Township Board during the annual budget process.

Non-Discrimination Requirements:

In accordance with the requirements of 1976 P.A. 453 (Michigan Civil Rights Act) and 1976 P.A. 220 (Michigan Handicapped Rights Act) and the Oshtemo Charter Township Non-Discrimination Ordinance No. 549 adopted August 27, 2013, to the greatest extent possible, the Township will do business with vendors of goods and services which “do not discriminate against any employee or applicant for employment with respect to hire, tenure, terms, conditions, or privileges of employment, or a matter directly or indirectly related to employment, because of race, color, religion, national origin, age, sex, height, weight, marital status, familial status, citizenship, gender identity, sexual orientation, genetic information, or because of a physical or mental disability/handicap that is unrelated to the person's ability to perform the duties of a particular job or position. Any vendor found to not comply with these requirements shall be ineligible to do business with the Township.



Authorization to Purchase:

Purchasers are authorized and required to make purchases of goods or services through the formal requisition process using the purchase order program. Employees must get the following requisition authorization depending on the type of purchase they are requesting. Note: Supervisor, Treasurer or Clerk may determine any particular item can be presented for information to the Township Board. Department Heads will review budget monthly and submit reports and request amendments (using electronic Budget Amendment Form – T Drive) to the Township Supervisor. Corrections will be submitted to the Township Clerk (using electronic Journal Correction Form – T Drive). The Supervisor, Clerk, and Treasurer will review the budget quarterly to verify purchases are being made in accordance with purchasing policy and annual budget.

1) *Purchases that have been budgeted for in the annual budget \$~~2,000~~10,000 or less:* Purchaser initiates requisition using purchase order program, and Township Officials (or their designee) and Department Heads shall monitor sum of purchases for adherence to annual budget. The Township Supervisor, Treasurer, or Clerk must then review and approve the requisition for their respective offices.

~~2) Purchases that have been budgeted for in the annual budget for operations (no maximum) or for capital items \$2,000–\$10,000: Purchaser initiates requisition using purchase order program, and Township Officials (or their designee) and Department Heads shall monitor sum of purchases for adherence to annual budget. The Township Supervisor, Treasurer, or~~

~~Clerk must then review and approve the requisition. The Department Head must report this purchase to the Township Clerk requesting that the purchase be placed on the receipts and disbursements summary report issued monthly to the Township Board.~~

~~3)2) Purchases that have been budgeted for in the annual budget for capital items >\$10,000:~~ Capital purchases that have been budgeted for in the annual budget, including but not limited to large capital items such as vehicle purchases, road construction, water construction, and sewer construction, shall not require further Township Board approval up to \$50,000. These capital items will be detailed to the Township Board during the annual budget meeting process. These items will be included in the annual budget in the blue detail line items within each General Ledger category. Department Heads will provide a written update on the consent agenda or presentation at the meeting will be provided to the Board on the purchasing process used and the selected vendor or contractor.

~~4)3) Purchases that have not been budgeted for in the annual budget, less than or equal to \$2,000:~~ Purchaser must first receive authorization from their Department Head and Supervisor, Clerk or Treasurer for their respective offices. Department Head and Township Official shall identify source of fund from the annual budget. Upon authorization, purchaser shall make requisition request using the purchase order program. The Township Board will be informed via receipts and disbursements reports, and the Board will make budget amendments for all such purchases no less than quarterly.

~~5)4) Purchases that have not been detailed in the annual budget greater than \$2,000, or purchases that end up costing more than the detailed amount in the annual budget:~~ Purchaser must first receive recommendation from their Department Head and the Township Supervisor. The Township Board must then both approve the requisition and amend the annual budget. Purchaser then creates requisition in the purchase order program.

Using the above guidelines, a purchase order must be generated before the purchase is made.

There are three means by which the Township selects a service provider or material product. These are: a) sealed bids, b) informal quotes, and c) sole source purchasing. Refer to detail on each, below. It is the practice of Oshtemo Township to provide vendors with fair and equal opportunities to compete for work. Summaries shall state method used. Department Heads will review the method of procurement for vendor or service providers with the Township Supervisor. Employees will adhere to the Township Gratuity Policy in the employee handbook regarding gifts from vendors.

