JACKSON
Founded 1829

AGENDA- CITY COUNCIL MEETING

Tuesday, April 25, 2023
6:30 PM

Page

1. CALL TO ORDER.

2. PLEDGE OF ALLEGIANCE.

Invocation will be given by 5th Ward Councilmember Karen Bunnell.

3. ROLL CALL.

4. ADOPTION OF AGENDA.

5. PRESENTATIONS/PROCLAMATIONS.

6. PUBLIC HEARINGS.

6.1 Conduct a public hearing to receive citizen comment on the approval of a Brownfield plan for 228 W. Michigan Avenue (Hayes Hotel) Parcel ID 1-008100000 — 7 - 57

BF PLAN PACKET TO COUNCIL.PDF

Resolution in support of Brownfield plan for 228 W. Michigan

7. CITIZEN COMMENTS.

(3-Minute Limit)

8. PETITIONS & COMMUNICATION FROM CITY STAFF AND OTHER GOVERNMENTAL ENTITIES.

(Accept and Place on File)

8.1 Michigan Liquor Commission Acknowledgement Letter - House of Umami, LLC — 58 - 60

House of Umami LLC MLCC application.pdf

8.2 CDBG, HOME, & CV Financial Summaries for March 2023 61 - 66

March 2023 - CDBG, Home, & CV Financial Summaries.pdf

9. CONSENT CALENDAR

Consent Action

9.1 Minutes of the Regular Meeting of 04/11/23 67 - 73

CCMIN 4.11.23.pdf

9.2 Special Event Application: City of Jackson Police Department Police Memorial 74 - 79

SEA---Police Officer Memorial.pdf

Approve a request from the City of Jackson Police Department to host their Police Memorial on May 10, 2023 in Horace Blackman Park.

9.3 Special Event Application for Spring Fling 80 - 88

SEA -- Spring Fling.pdf

Approve a request from the Jackson Downtown Development Authority to host their Spring Fling on Sunday, May 7, 2023 from 11 am – 4 pm in downtown Jackson.

9.4 Special Event Application for the Jackson Downtown Development Authority 2023
Cruise Ins and Concerts. 89 - 96

SEA -- Cruise Ins & Concerts (2023).pdf

Approve a request from the Jackson Downtown Development Authority, Michigan Theatre, and Jackson Symphony Orchestra to conduct their Cruise In and Concert events on May 26, June 23, July 28, August 25, and September 22, 2023 from 5:00 p.m. to 9:30 p.m. in Downtown Jackson.

9.5 Special Event Application for Food Truck Tuesdays 97 - 103

SEA -- Food Truck Tuesdays (2023).pdf

Approve a request from the Jackson Downtown Development Authority, Michigan Theatre, and Jackson Symphony Orchestra to conduct their Food Truck Tuesday events on June 6 & 20, July 11 & 25, August 1 & 15, September 12, 2023 from 11:00 a.m. until 1:00 p.m. in the True Community Credit Union City Square and Horace Blackman Park.

9.6 Special Event Application for Friday Film Nights 104 - 109

SEA -- Friday Film Nights (2023).pdf

Approve a request from the Jackson Downtown Development Authority, Michigan Theatre, and Jackson Symphony Orchestra to conduct their Friday Film Nights on June 30, July 14, and August 11 from 9:00–11:30 p.m. in the True Community Credit Union City Square and Horace Blackman Park.

9.7 Special Event Application for the Cascades Cycling Club's Ride of Silence — 110 - 119

SEA--Ride of Silence.pdf

Approve a request from the Cascades Cycling Club to host their Ride of Silence on May 17, 2023 on the streets of Jackson.

9.8 Special Event Application for the Council for the Prevention of Child Abuse & Neglect Banner Hanging & Pinwheel Garden to honor Child Abuse Prevention Month — 120 - 127

SEA--Pinwheel Garden 2023.pdf

Approve a request from the Council for the Prevention of Child Abuse & Neglect to hang a banner and create a small pinwheel garden in recognition of Child Abuse Prevention Month during the month of April in Austin Blair ("Greenwood") Park in the City of Jackson.

9.9 Special Event Application for the First United Methodist Church Back to School Blast and Community Resource Fair. — 128 - 135

SEA--Back to School Blast.pdf

Approve a request from the First United Methodist Church to host their Back to School Blast and Community Resource Fair on Thursday, July 27, 2023 in Horace Blackman Park, Hayes Court, and on Michigan Avenue in downtown Jackson.

9.10 Special Event Application: 2023 Walk to End Alzheimer's — 136 - 145

SEA--Walk to End Alzheimer's.pdf

Approve a request from the Alzheimer's Disease & Related Disorders Association to host their 2023 Walk to End Alzheimer's on October 14, 2023 on the streets of downtown Jackson.

9.11 Accept with regret, the resignation of Angela Edward from the Public Arts Commission — 146

Public Arts Resignation - A. Edward.pdf

10. OTHER BUSINESS.

11. NEW BUSINESS.

11.1 Changes to Standard Lighting Contract with Consumers Energy — 147 - 152

Engineering Consumers Streetlight Contract Change.pdf

Approve the Resolution for Changes to the Standard Lighting Contract with Consumers Energy for two streetlight installations and authorize the Mayor and City Clerk to execute the appropriate documents.

11.2 Confirm CDBG and HOME projects for Fiscal Year 2023 – 2024 and final funding allocations for those projects. — 153 - 156

CBDG-HOME Final Allocation CC Packet Item 4.25.23.pdf

Confirm Community Development Block Grant (CDBG) and HOME Investment Partnerships (HOME) Projects for Fiscal Year 2023 – 2024 and Final Funding Allocations for those Projects.

11.3 Funding Letters for Pension Systems — 157 - 298

Finance Pension Funding Letters and 6-30-22 Valuations to Council.pdf

Receive the actuarial valuations as of June 30, 2022 for the Act 345 Policemen's & Firemen's Retirement Plan, the Employees Retirement System and the Policemen's and Firemen's Retirement System, and approve the actuarial funding necessary for the fiscal year 2023-2024.

11.4 Approve the sale of City owned property located at 323 W Wesley Street, to North Shore Enterprise LLC. Authorize the City Manager to sign all sale documents associated with the Property Transfer and to make minor modifications. — 299 - 307

323 W Wesley Sale Agenda Packet.pdf

Approve the sale of City owned property located at 323 W. Wesley Street for $12,000.

11.5 Approve the sale of four vacant residential City lots to the Welcome Home Organization. Lots are identified as; 1203 Woodbridge (Pin # 4-101900000), 1201 Woodbridge (Pin #4-115300000), 1226 Woodbridge (Pin # 4-115500000), 1227 Woodbridge (Pin #4-115600000). Authorize the City Manager — 308 - 309

to execute the Sale and Development agreement.
Approve the sale of four vacant residential City lots to the Welcome Home Organization

Lot Sales WHO Agenda Packet.pdf

11.6 Approve the sale of City owned property located at 1014 Woodbridge Street, to Kyle Brown for $7,500. Authorize the City Manager to sign all sale documents associated with the Property Transfer and to make minor modifications. 310 - 325

1014 Woodbridge Agenda Packet.pdf

Approve the sale of City owned property located at 1014 Woodbridge Street for $7,500.

11.7 Racial Equity Commission Purchasing Policy Revisions 326 - 354
To approve the revisions to the City of Jackson Purchasing Policy Manual as suggested by the Racial Equity Commission to provide equitable opportunities for those interested in providing services, and goods, and entering into contracts with the City of Jackson.

REC Purchasing Manual - REVISED 2023 VERSION 5 (Rev 3).pdf

11.8 Approve a Zoning Map Amendment – 523 – 543 E. Washington Avenue (Parcel #6-01330) and
E. Washington Avenue (Parcel #6-0137.A0) 355 - 413

CC Memo Packet - 523-543 E. Washington Ave. Rezone.pdf

Approve a Zoning Map Amendment – 523 – 543 E. Washington Avenue (Parcel #6-01330) and E. Washington Avenue (Parcel #6-0137.A0)

11.9 Resolution to Apply for a Transportation Economic Development Fund Category F Grant for Repaving Wisner Street from Ganson Street to North Street 414 - 416

Engineering TEDF Grant Resolution Wisner-Ganson to North.pdf

Approve a resolution for application to the Michigan Department of Transportation (MDOT) for a Transportation Economic Development Fund (TEDF) Category F Grant, authorization for the Mayor and City Clerk to execute the resolution, and authorization for the City Engineer to file an application for repaving Wisner Street from Ganson Street to North Street.

11.10 Approval of American Rescue Plan Act – State and Local Fiscal Recovery Funds for the provisioning of governmental services 417 - 418

in the General Fund

ARPA Request for Allocation.pdf

Approval of American Rescue Plan Act – State and Local Fiscal Recovery Funds for the provisioning of governmental services in the General Fund in the amount of $4,514,997.74.

12. CITY COUNCILMEMBER'S COMMENTS.

13. MANAGER'S COMMENTS.

14. ADJOURNMENT.

JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Telephone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jackson Brownfield Redevelopment Authority (JBRA)

DATE: April 18, 2023

SUBJECT: Brownfield Plan for 228 W. Michigan Avenue (Hayes Hotel) Parcel ID 1-008100000

At the regularly scheduled April 12, 2023 City of Jackson Brownfield Redevelopment Authority meeting reviewed and recommended adoption of the Brownfield Plan related to the development of a parcel of property located at 228 W. Michigan Avenue, Jackson, MI.

The project is the renovation of a vacant 122,709 square-foot former Hayes Hotel and associated parking. Project renovations include restaurant and retail use on the first floor, event space and office/commercial suites on the second floor, short term rentals on the third floor, and residential use on the fourth through tenth floors.

The estimated private investment is anticipated at $34,536,255; the total number of permanent, fulltime equivalent jobs to be added is approximately thirty-one (31).

This Plan will remain in effect for 30 years from the beginning date of the capture of tax increment revenues, or for the duration necessary to complete the reimbursement of eligible expenses for the Project, whichever is less. In no event shall the duration of the Plan exceed 35 years following the date of the resolution approving the Plan, nor shall the duration of the tax capture exceed the lesser of the period authorized under subsection (4) and (5) of Section 13 of Act 381 or 30 years.

Motion was made by Member Greene recommended to approval of a Brownfield Plan for 228 W. Michigan Avenue (Hayes Hotel) Parcel ID 1-008100000. Support Member Duke.

Vote – *Yeas: Mayor Mahoney, Councilmember Schlecte, City Manager Greene, JBRA Members Greer, Hones, Duke, Damich, and Wilkins (8). Nays: none. Motion carried.*

Recommendation:

Hold the public hearing and adopt the Brownfield Plan for 228 W. Michigan Avenue (Hayes Hotel) Parcel ID 1-008100000.

Your consideration and concurrence is appreciated.

Attachments: Resolution, Brownfield Plan, and Public Hearing Notices.

CITY OF JACKSON, JACKSON COUNTY

MICHIGAN

RESOLUTION IN SUPPORT OF A BROWNFIELD PLAN PURSUANT TO AND IN ACCORDANCE WITH THE PROVISIONS OF ACT 381 OF THE PUBLIC ACTS OF THE STATE OF MICHIGAN OF 1996, AS AMENDED

At a regular meeting of the City Council of Jackson, Michigan, held in the Council Chambers within the City Hall, 161 West Michigan Avenue, Jackson, Michigan, on_____, 2023 at 6:30 p.m.

PRESENT:

ABSENT:

MOTION BY:

SUPPORTED BY:

WHEREAS, the City Council of Jackson, pursuant to and in accordance with the provisions of the Brownfield Redevelopment Financing Act being Act 381 of the Public Acts of the State of Michigan of 1996, as amended (the "Act"), have formally resolved to participate in the Brownfield Redevelopment Authority (BRA) of the City of Jackson (the "Authority") and have designated that all related activities shall proceed through the BRA; and

WHEREAS, the Authority, pursuant to and in accordance with Section 13 of the Act, seeks approval by the City Council of Jackson, the Brownfield Plan (the "Plan") attached hereto, to be carried out within the City of Jackson, relating to the development of property located at 228 West Michigan Avenue in the City of Jackson, Jackson County, Michigan (the "Site"), as shown in Figures 1 and 2 of the Plan and more particularly described in the legal description of the property contained within the attached Plan; and

WHEREAS, the City Council of Jackson has reviewed the Plan, and was provided a reasonable opportunity to express their views and recommendations regarding the Plan and in accordance with Section 14(5) of the Act; and

WHEREAS, as a result of the review of the Plan the City Council of Jackson concurs with the approval of the individual Plan.

NOW, THEREFORE BE IT RESOLVED THAT:

1. **Plan Support**. Pursuant to the authority vested in the City Council of Jackson, by the Act, the Plan is hereby supported in the form attached to this Resolution.

2. **Severability**. Should any section, clause, or phrase of this Resolution be declared by the courts to be invalid, the same shall not affect the validity of this Resolution as a whole nor any part thereof other than the part so declared to be invalid.
3. **Repeals**. All resolutions of parts of resolutions in conflict with any of the provisions of this Resolution are hereby repealed.

AYES:

NAYES:

ABSTAINED:

RESOLUTION DECLARED ADOPTED.

STATE OF MICHIGAN)

)§

CITY OF JACKSON)

I, the undersigned, the fully qualified and acting Clerk of the City of Jackson, State of Michigan, do hereby certify that the foregoing is a true and complete copy of a resolution adopted by the City Council of Jackson at a regular meeting held on the_____day of_____, 2023, the original of which resolution is on file in my office.

IN WITNESS WHEREOF, I have hereunto set my official signature this_____day of _____, 2023.

Andrea Muray

City Clerk

Daniel Mahoney

Mayor

ACT 381 BROWNFIELD PLAN
For the
Former Hotel Hayes Project
228 W Michigan Ave, Jackson, Michigan 49201

City of Jackson
Brownfield Redevelopment Authority

March 20, 2023

Prepared by:
228 West Michigan Avenue LLC
225 E. Michigan Ave, Suite 300
Milwaukee, WI 53202
Contact: Brian Loftin
414.803.4612/bloftin@jjeffers.com

ASTI Environmental
10448 Citation Dr., Suite 100
Brighton, Michigan 48116
Contact: Tom Wackerman
810.599.5463/twacker@asti-env.com
ASTI File 3-11688

Approved by the Brownfield Redevelopment Authority on _____
Approved by the governing body of the local jurisdiction on _____

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  - 1.1.4 Current Use of the Subject Property
  - 1.1.5 Site Conditions and Known Environmental Contamination

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- 2.5 Maximum Amount of Note or Bonded Indebtedness
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- 2.10 Local Brownfield Revolving Fund ("LBRF") (Section 8; Section 13(2)(m))
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TABLE

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Attachment B Reimbursement Agreement
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ACT 381 BROWNFIELD PLAN

1.0 INTRODUCTION

In order to promote the revitalization of environmentally distressed and blighted areas within the boundaries of the City of Jackson ("the City"), the City established the City of Jackson Brownfield Redevelopment Authority (the "Authority") pursuant to Michigan Public Act 381 of 1996, as amended ("Act 381").

The primary purpose of this Brownfield Plan (the "Plan") is to promote the redevelopment of, and private investment in, certain "brownfield" properties within the City. Inclusion of property within this Plan will facilitate financing of environmental response and other eligible activities at eligible properties, and will also provide tax incentives to eligible taxpayers willing to invest in the revitalization of eligible sites, commonly referred to as "brownfields." By facilitating redevelopment of brownfield properties, this Plan is intended to promote economic growth for the benefit of the residents of the City and all taxing units located within, and benefited by, the Authority.

This Plan is intended to apply to the eligible property identified in this Plan and, if tax increment revenues are proposed to be captured from that eligible property, to identify and authorize the eligible activities to be funded by such tax increment revenues.

This Plan is intended to be a living document, which may be modified or amended in accordance with the requirements of Act 381, as necessary to achieve the purposes of Act 381. A subsequent change to the identification or designation of a developer after the approval of this Plan by the governing body (as defined by Act 381) shall not necessitate an amendment to this Plan, affect the application of this Plan to the eligible property, or impair the rights available to the Authority under this Plan.

This Plan describes the project to be completed and contains all the information required by Section 13(2) of Act 381. The applicable sections of Act 381 are noted throughout the Plan for reference purposes.

1.1 Description of Eligible Property (Section 13 (2)(h))

1.1.1 Proposed Redevelopment and Future Use for Each Eligible Property

The project is the renovation of a vacant 122,709 square foot, multi-story, former hotel and associated parking, as indicated in Figure 4 (the "Project"). This will include restaurant and retail on the first floor, event space and office/commercial suites on the second floor, short term rentals on the third floor, and residential on the fourth through tenth floors. The redevelopment of this iconic structure into a mixed-use commercial and residential development will provide an important investment to revitalize the City's primary business district, seat of county government and historic core, and to encourage spin-off investment to redevelop this portion of the downtown.

The project description provided herein is a summary of the proposed development at the time of the adoption of the Plan. The actual development may vary from the project description provided herein, without necessitating an amendment to this Plan, so long as such variations are not material and arise as a result of changes in market and/or financing conditions affecting the project and/or are related to the addition or immaterial removal of amenities to the project. All material changes to the project description, as determined by the Authority in its sole discretion, are subject to the approval of the Authority and shall be consistent with the overall nature of the proposed development, its proposed public purpose, and the purposes of Act 381.

The estimated private investment is anticipated at $34,536,255. The total number of permanent, fulltime equivalent jobs to be added as a result of the Project is estimated to be 31.5.

The Project is anticipated to begin in the fall of 2023 with Project completion in early 2025.

228 West Michigan Avenue LLC is the project developer (the "Developer").

1.1.2 Eligible Property Information

The property comprising the eligible property consists of one parcel containing the former hotel building (known as the Hotel Hayes) and adjacent surface parking, for a total of approximately 0.764 acres. The parcel is located on the northwest corner of W Michigan Ave and Hayes Ct (see Figure 1 titled "Site Location Map") in downtown Jackson, Michigan. The parcel and all tangible personal property located thereon will comprise the eligible property and are referred to herein as the "Subject Property". The boundaries of the Subject Property are shown in the Figure 2 titled "Eligible Property Map".

Parcel information is outlined below.

Address Parcel	228 W Michigan Ave
Parcel ID	1-008100000
Acreage	0.764
Owner	City of Jackson 161 W. Michigan Avenue Jackson, Michigan 49201
Legal Description	LOTS 7, 8, 9 EX E 22.5 FT OF LOTS 7 & 9, ALSO ALL OF VACATED ALLEY ADJOINING LOTS 8 & 9 TO THE WEST B1N R1W OF THE ORIGINAL PLAT OF THE VILLAGE OF JACKSONBURG

The Subject Property is located in the Downtown Development Association District, the Jackson Smart Energy District, and the Downtown Opportunity Zone.

1.1.3 Historical Use and Previous Ownership

The Subject Property was occupied by residential dwellings, the Jackson City Club, and an undertaker from at least 1886 until approximately 1926 when the current hotel building was built. A dry cleaner was a tenant from 1936 until 1941 other previous tenants include Christian Science Reading Room, Consumers Energy offices, Boy Scouts of America, and other commercial businesses.

1.1.4 Current Use of the Subject Property

The Subject Property has been vacant since 2003, but was most recently used for commercial purposes.

1.1.5 Site Conditions and Known Environmental Contamination

Phase I Environmental Site Assessment

The most recent Phase I Environmental Site Assessment (ESA) of the Subject Property is dated September 9, 2022. The following recognized environmental conditions (RECs) were identified based on historical uses of the Subject Property.

- A 2008 BEA conducted on the Subject Property concluded the presence of arsenic in soil at concentrations exceeding Part 201 GRCC is the basis for the conclusion that the Subject Property is a "Facility" as defined by Part 201.
- A former tenant space on the Subject Property was occupied by a dry cleaner from 1936 until 1941. Dry cleaner solvents pose significant environmental risk even when managed properly due to their ability to easily penetrate concrete and because they are toxic at relatively low concentrations. Previous investigations assessed the Subject Property for impact from the dry cleaner. No evidence of contamination was found. However, soil boring locations were placed approximately 100-feet northeast of the former drycleaner suite, only shallow soil samples were collected, and no groundwater samples were collected in the vicinity of the suite. Based on this information, previous sampling practices may not meet current regulatory standards, procedures, and criteria which are typically more restrictive. Use of the Subject Property as a dry cleaner is considered a REC.
- The eastern adjoining property located at 212-222 W. Michigan Avenue historically operated as a millinery (i.e., hat shop), Consumers Energy headquarters, and a park. It has been identified as a "Facility," as defined by Part 201. Additionally, EPA conducted mercury assessments on the site. Based on the likely presence of historic mercury contamination on the site and the presence of a known release, migration of a release onto the Subject Property is likely.

In addition, there are two significant data gaps:

- Around 1941 There was an unknown fuel source for the Subject Property prior to natural gas service installation in 1952. Past use of fuel oil has been documented for the north adjoining property. A geophysical survey of the

Subject Property was completed August 7, 2000. The results of the geophysical subsurface survey adjacent to the parked automobiles and the existing building were inconclusive. The electro-magnetic interference associated with the vehicles made it difficult to interpret the collected data in the areas where the vehicles were parked. The remainder of the surveyed area did not indicate subsurface anomalies consistent with USTs or other large, metallic objects. Based on the survey and interference from the vehicles, it is a possibility that a UST(s) may be present on the Subject Property. Although no evidence (i.e., fill ports, vent pipes, or pressure gages, etc.) was found during the assessment, there is a potential that heating oil was used as a fuel source prior to natural gas. If a buried heating oil fuel tank is found during any redevelopment activities, the tank should be properly decommissioned with verification sampling conducted.

- The Subject Property was identified as a US Brownfield site in the Standard Government Environmental Record Sources. According to Chris Atkins, the Planning Director and Zoning Administrator for the City of Jackson, he has no knowledge of a Brownfield Plan for the property. No records were found by the EPA. The EDR report indicated a Phase II ESA was completed August 12, 2008. It is unknown if cleanup was required. Soils were affected. The inability to review the EPA records does not allow ASTI to form an adequate opinion of whether the assessment results would be considered a REC for the Subject Property. The EPA records could disclosure information about a release including contaminant concentrations, extent, and source of the release.

Soil and Groundwater Sampling

On August 10, 2000, SME conducted three soil borings (SP19, SP20, and SP21) on the Subject Property regarding the identified RECs. Two soil samples from SP19, one soil sample from SP20 and SP21, and one groundwater sample each from SP19 and SP29 were submitted for analysis of volatile organic compounds (VOCs), polynuclear aromatic hydrocarbons (PNAs), and the 10 Michigan Metals (arsenic, barium, cadmium, chromium, copper, lead, mercury, selenium, silver, and zinc). Arsenic was detected in the soil sample at SP19 (8'-10') at 8,300 µg/kg, which exceeds the current EGLE Part 201 GRCC for Direct Contact of 7,600 µg/kg and the Drinking Water Protection (DWP) and Groundwater Surface Water Interface Protection (GSIP) of 4,600 µg/kg.

With regard to the unknown fuel source for the Property prior to natural gas service installation in 1952, SME Inc. conducted a geophysical subsurface survey of the Property, report dated September 8, 2000. SME concluded the survey did not indicate subsurface anomalies consistent with USTs or other large, metallic objects, other than anomalies identified near vehicles in the parking lot. The electro-magnetic interference associated with the vehicles made it difficult for SME to interpret the collected data in the areas where the vehicles were parked. Based on the survey, it is unlikely that a UST(s) were used to fuel the building prior to conversion to natural gas.

On July 18, 2008, ASTI conducted four soil borings (HH-SS-01 through HH-SS-04) on the Subject Property with regard to the identified RECs. One soil sample was collected from

each of the borings. Groundwater was encountered in borings HH-MW-01 and HH-MW-02 and one groundwater sample was collected. The soil samples from HH-SS-01 and HH-SS-02 were submitted to Brighton Analytical of Brighton, Michigan for analysis of volatile organic compounds (VOCs). The soil samples from HH-SS-03 and HH-SS-04 were submitted for analysis of arsenic. The groundwater samples from HH-1-MW-01 and HH-MW-02 were submitted to Brighton Analytical for analysis of lead, polynuclear aromatic hydrocarbons (PNAs), and VOCs. Arsenic was detected in the soil samples HH-SS-03 (8-10') at a concentration of 29,000 µg/kg which exceeds the GRCC for DWP, GSIP, and DC. Arsenic was also detected in the soil sample HH-SS-04 at 6,600 µg/kg, which exceeds the GRCC for DWP and GSIP.

On October 24, 2022, ASTI supervised the completion of three soil borings (SB-1, SB-2, SB- 3) at the Subject Property. The soil borings were advanced to depths of 5 or 12 feet below ground surface (bgs). Groundwater was encountered in soil borings SB-1 and SB-2 and temporary monitoring wells were installed at each of these boring locations for collection of groundwater samples. The soil sample was analyzed for the following: volatile organic compounds (VOCs) and mercury. Groundwater was encountered in soil borings SB-1 and SB-2 and temporary monitoring wells were installed. Neither VOCs nor mercury were detected above the laboratory reporting limits in soil or groundwater.

Hazardous Materials Survey

In 2022, the Developer conducted a hazardous materials survey that included an evaluation of asbestos containing materials and an inventory of other hazardous materials, such as mercury switches and light ballasts. The survey identified approximately 40,000 square feet of asbestos containing building materials and almost 1,000 individual sources of hazardous materials in various locations as summarized below, that will need to be removed prior to renovation.

Asbestos Containing Building Materials

- Pipe insulation joint and wrap
- Roof flashing
- Glue Pods
- Brick glue
- Window caulk
- Floor tile
- Sink undercoating
- Paint
- Ceiling materials
- Boiler gaskets and insulation
- Vibration dampeners
- Fire door insulation
- Possible roofing system

Hazardous Materials

- Fluorescent light tubes and ballasts
- Sodium lamps
- Halogen lamps

- Mercury containing thermostats
- HVAC and motor parts
- Ceiling heaters
- Elevator chemicals
- Lead acid batteries
- CRT monitors

2.0 Information Required by Section 13(2) of the Statute

2.1 Basis for Eligibility (Section 13 (2)(h) and Section 2 (p))

The Subject Property is considered "eligible property" as defined by Act 381, Section 2 because (a) the Subject Property was previously utilized for a commercial purpose; (b) it is located within the City of Jackson, a qualified local governmental unit under Act 381; and (c) the Subject Property is a facility, as that term is defined in Part 201 of Michigan's Natural Resources and Environmental Protection Act (1994 PA 451), based on investigations in 2008 and 2022.

2.2 Summary of Eligible Activities and Costs (Section 13 (2)(a),(b))

The "eligible activities" that are intended to be carried out at the Subject Property are considered "eligible activities" as defined by Section 2 of Act 381, because they include baseline environmental assessment activities, due care activities, additional response activities, asbestos and hazardous materials abatement, lead based paint abatement, waste disposal, demolition, public infrastructure improvements, site preparation, interest, and preparation and implementation of a Brownfield Plan and 381 Work Plan

A summary of the eligible activities and the estimated cost of each eligible activity intended to be paid for with tax increment revenues from the Subject Property are shown in Table 1 titled "Eligible Activity Cost Estimates". The eligible activities described in the table are not exhaustive. Subject to the approval of the Authority in writing, additional eligible activities may be carried out at the Subject Property, without requiring an amendment to this Plan, so long as such eligible activities are permitted by Act 381 and the cost of such eligible activities does not exceed the total costs stated below.

The costs listed in the Plan are estimated costs and may increase or decrease depending on the nature and extent of environmental contamination and other unknown conditions encountered on the Subject Property. As long as the total costs are not exceeded, line item costs of eligible activities may be adjusted after the date this Plan is approved by the governing body, to the extent the adjustments do not violate the terms of the Plan, and provided that the total cost of eligible activities subject to payment or reimbursement shall not exceed the estimated costs set forth in the Plan.

The Developer desires to be reimbursed for the costs of eligible activities. Tax increment revenues generated by the Subject Property will be captured by the Authority and used

to reimburse the cost of the eligible activities completed on the Subject Property. The actual cost of those eligible activities encompassed by this Plan that will qualify for reimbursement from tax increment revenues from the Subject Property shall be governed by the terms of a Reimbursement Agreement and Act 381.