Selecting Vendors/Service Providers:

A. Sealed Bid Procedure:

Sealed bids may be obtained using a request for proposal (RFP), a set of detailed specifications, or contract documents (plans and specifications). Publication or communication of proper notice of the need for bids shall be arranged for in the manner which will bring the information to the

attention of appropriate professionals, contractors, or vendors. A minimum of three bids are recommended for all purchases over \$10,000. Employees may choose to seek multiple bids for purchases less than or equal to \$10,000 as well. The Township may choose to forego the bidding procedure due to circumstances that would result in a savings to the Township and if the quality of services provided will not be diminished due to the lack of bidding.

All bids received by the Township will be time/date stamped when received. All bids must be sealed when received; unsealed bids will not be accepted. Bids will be opened by the Township Supervisor or personnel appointed by the Supervisor at the place and time described in the bid advertisement and shall be open to the public. Once the bid opening process is complete, staff will prepare a written purchase recommendation. If approved, staff will inform the winning bidder. The Township reserves the right to reject any and all bids and is not required to accept the lowest bid. In general, the Township works in accordance with the Qualifications-Based Selection (QBS)*.

(*From online: “Qualifications-Based Selection (QBS) is a procurement process established by the United States Congress as a part of the Brooks Act[1] (Public Law 92-582; see also 40 USC 1101 et. seq.)[2] and further developed as a process for public agencies to use for the selection of architectural and engineering services for public construction projects. It is a competitive contract procurement process whereby consulting firms submit qualifications to a procuring entity (owner) who evaluates and selects the most qualified firm, and then negotiates the project scope of work, schedule, budget, and consultant fee.” Additional information on QBS in Michigan is available at www.qbs-mi.org).

B. Quoting Procedure:

Quotes may be obtained by means of discussion and/or written outline scope of services request. A minimum of three quotes from professionals, contractors, or vendors is recommended for substantive purchases. The Township may choose to forego the quoting procedure due to circumstances that would result in a savings to the Township and if the quality of services provided will not be diminished due to the lack of quoting.

All quotes received by the Supervisor’s Office or designee will be time/date stamped when received. Quotes do not need to be sealed. Quotes may be opened at the time they are received. The approving party must approve or deny all purchases that have been quoted according to purchasing standards previously stated. The Township reserves the right to reject any and all quotes and is not required to accept the lowest quote. In general, the Township works in accordance with the quality based selection on all quotes.

C. Sole Source Purchasing:

In recognition that certain products and services are clearly superior and/or compatible with township operations, the approving party may determine that a specific product or vendor be the sole source of purchasing for the Township. In doing so, the items will be purchased without a formal bidding process. Examples of sole source purchasing include engineering, information technology, insurances, and auditing services.

Purchaser will periodically evaluate composite billings and compare sole source vendor with other vendors, for comparison of pricing and quality, and provide summary of review and decision. Suggested review period is every three years.

Methods of Payment

Petty Cash:

Miscellaneous purchases under \$25 may be made using the petty cash fund in accordance with this policy. Petty cash is maintained by the Treasurer. Receipts must be submitted to the Treasurer for reimbursement. The Treasurer shall keep petty cash in his/her office and may designate additional areas in which petty cash may kept; e.g., in the Fire Department.

The Treasurer will review petty cash disbursements prior to replenishing the fund. Records of petty cash distribution will be kept in the Treasurer's office and are available at all times for review.

Checks:

Checks are the standard form of payment from the Township. A check will be issued through the purchase order process, unless another form of payment is requested.

Credit Cards (for employee use):

~~When no other payment method is available,~~ Township credit cards may be used to make purchases from vendors where credit terms are not available (such as travel), as well as for one time non routine items. Treasurer manages credit card availability to employees. **Please see the Township's Credit Card Policy.** Purchaser must submit detailed receipt to Clerk's office.