The following eligible activities will be completed for this Project and are the subject of this Plan. A list of eligible activities included in this Plan, and the associated estimated costs, is provided in Table 1.

EGLE Eligible Activities

The following activities will be reimbursed from local and school tax capture. Some of these activities were completed prior to this Plan as permitted by Act 381 Plan and those activities do not include contingency.

Pre-Approved Activities

Baseline Environmental Assessment Activities
This includes the completion of environmental due diligence activities that include preparation of Phase I and II Environmental Site Assessments (ESAs); Baseline Environmental Assessments (BEA); investigations to document and support the due care activities; additional delineation required to define impacts or design remedies, preparation of a Due Care Plan; and data interpretation and reporting, oversight and project management as required to support the Project.

Hazardous Materials Survey and Lead Based Paint Survey
This includes the Hazardous Materials Survey and the Lead Based Paint Survey, as well as preparation of bid specifications for pre-demolition asbestos abatement.

Other Activities

Develop/Prepare Brownfield Plan
This includes the reasonable costs of preparing the Brownfield Plan. This activity also includes professional costs related to oversight and project management of these activities as needed.

Implement Brownfield Plan
This includes costs for implementation of the Brownfield Plan. This activity also includes professional costs related to oversight and project management of these activities as needed.

Interest
Interest costs are included in this Work Plan, calculated on the outstanding balance of unreimbursed Eligible Activities at the rate of the lesser of 1% over prime rate or five percent (5%) per year.

MSF Eligible Activities

The following activities will be reimbursed from local and school tax capture.

Lead and Asbestos Abatement
Based on the results of the Hazardous Materials Survey, this includes abatement of asbestos containing materials, hazardous materials, and lead based paint prior to demolition. This activity also includes professional costs related to engineering, design, and oversight and project management of these activities as needed.

Demolition
This includes interior and exterior demolition to prepare the existing buildings for renovation, site demolition, and infrastructure removal as necessary to prepare the Subject Property for redevelopment. This activity also includes professional costs related to engineering, design, and oversight and project management of these activities as needed.

Public Infrastructure Improvements
This includes replacement and upgrading of sidewalks, curbs and gutters in the public right-of-way (see Figure 3). This activity also includes professional costs related to engineering, design, and oversight and project management of these activities as needed.

Other Activities

Some of these activities were completed prior to this Plan as permitted by Act 381 Plan and those activities do not include contingency.

Develop/Prepare Brownfield Plan
This includes the reasonable costs of preparing the Brownfield Plan and 381 Work Plan. This activity also includes professional costs related to oversight and project management of these activities as needed.

Implement Brownfield Plan
This includes costs for implementation of the Brownfield Plan and 381 Work Plan. This activity also includes professional costs related to oversight and project management of these activities as needed.

Interest
Interest costs are included in this Work Plan, calculated on the outstanding balance of unreimbursed Eligible Activities at the rate of the lesser of 1% over prime rate or five percent (5%) per year.

2.3 Estimate of Captured Taxable Value and Tax Increment Revenues (Section 13(2)(c))

This Plan anticipates the capture of tax increment revenues to reimburse the Developer for the costs of Eligible Activities under this Plan in accordance with the Reimbursement Agreement. The initial taxable value will be the taxable value of the eligible property at the time of plan approval, as shown by the assessment roll. For illustration purposes this Plan uses an initial taxable value of $1 because the current taxable value is $0, and a projected future taxable value of $3,830,000 which is the estimated taxable value of the Subject Property at the time of the next assessment roll after project completion. The captured taxable value will be the difference between the initial taxable value at the time this Plan is approved and the actual taxable value for each year for which this Plan is in effect.

A table of the total estimated tax increment revenues to be captured for the Project is attached to this Plan as Table 2. Tax capture for reimbursement of Eligible Activities as described in this Plan is estimated to require 20 years, assuming reimbursement from local and state taxes, as illustrated in Table 3. Conservative assumptions were included in the captured taxable value and tax rates. These assumptions are used for illustrative purposes only and are not intended to limit reimbursement of the actual annual tax capture amount. The following assumptions were used to develop the attached tables.

1. The Plan assumes reimbursement for all eligible costs in the amount of $2,484,629.
2. The Developer is requesting an Obsolete Property Rehabilitation Act (OPRA) tax abatement, and therefore local tax capture is assumed to be limited during the first 12 years, and state tax capture is assumed to be limited during the first 6 years.
3. Administrative expense capture for the Authority is 6% per year, except when the local tax capture is less than that amount during the proposed OPRA tax abatement, during which the administrative capture is equal to the total local capture.
4. Local and state tax capture are included in calculating capture.
5. Annual appreciation in taxable value of 1%.
6. The Plan assumes that an intergovernmental agreement will be prepared with the Downtown Development Authority to permit capture of the DDA milage.

Tax increments are projected to be captured and applied: (i) to reimbursement of Eligible Activity costs; (ii) for payment of the City of Jackson Brownfield Redevelopment Authority administrative expenses; (ii) to make deposits into the State of Michigan Brownfield Redevelopment Fund (BRF); and (iii) to make deposits into the Local Brownfield Redevelopment Fund (LBRF) as follows:

Eligible Activity Reimbursement	$	2,484,629
Administrative Fees	$	149,217
State Brownfield Redevelopment Fund	$	218,116
Local Brownfield Revolving Fund	$	880,321
Total Brownfield Plan Capture	$	3,732,283

2.4 Method of Financing and Description of Advances Made by the Municipality

The Eligible Activities are to be financed solely by the Developer. No advances have been made by the Authority or City for the costs of eligible activities under this Plan.

2.5 Maximum Amount of Note or Bonded Indebtedness

The Authority will not incur any note or bonded indebtedness to finance the purposes of this Plan.

2.6 Duration of Brownfield Plan (Section (13)(2)(f)

This Plan will remain in effect for 30 years from the beginning date of the capture of tax increment revenues, or for the duration necessary to complete the reimbursement of eligible expenses for the Project, whichever is less. In no event shall the duration of the Plan exceed 35 years following the date of the resolution approving the Plan, nor shall the duration of the tax capture exceed the lesser of the period authorized under subsection (4) and (5) of Section 13 of Act 381 or 30 years.

The beginning date of capture of tax increment revenues for the eligible property is anticipated to occur in accordance with the TIF table included as Table 3. However, in no event shall the beginning date of the capture of tax increment revenues be later than five years after the date of the resolution approving the Plan.

The Subject Property will become a part of this Plan on the date this Plan is approved by the governing body and the Reimbursement Agreement is approved by the Authority.

2.7 Estimated Impact of Tax Increment Financing on Revenues of Taxing Jurisdictions (Section 13(2)(g))

The following is the estimated impact of this Plan on the taxing jurisdictions.

		Tax Capture for This Plan (24 Year Plan)				
School Capture	Millage Rate	**Total Capture**	**Reimburse**	**Brownfield Authority**	**State BRF**	**LBRF**
School Operating Tax	18.0000	$ 1,343,637	$ 1,249,699	$ -		$ 93,938
State Education Tax (SET)	6.0000	$ 442,056	$ 208,283	$ -	$ 218,116	$ 15,656
School Total	**24.0000**	*$ 1,785,693*	*$ 1,457,982*	*$ -*	*$ 218,116*	*$ 109,595*
Local Capture	Millage Rate					
MED CARE	0.2476	$ 13,709	$ 7,230	$ 1,051		$ 5,428
SENIOR SERVICES	0.5966	$ 33,033	$ 17,422	$ 2,532		$ 13,079
LIFEWAYS	0.4947	$ 27,391	$ 14,446	$ 2,100		$ 10,845
COUNTY PARKS	0.4954	$ 27,430	$ 14,467	$ 2,103		$ 10,860
ANIMAL CONTROL	0.2476	$ 13,709	$ 7,230	$ 1,051		$ 5,428
LIBRARY	1.7411	$ 96,402	$ 50,843	$ 7,390		$ 38,169
JACKSON ISD OPER	0.1700	$ 9,413	$ 4,964	$ 722		$ 3,727
JACKSON ISD VOC	1.0643	$ 58,929	$ 31,079	$ 4,517		$ 23,332
JACKSON ISD SPEC	2.3492	$ 130,072	$ 68,601	$ 9,971		$ 51,500
JACKSON ISD SP12	0.7704	$ 42,656	$ 22,497	$ 3,270		$ 16,889
JTA	0.9946	$ 55,069	$ 29,044	$ 4,221		$ 21,804
CITY OPER	6.6828	$ 370,017	$ 195,150	$ 28,364		$ 146,503
CITY PUB IMP	1.9092	$ 105,710	$ 55,752	$ 8,103		$ 41,854
CITY POL/FIRE	8.7000	$ 481,706	$ 254,056	$ 36,925		$ 190,725
JACKSON COLLEGE	1.1327	$ 62,716	$ 33,077	$ 4,808		$ 24,832
JPS OPER PUB REC	0.4952	$ 27,418	$ 14,461	$ 2,102		$ 10,856
COUNTY OPER	5.0660	$ 280,497	$ 147,936	$ 21,502		$ 111,059
CITY DDA	1.9996	$ 110,715	$ 58,392	$ 8,487		$ 43,836
Local Total	**35.1570**	*$ 1,946,590*	*$ 1,026,647*	*$ 149,217*	*$ -*	*$ 770,726*
Total Captured Above	**59.1570**	$ 3,732,283	$ 2,484,629	$ 149,217	$ 218,116	$ 880,321

In addition, the following taxes are projected to be generated but shall not be captured during the life of the Plan.

Millages Not Captured	Millage Rate	**Increment Not Captured (24 Year Plan)**
CITY HALL DEBT	0.9500	$ 98,143
JPS DEBT 2004, 2009, 2011	6.2000	$ 640,512
Total Above	**7.1500**	$ 738,655

2.8 Estimates of Residents and Displacement of Individuals/Families (Section 13(2)(i-l))

There are currently no residential dwellings or residences that occupy the Subject Property and no occupied residences will be acquired or cleared, therefore there will be no displacement or relocation of persons under this Plan.

2.9 Plan of Financing (Section 13(2)(d)) and Maximum Amount of Indebtedness (Section 13(2)(e))

The Eligible Activities are to be financed solely by the Developer. The Authority will reimburse the Developer for the actual cost of approved Eligible Activities, but only from actual tax increment revenues generated from the Subject Property.

All reimbursements authorized under this Plan shall be governed by the Reimbursement Agreement. Reimbursements under the Reimbursement Agreement shall not exceed the cost of eligible activities permitted under this Plan.

Unless otherwise agreed upon by the Developer, the Authority, and the State of Michigan, the Authority shall not incur any note or bonded indebtedness to finance the purposes of this Plan.

2.10 Local Brownfield Revolving Fund ("LBRF") (Section 8; Section 13(2)(m))

The Authority has established a Local Brownfield Revolving Fund (LBRF) consisting of all tax increment revenues authorized to be captured and deposited in the LBRF, as specified in Section 13(5) of Act 381, under this Plan and any other plan of the Authority. It may also include funds appropriated or otherwise made available from public or private sources.

The amount of tax increment revenue authorized for capture and deposit in the LBRF is estimated at $880,321. All funds, if any, deposited in the LBRF shall be used in accordance with Section 8 of Act 381.

2.11 Brownfield Redevelopment Fund (Section 8a; Section 13(2)(m))

The Authority shall pay to the Department of Treasury at least once annually an amount equal to 50% of the taxes levied under the state education tax, 1993 PA 331, MCL 211.901 to 211.906, that are captured under this Plan for up to the first twenty-five (25) years or the duration of capture of tax increment revenues for each eligible property included in this Plan. If the Authority pays an amount equal to 50% of the taxes levied under the state education tax, 1993 PA 331, MCL 211.901 to 211.906, on a parcel of eligible property to the Department of Treasury under Section 13b(14) of Act 381, the percentage of local taxes levied on that parcel and used to reimburse eligible activities for the Project under this Plan shall not exceed the percentage of local taxes levied on that parcel that would have been used to reimburse eligible activities for the Project under this Plan if the 50% of the taxes levied under the state education tax, 1993 PA 331, MCL 211.901 to 211.906, on that parcel were not paid to the Department of Treasury under Section 13b(14) of Act 381.

2.12 Other Material that the Authority or Governing Body Considers Pertinent

The Developer and its affiliates shall comply with all applicable laws, ordinances,

executive orders, or other regulations imposed by the City or any other properly constituted governmental authority with respect to the Subject Property and shall use the Subject Property in accordance with this Plan.

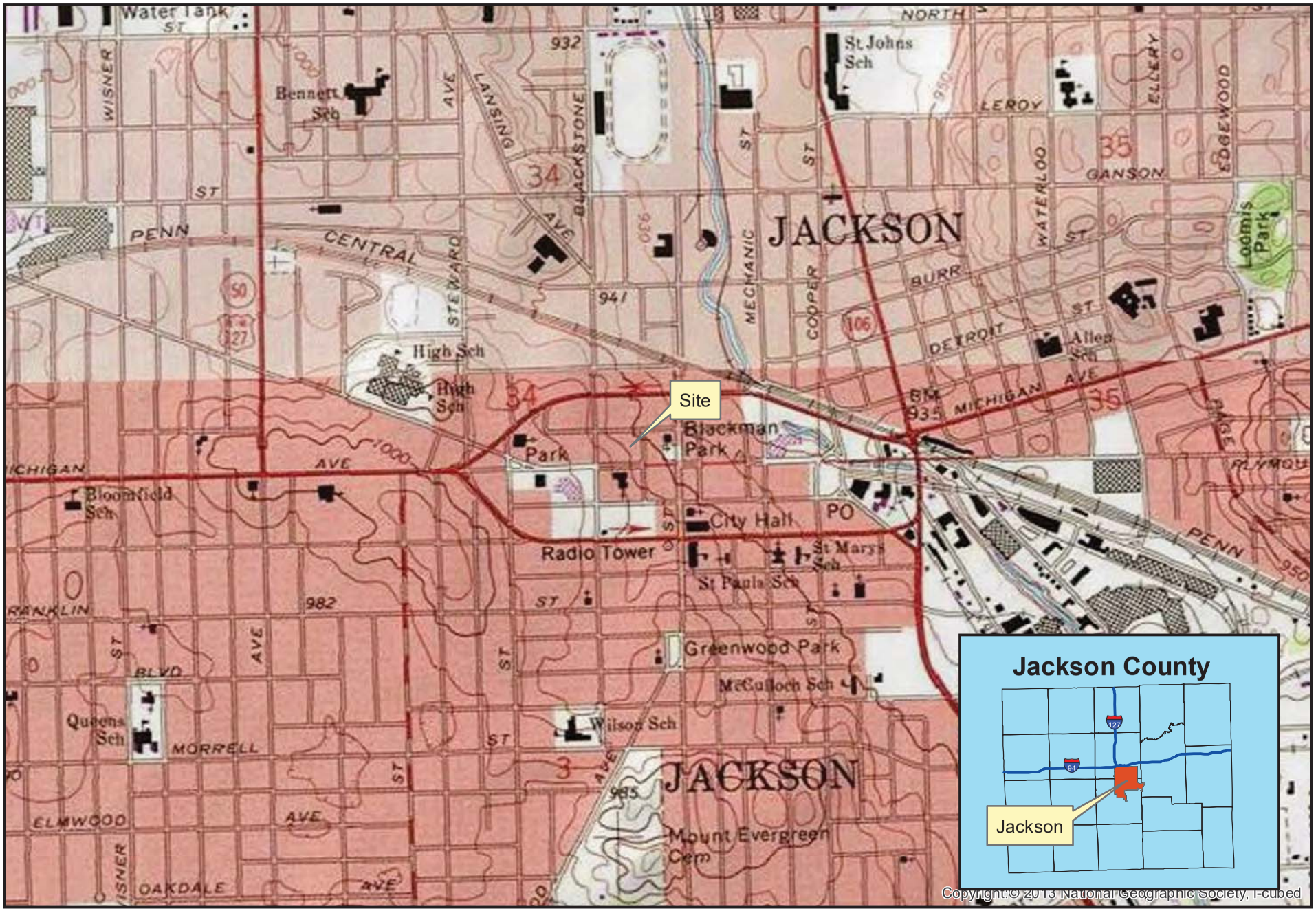
The Developer represents and warrants that a Phase I Environmental Site Assessment ("ESA"), and if appropriate, a Phase II ESA, baseline environmental assessment, and due care plan, pursuant to Part 201 of Michigan's Natural Resources and Environmental Protection Act (MCL 324.20101 et seq.), have been performed on the Subject Property ("Environmental Documents").

Because of the challenges of renovation of this historic building, the Developer is also seeking an Obsolete Property Rehabilitation Act tax abatement, a Community Revitalization loan or grant, a Revitalization and Placemaking Program grant, and historic tax credits. Although that OPRA abatement has not yet been approved, the tax capture and reimbursement tables provided as Tables 2 and 3, respectively, include assumptions for that tax abatement. Tax capture during the tax abatement period is limited to the difference between the abated tax and the tax on the base taxable value.

III. EXHIBITS

FIGURES

Site Maps



Former Hayes Hotel

228 W. Michigan Avenue, Jackson, MI

1,000 500 0 1,000 Feet

Created for: Hayes Hotel Development, LLC
Created by: RMH, July 11, 2022, ASTI Project 1-6757

Site Location Map



228 W Michigan Ave

Jackson, MI

ASTI Environmental

Created for: J. Jeffers & Co.
Created by: TJW (4-6757) February 7, 2023

Figure 2: Eligible Property Map



228 W Michigan Ave

Jackson, MI

ASTI Environmental

Created for: J. Jeffers & Co.
Created by: TJW (4-6757) February 7, 2023

Figure 3: Public Infrastructure Improvements



J. JEFFERS & CO.

The Hayes

Development Summary / January 24, 2023 / **Confidential**

The Hayes is an opportunity to restore an iconic building to its former landmark status and foster community viability & vibrancy through **historic rehabilitation.**

Development Summary

- 228 West Michigan Avenue / Jackson, MI
- **10-story / Mixed-use / Historic Rehabilitation**
- Market Rate Apartments with Tenant Amenities
- Restaurant & Retail
- Office / Commercial Suites
- Event & Hospitality Space
- Parking & Site Improvements



Image is a basic architectural rendering of proposed rehabilitation. "Hotel Hayes" was originally constructed in 1926.


Floorplans

Rehabilitation Highlights

- **Floor One**
  - Restaurant
  - Commercial/Retail
  - Private Residence Entrance
- **Floor Two**
  - Grand Ballroom & Events
  - Office/Commercial
- **Floor Three**
  - Office/Commercial
- **Floors 4-10**
  - 84 Market Rate Apartments





Hotel Hayes / Current Condition



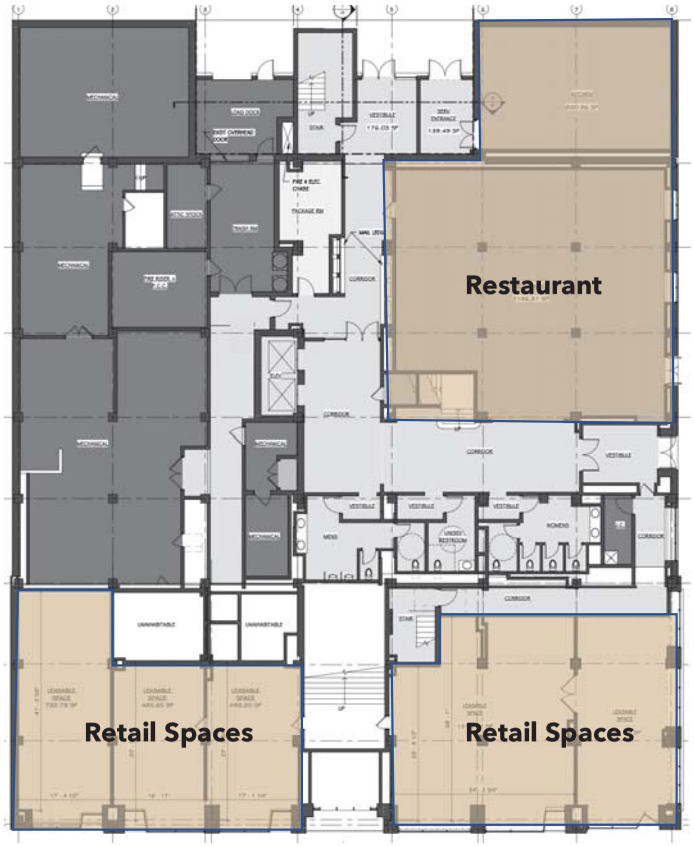
The Hayes / Rehabilitation Rendering

First Floor

- Restaurant (3,035 SF)
- Retail/Commercial spaces (3,545 SF)
- Restored historic Entrance & Grand Staircase
- Private Residence Entry (rear of building)

Common corridors & bathrooms, building infrastructure & core mechanicals are also located on this floor.

First floor storefront windows will be returned to their original architectural height and scale.



Second Floor

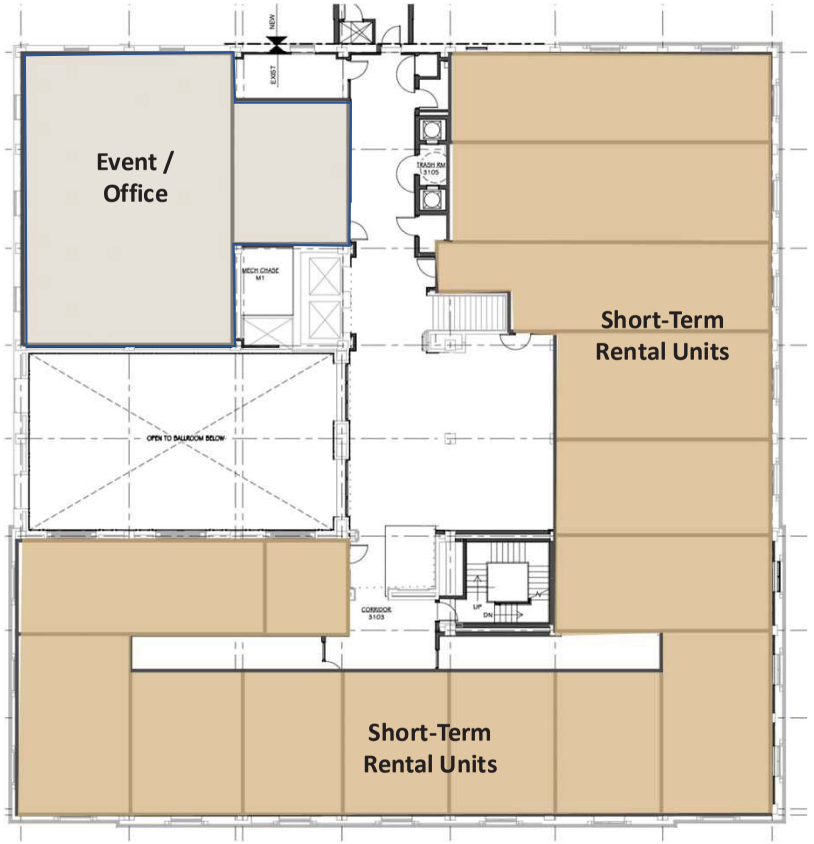
- Grand Ballroom & Event spaces (4,615 SF)
- Office/Commercial Suites (3,070 SF)
- Onsite Property Management
- Restored Historic Staircase (interior)
- Restored Grand Lobby



Third Floor

- 14 Short-term Rental Units (Avg. 560 SF)
- Event/Office Space (1,995 SF)
- Amenity Restrooms
- Restored interior stairs
- Views into Grand Ballroom

Event/Office space will be used exclusively by the Hospitality Group and Rental Unit management company.



Residential Floors (4-10)

- **Sample layout & unit configuration**
- Studios, 1 and 2-bedrooms
- Open living floor plans
- Modern kitchens & bathrooms
- Historic details & character
- In-unit washer/dryer
- Stainless appliances



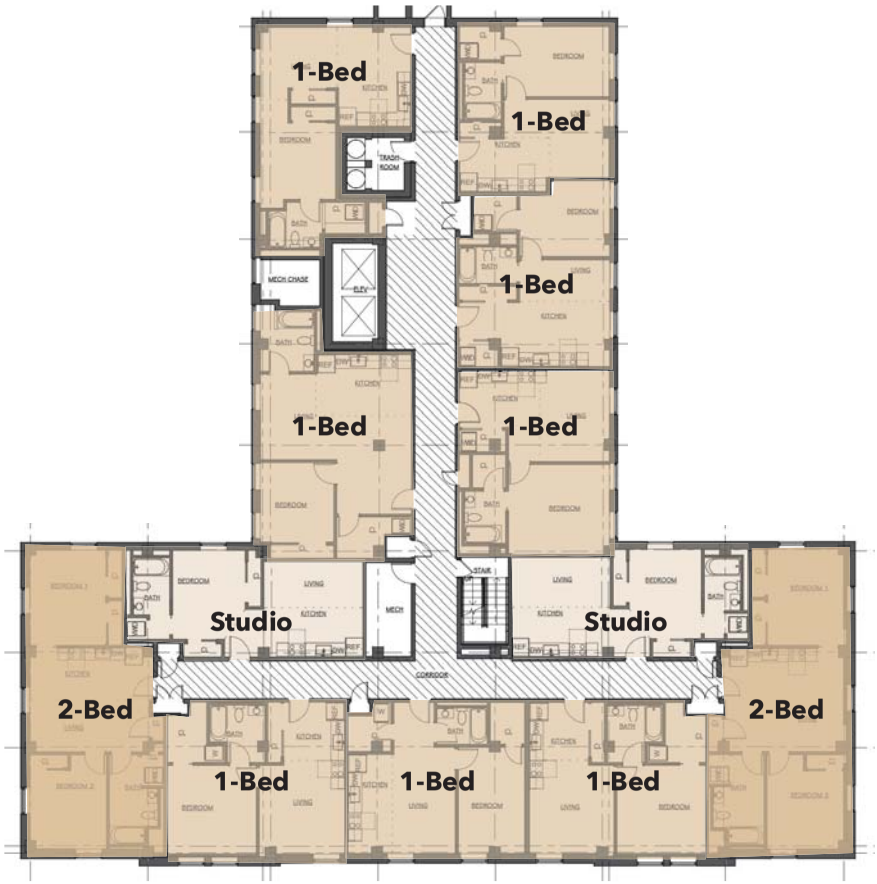
Floorplans 5-10

- **12 Units per floor**
- 2 / Two bedroom (820 SF)
- 8 / One bedroom (535 – 630 SF)
- 2 / Studio (510 SF)

Fourth Floor layout varies from floorplans 5-10. Floors 5-10 stack and repeat.

Floorplans include two (new) mechanical chases, (new) internal trash & recycling chutes, and restored historical stairwell.

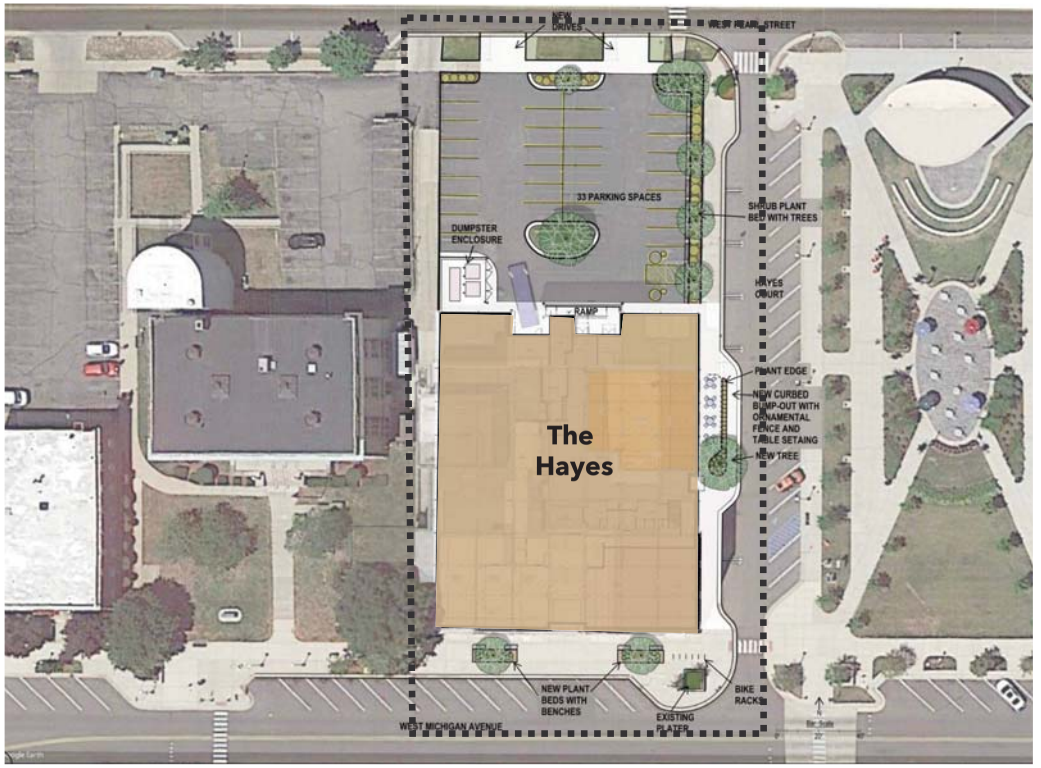
Building rehabilitation will include elevator upgrades and a (new) rear of building stairwell.



Proposed Site Plan

- Comprehensive landscaping
- Improved street and pedestrian appeal
- New bike racks, planters, and greenery
- Updated parking lot and lighting
- Curb/Dinning Bump-out (facing park)
- Concealed trash corral

Plan shown for conceptual direction only – appropriate approvals and permitting required.





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TABLES

Table 1
Eligible Activity Cost Estimates

Assessment and Due Care		Estimated Costs
Pre-Approved Activities		
	Phase I	$2,800
	Phase II Investigation	$11,800
	BEA	$2,900
	Due Care Plan	$2,200
	Subtotal Pre-Approved Activities	**$19,700**
Lead, Mold, and Asbestos Abatement		
	Asbestos Survey	$11,300
	Asbestos and Haz Sub Inspection/Bid Specs	$2,000
	Asbestos Abatement and Monitoring	$381,000
	Lead Survey	$11,300
	Lead Abatement	$889,000
	Subtotal Abatement Activities	**$1,294,600**
Brownfield Contractor Costs		
	Brownfield Plan	$10,000
	381 Work Plan	$10,000
	Implementation of Brownfield Plan and 381 Work Plan	$5,000
	Subtotal Plan Activities	**$25,000**

Site Preparation		
	Staking related to Rough Grade, Roadway and Utilities	$15,000
	Geotechnical Engineering	$10,000
	Temporary Erosion Control	$25,000
	Temporary Site Control (i.e., security, fencing, lighting)	$40,000
	Subtotal Site Preparation Activities	**$90,000**

Infrastructure		
Public		
	Sidewalk	$25,000
	Curbs and Gutters	$15,000
	Subtotal Public Infrastructure	**$40,000**

Subtotal Above	$1,469,300
*Contingency at 15%**	$213,690
Total Activity Costs with Contingency	$1,682,990

*Contingency does not include Pre-Approved Activities, Brownfield Plan, or 381 Work Plan

Other Eligible Costs		
	Interest	$801,639

Total Costs Above	$2,484,629

FINANCIAL ANALYSIS *Former Hotel Hayes*
Table 2 - Total Brownfield Tax Capture March 15, 2023

0

1.00% Estimated Taxable Value (TV) Increase Rate

Plan Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Calendar Year	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041
Base Taxable Value	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1
Estimated New TV	$ 3,830,000	$ 3,868,300	$ 3,906,983	$ 3,946,053	$ 3,985,513	$ 4,025,369	$ 4,065,622	$ 4,106,278	$ 4,147,341	$ 4,188,815	$ 4,230,703	$ 4,273,010	$ 4,315,740	$ 4,358,897	$ 4,402,486	$ 4,446,511
Incremental Difference (New TV - Base TV)	**$ 3,829,999**	**$ 3,868,299**	**$ 3,906,982**	**$ 3,946,052**	**$ 3,985,512**	**$ 4,025,368**	**$ 4,065,621**	**$ 4,106,277**	**$ 4,147,340**	**$ 4,188,814**	**$ 4,230,702**	**$ 4,273,009**	**$ 4,315,739**	**$ 4,358,896**	**$ 4,402,485**	**$ 4,446,510**
School Capture	Millage Rate	Tax Abatement Period															
School Operating Tax	18.0000	$ 34,920	$ 35,269	$ 35,622	$ 35,978	$ 36,338	$ 36,701	$ 73,181	$ 73,913	$ 74,652	$ 75,399	$ 76,153	$ 76,914	$ 77,683	$ 78,460	$ 79,245	$ 80,037
State Education Tax (SET)	6.0000	$ 11,640	$ 11,756	$ 11,874	$ 11,993	$ 12,113	$ 12,234	$ 24,394	$ 24,638	$ 24,884	$ 25,133	$ 25,384	$ 25,638	$ 25,894	$ 26,153	$ 26,415	$ 26,679
School Total	**24.0000**																
Local Capture	Millage Rate	Tax Abatement Period															
MED CARE	0.2476	$ 12	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 14	$ 14	$ 14	$ 1,069	$ 1,079	$ 1,090	$ 1,101
SENIOR SERVICES	0.5966	$ 30	$ 30	$ 30	$ 31	$ 31	$ 31	$ 32	$ 32	$ 32	$ 33	$ 33	$ 33	$ 2,575	$ 2,601	$ 2,627	$ 2,653
LIFEWAYS	0.4947	$ 25	$ 25	$ 25	$ 25	$ 26	$ 26	$ 26	$ 27	$ 27	$ 27	$ 27	$ 28	$ 2,135	$ 2,156	$ 2,178	$ 2,200
COUNTY PARKS	0.4954	$ 25	$ 25	$ 25	$ 26	$ 26	$ 26	$ 26	$ 27	$ 27	$ 27	$ 27	$ 28	$ 2,138	$ 2,159	$ 2,181	$ 2,203
ANIMAL CONTROL	0.2476	$ 12	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 14	$ 14	$ 14	$ 1,069	$ 1,079	$ 1,090	$ 1,101
LIBRARY	1.7411	$ 87	$ 88	$ 89	$ 90	$ 91	$ 91	$ 92	$ 93	$ 94	$ 95	$ 96	$ 97	$ 7,514	$ 7,589	$ 7,665	$ 7,742
JACKSON ISD OPER	0.1700	$ 8	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 734	$ 741	$ 748	$ 756
JACKSON ISD VOC	1.0643	$ 53	$ 54	$ 54	$ 55	$ 55	$ 56	$ 56	$ 57	$ 58	$ 58	$ 59	$ 59	$ 4,593	$ 4,639	$ 4,686	$ 4,732
JACKSON ISD SPEC	2.3492	$ 117	$ 119	$ 120	$ 121	$ 122	$ 123	$ 125	$ 126	$ 127	$ 128	$ 130	$ 131	$ 10,139	$ 10,240	$ 10,342	$ 10,446
JACKSON ISD SP12	0.7704	$ 39	$ 39	$ 39	$ 40	$ 40	$ 40	$ 41	$ 41	$ 42	$ 42	$ 43	$ 43	$ 3,325	$ 3,358	$ 3,392	$ 3,426
JTA	0.9946	$ 50	$ 50	$ 51	$ 51	$ 52	$ 52	$ 53	$ 53	$ 54	$ 54	$ 55	$ 55	$ 4,292	$ 4,335	$ 4,379	$ 4,422
CITY OPER	6.6828	$ 334	$ 337	$ 341	$ 344	$ 348	$ 351	$ 355	$ 358	$ 362	$ 365	$ 369	$ 373	$ 28,841	$ 29,130	$ 29,421	$ 29,715
CITY PUB IMP	1.9092	$ 95	$ 96	$ 97	$ 98	$ 99	$ 100	$ 101	$ 102	$ 103	$ 104	$ 105	$ 106	$ 8,240	$ 8,322	$ 8,405	$ 8,489
CITY POL/FIRE	8.7000	$ 435	$ 439	$ 444	$ 448	$ 453	$ 457	$ 462	$ 466	$ 471	$ 476	$ 481	$ 485	$ 37,547	$ 37,922	$ 38,302	$ 38,685
JACKSON COLLEGE	1.1327	$ 57	$ 57	$ 58	$ 58	$ 59	$ 60	$ 60	$ 61	$ 61	$ 62	$ 63	$ 63	$ 4,888	$ 4,937	$ 4,987	$ 5,037
JPS OPER PUB REC	0.4952	$ 25	$ 25	$ 25	$ 26	$ 26	$ 26	$ 26	$ 27	$ 27	$ 27	$ 27	$ 28	$ 2,137	$ 2,159	$ 2,180	$ 2,202
COUNTY OPER	5.0660	$ 253	$ 256	$ 258	$ 261	$ 264	$ 266	$ 269	$ 272	$ 274	$ 277	$ 280	$ 283	$ 21,864	$ 22,082	$ 22,303	$ 22,526
CITY DDA	1.9996	$ 100	$ 101	$ 102	$ 103	$ 104	$ 105	$ 106	$ 107	$ 108	$ 109	$ 110	$ 112	$ 8,630	$ 8,716	$ 8,803	$ 8,891
Local Total	**35.1570**																
Non-Capturable Millages	Millage Rate																
CITY HALL DEBT	0.9500	$ 47	$ 48	$ 48	$ 49	$ 49	$ 50	$ 50	$ 51	$ 51	$ 52	$ 52	$ 53	$ 4,100	$ 4,141	$ 4,182	$ 4,224
JPS DEBT 2004, 2009, 20118	6.2000	$ 310	$ 313	$ 316	$ 319	$ 323	$ 326	$ 329	$ 332	$ 336	$ 339	$ 342	$ 346	$ 26,758	$ 27,025	$ 27,295	$ 27,568
Total Non-Capturable Taxes	**7.1500**																
Total Tax Increment Revenue (TIR) Available for Capture		$ 48,318	$ 48,801	$ 49,289	$ 49,782	$ 50,280	$ 50,782	$ 99,441	$ 100,435	$ 101,440	$ 102,454	$ 103,479	$ 104,513	$ 255,306	$ 257,859	$ 260,438	$ 263,042
Total Tax Increment Revenue (TIR) Not Available		$ 357	$ 361	$ 365	$ 368	$ 372	$ 376	$ 379	$ 383	$ 387	$ 391	$ 395	$ 399	$ 30,858	$ 31,166	$ 31,478	$ 31,793

Footnotes: Amounts provided are estimates based on the assumptions used as of the date of this table. Actual tax payments and reimbursement amounts will vary based on assessed value, tax rates and other factors. This table is provided for illustration purposes only.

0

Plan Year	17	18	19	20	21	22	23	24	25	26	27	28	29	30	TOTAL
Calendar Year	2042	2043	2044	2045	2046	2047	2048	2049	2050	2051	2052	2053	2054	2055	
Base Taxable Value	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	
Estimated New TV	$ 4,490,976	$ 4,535,886	$ 4,581,245	$ 4,627,057	$ 4,673,328	$ 4,720,061	$ 4,767,262	$ 4,814,934	$ 4,863,084	$ 4,911,715	$ 4,960,832	$ 5,010,440	$ 5,060,544	$ 5,111,150	
Incremental Difference (New TV - Base TV)	**$ 4,490,975**	**$ 4,535,885**	**$ 4,581,244**	**$ 4,627,056**	**$ 4,673,327**	**$ 4,720,060**	**$ 4,767,261**	**$ 4,814,933**	**$ 4,863,083**	**$ 4,911,714**	**$ 4,960,831**	**$ 5,010,439**	**$ 5,060,543**	**$ 5,111,149**	
School Capture	Millage Rate														
School Operating Tax	18.0000	$ 80,838	$ 81,646	$ 82,462	$ 83,287	$ 84,120	$ 84,961	$ 85,811	$ 86,669	$ 87,535	$ 88,411	$ 89,295	$ 90,188	$ 91,090	$ 92,001	$ 2,188,778
State Education Tax (SET)	6.0000	$ 26,946	$ 27,215	$ 27,487	$ 27,762	$ 28,040	$ 28,320	$ 28,604	$ 28,890	$ 29,178	$ 29,470	$ 29,765	$ 30,063	$ 30,363	$ 30,667	$ 729,593
School Total	**24.0000**															$ 2,918,371
Local Capture	Millage Rate														
MED CARE	0.2476	$ 1,112	$ 1,123	$ 1,134	$ 1,146	$ 1,157	$ 1,169	$ 1,180	$ 1,192	$ 1,204	$ 1,216	$ 1,228	$ 1,241	$ 1,253	$ 1,266	$ 21,117
SENIOR SERVICES	0.5966	$ 2,679	$ 2,706	$ 2,733	$ 2,761	$ 2,788	$ 2,816	$ 2,844	$ 2,873	$ 2,901	$ 2,930	$ 2,960	$ 2,989	$ 3,019	$ 3,049	$ 50,882
LIFEWAYS	0.4947	$ 2,222	$ 2,244	$ 2,266	$ 2,289	$ 2,312	$ 2,335	$ 2,358	$ 2,382	$ 2,406	$ 2,430	$ 2,454	$ 2,479	$ 2,503	$ 2,528	$ 42,191
COUNTY PARKS	0.4954	$ 2,225	$ 2,247	$ 2,270	$ 2,292	$ 2,315	$ 2,338	$ 2,362	$ 2,385	$ 2,409	$ 2,433	$ 2,458	$ 2,482	$ 2,507	$ 2,532	$ 42,251
ANIMAL CONTROL	0.2476	$ 1,112	$ 1,123	$ 1,134	$ 1,146	$ 1,157	$ 1,169	$ 1,180	$ 1,192	$ 1,204	$ 1,216	$ 1,228	$ 1,241	$ 1,253	$ 1,266	$ 21,117
LIBRARY	1.7411	$ 7,819	$ 7,897	$ 7,976	$ 8,056	$ 8,137	$ 8,218	$ 8,300	$ 8,383	$ 8,467	$ 8,552	$ 8,637	$ 8,724	$ 8,811	$ 8,899	$ 148,492
JACKSON ISD OPER	0.1700	$ 763	$ 771	$ 779	$ 787	$ 794	$ 802	$ 810	$ 819	$ 827	$ 835	$ 843	$ 852	$ 860	$ 869	$ 14,499
JACKSON ISD VOC	1.0643	$ 4,780	$ 4,828	$ 4,876	$ 4,925	$ 4,974	$ 5,024	$ 5,074	$ 5,125	$ 5,176	$ 5,228	$ 5,280	$ 5,333	$ 5,386	$ 5,440	$ 90,770
JACKSON ISD SPEC	2.3492	$ 10,550	$ 10,656	$ 10,762	$ 10,870	$ 10,979	$ 11,088	$ 11,199	$ 11,311	$ 11,424	$ 11,539	$ 11,654	$ 11,771	$ 11,888	$ 12,007	$ 200,354
JACKSON ISD SP12	0.7704	$ 3,460	$ 3,494	$ 3,529	$ 3,565	$ 3,600	$ 3,636	$ 3,673	$ 3,709	$ 3,747	$ 3,784	$ 3,822	$ 3,860	$ 3,899	$ 3,938	$ 65,705
JTA	0.9946	$ 4,467	$ 4,511	$ 4,557	$ 4,602	$ 4,648	$ 4,695	$ 4,742	$ 4,789	$ 4,837	$ 4,885	$ 4,934	$ 4,983	$ 5,033	$ 5,084	$ 84,826
CITY OPER	6.6828	$ 30,012	$ 30,312	$ 30,616	$ 30,922	$ 31,231	$ 31,543	$ 31,859	$ 32,177	$ 32,499	$ 32,824	$ 33,152	$ 33,484	$ 33,819	$ 34,157	$ 569,951
CITY PUB IMP	1.9092	$ 8,574	$ 8,660	$ 8,747	$ 8,834	$ 8,922	$ 9,012	$ 9,102	$ 9,193	$ 9,285	$ 9,377	$ 9,471	$ 9,566	$ 9,662	$ 9,758	$ 162,828
CITY POL/FIRE	8.7000	$ 39,071	$ 39,462	$ 39,857	$ 40,255	$ 40,658	$ 41,065	$ 41,475	$ 41,890	$ 42,309	$ 42,732	$ 43,159	$ 43,591	$ 44,027	$ 44,467	$ 741,990
JACKSON COLLEGE	1.1327	$ 5,087	$ 5,138	$ 5,189	$ 5,241	$ 5,293	$ 5,346	$ 5,400	$ 5,454	$ 5,508	$ 5,563	$ 5,619	$ 5,675	$ 5,732	$ 5,789	$ 96,604
JPS OPER PUB REC	0.4952	$ 2,224	$ 2,246	$ 2,269	$ 2,291	$ 2,314	$ 2,337	$ 2,361	$ 2,384	$ 2,408	$ 2,432	$ 2,457	$ 2,481	$ 2,506	$ 2,531	$ 42,234
COUNTY OPER	5.0660	$ 22,751	$ 22,979	$ 23,209	$ 23,441	$ 23,675	$ 23,912	$ 24,151	$ 24,392	$ 24,636	$ 24,883	$ 25,132	$ 25,383	$ 25,637	$ 25,893	$ 432,060
CITY DDA	1.9996	$ 8,980	$ 9,070	$ 9,161	$ 9,252	$ 9,345	$ 9,438	$ 9,533	$ 9,628	$ 9,724	$ 9,821	$ 9,920	$ 10,019	$ 10,119	$ 10,220	$ 170,538
Local Total	**35.1570**															$ 2,998,409
Non-Capturable Millages	Millage Rate														
CITY HALL DEBT	0.9500	$ 4,266	$ 4,309	$ 4,352	$ 4,396	$ 4,440	$ 4,484	$ 4,529	$ 4,574	$ 4,620	$ 4,666	$ 4,713	$ 4,760	$ 4,808	$ 4,856	$ 81,022
JPS DEBT 2004, 2009, 20118	6.2000	$ 27,844	$ 28,122	$ 28,404	$ 28,688	$ 28,975	$ 29,264	$ 29,557	$ 29,853	$ 30,151	$ 30,453	$ 30,757	$ 31,065	$ 31,375	$ 31,689	$ 528,775
Total Non-Capturable Taxes	**7.1500**															$ 609,797
Total Tax Increment Revenue (TIR) Available for Capture		$ 265,673	$ 268,329	$ 271,013	$ 273,723	$ 276,460	$ 279,225	$ 282,017	$ 284,837	$ 287,685	$ 290,562	$ 293,468	$ 296,403	$ 299,367	$ 302,360	$ 5,916,780
Total Tax Increment Revenue (TIR) Not Available		$ 32,110	$ 32,432	$ 32,756	$ 33,083	$ 33,414	$ 33,748	$ 34,086	$ 34,427	$ 34,771	$ 35,119	$ 35,470	$ 35,825	$ 36,183	$ 36,545	$ 609,797

FINANCIAL ANALYSIS — *Former Hotel Hayes*
Table 3 - Brownfield Plan Reimbursement — **March 15, 2023**

	Developer Maximum Reimburse-ment	Proportionality	Actual School & Local Taxes Capture	Actual Local-Only Taxes	Total Actual Capture
State		**37%**	**$ 1,457,982**		$ 1,457,982
Local		**63%**	**$ 1,026,647**	$ -	$ 1,026,647
TOTAL					
EGLE		**3%**	$ 85,907	$ -	$ 85,907
MSF		**97%**	$ 2,398,722	$ -	$ 2,398,722

Estimated Total Years of Plan: 24

0

Estimated Developer Reimbursement	$ 2,484,629
Administrative Fees	$ 149,217
State Brownfield Redevelopment Fund	$ 218,116
Local Brownfield Revolving Fund	$ 880,321

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
		2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
Total State Incremental Revenue		$ 46,560	$ 47,026	$ 47,496	$ 47,971	$ 48,450	$ 48,935	$ 97,575	$ 98,551	$ 99,536	$ 100,532	$ 101,537	$ 102,552	$ 103,578	$ 104,614	$ 105,660	$ 106,716	$ 107,783
State Brownfield Redevelopment Fund (3 mils of SET)		$ 5,820	$ 5,878	$ 5,937	$ 5,996	$ 6,056	$ 6,117	$ 12,197	$ 12,319	$ 12,442	$ 12,566	$ 12,692	$ 12,819	$ 12,947	$ 13,077	$ 13,207	$ 13,340	$ 13,473
State TIR Available for Reimbursement		**$ 40,740**	**$ 41,147**	**$ 41,559**	**$ 41,974**	**$ 42,394**	**$ 42,818**	**$ 85,378**	**$ 86,232**	**$ 87,094**	**$ 87,965**	**$ 88,845**	**$ 89,733**	**$ 90,631**	**$ 91,537**	**$ 92,452**	**$ 93,377**	**$ 94,310**
Total Local Incremental Revenue		$ 1,758	$ 1,775	$ 1,793	$ 1,811	$ 1,829	$ 1,847	$ 1,866	$ 1,885	$ 1,903	$ 1,923	$ 1,942	$ 1,961	$ 151,728	$ 153,246	$ 154,778	$ 156,326	$ 157,889
BRA Administrative Fee	6.0%	$ 1,758	$ 1,775	$ 1,793	$ 1,811	$ 1,829	$ 1,847	$ 1,866	$ 1,885	$ 1,903	$ 1,923	$ 1,942	$ 1,961	$ 15,318	$ 15,472	$ 15,626	$ 15,783	$ 15,940
Local TIR Available for Reimbursement		**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 136,410**	**$ 137,774**	**$ 139,152**	**$ 140,543**	**$ 141,949**
Total State & Local TIR Available		**$ 40,740**	**$ 41,147**	**$ 41,559**	**$ 41,974**	**$ 42,394**	**$ 42,818**	**$ 85,378**	**$ 86,232**	**$ 87,094**	**$ 87,965**	**$ 88,845**	**$ 89,733**	**$ 227,041**	**$ 229,311**	**$ 231,604**	**$ 233,920**	**$ 236,259**
DEVELOPER	Beginning Balance																	
DEVELOPER Reimbursement Balance	*$ 2,484,629*	*$ 2,443,889*	*$ 2,402,742*	*$ 2,361,183*	*$ 2,319,209*	*$ 2,276,814*	*$ 2,233,996*	*$ 2,148,618*	*$ 2,062,386*	*$ 1,975,292*	*$ 1,887,327*	*$ 1,798,483*	*$ 1,708,749*	*$ 1,481,709*	*$ 1,252,398*	*$ 1,020,794*	*$ 786,874*	*$ 550,614*
MSF Non-Environmental Costs	$ 1,624,800	$ 39,331	$ 39,725	$ 40,122	$ 40,523	$ 40,928	$ 41,338	$ 82,426	$ 83,250	$ 84,083	$ 84,924	$ 85,773	$ 86,631	$ 219,191	$ 221,382	$ 223,596	$ 211,577	$ -
State Tax Reimbursement		$ 39,331	$ 39,725	$ 40,122	$ 40,523	$ 40,928	$ 41,338	$ 82,426	$ 83,250	$ 84,083	$ 84,924	$ 85,773	$ 86,631	$ 87,497	$ 88,372	$ 89,256	$ 84,458	$ -
Local Tax Reimbursement		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 131,694	$ 133,011	$ 134,341	$ 127,119	$ -
Total MSF Reimbursement Balance		*$ 1,585,469*	*$ 1,545,744*	*$ 1,505,622*	*$ 1,465,099*	*$ 1,424,170*	*$ 1,382,833*	*$ 1,300,407*	*$ 1,217,156*	*$ 1,133,074*	*$ 1,048,150*	*$ 962,377*	*$ 875,746*	*$ 656,556*	*$ 435,173*	*$ 211,577*	*$ -*	*$ -*
EGLE Environmental Costs	$ 58,190	$ 1,409	$ 1,423	$ 1,437	$ 1,451	$ 1,466	$ 1,480	$ 2,952	$ 2,981	$ 3,011	$ 3,041	$ 3,072	$ 3,103	$ 7,850	$ 7,929	$ 8,008	$ 7,577	$ -
State Tax Reimbursement		$ 1,409	$ 1,423	$ 1,437	$ 1,451	$ 1,466	$ 1,480	$ 2,952	$ 2,981	$ 3,011	$ 3,041	$ 3,072	$ 3,103	$ 3,134	$ 3,165	$ 3,197	$ 3,025	$ -
Local Tax Reimbursement		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 4,716	$ 4,764	$ 4,811	$ 4,553	$ -
Total EGLE Reimbursement Balance		*$ 56,781*	*$ 55,359*	*$ 53,922*	*$ 52,471*	*$ 51,005*	*$ 49,524*	*$ 46,572*	*$ 43,591*	*$ 40,579*	*$ 37,538*	*$ 34,466*	*$ 31,364*	*$ 23,514*	*$ 15,585*	*$ 7,577*	*$ -*	*$ -*
Local Only Costs	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Local Tax Reimbursement		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Total Local Only Reimbursement Balance		*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Interest Costs	$ 801,639	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 0	$ (0)	$ 0	$ 14,766	$ 236,259
State Tax Reimbursement		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 5,894	$ 94,310
Local Tax Reimbursement		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 0	$ (0)	$ 0	$ 8,872	$ 141,949
Total Interest Reimbursement Balance		*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 786,874*	*$ 550,614*
Total Annual Developer Reimbursement		*$ 40,740*	*$ 41,147*	*$ 41,559*	*$ 41,974*	*$ 42,394*	*$ 42,818*	*$ 85,378*	*$ 86,232*	*$ 87,094*	*$ 87,965*	*$ 88,845*	*$ 89,733*	*$ 227,041*	*$ 229,311*	*$ 231,604*	*$ 233,920*	*$ 236,259*
LOCAL BROWNFIELD REVOLVING FUND																		
LBRF Deposits *		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -								
State Tax Capture		$ -	$ (0)	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Local Tax Capture		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Total LBRF Capture		*$ -*	*$ (0)*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*

* Up to five years of capture for LBRF Deposits after eligible activities are reimbursed. May be taken from DEQ & Local TIR only.

Footnotes:
Amounts provided are estimates based on the assumptions used as of the date of this table. Actual tax payments and reimbursement amounts will vary based on assessed value, tax rates and other factors. This table is provided for illustration purposes only.