Purchases made on credit cards are subject to transaction and credit limits established for each individual card by the Treasurer. ~~A minimum transaction of five dollars (\$5) is required for all credit card transactions.~~

Contracts:

In general, all contracts are approved through the Township Supervisor who by law is the purchasing agent for the Township. The Supervisor signs the contracts and may do so if signature aligns with purchasing policy herein (budget) and state law. The Treasurer and Clerk co-sign the payments.

Education and Training:

The employee's Department Head shall approve all requests for continuing education, conferences, and external training, prior to registration. Department Head shall approve based on annual budgeted education/training line item and shall not exceed the annual appropriated amount without budget amendment per previous guidelines.

Cooperative Government Contracts:

Should the Township be able to secure quality products at favorable prices by joining with other local units of government, or participating in a State of Michigan or federal government purchasing program, the Township Supervisor may waive the formal bidding process.

Emergency Purchases:

Emergency purchases can be authorized only when health, safety, and/or welfare of Township residents or their property are endangered through unexpected circumstances, when normal operations of the Township would be severely hampered by a long delay, or when Township property or employees are endangered through unexpected circumstances. Normal purchasing procedures outlined in this policy may be suspended when such circumstances exist. In the case of an emergency situation, the Township Supervisor, Treasurer, Clerk, Fire Chief, or Maintenance Director can authorize the immediate purchase of any materials, supplies, equipment, or services needed to resolve the emergency situation. The Supervisor will report all emergency purchases to the Township Board at its next scheduled meeting.

Change Orders (Within Annual Budget Detail):

Staff & Supervisor are expected to document all change orders through the purchase order program in excess of 10% of the original contracted price. Approval is subject to Supervisor review and approval and availability of funds.

Change Orders: (Outside Annual Budget Detail):

Supervisor or Staff will include up to an additional 10% of contract or specified lump sum amount in all project budgets for capital projects when submitting request to Township Board to award contract. Request will identify source of payment funds. As with any other budget approval, Board approval shall be subject to monies availability in either annual budget or in Township reserves. Subsequently, Supervisor can approve change orders within the additional approved budget amount. Supervisor shall work in consultation with consultants and/or Staff to make determination.

Tax Exempt Status:

Section 4 of the General Sales Tax Act, MCL 205.54(5); MSA 7.524(5) and Michigan Sales and Use Tax Rule, 1979 AC, R205.79, provide that sales to the United States Government, the State of Michigan and their political subdivisions, departments and institutions are not taxable when ordered and paid for by warrant on government funds. In the alternative, the government may claim exemption at the time of purchase by providing the seller with a signed statement to the effect that the purchaser is a governmental entity. Statement is available upon request from the Clerk’s office.

Forms:

Every Township vendor is required to complete an IRS W-9 form or have this form on record prior to the release of payment for goods and services.

Documentation:

When a purchase order is requested all supporting documentation should be attached to the requisition within the purchase order program (bids, board resolution, etc.). Once a purchase order requisition is approved, all invoices for goods and services will be attached in the accounts payable program.

This policy will be in effect upon adoption by the Township Board and will remain in effect until rescinded by the Township Board. Revisions or amendments must be approved by the Township Board, and must be recorded in writing and maintained with this original policy by the Township Clerk. This policy, and all subsequent amendments, will be provided by the Clerk to all Township Board members, Department Heads, and employees.

A motion was made by Zak Ford, seconded by Naney Culp, to adopt the restatement of the Purchasing Policy.

Upon the call for a vote, the following voted "Aye":

~~Elizabeth Heiny Cogswell, Dusty Farmer, Nancy Culp,
Dave Bushouse, Deborah Everett, Zak Ford and Ken Hudok~~

The following voted "Nay": None

The following "Abstained": None

The following were Absent: None

The Supervisor declared that the motion has been adopted.

DUSTY FARMER, Clerk
Oshtemo Charter Township

CERTIFICATE

I hereby certify that the foregoing constitutes a true and complete copy of an Excerpt of the Minutes of a meeting of the Oshtemo Charter Township Board, held on November 13, 2018, at which meeting all members were present and voted upon the same as indicated in said Minutes; that said meeting was held in accordance with the Open Meetings Act of the State of Michigan.

DUSTY FARMER, Township Clerk