0

			18	19	20	21	22	23	24	25	26	27	28	29	30	
			2043	2044	2045	2046	2047	2048	2049	2050	2051	2052	2053	2054	2055	TOTAL
Total State Incremental Revenue			$ 108,861	$ 109,950	$ 111,049	$ 112,160	$ 113,281	$ 114,414	$ 115,558	$ 116,714	$ 117,881	$ 119,060	$ 120,251	$ 121,453	$ 122,668	$ 2,918,371
State Brownfield Redevelopment Fund (3 mils of SET)			$ 13,608	$ 13,744	$ 13,881	$ -	$ -	$ -	$ -	$ -						$ 218,116
State TIR Available for Reimbursement			**$ 95,254**	**$ 96,206**	**$ 97,168**	**$ 112,160**	**$ 113,281**	**$ 114,414**	**$ 115,558**	**$ 116,714**	**$ 117,881**	**$ 119,060**	**$ 120,251**	**$ 121,453**	**$ 122,668**	**$ 2,700,255**
Total Local Incremental Revenue			$ 159,468	$ 161,063	$ 162,673	$ 164,300	$ 165,943	$ 167,603	$ 169,279	$ 170,971	$ 172,681	$ 174,408	$ 176,152	$ 177,914	$ 179,693	$ 2,998,409
BRA Administrative Fee		6.0%	$ 16,100	$ 16,261	$ 16,423	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 149,217
Local TIR Available for Reimbursement			**$ 143,368**	**$ 144,802**	**$ 146,250**	**$ 164,300**	**$ 165,943**	**$ 167,603**	**$ 169,279**	**$ 170,971**	**$ 172,681**	**$ 174,408**	**$ 176,152**	**$ 177,914**	**$ 179,693**	**$ 2,849,192**
Total State & Local TIR Available			**$ 238,622**	**$ 241,008**	**$ 243,418**	**$ 276,460**	**$ 279,225**	**$ 282,017**	**$ 284,837**	**$ 287,685**	**$ 290,562**	**$ 293,468**	**$ 296,403**	**$ 299,367**	**$ 302,360**	**$ 5,549,447**
DEVELOPER	Beginning Balance															
DEVELOPER Reimbursement Balance	***$ 2,484,629***		***$ 311,992***	***$ 70,984***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	
MSF Non-Environmental Costs	*$ 1,624,800*		*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ 1,624,800*
State Tax Reimbursement			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 1,098,636
Local Tax Reimbursement			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 526,164
Total MSF Reimbursement Balance			*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
EGLE Environmental Costs	*$ 58,190*		*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ 58,190*
State Tax Reimbursement			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 39,346
Local Tax Reimbursement			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 18,844
Total EGLE Reimbursement Balance			*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Local Only Costs	*$ -*		*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Local Tax Reimbursement			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Total Local Only Reimbursement Balance			*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Interest Costs	*$ 801,639*		*$ 238,622*	*$ 241,008*	*$ 70,984*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ 801,639*
State Tax Reimbursement			$ 95,254	$ 96,206	$ 28,336	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 320,000
Local Tax Reimbursement			$ 143,368	$ 144,802	$ 42,649	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 481,639
Total Interest Reimbursement Balance			*$ 311,992*	*$ 70,984*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Total Annual Developer Reimbursement			***$ 238,622***	***$ 241,008***	***$ 70,984***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ 2,484,629***
LOCAL BROWNFIELD REVOLVING FUND																
LBRF Deposits *																
State Tax Capture			*$ -*	*$ -*	*$ 68,833*	*$ 40,762*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	***$ 109,595***
Local Tax Capture			*$ -*	*$ -*	*$ 103,602*	*$ 164,300*	*$ 165,943*	*$ 167,603*	*$ 169,279*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	***$ 770,726***
Total LBRF Capture			***$ -***	***$ -***	***$ 172,434***	***$ 205,062***	***$ 165,943***	***$ 167,603***	***$ 169,279***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ 880,321***

ATTACHMENT A

Brownfield Plan Resolution(s)

ATTACHMENT B

Reimbursement Agreement

ATTACHMENT C

Letters of Support

Spring Arbor
UNIVERSITY

Office of the President

May 20, 2022

Grant Review Committee
Revitalization and Placemaking Program (RAP)
Michigan Economic Development Corporation
300 N. Washington Square
Lansing, MI 48913

Dear Grant Review Committee,

Please accept the enclosed as an indication of Spring Arbor University's enthusiastic support for J. Jeffers & Co.'s proposed redevelopment of the iconic 1926 Hotel Hayes building Downtown Jackson.

A priority site for investment identified by the City of Jackson and Jackson Anchor Initiative in MEDC's Redevelopment Ready Communities Program, the long-vacant property is uniquely positioned to support stakeholders' key revitalization goals. Among those goals are attracting new residents and new spending power to the community's traditional commercial core, which has been successfully reimagined as an Innovation & Smart Energy District.

J. Jeffers & Co.'s proposed historic rehabilitation of the Hotel Hayes building – estimated at $27 million – will reactivate more than 110,000 square feet of space in a high-quality, mixed-use scenario. Initial plans call for 91 apartment units along with accommodation for premier event space and ground-floor boutique retail/hospitality uses. Centered in community impact as outlined across our community's primary planning documents, a project of this scope will bolster local efforts to build long-term economic, social and environmental resilience. This includes mitigating the varied detrimental impacts of the ongoing Covid-19 pandemic.

Spring Arbor University continues be actively engaged in initiatives to provide for a vibrant community. Our students, faculty, and staff value Jackson by serving in a variety of ways. These individuals participate in the community with over 77,000 hours of volunteerism, thus supporting one of the pillars of the University's Concept Statement ".....critical participation in the contemporary world."

Spring Arbor University salutes the City of Jackson and Jackson Anchor Initiative for effectively marketing this cherished Downtown anchor and welcomes opportunities to collaborate with J. Jeffers &

Co., a company that is mission driven in its community practice to approach real estate development both holistically and inclusively.

MEDC's consideration of the Hayes Hotel project for RAP grant funding is appreciated and applauded. Please feel free to contact me at president@arbor.edu or my office phone, 517-750-6308 with any questions regarding Spring Arbor University's support of J. Jeffers & Co.'s catalytic investment.

Sincerely,

Dr. Brent D. Ellis
President

CITY OF JACKSON
Founded 1829

City Manager's Office

161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (866) 384-1772

May 31, 2022

Grant Review Committee
Revitalization and Placemaking Program (RAP)
Michigan Economic Development Corporation
300 N. Washington Square
Lansing, MI 48913

Dear Grant Review Committee,

Please accept this letter as an indication of the City of Jackson's enthusiastic support for J. Jeffers & Co.'s proposed redevelopment of the iconic 1926 Hotel Hayes building Downtown Jackson. In-kind and direct financial support that the City intends to provide to the project include:

- Brownfield TIF. Net Present Value of the project is estimated at $3,000,000.
- Obsolete Property Rehabilitation Act (OPRA) financing. Net Present Value of the project is estimated at $1,350,000.
- Reduced Property Acquisition Cost, valued at $2,975,000.
- Predevelopment Grant financing, valued at $100,000.

The Hotel Hayes property is a priority site for investment identified by the City of Jackson's Redevelopment Ready Communities Program. The long-vacant property is uniquely positioned to support stakeholders' key revitalization goals. Among those goals are attracting new residents and new spending power to the community's traditional commercial core, which has been successfully reimagined as an Innovation & Smart Energy District.

J. Jeffers & Co.'s proposed historic rehabilitation of the Hotel Hayes building – estimated at $31.6 million – will reactivate more than 110,000 square feet of space in a high-quality, mixed-use scenario. Initial plans call for 115 apartment units along with accommodation for premier event space and ground-floor boutique retail/hospitality uses. Centered on community impact as outlined across our community's primary planning documents, a project of this scope will bolster local efforts to build long-term economic, social, and environmental resilience. This includes mitigating the varied detrimental impacts of the ongoing Covid-19 pandemic.

The City of Jackson is pleased to support this building redevelopment. We value the tools, resources, and incentives that the MEDC brings to this project to help the City enhance its economic vitality.

Respectfully,

Jonathan Greene
City Manager

Jackson ANCHOR INITIATIVE

Live.
Invest.
Innovate.
Locally.

May 12, 2022

Grant Review Committee
Revitalization and Placemaking Program (RAP)
Michigan Economic Development Corporation
300 N. Washington Square
Lansing, MI 48913

Dear Grant Review Committee,

Please accept this letter as an indication of Jackson Anchor Initiative's enthusiastic support for J. Jeffers & Co.'s proposed redevelopment of the iconic 1926 Hotel Hayes building in Downtown Jackson.

The Hotel Hayes property has been identified as a priority investment site by the City of Jackson and Jackson Anchor Initiative in MEDC's Redevelopment Ready Communities program. The long-vacant property is uniquely positioned to support stakeholders' key revitalization goals. Among those goals are attracting new residents and adding new spending power to the community's traditional commercial core, which has been successfully reimagined as an Innovation & Smart Energy District.

J. Jeffers & Co.'s proposed historic rehabilitation of the Hotel Hayes building – estimated at $27 million – will reactivate more than 110,000 square feet of space in a high-quality, mixed-use scenario. Initial plans call for 91 apartment units along with accommodation for premier event space and ground-floor boutique retail/hospitality uses. Centered in community impact as outlined across our community's primary planning documents, a project of this scope will bolster local efforts to build long-term economic, social and environmental resilience. This includes mitigating the varied detrimental impacts of the ongoing COVID-19 pandemic.

The Jackson Anchor Initiative is pleased to partner with the City of Jackson and J. Jeffers & Co. in marketing this cherished downtown anchor. We welcome opportunities to collaborate with J. Jeffers & Co., a company that is mission driven in its community practice to approach real estate development both holistically and inclusively. MEDC's consideration of the Hotel Hayes project for RAP grant funding is appreciated and applauded. Please feel free to contact me at Scott@JaxAnchor.org / 734-765-8124 with any questions regarding the Jackson Anchor Initiative's support of J. Jeffers & Co.'s catalytic investment.

Sincerely,

Scott Fleming

Scott Fleming, CEcD
President/ CEO, Jackson Anchor Initiative

May 13, 2022

Grant Review Committee
Revitalization and Placemaking Program (RAP)
Michigan Economic Development Corporation
300 N. Washington Square
Lansing, MI 48913

Dear Grant Review Committee,

Consumers Energy is supportive of J. Jeffers & Co.'s proposed redevelopment of the iconic 1926 Hotel Hayes building Downtown Jackson.

A priority site for investment identified by the City of Jackson and Jackson Anchor Initiative in MEDC's Redevelopment Ready Communities Program, the long-vacant property is uniquely positioned to support stakeholders' key revitalization goals. Among those goals are attracting new residents and new spending power to the community's traditional commercial core, which has been successfully reimagined as an Innovation & Smart Energy District.

J. Jeffers & Co.'s proposed historic rehabilitation of the Hotel Hayes building – estimated at $27 million – will reactivate more than 110,000 square feet of space in a high-quality, mixed-use scenario. Initial plans call for 91 apartment units along with accommodation for event space and ground-floor retail space. Centered in an impactful location as outlined across our community's primary planning documents, a project of this scope will bolster local efforts to build long-term economic, social, and environmental resilience.

Consumers Energy is excited and supportive of the proposed redevelopment of the Hotel Hayes building because of the ways it will support new growth in our hometown. We are prepared to support the project through our Smart Energy District and provide clean and affordable energy solutions.

MEDC's consideration of the Hayes Hotel project for RAP grant funding is appreciated. Please feel free to contact me at 517-788-7194 with any questions regarding Consumers Energy's support of J. Jeffers & Co.'s investment.

Sincerely,



Consumers Energy
One Energy Plaza
Jackson, MI 49201
consumersenergy.com

Garrick J. Rochow
President and Chief Executive Officer

161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 788-4028 • Facsimile: (866) 384-1772

Public Hearing on Brownfield Plan set for April 25, 2023

Jackson City Council will hold a Public Hearing on April 25, 2023 at approximately 6:30 p.m., in Council Chambers within the City Hall, 161 West Michigan Avenue, Jackson, Michigan, to receive public comment on a Brownfield Plan Development and Reimbursement Agreement to include therein the property located at 228 West Michigan Avenue in Jackson, Michigan. The following legal parcels are included as the "eligible property":

- PIN 1-008100000

On April 12, 2023, the Authority Board reviewed and recommended adoption of the Brownfield Plan Development and Reimbursement Agreement related to the development of a parcel of property located at 228 West Michigan Avenue in the City of Jackson, Michigan. The project is the renovation of a vacant 122,709 square foot, multi-story, former hotel and associated parking. Project renovations include restaurant and retail on the first floor, event space and office/commercial suites on the second floor, short term rentals on the third floor, and residential on the fourth through tenth floors. The redevelopment of this iconic structure into a mixed-use commercial and residential development will provide an important investment to revitalize the City's primary business district, seat of county government and historic core, and to encourage spin-off investment to redevelop this portion of the downtown.

The building has been deemed functionally obsolete based on outdated and inadequate mechanical, electrical, and telecommunications/IT systems. Thus, the parcel included in this development is "eligible property" as defined in the Brownfield Redevelopment Financing Act (1996 PA 381).

The Brownfield Plan, which includes a site map and legal description of the property, is available for public inspection at City Hall, Community Development Department, located on the 3rd floor at 161 West Michigan Avenue, Jackson, Michigan 49201. All aspects of the plan are open for discussion at the public hearing.

FURTHER INFORMATION may be obtained from the Brownfield Redevelopment Authority of the City of Jackson at (517) 768-6433.

THIS NOTICE is given by order of the City Council of Jackson, Michigan.

Posted on: April 14, 2023

JACKSON
Founded 1829

City Clerk's Office
161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 788-4025

MEMO TO: Mayor and City Councilmembers

FROM: Andrea Muray, City Clerk

DATE: April 25, 2023

SUBJECT: Receipt of Acknowledgement Letter from Michigan Liquor Control Commission

Recommendation:

Receipt of Acknowledgement Letter from Michigan Liquor Control Commission for a transfer application from House of Umami LLC.

The MLCC provides an opportunity for the Local Governmental Unit to submit an opinion or the application or advice of any local non-compliance issues.

Chief Hitt has reviewed the document and has no concerns at this time.

March 27, 2023

House of Umami LLC
Attorney Bradley Scobel
(bscobel@skdetroitlaw.com)

RID # 2301-00023 **Reference/Transaction:** Transfer Ownership escrowed 2022 Class C license from Goodrich Quality Theaters, Inc.; transfer location from 1501 N Wisner St; new SDM license issued under MCL 436.1533(5)(A), non-transferable, Sunday Sales (AM), Sunday Sales (PM) for Class C, Dance-Entertainment Permit and Outdoor Service Area.

Please let this letter serve as notice the Michigan Liquor Control Commission has referred your application to our Enforcement Division for investigation of your request.

Applicant/Licensee: House of Umami LLC

Business address and phone number: 1375 Boardman Rd, Jackson 49202

Home address and phone number of partner(s)/subordinates:
1. Chun Chen:

As part of the licensing process, an investigation is required by the Michigan Liquor Control Commission Enforcement Division. The Enforcement investigation will be conducted from the following designated District Office: **Lansing District Office (866) 813-0011**

You may contact your designated District Office regarding any appointments or questions on documentation requested by the Investigator. **Failure to provide requested information or to keep scheduled appointments will cause the application to be returned to the Lansing office for cancellation.**

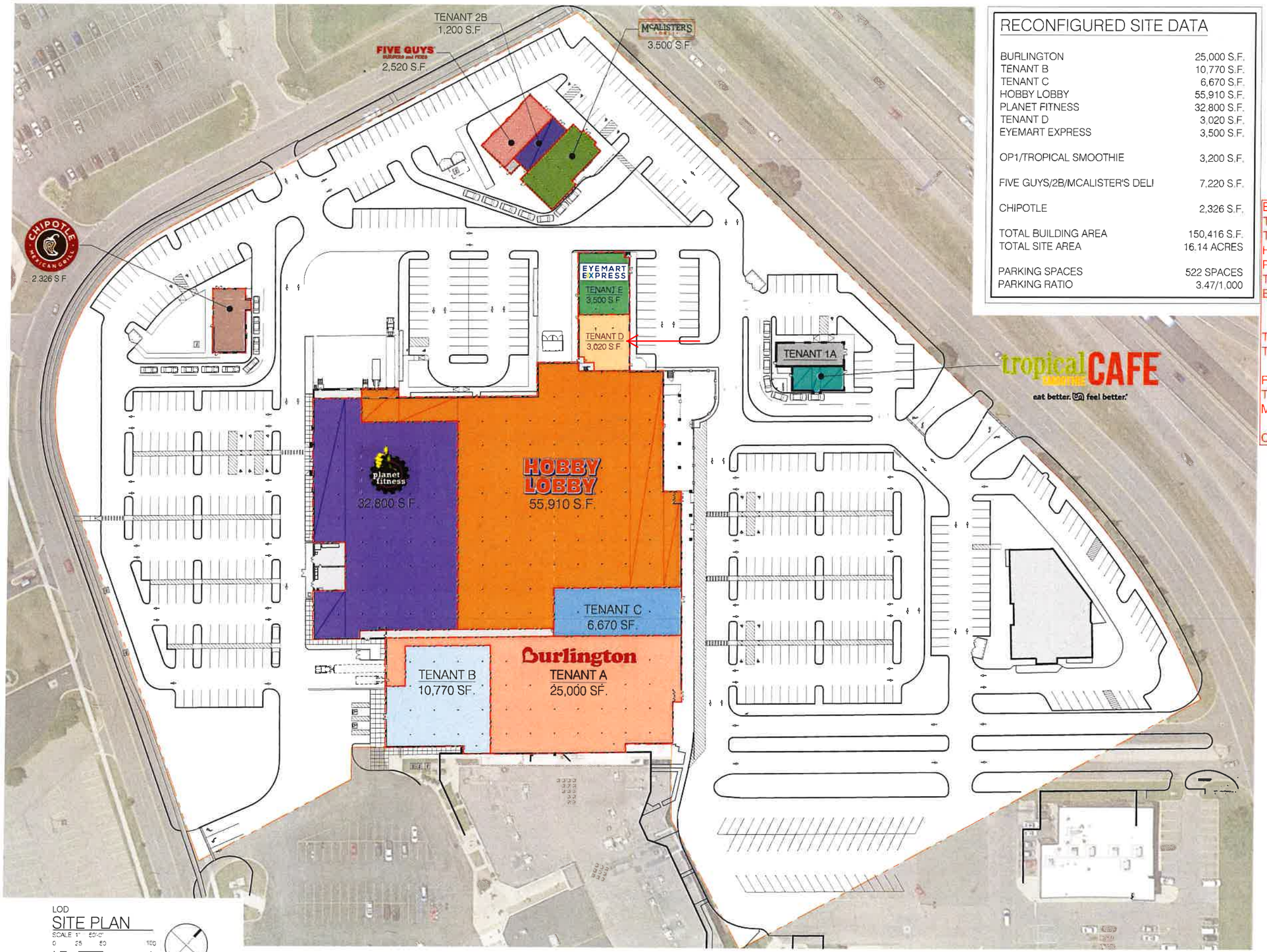
Since this request is a transfer under MCL 436.1529(1), approval of the local unit of government is not required. However, a copy of this notice is also being provided to **Local Governmental Unit** should they wish to submit an opinion on the application or advise of any local non-compliance issues.

Under administrative rule R 436.1105, the Commission shall consider the opinions of the local residents, local legislative body, or local law enforcement agency with regard to the proposed business when determining whether an applicant may be issued a license or permit.

Under administrative rule R 436.1003, the licensee shall comply with all state and local building, plumbing, zoning, sanitation, and health laws, rules, and ordinances as determined by the state and local law enforcements officials who have jurisdiction over the licensee. The licensee must obtain all other required state and local licenses, permits, and approvals before using this license for the sale of alcoholic liquor. Approval of this license by the Michigan Liquor Control Commission does not waive any of these requirements.

MICHIGAN LIQUOR CONTROL COMMISSION
Retail Licensing Division
(866) 813-0011

cc: City of Jackson (amuray@cityofjackson.org)



LOD
SITE PLAN
SCALE 1" 50'-0"
0 25 50 100

RECONFIGURED SITE DATA

BURLINGTON	25,000 S.F.
TENANT B	10,770 S.F.
TENANT C	6,670 S.F.
HOBBY LOBBY	55,910 S.F.
PLANET FITNESS	32,800 S.F.
TENANT D	3,020 S.F.
EYEMART EXPRESS	3,500 S.F.
OP1/TROPICAL SMOOTHIE	3,200 S.F.
FIVE GUYS/2B/MCALISTER'S DELI	7,220 S.F.
CHIPOTLE	2,326 S.F.
TOTAL BUILDING AREA	150,416 S.F.
TOTAL SITE AREA	16.14 ACRES
PARKING SPACES	522 SPACES
PARKING RATIO	3.47/1,000

Jackson
Retail Commercial

1250 Jackson Crossing
Jackson, MI 49202

Burlington - 1325 BOARDMAN RD
Tenant B - 1805 N WISNER
Tenant C - 1335 BOARDMAN RD
Hobby Lobby - 1355 Boardman Rd.
Planet Fitnes - 1855 N. Wisner Rd.
Tenant D - 1375 Boardman Rd.
Eyemart Express - 1379 Boardman Rd.

Tropical Smoothie - 1361 Boardman Rd.
Tenant 1A - 1365 Boardman Rd.

Five Guys - 1435 BOARDMAN RD
Tenant 2B - 1425 BOARDMAN RD
Mcalister's Deli - 1415 BOARDMAN RD

Chiptole - 1925 N. WISNER

RHINO INVESTMENTS

THIS DRAWING IS FOR GENERAL INFORMATION PURPOSES ONLY ANY AND ALL FEATURES, MATTERS AND OTHER INFORMATION DEPICTED HEREON OR CONTAINED HEREIN ARE FOR ILLUSTRATIVE PURPOSES ONLY

SA group

OPTION RR-B
08-09-22

CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Accept and place on file the CDBG, HOME, and CDBG-CV Homeless Prevention Financial Summaries through March 31, 2023

Recommendation:

Accept and place on file the CDBG, HOME and CDBG-CV Homeless Prevention Financial Summaries through March 31, 2023.

Attached is a memo from Shane LaPorte, the Director of Community Development, regarding accepting and placing on file the CDBG, HOME, and CDBG-CV Homeless Prevention Financial Summaries through March 31, 2023. Monthly expenses includes Personnel Salaries & Expenses, Administration Cost, City Attorney Expenses, Demolition Expenses, Boos Center Improvement Cost, and Homeless Prevention HAVC Project Expenses.

I recommend accepting and placing on file the CDBG, HOME, and CDBG-CV Homeless Prevention Financial Summaries through March 31, 2023. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Shane LaPorte, Director of Community Development

DATE: April 25, 2023

RECOMMENDATION: To accept and place on file the CDBG, HOME, and CDBG-CV Homeless Prevention Financial Summaries through March 31, 2023

SUMMARY

Attached please find the Financial Summaries for the CDBG, HOME, and CDBG-CV Homeless Prevention funds for the month ending March 31, 2023.

Monthly expenses included:

- Personnel – Salaries & Expenses
- Administration – Rehabilitation Administration Cost
- City Attorney Expenses
- Demolition Expense
  - 158 Randolph
  - 411 W. Trail
  - Pre-Demo Cost
    - RedCedar
    - ETC
- Parks & Recreation
  - Boos Center Improvements - Playground Expenses
- Homeless Prevention
  - Boos Center – Final HAVC Project Expenses

My recommendation is to accept and place on file the CDBG, HOME, and CDBG-CV Homeless Prevention Financial Summaries through March 31, 2023.

ATTACHMENTS

City of Jackson
Community Development Block Grant
Monthly Financial Summary
For the Nine Months Ended March 31, 2023

		Budgeted	Expended Prior Year	Actual Month-to-Date	Actual Year-to-Date	Total Funds Expended-to-Date	Balance	Percent Spent
	Administration							
1	Administration & Planning							
	FY 2021/2022	145,000	109,937	-	35,063	145,000	-	100.0%
	FY 2022 / 2023	120,000	-	13,174	40,814	40,814	79,186	34.0%
	Code Enforcement							
2	City Attorney Office							
	FY 2021/2022	20,000	20,000	-	-	20,000	-	100.0%
	FY 2022 / 2023	25,000	-	2,229	15,253	15,253	9,747	61.0%
	Rehabilitation Projects							
3	Rehabilitation Administration							
	FY 2021/2022	135,000	108,932	-	26,068	135,000	-	100.0%
	FY 2022 / 2023	120,000	-	11,774	111,520	111,520	8,480	92.9%
4	City Emergency Hazard Repair Program							
	FY 2020/2021	497,059	479,248	-	17,811	497,059	-	100.0%
	FY 2022 / 2023	250,000	-	-	25,333	25,333	224,667	10.1%
	Street Projects							
5	Special Assessments							
	FY 2019/2020	25,000	4,365	-	1,715	6,080	18,920	24.3%
6	Cooley: Morrell to Biddle							
	FY 2021/2022	175,176	170,936	-	-	170,936	4,240	97.6%
7	Biddle: Mechanic to MLK Jr Dr							
	FY 2021/2022	134,702	130,463	-	-	130,463	4,239	96.9%
8	Perrine-Burr							
	FY 2021/2022	56,500	42,692	-	4,208	46,900	9,600	83.0%
	FY 2022/2023	463,000	-	-	-	-	463,000	**0.0%**

City of Jackson
Community Development Block Grant
Monthly Financial Summary
For the Nine Months Ended March 31, 2023

		Budgeted	Expended Prior Year	Actual Month-to-Date	Actual Year-to-Date	Total Funds Expended-to-Date	Balance	Percent Spent
	Recreation -Other Projects							
9	Loomis Park Court Improvements	312,849	304,867	-	-	304,867	7,982	97.4%
10	Boo Center Improvements							
	FY 2020/2021	305,000	245,982	-	-	245,982	59,018	80.6%
	FY 2021/2022	1,005,980	75,180	102,636	634,952	710,132	295,848	**70.6%**
	FY 2022/2023	241,133	-	-	-	-	241,133	**0.0%**
	Demolition							
11	Demolition							
	FY 2020/2021	300,000	241,639	-	58,361	300,000	0	100.0%
	FY 2021/2022	75,000	-	25,361	49,166	49,166	25,834	65.6%
	FY 2022 / 2023	150,000	-	-	-	-	150,000	0.0%

City of Jackson
HOME
Monthly Financial Summary
For the Nine Months Ended March 31, 2023

	Budgeted	Expended Prior Year	Actual Month-to-Date	Actual Year-to-Date	Total Funds Expended-to-Date	Balance	Percent Spent
1 Rehabilitation Assistance Program							
FY 2019/2020	55,068	54,384	-	-	54,384	684	98.8%
2 HOME Administration			-				
FY 2019/2020	25,000	25,000	-	-	25,000	-	100.0%
FY 2020/2021	33,000	31,703	-	-	31,703	1,297	96.1%
FY 2021/2022	16,000	16,000	-	-	16,000	-	100.0%
FY 2022/2023	30,000	-	-	-	-	30,000	0.0%
3 CHDO Reservation							
FY 2019/2020	503,052	358,955	-	127,996	486,951	16,101	96.8%
FY 2020/2021	287,439	-	-	-	-	287,439	0.0%
FY 2021/2022	118,329	-	-	-	-	118,329	0.0%
FY 2022/2023	129,404	-	-	-	-	129,404	0.0%
4 CHDO Operating Expenses							
FY 2019/2020	18,000	3,958	-	11,518	15,476	2,524	86.0%
FY 2020/2021	16,800	-	-	8,778	8,778	8,022	52.3%
FY 2022/2023	17,226	-	-	-	-	17,226	0.0%
5 Partnership Park - Homeowner Rehabilitation (CAA)							
FY 2021/2022	200,000	-	-	-	-	200,000	0.0%
FY 2022/2023	200,000	-	-	-	-	200,000	0.0%

City of Jackson
2020/8 CV Homeless Prevention
Monthly Financial Summary
For the Nine Months Ended March 31, 2023

		Budgeted	Expended Prior Year	Actual Month-to-Date	Actual Year-to-Date	Total Funds Expended-to-Date	Balance	Percent Spent
	Administration							
1	CDBG-CV Admin City							
	FY 2020/2021	60,000	12,383	-	2,293	14,676	45,324	24.5%
2	CDBG-CV Admin CAA							
	FY 2020/2021	33,270	33,270	-	-	33,270	-	100.0%
	Homeless Prevention - Public Services							
3	Eviction Prevention							
	FY 2020/2021	120,000	120,000	-	-	120,000	-	100.0%
4	Foreclosure Prevention							
	FY 2020/2021	41,112	41,112	-	-	41,112	-	100.0%
5	Water Shut-off Protection							
	FY 2020/2021	35,313	35,313	-	-	35,313	-	100.0%
	Parks & Recreation							
6	Boos Center - HVAC	319,425	97,207	54,056	129,111	226,318	93,107	70.9%
7	Boos Center - Trail	336,325	-	-	-	-	336,325	0.0%

CITY COUNCIL MEETING MINUTES

April 11, 023

CALL TO ORDER:

The Jackson City Council met in regular session in Council Chambers and was called to order at 6:30 p.m. by Mayor Daniel Mahoney.

PLEDGE OF ALLEGIANCE AND INVOCATION:

Council joined in the Pledge of Allegiance. Invocation was given by Fourth Ward Councilmember Laura Dwyer Schlecte.

ROLL CALL:

Present: Mayor Daniel Mahoney, Vice Mayor/First Ward Councilmember Arlene Robinson, Second Ward Councilmember Freddie Dancy, Third Ward Councilmember Angelita Gunn, Fourth Ward Councilmember Laura Dwyer Schlecte, Fifth Ward Councilmember Karen Bunnell, and Sixth Ward Councilmember Will Forgrave.

Absent: none.

Also present: City Manager Jonathan Greene, City Attorney Matthew Hagerty, City Clerk Andrea Muray, City Assessor Jason Yoakam, Chief Equity Officer John Willis, Director of Community Development Shane LaPorte, Deputy Director of Police Sergio Garcia, Director of Public Works Mike Osborne, and City Engineer Jon Dowling.

ADOPTION OF AGENDA:

Motion was made by Councilmember Forgrave, seconded by Councilmember Gunn to adopt the agenda. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

PRESENTATIONS/PROCLAMATIONS: none.

PUBLIC HEARINGS: none.

CITIZEN COMMENTS:

Citizen comments were heard and the meeting continued.

PETITIONS & COMMUNICATION FROM CITY STAFF AND OTHER GOVERNMENTAL ENTITIES:

8.1 City of Jackson, Michigan Financial Statements as of and for the 8 Months Ended February 28, 2023.

Motion was made by Councilmember Schlecte, seconded by Vice Mayor Robinson to accept and place on file the City of Jackson, Michigan Financial Statements for the 8 months ended February 28, 2023. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

8.2 Michigan Liquor Control Commission Acknowledgement Letter - Center Super Liquor, Inc.

Motion was made by Councilmember Schlecte, seconded by Councilmember Forgrave to accept and place on file the Michigan Liquor Control Commission Acknowledgement Letter for Center Super Liquor, Inc. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

8.3 Environmental Commission Minutes February 15, 2023

Motion was made by Councilmember Schlecte, seconded by Councilmember Forgrave to accept and place on file the Environmental Commission Minutes from February 15, 2023. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

CONSENT CALENDAR:

9.1 Minutes of the Regular Meeting of March 21, 2023
Approve the minutes of the regular meeting of March 21, 2023 Council Meeting

9.2 Resignation from Building Code Board of Examiners and Appeals
Accept with regret, the resignation of David Wooden from the Building Code Board of Examiners and Appeals

9.3 Appointment to Building Code Board of Examiners and Appeals
Approve the Mayor's recommendation to appoint Chad Everett to complete David Wooden's term on the Building Code Board of Examiners and Appeals, with a term beginning April 29, 2023, and ending on December 31, 2025.

9.4 Reappointment to the Local Officers Compensation Commission
Approve the Mayor's recommendation to reappoint Charles Keeling to the Local Officers Compensation Commission for a term of seven years, beginning immediately and ending on February 28, 2030.

9.5 Appointment to Environmental Commission
Approve the Mayor's recommendation to appoint Andrew Johnson to the Environmental Commission for a three-year term beginning June 1, 2023 and ending on May 29, 2026.

9.6 Appointment to Election Commission
Approve the Mayor's recommendation to appoint David Hammontree to the Election Commission for a four-year term, beginning immediately and ending on December 31, 2026.

9.7 Special Event Application: 2023 Hot Air Jubilee
Approve a request from Jacqueline Austin to host the 2023 Hot Air Jubilee on July 20-23 in Ella Sharp Park.

9.8 Special Event Application: Huntington's Disease Society Team Hope Walk
Approve a request from the Huntington's Disease Society Team Hope Walk on September 17, 2023 on the sidewalks of downtown Jackson.

9.9 Appointment to Human Relations Commission
Approve the Mayor's recommendation to appoint Amy Rich to the Human Relations Commission beginning immediately and ending December 31, 2024, in concurrence with the HRC recommendation.

9.10 Resignation from Election Commission
Accept with regret, the resignation of Conner Wood from the Election Commission, effective immediately.

9.11 Appointment to the Jackson Housing Commission
Approve the Mayors recommendation to appoint Jacqueline Barber to the Jackson Housing Commission for a 5-year term, beginning immediately and ending on October 31, 2028.

Motion was made by Councilmember Gunn, seconded by Councilmember Bunnell to approve the consent calendar. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

OTHER BUSINESS: none.

NEW BUSINESS:

11.1 Resolution Authorizing Opioid Class Action Participation
Recommendation: *Approve resolution authorizing the execution of the Subdivision and Special District Settlement Participation forms concerning the proposed class-action opioid litigation settlement with Teva, Allergan, CVS, and Walmart as recommended by the City Attorney and Class Action Counsel. Authorize the City Attorney to execute all necessary documents to effectuate the Agreement(s).*

Motion was made by Councilmember Bunnell, seconded by Councilmember Schlecte to approve a resolution authorizing entry of participation agreements for National Prescription Opiate Litigation and entry of State-Local Government Intrastate Agreement. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

11.2 Professional Service Agreement for Assessing Services
Recommendation: *Approval of Professional Service Agreement for Assessing Services*

Motion was made by Councilmember Gunn, seconded by Councilmember Schlecte to approve the professional service agreement for assessing services. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

11.3 Water Treatment Plant Repaint & Repairs Change Order No. 1
Recommendation: *Approval of Change Order No. 1, to the Repainting of Four Clarifiers and Miscellaneous Repairs contract with Blastek LLC, in the increased amount of $43,642, any funds in excess of the City Local Recovery Funds under the American Rescue Plan Act will be funded with Water System Funds, and authorize the City Manager and Director of Public Works to execute the appropriate document.*

Motion was made by Councilmember Schlecte, seconded by Vice Mayor Robinson to approve the Water Treatment Plant Repaint and Repairs Change Order No. 1. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

11.4 Change Orders to Incorporate SLFRF Uniform Guidance Language
Recommendation: *Approve the contract change orders for the projects to be funded by the State and Local Fiscal Recovery Funds under the American Rescue Plan Act to incorporate the Uniform Guidance Language for Procurement and Contracts to comply with Federal Guidelines, with no monetary change in the contract amounts and authorize the City Manager and Department Heads to execute the appropriate documents.*

Motion was made by Councilmember Schlecte, seconded by Councilmember Dancy to approve change orders to incorporate SLFRF Uniform Guidance Language. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

11.5 Change Order 3 to the Miscellaneous Construction Contract with Bailey Excavating, Inc.
Recommendation: *Approve Change Order 3 to the Miscellaneous Construction contract with Bailey Excavating, Inc. in the increased amount of $13,420.33 to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document.*

Motion was made by Councilmember Schlecte, seconded by Councilmember Gunn to Approve Change Order 3 to the Miscellaneous Construction contract with Bailey Excavating, Inc. in the increased amount of $13,420.33 to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate documents. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

11.6 Award a Contract to Red Cedar Consulting for Hazardous Materials Assessments and Emergency Asbestos Assessment and Abatement Services on an As-Needed Basis
Recommendation: *Award a contract to Red Cedar Consulting for hazardous materials assessments and emergency asbestos assessment and abatement services on an as-needed basis.*

Motion was made by Councilmember Dancy, seconded by Councilmember Bunnell to Award a contract to Red Cedar Consulting for hazardous materials assessments and emergency asbestos assessment and abatement services on an as-needed basis. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

11.7 Change Order 1 to the East Michigan Avenue Lead Service Line Replacements Contract with Dunigan Brothers, Inc.
Recommendation: *Approve Change Order 1 to the East Michigan Avenue Lead Service Line Replacements contract with Dunigan Brothers, Inc. in the decreased amount of $393,666.33 to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document.*

Motion was made by Councilmember Bunnell, seconded by Councilmember Gunn to approve Change Order 1 to the East Michigan Avenue Lead Service Line Replacements with Dunigan Brothers, Inc. in the decreased amount of $393,666.33. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

11.8 Change Order 1 to the West Avenue Water Main Replacement contract with Bailey Excavating, Inc.
Recommendation: *Approve Change Order 1 to the West Avenue Water Main Replacement contract with Bailey Excavating, Inc. in the decreased amount of $148,920.87 to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document.*

Motion was made by Councilmember Schlecte, seconded by Vice Mayor Robinson to approve Change Order 1 to the West Avenue Water Main Replacement contract with Bailey Excavating, Inc. in the decreased amount of $148,920.87 to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7).

Nays: none. Motion carried.

11.9 Revisions to the City of Jackson Purchasing Policy Manual

Recommendation: *Approve revisions to the City of Jackson Purchasing Policy Manual as suggested by the Racial Equity Commission to provide equitable opportunities for those interested in providing services, and goods, and entering into contracts with the City of Jackson.*

Motion was made by Councilmember Dancy seconded by Councilmember Schlecte to approve the revisions to the City of Jackson Purchasing Policy Manual.

Motion was made by Councilmember Forgrave, seconded by Councilmember Bunnell to table until the next meeting. A friendly amendment was made by Mayor Mahoney to postpone until the next meeting. The friendly amendment was accepted by Councilmembers Forgrave and Bunnell. Vote was taken on postponing the item until the next Council meeting. Vote - Yeas: Vice Mayor Robinson, Councilmembers Gunn, Schlecte, Bunnell, and Forgrave (5). Nays: Mayor Mahoney and Councilmember Dancy (2). Motion carried.

12.0 Closed Session

Motion was made by Councilmember Bunnell, seconded by Vice Mayor Robinson to conduct a closed session pursuant to MCL 15.268(1)(c) in order to update City Council on IAFF labor negotiations. Vote - Yeas: Mayor Mahoney, Vice Mayor Robinson, Councilmembers Dancy, Gunn, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

Motion was made by Councilmember Schlecte, seconded by Councilmember Bunnell to return to open session. Vote was done by voice with all in favor.

Motion was made by Councilmember Forgrave, seconded by Councilmember Bunnell to approve the following changes to the IAFF City collective bargaining agreement including a 3% increase to Tier 1 pay effective March 1, 2023, a 3% increase to Tier 1 pay effective July 1, 2023, and a $1250 lump sum signing bonus effective upon signing of the agreement. A roll call vote was done - Mayor Mahoney - yes, Vice Mayor Robinson - yes, Councilmember Dancy - yes, Councilmember Gunn - yes, Councilmember Schlecte - yes, Councilmember Bunnell - yes, Councilmember Forgrave – yes. Motion carried.

CITY COUNCILMEMBER'S COMMENTS:

Mayor Mahoney, Vice Mayor Robinson, and Councilmembers Dancy, Schlecte, and Bunnell offered comments. Councilmembers Gunn and Forgrave declined to offer comments.

MANAGER'S COMMENTS:

City Manager Jonathan Green offered comments.

ADJOURNMENT:

No further business being offered, a motion to adjourn was made by Councilmember Dancy, seconded by Councilmember Schlecte. Vote was done by voice with all in favor. Mayor Mahoney adjourned the meeting at 8:01 p.m.

CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Council Members

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Special Event Application: City of Jackson Police Department Police Memorial

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Recommendation:

Approve a request from the City of Jackson Police Department to host their Police Memorial on May 10, 2023 in Horace Blackman Park.

Attached is a memo and supporting paperwork from Coyn Speiser regarding the Special Event Application for JPD Police Memorial.

I recommend approval of the special event application for the JPD Police Memorial. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Coyn Speiser, Executive Director, DDA

DATE: April 25, 2023

RECOMMENDATION: Approve a request from the City of Jackson Police Department to host their Police Memorial on May 10, 2023 in Horace Blackman Park.

SUMMARY: Ceremony honoring fallen police officers from the Jackson area.

DEPARTMENTAL APPROVAL SUMMARY

Approvals noted below by each department indicate they have been made aware of the request and the capacity of their department has been met. Conditions of their approval and special considerations are noted.

DEPARTMENT	APPROVAL	DENIAL	ECONOMIC IMPACT
DDA	X		$0.00
Engineering	X		$0.00
Fire	X		$0.00
Community Development	X		$0.00
Parks & Recreation	X		$0.00
Police	X		$0.00
Public Works	X		$100.00
		TOTAL	***$100.00***

CONDITIONS & CONSIDERATIONS

Road closures

INSURANCE STATUS

Covered under the City of Jackson's insurance policy

ATTACHMENTS: Special Event Application: JPD Police Memorial

JACKSON
Founded 1829

City of Jackson Downtown Development Authority
161 W Michigan Ave, Jackson Michigan, MI 49201
Contact for questions at 517-768-6411 or aecon@cityofjackosn.org

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- ☐ $50 Application Fee
- ☐ $25 Late/Rush Fee
- ☐ Insurance documentation for sponsoring organization
- ☐ Event Map –*Please indicate the location of all items*
- ☐ Liquor License & Liquor Liability Insurance (if applicable)
- ☐ Carnival Ride Permit (*if applicable*)
- ☐ Insurance documentation for all vendors (if applicable)

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

1. The applicant or representative of any business, group, or organization that seeks approval to conduct a special event must be 21 years of age or older.
2. No ground stakes are allowed on City property. Tents and inflatables must be weighted down.
3. Glitter and confetti are prohibited at all events.
4. No plugging into outlets without prior approval.
5. For events utilizing street space, all fixtures (tents, vehicles, trucks, etc.) must be placed near the curbs to allow for emergency vehicle access.
6. No alcoholic beverages allowed unless proper paperwork is provided along with City Council approval. Alcoholic beverages must be consumed within the area in which they are served. No containers, open or closed, may leave the event area unless approval is granted.
7. Only a removable medium, such as chalk and/or tape, can be used to mark event area or routes. No paint of any kind is permitted. Tape must be removed once event is over.
8. One temporary sign/banner is permitted with your event, provided it measures no more than 12 ft^2 and does not block any intersections, driveways, or right-of-ways.

Applicant Information

Sponsoring Organization Legal Name: City of Jackson Police Department		
Address: 216 E. Washington Ave		Phone: (517) 768-8752
Tax ID#:	Website:	
Contact Name: R. Michael Klimmer	Phone: (517) 768-8752	Email: mklimmer@cityofjackson.org
Contact Name:	Phone:	Email:
Contact Name During Event: Same		Phone: ( )

Event Information

Event Name: Police Officer Memorial

Event Date(s):	Set up Time:	Start Time:	End Time:	Tear Down Time:
May 10, 2023	0800	12:00	13:00	14:00

Has this event occurred before? ☒Yes, (if yes, how many previous years? 5 years ☐No

Do you expect this event to occur again next year? Yes What is the expected attendance for this event? 250

Type of Event (*please check all that apply*)

☐Walk/Run ☐Festival ☐March/Parade ☒Other: Memorial Service

Event Location – *Choose any of the following that apply. For parks, include a map of the area being used.*

☒Horace Blackman Park

☐Bucky Harris Park

☐Ella Sharp Park *(requires Ella Sharp Board approval)*

☐GrandRiver Farmers Market Pavilion

☐TRUE City Square (Stage)

☐MLK Equality Trail

☐Other Location: _____

☐ Streets: _____

☐Other Park: _____

Brief description of Event

This description will be posted on the Special Events Calendar on our website. Please attach an additional sheet if necessary.

An event sponsored by the City of Jackson Police Department honoring all local fallen officers.

Street Closure– *Please indicate all street closures on your map.*

Street Name: Hayes Ct. Cross Streets W. Michigan / Pearl St.

Closure Start Date: 5/10/2023 Time: 0800 Closure End Date: 5/10/2023 Time: 14:00

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

City Resources Requests

Not all resources may be available at your requested site.

Please be specific and list any additional information or requests. Such requests might include assistance from the Police Department, Fire Department, Parks and Recreation Department, Public Works Department, etc. Attach additional pages, if needed.

☑ **Electrical Power:** Indicate electrical requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____
****All electrical lines MUST be covered to limit tripping hazards. ****

☐ **Water Needs**: Indicate water requirements:_____
Amount of water needed:_____ Locations of where water is needed: _____

☐ **Food/Vendors**: Indicate vendors requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____ Number of vendors: _____

☐ **Alcohol Sales**: (If yes attach liquor license and liquor liability insurance)
Start Time:_____ End Time: _____

☐ **Amusement or Carnival Rides**: If yes indicate electrical requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ **Fireworks**: If yes indicate electrical requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐Traffic Cones ☐ Mobile Stage (*please circle* **15-foot** or **25-foot** *version*)

☐Other:_____

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance *(MUST also be provided by all vendors)*	• Showing a liability coverage of at least $1,000,000 • Identifying "City of Jackson" & " Jackson Downtown Development Authority as additional insured
Liquor Liability Insurance *(if needed)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance *(if needed; required for all fireworks displays)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

☐ *I am a Level 1 Special Event (low resources), and would like to be considered for eligibility to enter a Hold Harmless Agreement with The City of Jackson in lieu of providing the above-required insurance documentation.*

Event Map *Details of all event activities MUST be included.*

☐Route Plan	☐Emergency Vehicle Access	☐Restroom Locations
☐Vendor Locations	☐Dispersal Locations	☐Tables
☐Tent Locations	☐Trash Receptacles	☐Requested Reserved Parking
☐Assembly Locations	☐Requested Street Closures	☐Electrical Wires & Outlets

If these details change, a revised map must be provided seven days prior to event.
Revised maps cannot include any additional street use, reserved parking, or additional space reservations.

Special Event Application

Certification & Signature

1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will be permitted at the event. If additional activities are added, I will immediately contact the City of Jackson. I understand that the approval of my application may be withdrawn or additional action required.
5. All food vendors must be approved by the Jackson County Health Department and each food and other vendor must provide the City of Jackson with a Certificate of Insurance which names the City of Jackson and the Downtown Development Authority as additional insured parties on the policy.
6. Fire Department permit and approval is required for events including display fireworks. Extreme Close-Up (XCU) fireworks liability insurance is required for all fireworks display.
7. The approval of this special event may include additional requirements, limitations, or fees based on the City's review of the application.
8. If I, or my organization, fail to clean up and repair damages to the event area, my organization may be billed for City services, and that failure to clean up and repair damage will be considered for future applications.
9. As the duly authorized agent of the sponsoring organization applying for approval of the Special Event, I affirm the above understandings and agree that my sponsoring organization will comply with the terms of the written confirmation of approval and all City requirements, ordinances and other laws which apply to this Special Event.
10. By signing this Special Event Application, I declare I am 21 years of age or older.
11. If required to provide liability insurance, the sponsoring organization will add the City of Jackson and the Downtown Development Authority as additional insured parties on the sponsoring organization's liability policy.
12. On behalf of the sponsoring organization, I agree that the sponsoring organization will defend, indemnify, and hold harmless the City of Jackson, its officers, employees and agents from and against any claim, demand, suit, loss, cost or expense, or any damage, which may be asserted, claimed, or recovered against or from the City of Jackson, its officers, employees, and agent, by reason of any damage to property, bodily injury, or death, sustained by any person whomsoever, and which damage, injury, or death arises out of or is incident to or in any way connected with or related to this Special Event.
13. The City of Jackson reserves the right to waive any requirements of this policy in the interests of the health, safety, and welfare of the citizens of Jackson.

Signature: R.M. Xl J

Date: 3/9/2023

Office Use ONLY
Application Received:
Date:
Time: AZ
By:
Application Fee Received: N/A

Application Requirements
Application MUST be submitted 60 days PRIOR to event ***NO EXCEPTIONS*** Application MUST be submitted along with all required attachments to: City of Jackson Downtown Development Authority Office 161 W Michigan Ave, 5th Floor Jackson Michigan, MI 49201 or aecon@cityofjackson.org (517) 768-6411
Prohibited Items *Additional fees may apply if policies are not followed*
No ground stakes No confetti or glitter No use of outlets without prior approval

CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Special Event Application for Spring Fling

Recommendation:

Approve a request from the Jackson Downtown Development Authority to host their Spring Fling on Sunday, May 7, 2023 from 11 am – 4 pm in downtown Jackson.

Attached is a memo from Coyn Speiser regarding the Special Event Application for the Spring Fling.

I recommend approval of the Special Event Application for the Spring Fling. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Coyn Speiser, Executive Director, DDA

DATE: April 25, 2023

RECOMMENDATION: Approve a request from the Jackson Downtown Development Authority to host their Spring Fling on Sunday, May 7, 2023 from 11 am – 4 pm in downtown Jackson.

SUMMARY: Retail event featuring food trucks, sidewalk sales, music, and shopping fun

DEPARTMENTAL APPROVAL SUMMARY

Approvals noted below by each department indicate they have been made aware of the request and the capacity of their department has been met. Conditions of their approval and special considerations are noted.

DEPARTMENT	APPROVAL	DENIAL	ECONOMIC IMPACT
DDA	X		$0.00
Engineering	X		$0.00
Fire	X		$0.00
Community Development	X		$0.00
Parks & Recreation	X		$0.00
Police	X		$0.00
Public Works	X		$300.00
		TOTAL	***$300.00***

CONDITIONS & CONSIDERATIONS

Additional garbage cans & picnic tables; no-parking tripods, electrical for food trucks

INSURANCE STATUS

This event is covered under the City of Jackson's insurance policy.

ATTACHMENTS: Special Event Application: Spring Fling

JACKSON
Founded 1829

City of Jackson Downtown Development Authority
161 W Michigan Ave, Jackson Michigan, MI 49201
Contact for questions at 517-768-6410 or cmays@cityofjackson.org

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- ☐ $50 Application Fee
- ☐ $25 Late/Rush Fee
- ☐ Insurance documentation for sponsoring organization
- ☒ Event Map –*Please indicate the location of all items*
- ☐ Liquor License & Liquor Liability Insurance (if applicable)
- ☐ Carnival Ride Permit (*if applicable*)
- ☐ Insurance documentation for all vendors (if applicable)

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

1. The applicant or representative of any business, group, or organization that seeks approval to conduct a special event must be 21 years of age or older.
2. No ground stakes are allowed on City property. Tents and inflatables must be weighted down.
3. Glitter and confetti are prohibited at all events.
4. No plugging into outlets without prior approval.
5. For events utilizing street space, all fixtures (tents, vehicles, trucks, etc.) must be placed near the curbs to allow for emergency vehicle access.
6. No alcoholic beverages allowed unless proper paperwork is provided along with City Council approval. Alcoholic beverages must be consumed within the area in which they are served. No containers, open or closed, may leave the event area unless approval is granted.
7. Only a removable medium, such as chalk and/or tape, can be used to mark event area or routes. No paint of any kind is permitted. Tape must be removed once event is over.

Applicant Information

Sponsoring Organization Legal Name: Jackson Downtown Development Authority		
Address: 161 W. Michigan Avenue Jackson, MI 49201		Phone: (517) 768-6410
Tax ID#:	Website: www.jacksondda.org	
Contact Name: Andrea Econ	Phone:	Email: aecon@cityofjackson.org
Contact Name:	Phone:	Email:
Contact Name During Event: SAME		Phone: (517) 392-7912

Event Information

Event Name: Spring Fling

Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
Sunday, May 7	9 am	11 am	4 pm	5 pm

Has this event occurred before? ☒Yes, (if yes, how many previous years? 2) ☐No

Do you expect this event to occur again next year? YES What is the expected attendance for this event? 200-300

Type of Event (*please check all that apply*)

☐Walk/Run ☒Festival ☐March/Parade ☐Other:_____

Event Location – *Choose any of the following that apply. For parks, include a map of the area being used.*

☐Horace Blackman Park

☒Bucky Harris Park

☐Ella Sharp Park *(requires Ella Sharp Board approval)*

☐GrandRiver Farmers Market Pavilion

☐CP Federal City Square (Stage)

☐MLK Equality Trail

☒Other Location: Downtown Sidewalks ; parking lot #8 (post office/ no need to close)

☒ Streets: Michigan Ave, Jackson, Mechanic (angled parking spaces only)

☐Other Park:_____

Brief description of Event

This description will be posted on the Special Events Calendar on our website. Please attach an additional sheet if necessary.

A downtown shopping and family-friendly event featuring food trucks, pop-up vendors, music on the new speaker system, music at park and a few vendor pods.

Street Closure– *Please indicate all street closures on your map.*

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

City Resources Requests

Not all resources may be available at your requested site.

Please be specific and list any additional information or requests. Such requests might include assistance from the Police Department, Fire Department, Parks and Recreation Department, Public Works Department, etc. Attach additional pages, if needed.

☒ **Electrical Power:** Indicate electrical requirements: Outlets on the side of Lean Rocket Lab
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____
****All electrical lines MUST be covered to limit tripping hazards. ****

☐ **Water Needs**: Indicate water requirements:_____
Amount of water needed:_____ Locations of where water is needed: _____

☒ **Food/Vendors**: Indicate vendors requirements: Health Dept. License, from the DDA-approved list
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____ Number of vendors: _____

☐ **Alcohol Sales**: (If yes attach liquor license and liquor liability insurance)
Start Time:_____ End Time: _____

☐ **Amusement or Carnival Rides**: If yes indicate electrical requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ **Fireworks**: If yes indicate electrical requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐Traffic Cones ☐ Mobile Stage (*please circle* **15-foot** or **25-foot** *version*)

☒Other: Red tripods for parking space closures (18); 6 trash cans (1 each at of the 6 food truck stations); 6 picnic tables (1 at each of the 6 food truck stations).; restrooms will be placed in Bucky Harris Park (2)

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance *(MUST also be provided by all vendors)*	• Showing a liability coverage of at least $1,000,000 • Identifying "City of Jackson" & " Jackson Downtown Development Authority as additional insured
Liquor Liability Insurance *(if needed)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance *(if needed; required for all fireworks displays)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

☐ *I am a Level 1 Special Event (low resources), and would like to be considered for eligibility to enter a Hold Harmless Agreement with The City of Jackson in lieu of providing the above-required insurance documentation.*

Event Map *Details of all event activities MUST be included.*

☒Route Plan	☐Emergency Vehicle Access	☒Restroom Locations
☒Vendor Locations	☐Dispersal Locations	☒Tables
☐Tent Locations	☒Trash Receptacles	☐Requested Reserved Parking
☐Assembly Locations	☐Requested Street Closures	☐Electrical Wires & Outlets

If these details change, a revised map must be provided seven days prior to event.
Revised maps cannot include any additional street use, reserved parking, or additional space reservations.

Special Event Application

Certification & Signature

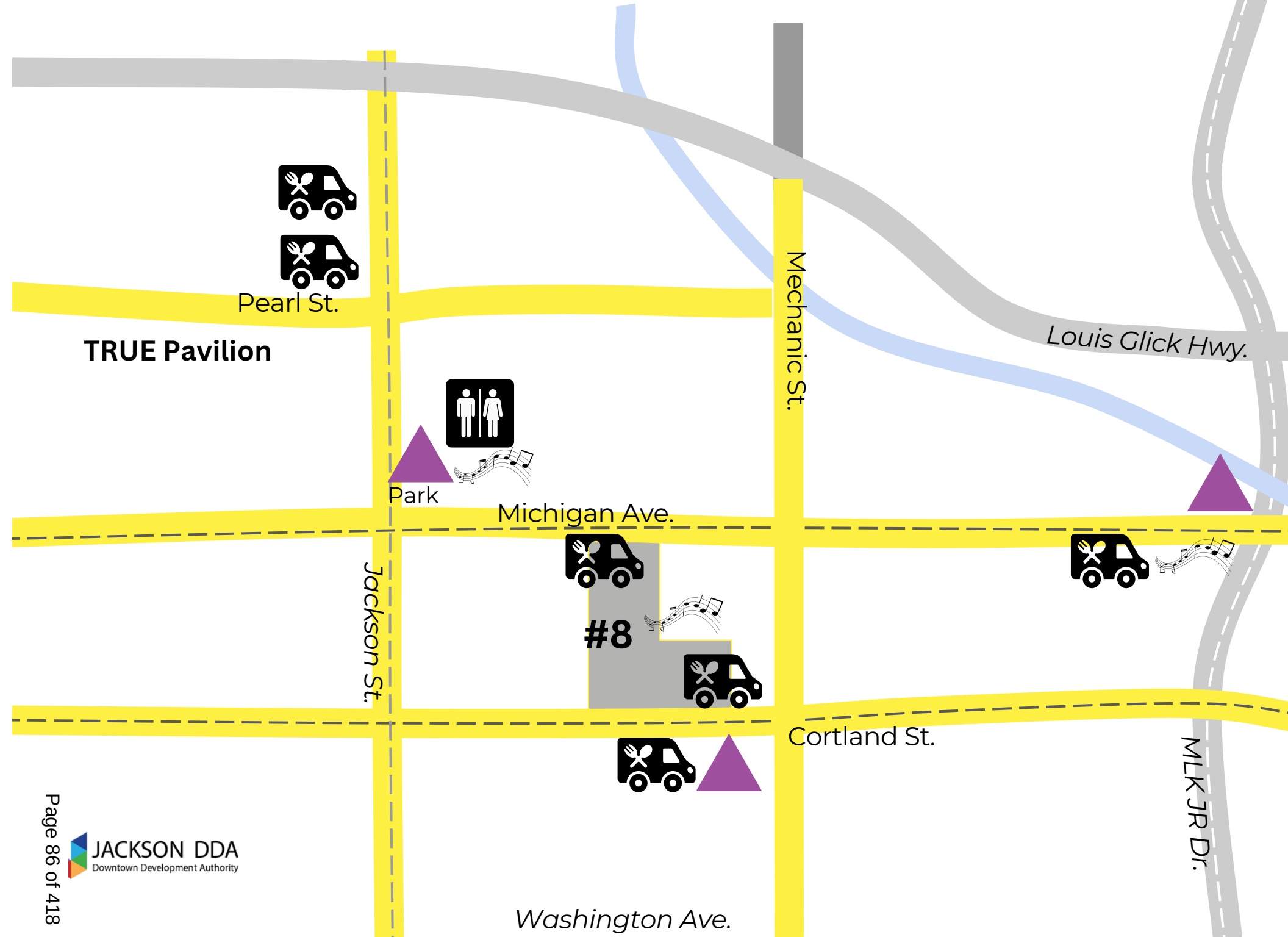
1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will be permitted at the event. If additional activities are added, I will immediately contact the City of Jackson. I understand that the approval of my application may be withdrawn or additional action required.
5. All food vendors must be approved by the Jackson County Health Department and each food and other vendor must provide the City of Jackson with a Certificate of Insurance which names the City of Jackson and the Downtown Development Authority as additional insured parties on the policy.
6. Fire Department permit and approval is required for events including display fireworks. Extreme Close-Up (XCU) fireworks liability insurance is required for all fireworks display.
7. The approval of this special event may include additional requirements, limitations, or fees based on the City's review of the application.
8. If I, or my organization, fail to clean up and repair damages to the event area, my organization may be billed for City services, and that failure to clean up and repair damage will be considered for future applications.
9. As the duly authorized agent of the sponsoring organization applying for approval of the Special Event, I affirm the above understandings and agree that my sponsoring organization will comply with the terms of the written confirmation of approval and all City requirements, ordinances and other laws which apply to this Special Event.
10. By signing this Special Event Application, I declare I am 21 years of age or older.
11. If required to provide liability insurance, the sponsoring organization will add the City of Jackson and the Downtown Development Authority as additional insured parties on the sponsoring organization's liability policy.
12. On behalf of the sponsoring organization, I agree that the sponsoring organization will defend, indemnify, and hold harmless the City of Jackson, its officers, employees and agents from and against any claim, demand, suit, loss, cost or expense, or any damage, which may be asserted, claimed, or recovered against or from the City of Jackson, its officers, employees, and agent, by reason of any damage to property, bodily injury, or death, sustained by any person whomsoever, and which damage, injury, or death arises out of or is incident to or in any way connected with or related to this Special Event.
13. The City of Jackson reserves the right to waive any requirements of this policy in the interests of the health, safety, and welfare of the citizens of Jackson.

Signature: Andrea Econ

Date: 3/21/23

Office Use ONLY	
Application Received:	
Date:	A.E
Time:	3/21/23
By:	
Application Fee Received:	N/A

Application Requirements
Application MUST be submitted 60 days PRIOR to event *****NO EXCEPTIONS*****
Application MUST be submitted along with all required attachments to: City of Jackson Downtown Development Authority Office 161 W Michigan Ave, 5th Floor Jackson Michigan, MI 49201 or aecon@cityofjackson.org (517) 768-6411
Prohibited Items *Additional fees may apply if policies are not followed*
No ground stakes No confetti or glitter No use of outlets without prior approval



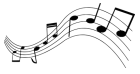
JACKSON DDA
Downtown Development Authority



Food Truck



Vendor Pods



Music



Restroom

- **1 trash can and 1 picnic table should be placed in 2 angled parking spaces where the food truck is pictured on the map**
- **Portable toilets are ordered and will be placed in Buck Harris**

Spring Fling Details

Vendor Pods

- Bucky Harris Park
- Private lot on Mechanic and Cortland corner / or mechanic sidewalks depending on lot owner
- Around the Summer Nite Tree on the corner of MLK and Michigan (will not block side walk but utilize the space there)

Food Trucks

- One Trash can and one picnic table by each food truck
- 2 will be in parking lot #8 (only one will use a power hookup on the side of Lean Rocket Lab). Food trucks on street will use angled parking spaces.

CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Council Members

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Special Event Application for the Jackson Downtown Development Authority 2023 Cruise Ins and Concerts.

Recommendation:

Approve a request from the Jackson Downtown Development Authority, Michigan Theatre, and Jackson Symphony Orchestra to conduct their Cruise In and Concert events on May 26, June 23, July 28, August 25, and September 22, 2023 from 5:00 p.m. to 9:30 p.m. in Downtown Jackson.

Attached is a memo from Coyn Speiser regarding the Special Event Application for the event Downtown Development Authority Cruise-In and Concert events.

I recommend approval of the special event application for the event Jackson Downtown Development Authority Cruise In and Concert events. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Coyn Speiser, Executive Director, DDA

DATE: April 25, 2023

RECOMMENDATION: Approve a request from the Jackson Downtown Development Authority, Michigan Theatre, and Jackson Symphony Orchestra to conduct their Cruise In and Concert events on May 26, June 23, July 28, August 25, and September 22, 2023 from 5:00 p.m. to 9:30 p.m. in Downtown Jackson.

SUMMARY: Family oriented events featuring classic cars on display and food vendors. National touring bands will play live at True Community Credit Union City Square on each event night with alcohol sales in the True Community Credit Union Square only.

DEPARTMENTAL APPROVAL SUMMARY

Approvals noted below by each department indicate they have been made aware of the request and the capacity of their department has been met. Conditions of their approval and special considerations are noted.

DEPARTMENT	APPROVAL	DENIAL	ECONOMIC IMPACT
DDA	X		$0.00
Engineering	X		$0.00
Fire	X		$0.00
Community Development	X		$0.00
Parks & Recreation	X		$0.00
Police	X		$0.00
Public Works	X		$8,000.00
		TOTAL	***$8,000.00***

CONDITIONS & CONSIDERATIONS

Trash cans and picnic tables, no parking tripods, and barricades for road closures. Police to increase reserves for foot patrol.

INSURANCE STATUS

This event is covered under the City of Jackson's insurance policy.

ATTACHMENTS: Special Event Application: Cruise Ins and Concerts

City of Jackson Downtown Development Authority
161 W Michigan Ave, Jackson Michigan, MI 49201
Contact for questions at 517-768-6410 or cmays@cityofjackson.org

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- ☐ $50 Application Fee
- ☐ $25 Late/Rush Fee
- ☐ Insurance documentation for sponsoring organization
- ☒ Event Map –*Please indicate the location of all items*
- ☐ Liquor License & Liquor Liability Insurance (if applicable)
- ☐ Carnival Ride Permit (*if applicable*)
- ☐ Insurance documentation for all vendors (if applicable)

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

1. The applicant or representative of any business, group, or organization that seeks approval to conduct a special event must be 21 years of age or older.
2. No ground stakes are allowed on City property. Tents and inflatables must be waited down.
3. Glitter and confetti are prohibited at all events.
4. No plugging into outlets without prior approval.
5. For events utilizing street space, all fixtures (tents, vehicles, trucks, etc.) must be placed near the curbs to allow for emergency vehicle access.
6. No alcoholic beverages allowed unless proper paperwork is provided along with City Council approval. Alcoholic beverages must be consumed within the area in which they are served. No containers, open or closed, may leave the event area unless approval is granted.
7. Only a removable medium, such as chalk and/or tape, can be used to mark event area or routes. No paint of any kind is permitted. Tape must be removed once event is over.

Applicant Information

Sponsoring Organization Legal Name: Jackson Downtown Development Authority		
Address: 161 W. Michigan Avenue Jackson, MI 49201		Phone: (517) 768-6410
Tax ID#:	Website: www.jacksondda.org	
Contact Name: Andrea Econ	Phone: (517) 768-6411	Email: aecon@cityofjackson.org
Contact Name: DDA Director	Phone: 517-768-6410	Email:
Contact Name During Event: Andrea Econ		Phone: (517)392-7912

Event Information

Event Name: Cruise Ins & Concerts 2023

Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
See Complete list in description	3:30 pm	5:00 pm	9:00 pm	10:00 pm

Has this event occurred before? ☒Yes, (if yes, how many previous years? 23 years ☐No

Do you expect this event to occur again next year? YES What is the expected attendance for this event? 2,500

Type of Event (*please check all that apply*)

☐Walk/Run ☒Festival ☐March/Parade ☐Other:_____

Event Location – *Choose any of the following that apply. For parks, include a map of the area being used.*

☒Horace Blackman Park ☐GrandRiver Farmers Market Pavilion

☒Bucky Harris Park ☒CP Federal City Square (Stage)

☐Ella Sharp Park *(requires Ella Sharp Board approval)* ☐MLK Equality Trail

☐Other Location:_____

☒Streets: Various downtown streets (see map & street closure section below)

☐Other Park:_____

Brief description of Event

This description will be posted on the Special Events Calendar on our website. Please attach an additional sheet if necessary.

Cruise Ins are family-oriented events featuring classic cars on display throughout the streets of downtown Jackson. Food vendors will be available. Each night will also feature national touring bands or local musical groups performing at TRUE Community Square.

DATES:

May 26, June 23, July 28, August 25, September 22

Street Closure– *Please indicate all street closures on your map.*

Street Name: Michigan Avenue Cross Streets From Blackstone to MLK

Closure Start Date: 5/26, 6/23, 7/28, 8/25, 9/22 Time: 12 pm Closure End Date: 5/26, 6/23, 7/28, 8/25, 9/22 Time: 9 pm

Street Name: Mechanic Street Cross Streets From Cortland to Pearl

Closure Start Date: 5/26, 6/23, 7/28, 8/25, 9/22 Time: 12 pm Closure End Date: 5/26, 6/23, 7/28, 8/25, 9/22 Time: 9 pm

Street Name: Jackson Street Cross Streets From Cortland to Pearl

Closure Start Date: 5/26, 6/23, 7/28, 8/25, 9/22 Time: 12 pm Closure End Date: 5/26, 6/23, 7/28, 8/25, 9/22 Time: 9 pm

Street Name: Hayes Ct Cross Streets Pearl to Michigan

Closure Start Date: 5/26, 6/23, 7/28, 8/25, 9/22 Time: <----> Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

City Resources Requests

Not all resources may be available at your requested site.

Please be specific and list any additional information or requests. Such requests might include assistance from the Police Department, Fire Department, Parks and Recreation Department, Public Works Department, etc. Attach additional pages, if needed.

☒ **Electrical Power:** Indicate electrical requirements: All buried electrical in Horace Blackman Park; outlets on CP stage area
Amount of electrical wattage needed: _____ Amount of plug ins: 4-6 in ground, 2-3 on stage
Locations of where plugs are needed: Horace Blackman Park
****All electrical lines MUST be covered to limit tripping hazards. ****

☐ **Water Needs**: Indicate water requirements: _____
Amount of water needed: _____ Locations of where water is needed: _____

☒ **Food/Vendors**: Indicate vendors requirements: Access to buried electrical in Horace Blackman Park (with adaptors)
Amount of electrical wattage needed: _____ Amount of plug ins: 4-6
Locations of where plugs are needed: HB Park, in the ground Number of vendors: 4-6

☐ **Alcohol Sales**: (If yes attach liquor license and liquor liability insurance)
Start Time: _____ End Time: _____

☐ **Amusement or Carnival Rides**: If yes indicate electrical requirements: _____
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ **Fireworks**: If yes indicate electrical requirements: _____
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ Traffic Cones ☒ Mobile Stage (*please circle* **15-foot** or **25-foot** *version*)
☒ Other: Extra trash cans w/ liners (10) in/around HB park, picnic tables (6); 20 "no parking" delivered Friday mornings of event days (or provided for the season); Increased police patrols

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance *(MUST also be provided by all vendors)*	• Showing a liability coverage of at least $1,000,000 • Identifying "City of Jackson" & " Jackson Downtown Development Authority as additional insured
Liquor Liability Insurance *(if needed)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance *(if needed; required for all fireworks displays)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

☐ *I am a Level 1 Special Event (low resources), and would like to be considered for eligibility to enter a Hold Harmless Agreement with The City of Jackson in lieu of providing the above-required insurance documentation.*

Event Map *Details of all event activities MUST be included.*

☒ Route Plan	☐ Emergency Vehicle Access	☐ Restroom Locations
☐ Vendor Locations	☐ Dispersal Locations	☐ Tables
☐ Tent Locations	☐ Trash Receptacles	☒ Requested Reserved Parking
☐ Assembly Locations	☒ Requested Street Closures	☒ Electrical Wires & Outlets

If these details change, a revised map must be provided seven days prior to event.
Revised maps cannot include any additional street use, reserved parking, or additional space reservations.

Special Event Application

Certification & Signature

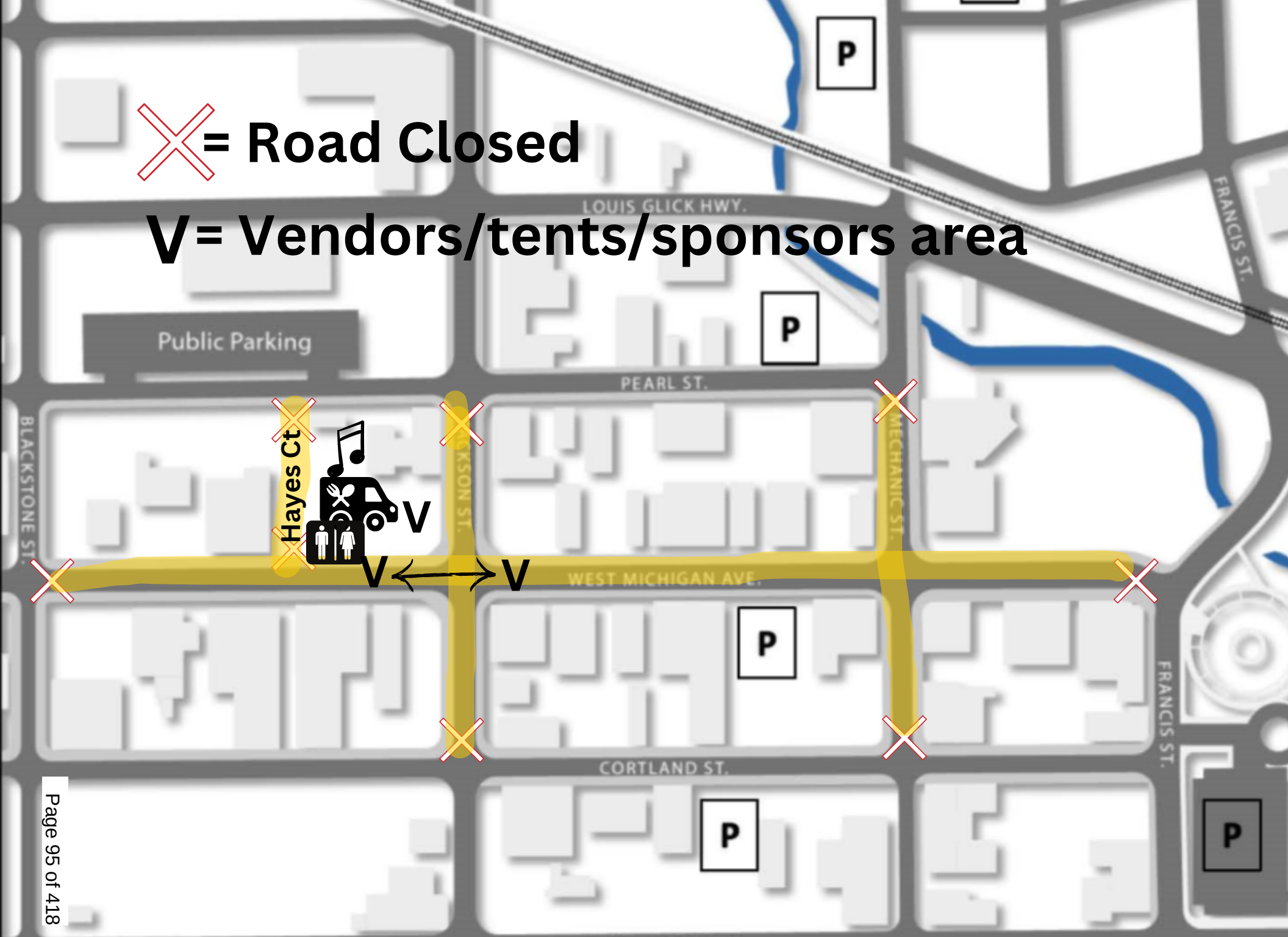
1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will be permitted at the event. If additional activities are added, I will immediately contact the City of Jackson. I understand that the approval of my application may be withdrawn or additional action required.
5. All food vendors must be approved by the Jackson County Health Department and each food and other vendor must provide the City of Jackson with a Certificate of Insurance which names the City of Jackson and the Downtown Development Authority as additional insured parties on the policy.
6. Fire Department permit and approval is required for events including display fireworks. Extreme Close-Up (XCU) fireworks liability insurance is required for all fireworks display.
7. The approval of this special event may include additional requirements, limitations, or fees based on the City's review of the application.
8. If I, or my organization, fail to clean up and repair damages to the event area, my organization may be billed for City services, and that failure to clean up and repair damage will be considered for future applications.
9. As the duly authorized agent of the sponsoring organization applying for approval of the Special Event, I affirm the above understandings and agree that my sponsoring organization will comply with the terms of the written confirmation of approval and all City requirements, ordinances and other laws which apply to this Special Event.
10. By signing this Special Event Application, I declare I am 21 years of age or older.
11. If required to provide liability insurance, the sponsoring organization will add the City of Jackson and the Downtown Development Authority as additional insured parties on the sponsoring organization's liability policy.
12. On behalf of the sponsoring organization, I agree that the sponsoring organization will defend, indemnify, and hold harmless the City of Jackson, its officers, employees and agents from and against any claim, demand, suit, loss, cost or expense, or any damage, which may be asserted, claimed, or recovered against or from the City of Jackson, its officers, employees, and agent, by reason of any damage to property, bodily injury, or death, sustained by any person whomsoever, and which damage, injury, or death arises out of or is incident to or in any way connected with or related to this Special Event.
13. The City of Jackson reserves the right to waive any requirements of this policy in the interests of the health, safety, and welfare of the citizens of Jackson.

Signature: AEcon

Date: _____

Office Use ONLY
Application Received: Date: 3/21 Time: By: AE
Application Fee Received: N/A

Application Requirements
Application MUST be submitted 60 days PRIOR to event *****NO EXCEPTIONS*****
Application MUST be submitted along with all required attachments to: City of Jackson Downtown Development Authority Office 161 W Michigan Ave, 5th Floor Jackson Michigan, MI 49201 or aecon@cityofjackson.org (517) 768-6411
Prohibited Items *Additional fees may apply if policies are not followed*
No ground stakes No confetti or glitter No use of outlets without prior approval


= Road Closed
V= Vendors/tents/sponsors area
Public Parking
LOUIS GLICK HWY.
PEARL ST.
WEST MICHIGAN AVE.
CORTLAND ST.
BLACKSTONE ST.
FRANCIS ST.
MECHANIC ST.
Hayes Ct
V
V
V
P

Cruise in and Concert Details

Note 2 closure types/staging for DPW

- **Ask that all barricades be placed near intersections (not blocking) by AM**
- **DDA will move them into place later in the afternoon (around 2pm) and we will place large signs that state why the road is closed and a hard time for cars to be off the road (we found this helped last year).**
- **Thank you DPW for moving all the barricades after the Car Show. At the end of the event/Monday morning the DDA will come and remove all the signage attached to the road closed barricades. Please don't discard them.**
- **15-foot Stage: We ask that the stage be reserved for these dates, use for each depending. We will contact DPW ahead of the event with stage details (likely location will be on Michigan ave past Mechanic as we try to drive foot traffic down toward MLK).**

CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Special Event Application for Food Truck Tuesdays

Recommendation:

Approve a request from the Jackson Downtown Development Authority, Michigan Theatre, and Jackson Symphony Orchestra to conduct their Food Truck Tuesday events on June 6 & 20, July 11 & 25, August 1 & 15, September 12, 2023 from 11:00 a.m. until 1:00 p.m. in the True Community Credit Union City Square and Horace Blackman Park.

Attached is a memo from Coyn Speiser regarding the Special Event Application for the Food Truck Tuesday events.

I recommend approval of the Special Event Application for the Food Truck Tuesdays. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Coyn Speiser, Executive Director, DDA

DATE: April 25, 2023

RECOMMENDATION: Approve a request from the Jackson Downtown Development Authority, Michigan Theatre, and Jackson Symphony Orchestra to conduct their Food Truck Tuesday events on June 6 & 20, July 11 & 25, August 1 & 15, September 12, 2023 from 11:00 a.m. until 1:00 p.m. in True Community Credit Union City Square and Horace Blackman Park.

SUMMARY: A lunchtime summer concert series. Free to attend and open to people of all ages. Food Trucks will be present in the park with original live music performed by local Jackson musicians.

DEPARTMENTAL APPROVAL SUMMARY

Approvals noted below by each department indicate they have been made aware of the request and the capacity of their department has been met. Conditions of their approval and special considerations are noted.

DEPARTMENT	APPROVAL	DENIAL	ECONOMIC IMPACT
DDA	X		$0.00
Engineering	X		$0.00
Fire	X		$0.00
Community Development	X		$0.00
Parks & Recreation	X		$0.00
Police	X		$0.00
Public Works	X		$300.00
		TOTAL	***$300.00***

CONDITIONS & CONSIDERATIONS

Public works to provide additional garbage cans & “no parking” tripods for each event; electrical service

INSURANCE STATUS

This event is covered under the City of Jackson’s insurance policy.

ATTACHMENTS: Special Event Application: Food Truck Tuesdays

City of Jackson Downtown Development Authority
161 W Michigan Ave, Jackson Michigan, MI 49201
Contact for questions at 517-768-6410 or cmays@cityofjackson.org

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- ☐ $50 Application Fee
- ☐ $25 Late/Rush Fee
- ☐ Insurance documentation for sponsoring organization
- ☒ Event Map –*Please indicate the location of all items*
- ☐ Liquor License & Liquor Liability Insurance (if applicable)
- ☐ Carnival Ride Permit (*if applicable*)
- ☐ Insurance documentation for all vendors (if applicable)

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

1. The applicant or representative of any business, group, or organization that seeks approval to conduct a special event must be 21 years of age or older.
2. No ground stakes are allowed on City property. Tents and inflatables must be waited down.
3. Glitter and confetti are prohibited at all events.
4. No plugging into outlets without prior approval.
5. For events utilizing street space, all fixtures (tents, vehicles, trucks, etc.) must be placed near the curbs to allow for emergency vehicle access.
6. No alcoholic beverages allowed unless proper paperwork is provided along with City Council approval. Alcoholic beverages must be consumed within the area in which they are served. No containers, open or closed, may leave the event area unless approval is granted.
7. Only a removable medium, such as chalk and/or tape, can be used to mark event area or routes. No paint of any kind is permitted. Tape must be removed once event is over.

Applicant Information

Sponsoring Organization Legal Name: Jackson Downtown Development Authority		
Address: 161 W. Michigan Avenue Jackson, MI 49201		Phone: (517) 768-6410
Tax ID#:	Website: www.jacksondda.org	
Contact Name: Andrea Econ	Phone: (517) 768-6411	Email: aecon@cityofjackson.org
Contact Name: DDA Director	Phone: 517-768-6410	Email:
Contact Name During Event: Andrea Econ		Phone: (517 392-7912)

Event Information

Event Name: Food Truck Tuesdays

Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
See Complete list in description	9 am	11 am	1 pm	2:30 pm

Has this event occurred before? ☒Yes, (if yes, how many previous years? 4 years ☐No

Do you expect this event to occur again next year? YES What is the expected attendance for this event? 1,500 each

Type of Event (*please check all that apply*)

☐Walk/Run ☒Festival ☐March/Parade ☐Other:_____

Event Location – *Choose any of the following that apply. For parks, include a map of the area being used.*

☒Horace Blackman Park

☐Bucky Harris Park

☐Ella Sharp Park *(requires Ella Sharp Board approval)*

☐GrandRiver Farmers Market Pavilion

☒CP Federal City Square (Stage)

☐MLK Equality Trail

☐Other Location:_____

☒Streets: Hayes Court; parking spaces on Michigan (Jackson -Hayes Ct, north side only)

☐Other Park:_____

Brief description of Event

This description will be posted on the Special Events Calendar on our website. Please attach an additional sheet if necessary.

A lunchtime summer concert series with food vendors. Food trucks will be present in the park, with musicians provided by the JSO and support from the Michigan Theatre. Original live music will be performed by local Jackson artists.
DATES:
June 6, June 20, July 11, July 25, August 1, August 15, September 12

Street Closure– *Please indicate all street closures on your map.*

Street Name: Hayes Court Cross Streets between Michigan & Pearl
Closure Start Date: All dates listed Time: 6:00 am Closure End Date: All dates listed Time: 2:30 pm

Street Name: June 6, June 20, July 11, July 25, August 1, August 15, September 12 Cross Streets _____
Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____
Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____
Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____
Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____
Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

City Resources Requests

Not all resources may be available at your requested site.

Please be specific and list any additional information or requests. Such requests might include assistance from the Police Department, Fire Department, Parks and Recreation Department, Public Works Department, etc. Attach additional pages, if needed.

☒ **Electrical Power:** Indicate electrical requirements: All buried electrical in Horace Blackman Park; outlets on True CCU stage area
Amount of electrical wattage needed: _____ Amount of plug ins: 10-12 in ground, 2-3 on stage
Locations of where plugs are needed: Horace Blackman Park
****All electrical lines MUST be covered to limit tripping hazards. ****

☐ **Water Needs**: Indicate water requirements: _____
Amount of water needed: _____ Locations of where water is needed: _____

☒ **Food/Vendors**: Indicate vendors requirements: Access to buried electrical in Horace Blackman Park (with adaptors)
Amount of electrical wattage needed: _____ Amount of plug ins: 10-12
Locations of where plugs are needed: HB Park, in the ground Number of vendors: 10-12

☐ **Alcohol Sales**: (If yes attach liquor license and liquor liability insurance)
Start Time: _____ End Time: _____

☐ **Amusement or Carnival Rides**: If yes indicate electrical requirements: _____
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ **Fireworks**: If yes indicate electrical requirements: _____
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ Traffic Cones ☐ Mobile Stage (*please circle* **15-foot** or **25-foot** *version*)
☒ Other: Extra trash cans in park (10); 10 "no parking" tripods placed near Hayes Court; ~~please turn off sprinklers on all event days; extra picnic tables (10) in park~~

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance *(MUST also be provided by all vendors)*	• Showing a liability coverage of at least $1,000,000 • Identifying "City of Jackson" & " Jackson Downtown Development Authority as additional insured
Liquor Liability Insurance *(if needed)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance *(if needed; required for all fireworks displays)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

☐ *I am a Level 1 Special Event (low resources), and would like to be considered for eligibility to enter a Hold Harmless Agreement with The City of Jackson in lieu of providing the above-required insurance documentation.*

Event Map *Details of all event activities MUST be included.*

☒ Route Plan	☐ Emergency Vehicle Access	☒ Restroom Locations
☐ Vendor Locations	☐ Dispersal Locations	☐ Tables
☐ Tent Locations	☐ Trash Receptacles	☒ Requested Reserved Parking
☐ Assembly Locations	☒ Requested Street Closures	☒ Electrical Wires & Outlets

If these details change, a revised map must be provided seven days prior to event.
Revised maps cannot include any additional street use, reserved parking, or additional space reservations.

Special Event Application

Certification & Signature

1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will be permitted at the event. If additional activities are added, I will immediately contact the City of Jackson. I understand that the approval of my application may be withdrawn or additional action required.
5. All food vendors must be approved by the Jackson County Health Department and each food and other vendor must provide the City of Jackson with a Certificate of Insurance which names the City of Jackson and the Downtown Development Authority as additional insured parties on the policy.
6. Fire Department permit and approval is required for events including display fireworks. Extreme Close-Up (XCU) fireworks liability insurance is required for all fireworks display.
7. The approval of this special event may include additional requirements, limitations, or fees based on the City's review of the application.
8. If I, or my organization, fail to clean up and repair damages to the event area, my organization may be billed for City services, and that failure to clean up and repair damage will be considered for future applications.
9. As the duly authorized agent of the sponsoring organization applying for approval of the Special Event, I affirm the above understandings and agree that my sponsoring organization will comply with the terms of the written confirmation of approval and all City requirements, ordinances and other laws which apply to this Special Event.
10. By signing this Special Event Application, I declare I am 21 years of age or older.
11. If required to provide liability insurance, the sponsoring organization will add the City of Jackson and the Downtown Development Authority as additional insured parties on the sponsoring organization's liability policy.
12. On behalf of the sponsoring organization, I agree that the sponsoring organization will defend, indemnify, and hold harmless the City of Jackson, its officers, employees and agents from and against any claim, demand, suit, loss, cost or expense, or any damage, which may be asserted, claimed, or recovered against or from the City of Jackson, its officers, employees, and agent, by reason of any damage to property, bodily injury, or death, sustained by any person whomsoever, and which damage, injury, or death arises out of or is incident to or in any way connected with or related to this Special Event.
13. The City of Jackson reserves the right to waive any requirements of this policy in the interests of the health, safety, and welfare of the citizens of Jackson.

Signature: Andrea Econ

Date: 3/21/23

Office Use ONLY	
Application Received:	
Date:	A.E
Time:	3/21/23
By:	
Application Fee Received:	N/A

Application Requirements
Application MUST be submitted 60 days PRIOR to event *****NO EXCEPTIONS*****
Application MUST be submitted along with all required attachments to: City of Jackson Downtown Development Authority Office 161 W Michigan Ave, 5th Floor Jackson Michigan, MI 49201 or aecon@cityofjackson.org (517) 768-6411
Prohibited Items *Additional fees may apply if policies are not followed*
No ground stakes No confetti or glitter No use of outlets without prior approval


W. PEARL STREET
closed off
LIVE MUSIC
TRUCK 6
TRUCK 5
TRUCK 4
TRUCK 3
TRUCK 2
TRUCK 1
TRUCK 7
TRUCK 8
TRUCK 9
TRUCK 10
TRUCK 11
POWER
110v plugs
up to 240v
S. JACKSON ST
ROAD CLOSED
LAWN GAMES
LAWN GAMES
LAWN GAMES
CE TENT
HOME.FM 106.9
Restrooms
TRUCK 12
TRUCK 13
parking spaces/ no parking
W. MICHIGAN AVE

CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Special Event Application for Friday Film Nights

Recommendation:

Approve a request from the Jackson Downtown Development Authority, Michigan Theatre, and Jackson Symphony Orchestra to conduct their Friday Film Nights on June 30, July 14, and August 11 from 9:00 – 11:30 p.m. in the True Community Credit Union City Square and Horace Blackman Park.

Attached is a memo from Coyn Speiser regarding the Special Event Application for the Friday Film Nights.

I recommend approval of the Special Event Application for the Friday Film Nights. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Coyn Speiser, Executive Director, DDA

DATE: April 25, 2023

RECOMMENDATION: Approve a request from the Jackson Downtown Development Authority, Michigan Theatre, and Jackson Symphony Orchestra to conduct their Friday Film Nights on June 30, July 14, and August 11 from 9:00 – 11:30 p.m. in the True Community Credit Union City Square and Horace Blackman Park.

SUMMARY: Summer film series for families, offering family-friendly movies in a relaxed outdoor atmosphere.

DEPARTMENTAL APPROVAL SUMMARY

Approvals noted below by each department indicate they have been made aware of the request and the capacity of their department has been met. Conditions of their approval and special considerations are noted.

DEPARTMENT	APPROVAL	DENIAL	ECONOMIC IMPACT
DDA	X		$0.00
Engineering	X		$0.00
Fire	X		$0.00
Community Development	X		$0.00
Parks & Recreation	X		$0.00
Police	X		$0.00
Public Works	X		$0.00
		TOTAL	***$0.00***

CONDITIONS & CONSIDERATIONS

Public works to provide additional garbage cans; electrical service

INSURANCE STATUS

This event is covered under the City of Jackson's insurance policy.

ATTACHMENTS: Special Event Application: Friday Film Nights

City of Jackson Downtown Development Authority
161 W Michigan Ave, Jackson Michigan, MI 49201
Contact for questions at 517-768-6410 or cmays@cityofjackson.org

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- ☐ $50 Application Fee
- ☐ $25 Late/Rush Fee
- ☐ Insurance documentation for sponsoring organization
- ☒ Event Map –*Please indicate the location of all items*
- ☐ Liquor License & Liquor Liability Insurance (if applicable)
- ☐ Carnival Ride Permit (*if applicable*)
- ☐ Insurance documentation for all vendors (if applicable)

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

1. The applicant or representative of any business, group, or organization that seeks approval to conduct a special event must be 21 years of age or older.
2. No ground stakes are allowed on City property. Tents and inflatables must be waited down.
3. Glitter and confetti are prohibited at all events.
4. No plugging into outlets without prior approval.
5. For events utilizing street space, all fixtures (tents, vehicles, trucks, etc.) must be placed near the curbs to allow for emergency vehicle access.
6. No alcoholic beverages allowed unless proper paperwork is provided along with City Council approval. Alcoholic beverages must be consumed within the area in which they are served. No containers, open or closed, may leave the event area unless approval is granted.
7. Only a removable medium, such as chalk and/or tape, can be used to mark event area or routes. No paint of any kind is permitted. Tape must be removed once event is over.

Applicant Information

Sponsoring Organization Legal Name: Jackson Downtown Development Authority		
Address: 161 W. Michigan Avenue Jackson, MI 49201		Phone: (517) 768-6410
Tax ID#:	Website: www.jacksondda.org	
Contact Name: Andrea Econ	Phone: (517) 768-6411	Email: aecon@cityofjackson.org
Contact Name:	Phone:	Email:
Contact Name During Event: Andrea Econ		Phone: (517)392-7912

Event Information

Event Name: Friday Film Nights

Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
See Complete list in description	7 pm	9:00 pm	11 pm	12:00 am

Has this event occurred before? ☒Yes, (if yes, how many previous years? Unknown ☐No

Do you expect this event to occur again next year? YES What is the expected attendance for this event? 500 each

Type of Event (*please check all that apply*)

☐Walk/Run ☒Festival ☐March/Parade ☐Other:_____

Event Location – *Choose any of the following that apply. For parks, include a map of the area being used.*

☒Horace Blackman Park

☐Bucky Harris Park

☐Ella Sharp Park *(requires Ella Sharp Board approval)*

☐GrandRiver Farmers Market Pavilion

☒CP Federal City Square (Stage)

☐MLK Equality Trail

☐Other Location:_____

☐ Streets:_____

☐Other Park:_____

Brief description of Event

This description will be posted on the Special Events Calendar on our website. Please attach an additional sheet if necessary.

A family-friendly evening of cinematic adventure and tasty treats. Food trucks will be on-site while families enjoy a free movie.
DATES:
June 30th, July 14, August 11

Street Closure– *Please indicate all street closures on your map.*

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

City Resources Requests

Not all resources may be available at your requested site.

Please be specific and list any additional information or requests. Such requests might include assistance from the Police Department, Fire Department, Parks and Recreation Department, Public Works Department, etc. Attach additional pages, if needed.

☒ **Electrical Power:** Indicate electrical requirements: Buried electrical in Horace Blackman Park; outlets on True CCU stage area
Amount of electrical wattage needed: _____ Amount of plug ins: 5 in ground, 2-3 on stage
Locations of where plugs are needed: Horace Blackman Park
****All electrical lines MUST be covered to limit tripping hazards. ****

☐ **Water Needs**: Indicate water requirements: _____
Amount of water needed: _____ Locations of where water is needed: _____

☒ **Food/Vendors**: Indicate vendors requirements: Access to buried electrical in Horace Blackman Park (with adaptors)
Amount of electrical wattage needed: _____ Amount of plug ins: 5
Locations of where plugs are needed: HB Park, in the ground Number of vendors: 5

☐ **Alcohol Sales**: (If yes attach liquor license and liquor liability insurance)
Start Time: _____ End Time: _____

☐ **Amusement or Carnival Rides**: If yes indicate electrical requirements: _____
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ **Fireworks**: If yes indicate electrical requirements: _____
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ Traffic Cones ☐ Mobile Stage (*please circle* **15-foot** or **25-foot** *version*)
☒ Other: Extra trash cans in park (5); please turn off sprinklers on all event days

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance *(MUST also be provided by all vendors)*	• Showing a liability coverage of at least $1,000,000 • Identifying "City of Jackson" & " Jackson Downtown Development Authority as additional insured
Liquor Liability Insurance *(if needed)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance *(if needed; required for all fireworks displays)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

☐ *I am a Level 1 Special Event (low resources), and would like to be considered for eligibility to enter a Hold Harmless Agreement with The City of Jackson in lieu of providing the above-required insurance documentation.*

Event Map *Details of all event activities MUST be included.*

☐Route Plan	☐Emergency Vehicle Access	☐Restroom Locations
☐Vendor Locations	☐Dispersal Locations	☐Tables
☐Tent Locations	☐Trash Receptacles	☐Requested Reserved Parking
☐Assembly Locations	☐Requested Street Closures	☐Electrical Wires & Outlets

If these details change, a revised map must be provided seven days prior to event.
Revised maps cannot include any additional street use, reserved parking, or additional space reservations.

Special Event Application

Certification & Signature

1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will be permitted at the event. If additional activities are added, I will immediately contact the City of Jackson. I understand that the approval of my application may be withdrawn or additional action required.
5. All food vendors must be approved by the Jackson County Health Department and each food and other vendor must provide the City of Jackson with a Certificate of Insurance which names the City of Jackson and the Downtown Development Authority as additional insured parties on the policy.
6. Fire Department permit and approval is required for events including display fireworks. Extreme Close-Up (XCU) fireworks liability insurance is required for all fireworks display.
7. The approval of this special event may include additional requirements, limitations, or fees based on the City's review of the application.
8. If I, or my organization, fail to clean up and repair damages to the event area, my organization may be billed for City services, and that failure to clean up and repair damage will be considered for future applications.
9. As the duly authorized agent of the sponsoring organization applying for approval of the Special Event, I affirm the above understandings and agree that my sponsoring organization will comply with the terms of the written confirmation of approval and all City requirements, ordinances and other laws which apply to this Special Event.
10. By signing this Special Event Application, I declare I am 21 years of age or older.
11. If required to provide liability insurance, the sponsoring organization will add the City of Jackson and the Downtown Development Authority as additional insured parties on the sponsoring organization's liability policy.
12. On behalf of the sponsoring organization, I agree that the sponsoring organization will defend, indemnify, and hold harmless the City of Jackson, its officers, employees and agents from and against any claim, demand, suit, loss, cost or expense, or any damage, which may be asserted, claimed, or recovered against or from the City of Jackson, its officers, employees, and agent, by reason of any damage to property, bodily injury, or death, sustained by any person whomsoever, and which damage, injury, or death arises out of or is incident to or in any way connected with or related to this Special Event.
13. The City of Jackson reserves the right to waive any requirements of this policy in the interests of the health, safety, and welfare of the citizens of Jackson.

Signature: Andrea Econ

Date: 3/21/23

Office Use ONLY	
Application Received:	
Date:	A.E
Time:	3/21/23
By:	
Application Fee Received:	N/A

Application Requirements
Application MUST be submitted 60 days PRIOR to event *****NO EXCEPTIONS*****
Application MUST be submitted along with all required attachments to: City of Jackson Downtown Development Authority Office 161 W Michigan Ave, 5th Floor Jackson Michigan, MI 49201 or aecon@cityofjackson.org (517) 768-6411
Prohibited Items *Additional fees may apply if policies are not followed*
No ground stakes No confetti or glitter No use of outlets without prior approval

CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Council Members

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Special Event Application for the Cascades Cycling Club's Ride of Silence

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Recommendation:

Approve a request from the Cascades Cycling Club to host their Ride of Silence on May 17, 2023 on the streets of Jackson.

Attached is a memo and supporting paperwork from Coyn Speiser regarding the Special Event Application for the Cascades Cycling Club's Ride of Silence.

I recommend approval of the Cascades Cycling Club's Ride of Silence. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Coyn Speiser, Executive Director, DDA

DATE: April 25, 2023

RECOMMENDATION: Approve a request from the Cascades Cycling Club to host their Ride of Silence on May 17, 2023 on the streets of Jackson.

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SUMMARY: An international annual event honoring bicyclists who have been injured or killed while riding.

DEPARTMENTAL APPROVAL SUMMARY

Approvals noted below by each department indicate they have been made aware of the request and the capacity of their department has been met. Conditions of their approval and special considerations are noted.

DEPARTMENT	APPROVAL	DENIAL	ECONOMIC IMPACT
DDA	X		$0.00
Engineering	X		$0.00
Fire	X		$0.00
Community Development	X		$0.00
Parks & Recreation	X		$0.00
Police	X		$180.00
Public Works	X		$0.00
		TOTAL	***$180.00***

CONDITIONS & CONSIDERATIONS

Police assistance

INSURANCE STATUS

Current and on-file with the Downtown Development Authority and the office of the City Attorney

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ATTACHMENTS: Special Event Application: Cascades Cycling Club Ride of Silence

JACKSON
Founded 1829

City of Jackson Downtown Development Authority
161 W Michigan Ave, Jackson Michigan, MI 49201
Contact for questions at 517-768-6410 or cmays@cityofjackson.org

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- ☑ $50 Application Fee
- ☐ $25 Late/Rush Fee
- ☑ Insurance documentation for sponsoring organization
- ☑ Event Map –*Please indicate the location of all items*
- ☐ Liquor License & Liquor Liability Insurance (if applicable)
- ☐ Carnival Ride Permit (*if applicable*)
- ☐ Insurance documentation for all vendors (if applicable)

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

1. The applicant or representative of any business, group, or organization that seeks approval to conduct a special event must be 21 years of age or older.
2. No ground stakes are allowed on City property. Tents and inflatables must be weighted down.
3. Glitter and confetti are prohibited at all events.
4. No plugging into outlets without prior approval.
5. For events utilizing street space, all fixtures (tents, vehicles, trucks, etc.) must be placed near the curbs to allow for emergency vehicle access.
6. No alcoholic beverages allowed unless proper paperwork is provided along with City Council approval. Alcoholic beverages must be consumed within the area in which they are served. No containers, open or closed, may leave the event area unless approval is granted.
7. Only a removable medium, such as chalk and/or tape, can be used to mark event area or routes. No paint of any kind is permitted. Tape must be removed once event is over.

Applicant Information

Sponsoring Organization Legal Name: Cascades Cycling Club (CCC)		
Address: P.O. Box 515 Jackson Michigan 49204		Phone: (517) 745-9962
Tax ID#: 81-4893536 501 C Tax Exempt	Website: cascadescycling@gmail.com	
Contact Name: Cindy Acker	Phone: 517-745-9962	Email: rcadventure@gmail.com
Contact Name: Mike Woizeschke	Phone: 517-795-6350	Email: michlwoiz@icloud.com
Contact Name During Event: Mike Woizeschke		Phone: (517) 795-6350

Event Information

Event Name: Ride of Silence

Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
May 17, 2023	6:45 pm	7:00 pm	8:45 pm	8:40 pm

Has this event occurred before? ☑Yes, (if yes, how many previous years? 2 years ☐No

Do you expect this event to occur again next year? Yes What is the expected attendance for this event? 45

Type of Event (*please check all that apply*)

☐Walk/Run ☐Festival ☐March/Parade ☑Other: Bicycle

Event Location – *Choose any of the following that apply. For parks, include a map of the area being used.*

☑Horace Blackman Park ☐GrandRiver Farmers Market Pavilion

☐Bucky Harris Park ☐CP Federal City Square (Stage)

☐Ella Sharp Park *(requires Ella Sharp Board approval)* ☐MLK Equality Trail

☑Other Location: Attached Route Map & Cue Sheet

☐ Streets: _____

☐Other Park: _____

Brief description of Event

This description will be posted on the Special Events Calendar on our website. Please attach an additional sheet if necessary.

See Attached

Street Closure– *Please indicate all street closures on your map.*

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

City Resources Requests

Not all resources may be available at your requested site.

Please be specific and list any additional information or requests. Such requests might include assistance from the Police Department, Fire Department, Parks and Recreation Department, Public Works Department, etc. Attach additional pages, if needed.

☐ **Electrical Power:** Indicate electrical requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____
****All electrical lines MUST be covered to limit tripping hazards. ****

☐ **Water Needs:** Indicate water requirements:_____
Amount of water needed:_____ Locations of where water is needed: _____

☐ **Food/Vendors:** Indicate vendors requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____ Number of vendors: _____

☐ **Alcohol Sales:** (If yes attach liquor license and liquor liability insurance)
Start Time:_____ End Time: _____

☐ **Amusement or Carnival Rides:** If yes indicate electrical requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ **Fireworks:** If yes indicate electrical requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐Traffic Cones ☐ Mobile Stage (*please circle* **15-foot** or **25-foot** *version*)

☐Other:_____

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance *(MUST also be provided by all vendors)*	• Showing a liability coverage of at least $1,000,000 • Identifying "City of Jackson" & " Jackson Downtown Development Authority as additional insured
Liquor Liability Insurance *(if needed)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance *(if needed; required for all fireworks displays)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

☐ *I am a Level 1 Special Event (low resources), and would like to be considered for eligibility to enter a Hold Harmless Agreement with The City of Jackson in lieu of providing the above-required insurance documentation.*

Event Map *Details of all event activities MUST be included.*

☑Route Plan	☐Emergency Vehicle Access	☐Restroom Locations
☐Vendor Locations	☐Dispersal Locations	☐Tables
☐Tent Locations	☐Trash Receptacles	☐Requested Reserved Parking
☐Assembly Locations	☐Requested Street Closures	☐Electrical Wires & Outlets

police esq

If these details change, a revised map must be provided seven days prior to event.
Revised maps cannot include any additional street use, reserved parking, or additional space reservations.

Special Event Application

Certification & Signature

1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will be permitted at the event. If additional activities are added, I will immediately contact the City of Jackson. I understand that the approval of my application may be withdrawn or additional action required.
5. All food vendors must be approved by the Jackson County Health Department and each food and other vendor must provide the City of Jackson with a Certificate of Insurance which names the City of Jackson and the Downtown Development Authority as additional insured parties on the policy.
6. Fire Department permit and approval is required for events including display fireworks. Extreme Close-Up (XCU) fireworks liability insurance is required for all fireworks display.
7. The approval of this special event may include additional requirements, limitations, or fees based on the City's review of the application.
8. If I, or my organization, fail to clean up and repair damages to the event area, my organization may be billed for City services, and that failure to clean up and repair damage will be considered for future applications.
9. As the duly authorized agent of the sponsoring organization applying for approval of the Special Event, I affirm the above understandings and agree that my sponsoring organization will comply with the terms of the written confirmation of approval and all City requirements, ordinances and other laws which apply to this Special Event.
10. By signing this Special Event Application, I declare I am 21 years of age or older.
11. If required to provide liability insurance, the sponsoring organization will add the City of Jackson and the Downtown Development Authority as additional insured parties on the sponsoring organization's liability policy.
12. On behalf of the sponsoring organization, I agree that the sponsoring organization will defend, indemnify, and hold harmless the City of Jackson, its officers, employees and agents from and against any claim, demand, suit, loss, cost or expense, or any damage, which may be asserted, claimed, or recovered against or from the City of Jackson, its officers, employees, and agent, by reason of any damage to property, bodily injury, or death, sustained by any person whomsoever, and which damage, injury, or death arises out of or is incident to or in any way connected with or related to this Special Event.
13. The City of Jackson reserves the right to waive any requirements of this policy in the interests of the health, safety, and welfare of the citizens of Jackson.

Signature: _____

Date: 1-16-2023

Office Use ONLY
Application Received:
Date: 3/14
Time: AG
By:
Application Fee Received: yes

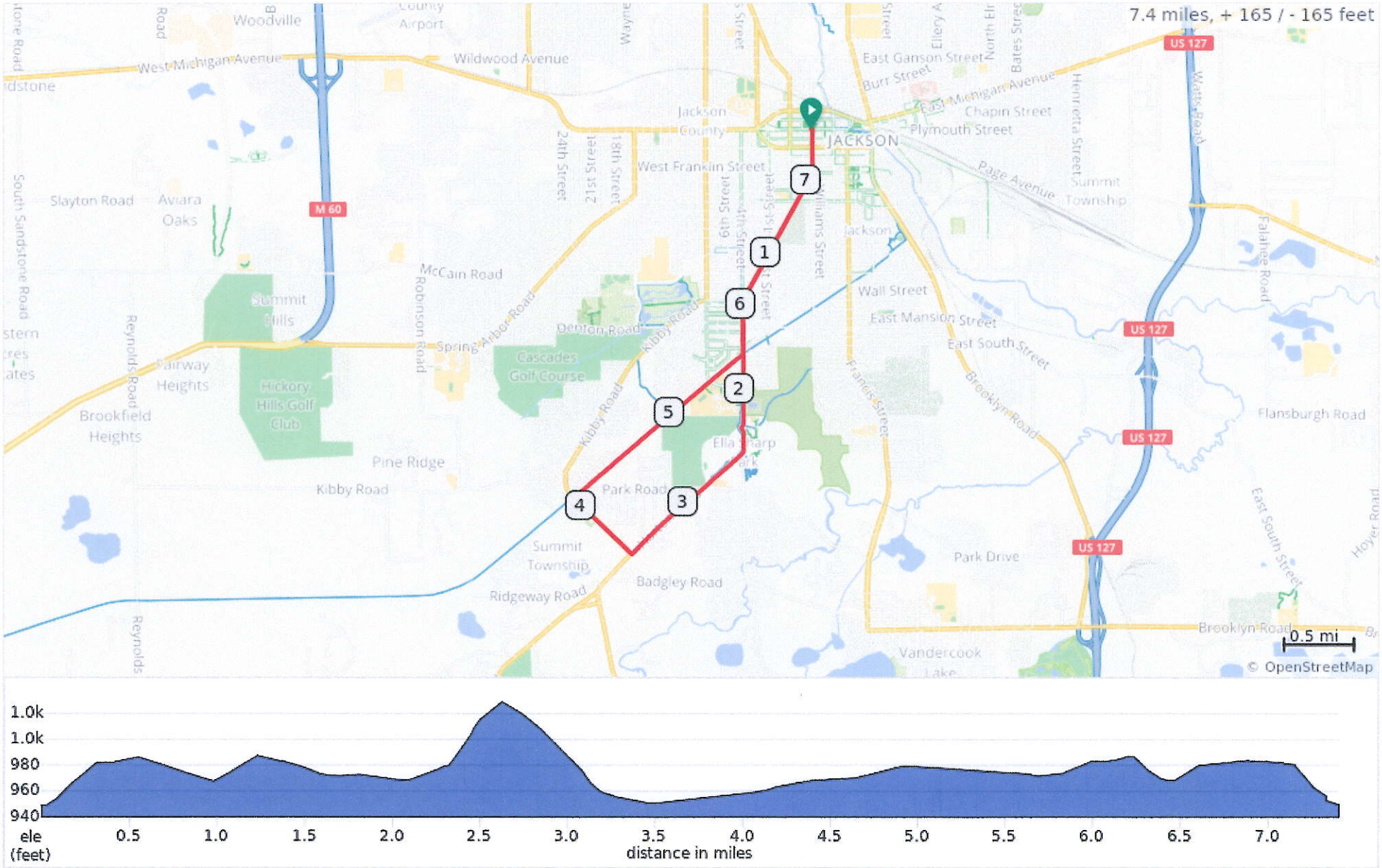
Application Requirements
Application MUST be submitted 60 days PRIOR to event ***NO EXCEPTIONS***
Application MUST be submitted along with all required attachments to: City of Jackson Downtown Development Authority Office 161 W Michigan Ave, 5th Floor Jackson Michigan, MI 49201 or cmays@cityofjackson.org (517) 768-6410
Prohibited Items *Additional fees may apply if policies are not followed*
No ground stakes No confetti or glitter No use of outlets without prior approval

Brief Description:

On May 17, 2023 Cascades Cycling Club will host the annual Ride of Silence.
The Ride of Silence is an international annual event that is a memorial ride in honor of bicyclists who have been killed or injured while riding. The ride not only remembers these individuals but promotes awareness of bicyclists on the road. The Ride of Silence organization stations bicycles, which have been painted white, at each location across the world where a cyclist(s) has been killed by a vehicle.

The ride is always held on the third Wednesday of May, which this year is May 17, 7:00 p.m. Riders are directed to assemble at the Horace Blackman Park downtown Jackson. The ride route loop is approximately 7.5 miles. It is conducted in silence, except where communicating for safety is necessary. Helmets are required. The ride will be conducted at no more than 12 m.p.h. This is a free event.

Ride of Silence - Jackson Michigan



Num	Dist	Type	Note	Next
1.	0.0		Start of route	0.0
2.	0.0	→	R onto North Jackson Street	0.3
3.	0.3	→	R onto West Mason Street	0.0
4.	0.4	←	L onto Greenwood Place	0.1
5.	0.4	↱	Slight R onto Greenwood Avenue	1.0
6.	1.4	↖	Slight L onto 4th Street	0.6
7.	2.0	↑	At roundabout, take exit 3 onto 4th Street	0.3
8.	2.3	↱	Keep R onto 4th Street	0.2

2.3 miles. +62/-34 feet

Num	Dist	Type	Note	Next
9.	2.4	↱	Keep R onto Horton Road	1.1
10.	3.5	→	R onto Weatherwax Drive	0.6
11.	4.1	→	R onto Inter-City Trail	0.1
12.	4.2	↑	Continue onto Inter-City Trail	1.5
13.	5.7	←	L onto 4th Street	0.4
14.	6.0	↱	Keep R onto Greenwood Avenue	1.0
15.	7.0	→	R onto West Wilkins Street	0.0
16.	7.0	←	L onto South Jackson Street	0.4
17.	7.4	←	L	0.0

5.1 miles. +68/-123 feet

CASCA-3 OP ID: DS

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 03/16/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Hacker-King-Sherry Agency, Inc 2205 Abbot Road East Lansing, MI 48823 Dwayne E Scheidler 517-337-6000	CONTACT NAME: Dwayne E Scheidler PHONE (A/C, No, Ext): 517-337-6000 FAX (A/C, No): 517-337-0982 E-MAIL ADDRESS:
INSURED Cascade Cycling Club- Jackson c/o Michael Woizeschke PO Box 515 Jackson, MI 49204	INSURER(S) AFFORDING COVERAGE / NAIC # INSURER A : West Bend Mutual INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE	$ 1,000,000
	CLAIMS-MADE X OCCUR	X		A235195-00	03/01/2023	03/01/2024	DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 100,000
A	AddItional Insure			A235195-05	03/01/2023	03/01/2024	MED EXP (Any one person)	$ per quote
							PERSONAL & ADV INJURY	$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$ 200,000
	X POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$ 2,000,000
	OTHER:						Emp Ben.	$ n/a
X	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident)	$
	ANY AUTO			A235195-05	03/01/2023	03/01/2024	BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	X HIRED AUTOS ONLY / X NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
	UMBRELLA LIAB OCCUR						EACH OCCURRENCE	$
	EXCESS LIAB CLAIMS-MADE						AGGREGATE	$
	DED RETENTION $							$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y / N						PER STATUTE OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	N / A					E.L. EACH ACCIDENT	$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$
							E.L. DISEASE - POLICY LIMIT	$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Bicycling Club- Additional Insured Liability is afforded to the City of Jackson and the Jackson Downtown Development Authority are included as additional insureds on the general liability for use of city parks as bicycle ride assembly and ride starting locations.

CERTIFICATE HOLDER

JACKS-2

City of Jackson & the Jackson
Downtown Development Authority
161 W Michigan Ave.
Jackson, MI 49201

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Dwayne Scheidler

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CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Council Members

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Special Event Application for the Council for the Prevention of Child Abuse & Neglect Banner Hanging & Pinwheel Garden to honor Child Abuse Prevention Month

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Recommendation:

Approve a request from the Council for the Prevention of Child Abuse & Neglect to hang a banner and create a small pinwheel garden in recognition of Child Abuse Prevention Month during the month of April in Austin Blair ("Greenwood") Park in the city of Jackson.

Attached is a memo and supporting paperwork from Coyn Speiser regarding the Special Event Application for the Council for the Prevention of Child Abuse & Neglect Banner Hanging to honor Child Abuse Prevention Month.

I recommend approval of the special event application for the Council for the Prevention of Child Abuse & Neglect Banner Hanging to honor Child Abuse Prevention Month. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Coyn Speiser, Executive Director, DDA

DATE: April 25, 2023

RECOMMENDATION: Approve a request from the Council for the Prevention of Child Abuse & Neglect to hang a banner and create a small pinwheel garden in recognition of Child Abuse Prevention Month during the month of April in Austin Blair ("Greenwood") Park in the city of Jackson.

SUMMARY: Annual event that recognizes Child Abuse Prevention Month

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DEPARTMENTAL APPROVAL SUMMARY

Approvals noted below by each department indicate they have been made aware of the request and the capacity of their department has been met. Conditions of their approval and special considerations are noted.

DEPARTMENT	APPROVAL	DENIAL	ECONOMIC IMPACT
DDA	X		$0.00
Engineering	X		$0.00
Fire	X		$0.00
Community Development	X		$0.00
Parks & Recreation	X		$0.00
Police	X		$0.00
Public Works	X		$0.00
		TOTAL	***$0.00***

CONDITIONS & CONSIDERATIONS

None

INSURANCE STATUS

Approved and on file with the DDA and City Attorney

ATTACHMENTS: Special Event Application: Child Abuse Prevention Month Banner Hanging Pinwheel Garden

JACKSON
Founded 1829

City of Jackson Downtown Development Authority
161 W Michigan Ave, Jackson Michigan, MI 49201
Contact for questions at 517-768-6411 or aecon@cityofjackosn.org

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- [x] $50 Application Fee
- [ ] $25 Late/Rush Fee
- [x] Insurance documentation for sponsoring organization
- [x] Event Map –*Please indicate the location of all items*
- [ ] Liquor License & Liquor Liability Insurance (if applicable)
- [ ] Carnival Ride Permit (*if applicable*)
- [ ] Insurance documentation for all vendors (if applicable)

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

1. The applicant or representative of any business, group, or organization that seeks approval to conduct a special event must be 21 years of age or older.
2. No ground stakes are allowed on City property. Tents and inflatables must be weighted down.
3. Glitter and confetti are prohibited at all events.
4. No plugging into outlets without prior approval.
5. For events utilizing street space, all fixtures (tents, vehicles, trucks, etc.) must be placed near the curbs to allow for emergency vehicle access.
6. No alcoholic beverages allowed unless proper paperwork is provided along with City Council approval. Alcoholic beverages must be consumed within the area in which they are served. No containers, open or closed, may leave the event area unless approval is granted.
7. Only a removable medium, such as chalk and/or tape, can be used to mark event area or routes. No paint of any kind is permitted. Tape must be removed once event is over.
8. One temporary sign/banner is permitted with your event, provided it measures no more than 12 ft^2 and does not block any intersections, driveways, or right-of-ways.

Applicant Information

Sponsoring Organization Legal Name: CPCAN (Council for the Prevention of Child Abuse & Neglect)		
Address: 1004 Greenwood Pl. Jackson, MI 49203	Phone: (517) 788-4239	
Tax ID#: 38-2331154	Website: www.cpcanjackson.org	
Contact Name: Staci Blalock	Phone: 517-788-4239	Email: sblalock@cpcanjackson.org
Contact Name:	Phone:	Email:
Contact Name During Event: Staci Blalock		Phone: (517) 917-5625

Event Information

Event Name: Child Abuse Prevention Month Pinwheel Garden

Event Date(s):	Set up Time:	Start Time:	End Time:	Tear Down Time:
04/06/2023	11AM	11:30AM	1:00pm	1:30pm

Has this event occurred before? ☒Yes, (if yes, how many previous years? Several ☐No

Do you expect this event to occur again next year? Yes What is the expected attendance for this event? less than 50 people

Type of Event (*please check all that apply*)

☐Walk/Run ☐Festival ☐March/Parade ☒Other: Gathering w/ 4 people speaking

Event Location – *Choose any of the following that apply. For parks, include a map of the area being used.*

☐Horace Blackman Park

☐Bucky Harris Park

☐Ella Sharp Park *(requires Ella Sharp Board approval)*

☐GrandRiver Farmers Market Pavilion

☐TRUE City Square (Stage)

☐MLK Equality Trail

☒Other Location: Greenwood Park

☐ Streets: _____

☐Other Park: _____

Brief description of Event

This description will be posted on the Special Events Calendar on our website. Please attach an additional sheet if necessary.

April is Child Abuse Prevention Month & as the only primary abuse/neglect agency in Jackson County, CPCAN holds a small gathering and plants a Pinwheel Garden every year. The pinwheel represents the happy, carefree childhood that every child deserves to experience. We will have local community members who are involved in child welfare/abuse & neglect prevention speak at this event as well. In previous years the honorable Judge LaFlamme, DHHS director Zoe Lyons, & the mayor have spoken.

Street Closure– *Please indicate all street closures on your map.*

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

City Resources Requests

Not all resources may be available at your requested site.

Please be specific and list any additional information or requests. Such requests might include assistance from the Police Department, Fire Department, Parks and Recreation Department, Public Works Department, etc. Attach additional pages, if needed.

☐ **Electrical Power:** Indicate electrical requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____
****All electrical lines MUST be covered to limit tripping hazards. ****

☐ **Water Needs**: Indicate water requirements:_____
Amount of water needed:_____ Locations of where water is needed: _____

☐ **Food/Vendors**: Indicate vendors requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____ Number of vendors: _____

☐ **Alcohol Sales**: (If yes attach liquor license and liquor liability insurance)
Start Time:_____ End Time: _____

☐ **Amusement or Carnival Rides**: If yes indicate electrical requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ **Fireworks**: If yes indicate electrical requirements:_____
Amount of electrical wattage needed:_____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐Traffic Cones ☐ Mobile Stage (*please circle* **15-foot** or **25-foot** *version*)
☐Other:_____

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance *(MUST also be provided by all vendors)*	• Showing a liability coverage of at least $1,000,000 • Identifying "City of Jackson" & " Jackson Downtown Development Authority as additional insured
Liquor Liability Insurance *(if needed)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance *(if needed; required for all fireworks displays)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

☐ *I am a Level 1 Special Event (low resources), and would like to be considered for eligibility to enter a Hold Harmless Agreement with The City of Jackson in lieu of providing the above-required insurance documentation.*

Event Map *Details of all event activities MUST be included.*

☐Route Plan	☐Emergency Vehicle Access	☐Restroom Locations
☐Vendor Locations	☐Dispersal Locations	☐Tables
☐Tent Locations	☐Trash Receptacles	☐Requested Reserved Parking
☐Assembly Locations	☐Requested Street Closures	☐Electrical Wires & Outlets

If these details change, a revised map must be provided seven days prior to event.
Revised maps cannot include any additional street use, reserved parking, or additional space reservations.

Special Event Application

Certification & Signature

1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will be permitted at the event. If additional activities are added, I will immediately contact the City of Jackson. I understand that the approval of my application may be withdrawn or additional action required.
5. All food vendors must be approved by the Jackson County Health Department and each food and other vendor must provide the City of Jackson with a Certificate of Insurance which names the City of Jackson and the Downtown Development Authority as additional insured parties on the policy.
6. Fire Department permit and approval is required for events including display fireworks. Extreme Close-Up (XCU) fireworks liability insurance is required for all fireworks display.
7. The approval of this special event may include additional requirements, limitations, or fees based on the City's review of the application.
8. If I, or my organization, fail to clean up and repair damages to the event area, my organization may be billed for City services, and that failure to clean up and repair damage will be considered for future applications.
9. As the duly authorized agent of the sponsoring organization applying for approval of the Special Event, I affirm the above understandings and agree that my sponsoring organization will comply with the terms of the written confirmation of approval and all City requirements, ordinances and other laws which apply to this Special Event.
10. By signing this Special Event Application, I declare I am 21 years of age or older.
11. If required to provide liability insurance, the sponsoring organization will add the City of Jackson and the Downtown Development Authority as additional insured parties on the sponsoring organization's liability policy.
12. On behalf of the sponsoring organization, I agree that the sponsoring organization will defend, indemnify, and hold harmless the City of Jackson, its officers, employees and agents from and against any claim, demand, suit, loss, cost or expense, or any damage, which may be asserted, claimed, or recovered against or from the City of Jackson, its officers, employees, and agent, by reason of any damage to property, bodily injury, or death, sustained by any person whomsoever, and which damage, injury, or death arises out of or is incident to or in any way connected with or related to this Special Event.
13. The City of Jackson reserves the right to waive any requirements of this policy in the interests of the health, safety, and welfare of the citizens of Jackson.

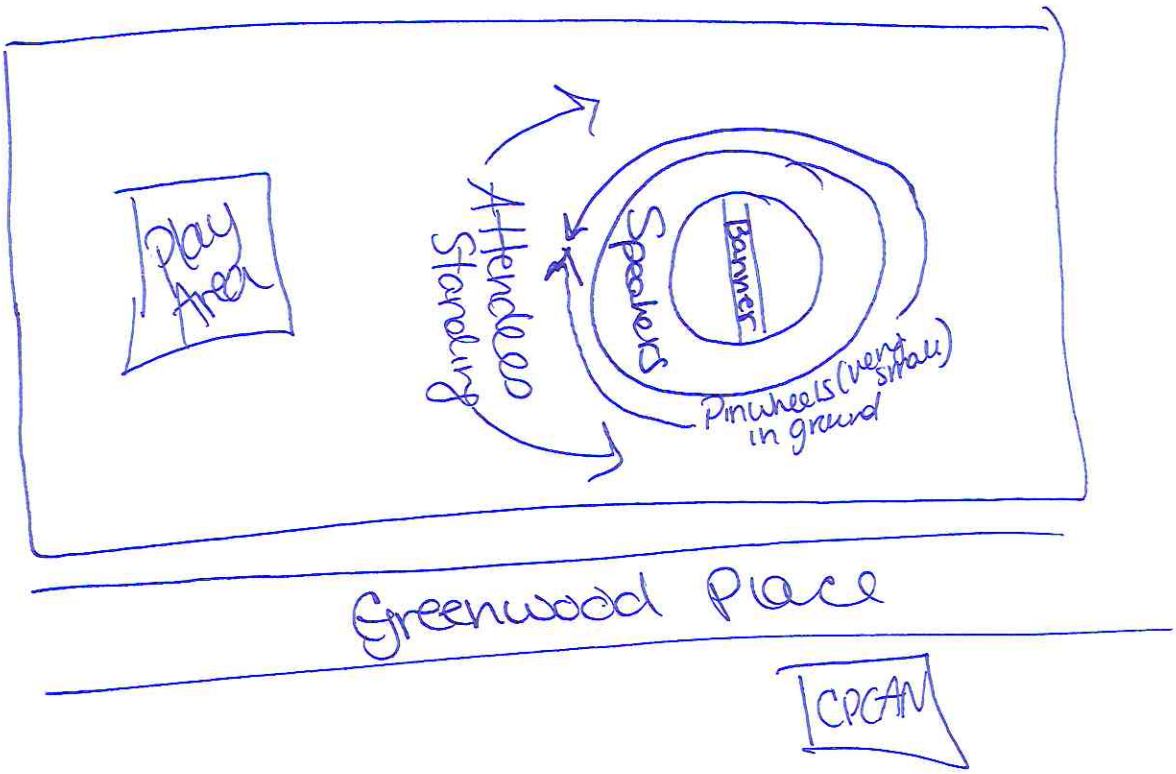
Signature: _____

Date: 02/06/2023

Office Use ONLY
Application Received:
Date: 2/7/23
Time:
By: AE
Application Fee Received: Yes

Application Requirements
Application MUST be submitted 60 days PRIOR to event ***NO EXCEPTIONS***
Application MUST be submitted along with all required attachments to: City of Jackson Downtown Development Authority Office 161 W Michigan Ave, 5th Floor Jackson Michigan, MI 49201 or aecon@cityofjackson.org (517) 768-6411

Prohibited Items *Additional fees may apply if policies are not followed*
No ground stakes No confetti or glitter No use of outlets without prior approval


Play Area
Athletics Starting
Spectators
Banner
Pinwheels (very small) in ground
Greenwood Place
CPCAM

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 2/6/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME: Pamela Bacon	
Walton Insurance Group 2929 Spring Arbor Rd. P.O. Box 3029 Jackson MI 49204	PHONE (A/C, No, Ext): (517)787-2600	FAX (A/C, No): (517)787-3857
	E-MAIL ADDRESS: pbacon@waltoninsurancegroup.com	
	INSURER(S) AFFORDING COVERAGE	NAIC #
	INSURER A : West Bend Mutual Ins. Co.	15350
INSURED	INSURER B :	
The Council for the Prevention of Child Abuse and Neglect 606 Greenwood Place Jackson MI 49203	INSURER C :	
	INSURER D :	
	INSURER E :	
	INSURER F :	

COVERAGES **CERTIFICATE NUMBER:** CL2292125427 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE / OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: X POLICY / PRO-JECT / LOC OTHER:	X		0719503	10/22/2022	10/22/2023	EACH OCCURRENCE	$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 100,000
							MED EXP (Any one person)	$
							PERSONAL & ADV INJURY	$ 1,000,000
							GENERAL AGGREGATE	$ 2,000,000
							PRODUCTS - COMP/OP AGG	$ 2,000,000
							Hired/Non-Owned Auto	$ 1,000,000
	AUTOMOBILE LIABILITY ANY AUTO ALL OWNED AUTOS / SCHEDULED AUTOS HIRED AUTOS / NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident)	$
							BODILY INJURY (Per person)	$
							BODILY INJURY (Per accident)	$
							PROPERTY DAMAGE (Per accident)	$
								$
	UMBRELLA LIAB / OCCUR EXCESS LIAB / CLAIMS-MADE DED / RETENTION $						EACH OCCURRENCE	$
							AGGREGATE	$
								$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N / A					PER STATUTE / OTH-ER	
							E.L. EACH ACCIDENT	$
							E.L. DISEASE - EA EMPLOYEE	$
							E.L. DISEASE - POLICY LIMIT	$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Event - April 6, 2023. City of Jackson and Jackson Downtown Development Authority are included as additional insureds for general liability.

CERTIFICATE HOLDER

City of Jackson &
Downtown Development Authority
161 W Michigan Ave
Jackson, MI 49201

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Pamela Bacon/PBACO

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CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Council Members

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Special Event Application for the First United Methodist Church Back to School Blast and Community Resource Fair

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Recommendation:

Approve a request from the First United Methodist Church to host their Back to School Blast and Community Resource Fair on Thursday, July 27, 2023 in Horace Blackman Park, Hayes Court, and on Michigan Avenue in downtown Jackson.

Attached is a memo and supporting paperwork from Coyn Speiser regarding the Special Event Application for the First United Methodist Church Back to School Blast and Community Resource Fair.

I recommend approval of the special event application for the First United Methodist Church Back to School Blast and Community Resource Fair. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Coyn Speiser, Executive Director, DDA

DATE: April 25, 2023

RECOMMENDATION: Approve a request from the First United Methodist Church to host their Back to School Blast and Community Resource Fair on Thursday, July 27, 2023 in Horace Blackman Park, Hayes Court, and on Michigan Avenue in downtown Jackson.

SUMMARY: Annual event that offers back to school items, food, resource vendors, and vision/dental exams, all at no cost, for the children of Jackson.

DEPARTMENTAL APPROVAL SUMMARY

Approvals noted below by each department indicate they have been made aware of the request and the capacity of their department has been met. Conditions of their approval and special considerations are noted.

DEPARTMENT	APPROVAL	DENIAL	ECONOMIC IMPACT
DDA	X		$0.00
Engineering	X		$0.00
Fire	X		$0.00
Community Development	X		$0.00
Parks & Recreation	X		$0.00
Police	X		$0.00
Public Works	X		$500.00
		TOTAL	***$500.00***

CONDITIONS & CONSIDERATIONS

Street closures (see map); reserved parking

INSURANCE STATUS

Updated insurance will be on file with by the time of the event

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ATTACHMENTS: Special Event Application: Back to School Blast & Community Resource Fair

JACKSON
Founded 1829

City of Jackson Downtown Development Authority
161 W Michigan Ave, Jackson Michigan, MI 49201
Contact for questions at 517-768-6410 or cmays@cityofjackson.org

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

- [x] $50 Application Fee
- [ ] $25 Late/Rush Fee
- [x] Insurance documentation for sponsoring organization
- [x] Event Map —*Please indicate the location of all items*
- [ ] Liquor License & Liquor Liability Insurance (if applicable)
- [ ] Carnival Ride Permit (*if applicable*)
- [ ] Insurance documentation for all vendors (if applicable)

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

1. The applicant or representative of any business, group, or organization that seeks approval to conduct a special event must be 21 years of age or older.
2. No ground stakes are allowed on City property. Tents and inflatables must be weighted down.
3. Glitter and confetti are prohibited at all events.
4. No plugging into outlets without prior approval.
5. For events utilizing street space, all fixtures (tents, vehicles, trucks, etc.) must be placed near the curbs to allow for emergency vehicle access.
6. No alcoholic beverages allowed unless proper paperwork is provided along with City Council approval. Alcoholic beverages must be consumed within the area in which they are served. No containers, open or closed, may leave the event area unless approval is granted.
7. Only a removable medium, such as chalk and/or tape, can be used to mark event area or routes. No paint of any kind is permitted. Tape must be removed once event is over.

Applicant Information

Sponsoring Organization Legal Name: First United Methodist Church of Jackson		
Address: 275 W. Michigan Avenue Jackson		Phone: (517) 787-6466
Tax ID#: 38-150-1144	Website:	
Contact Name: Fran Adams	Phone: 517-592-5502 or Email:	glfcadams@yahoo.com
Contact Name:	Phone: cell 517-581-8435 Email:	
Contact Name During Event: Fran Adams		Phone: (517) 581-8435

Event Information

Event Name: Back to School Blast - Resource Fair 2023

Event Date(s):	Event Set up Time:	Event Start Time:	Event End Time:	Event Tear Down Time:
7/27/23	11AM	3pm	7pm	8pm

Has this event occurred before? ☑Yes, (if yes, how many previous years? 9 yrs ☐No

Do you expect this event to occur again next year? Yes What is the expected attendance for this event? 1400

Type of Event (*please check all that apply*)

☐Walk/Run ☐Festival ☐March/Parade ☒Other: _____

Event Location – *Choose any of the following that apply. For parks, include a map of the area being used.*

☒Horace Blackman Park @ 275 W. Michigan Ave ☐GrandRiver Farmers Market Pavilion

☐Bucky Harris Park ☐CP Federal City Square (Stage)

☐Ella Sharp Park *(requires Ella Sharp Board approval)* ☐MLK Equality Trail

☐Other Location: _____

☐ Streets: _____

☐Other Park: _____

Brief description of Event

This description will be posted on the Special Events Calendar on our website. Please attach an additional sheet if necessary.

Back to school event with food, entertainment, Back pack give away & School supplies. Community Agencies invited to provide information to students & families There will be fun activities, music, games, Bounce house, Immunizations, Vision Screenings

Street Closure– *Please indicate all street closures on your map.*

Street Name: West Michigan Avenue Cross Streets S. Jackson (EAST) St & Blackstone St (West)

Closure Start Date: 7/27/23 Time: _____ Closure End Date: 7/27/23 Time: _____

Street Name: Hays CT Cross Streets Pearl & MI Ave

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

Street Name: _____ Cross Streets _____

Closure Start Date: _____ Time: _____ Closure End Date: _____ Time: _____

City Resources Requests

Not all resources may be available at your requested site.

Please be specific and list any additional information or requests. Such requests might include assistance from the Police Department, Fire Department, Parks and Recreation Department, Public Works Department, etc. Attach additional pages, if needed.

☑ **Electrical Power:** Indicate electrical requirements: inflatables, music/sound system
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____
****All electrical lines MUST be covered to limit tripping hazards. ****

☐ **Water Needs**: Indicate water requirements: _____
Amount of water needed: _____ Locations of where water is needed: _____

☐ **Food/Vendors**: Indicate vendors requirements: _____
Amount of electrical wattage needed: 110 Amount of plug ins: 2
Locations of where plugs are needed: _____ Number of vendors: 1
Fume only food provider

☐ **Alcohol Sales**: (If yes attach liquor license and liquor liability insurance)
Start Time: _____ End Time: _____

☐ **Amusement or Carnival Rides**: If yes indicate electrical requirements: _____
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ **Fireworks**: If yes indicate electrical requirements: _____
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☑ Traffic Cones ☐ Mobile Stage (*please circle* **15-foot** or **25-foot** *version*)
☑ Other: Road Closure Signs 2 - 1@ Jackson + 1@ Blackstone

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance *(MUST also be provided by all vendors)*	• Showing a liability coverage of at least $1,000,000 • Identifying "City of Jackson" & " Jackson Downtown Development Authority as additional insured
Liquor Liability Insurance *(if needed)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance *(if needed; required for all fireworks displays)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

☐ *I am a Level I Special Event (low resources), and would like to be considered for eligibility to enter a Hold Harmless Agreement with The City of Jackson in lieu of providing the above-required insurance documentation.*

Event Map *Details of all event activities MUST be included.*

☐ Route Plan	☒ Emergency Vehicle Access Alleys	☒ Restroom Locations Church
☒ Vendor Locations Community agencies	☐ Dispersal Locations	☒ Tables Food Area + community Agencies
☒ Tent Locations	☒ Trash Receptacles Park	☐ Requested Reserved Parking
☐ Assembly Locations	☒ Requested Street Closures	☒ Electrical Wires & Outlets

If these details change, a revised map must be provided seven days prior to event.
Revised maps cannot include any additional street use, reserved parking, or additional space reservations.

Special Event Application

Certification & Signature

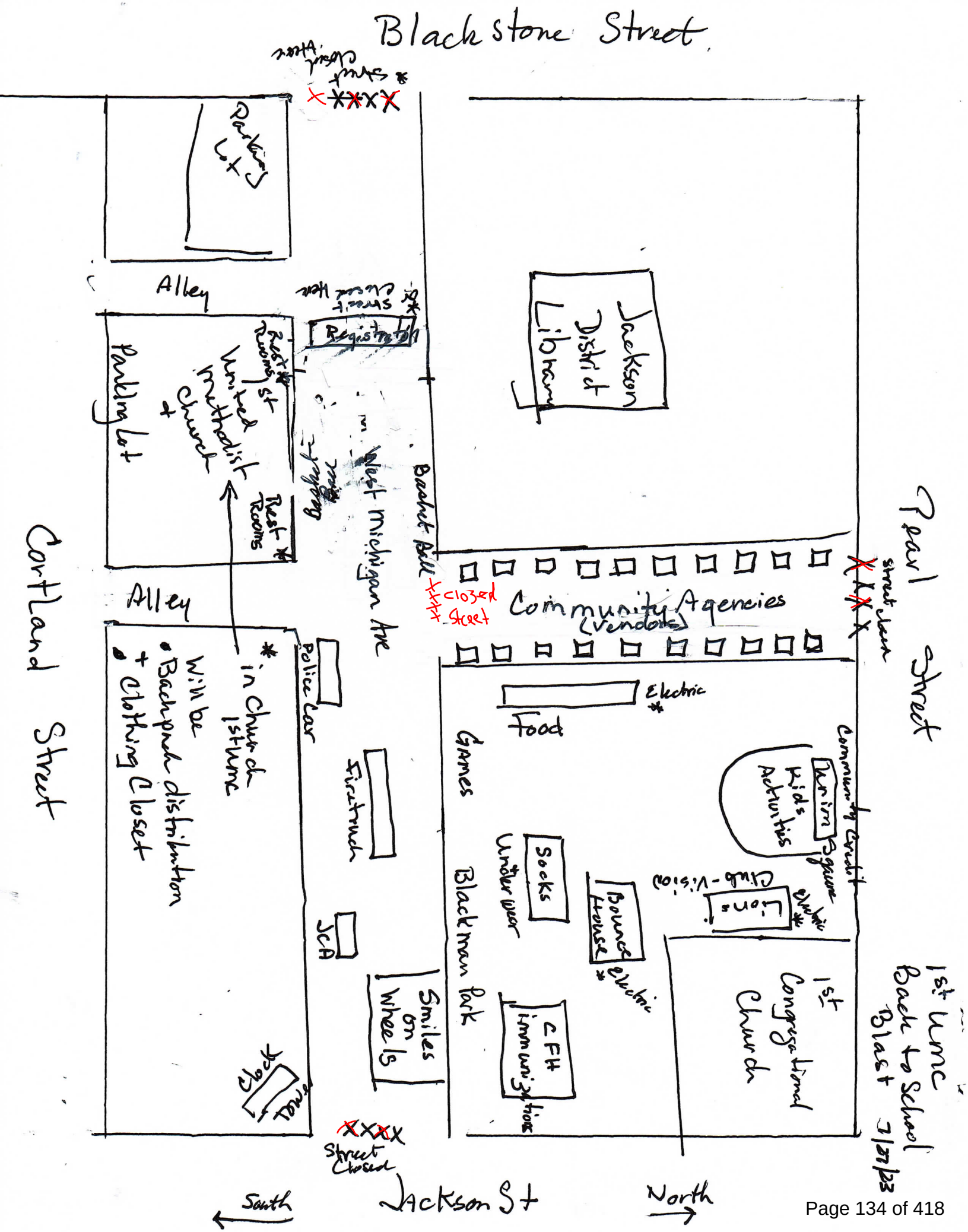
1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will be permitted at the event. If additional activities are added, I will immediately contact the City of Jackson. I understand that the approval of my application may be withdrawn or additional action required.
5. All food vendors must be approved by the Jackson County Health Department and each food and other vendor must provide the City of Jackson with a Certificate of Insurance which names the City of Jackson and the Downtown Development Authority as additional insured parties on the policy.
6. Fire Department permit and approval is required for events including display fireworks. Extreme Close-Up (XCU) fireworks liability insurance is required for all fireworks display.
7. The approval of this special event may include additional requirements, limitations, or fees based on the City's review of the application.
8. If I, or my organization, fail to clean up and repair damages to the event area, my organization may be billed for City services, and that failure to clean up and repair damage will be considered for future applications.
9. As the duly authorized agent of the sponsoring organization applying for approval of the Special Event, I affirm the above understandings and agree that my sponsoring organization will comply with the terms of the written confirmation of approval and all City requirements, ordinances and other laws which apply to this Special Event.
10. By signing this Special Event Application, I declare I am 21 years of age or older.
11. If required to provide liability insurance, the sponsoring organization will add the City of Jackson and the Downtown Development Authority as additional insured parties on the sponsoring organization's liability policy.
12. On behalf of the sponsoring organization, I agree that the sponsoring organization will defend, indemnify, and hold harmless the City of Jackson, its officers, employees and agents from and against any claim, demand, suit, loss, cost or expense, or any damage, which may be asserted, claimed, or recovered against or from the City of Jackson, its officers, employees, and agent, by reason of any damage to property, bodily injury, or death, sustained by any person whomsoever, and which damage, injury, or death arises out of or is incident to or in any way connected with or related to this Special Event.
13. The City of Jackson reserves the right to waive any requirements of this policy in the interests of the health, safety, and welfare of the citizens of Jackson.

Signature: Francis Adan

Date: 2/9/23

Office Use ONLY
Application Received: Date: 2/10 Time: 12 By:
Application Fee Received: YES

Application Requirements
Application MUST be submitted 60 days PRIOR to event *****NO EXCEPTIONS*****
Application MUST be submitted along with all required attachments to: City of Jackson Downtown Development Authority Office 161 W Michigan Ave, 5th Floor Jackson Michigan, MI 49201 or cmays@cityofjackson.org (517) 768-6410
Prohibited Items *Additional fees may apply if policies are not followed*
No ground stakes No confetti or glitter No use of outlets without prior approval


Blackstone Street
Street closed Here
Parking Lot
Alley
Street closed Here
Registration
Rest Rooms
1st United Methodist Church
Parking Lot
Rest Rooms
Bachet Ball
West Michigan Ave
Bachet Ball
Jackson District Library
Pearl Street
Street closed
closed Street
Community Agencies (Vendors)
Alley
Cortland Street
in Church 1st Umc
Will be
Backpack distribution
+
Clothing Closet
Police Car
Firetruck
JCA
Smiles on Wheels
Clock Tower
Street Closed
Electric
Food
Games
Community Credit Union
Kids Activities
Square
Club-Vision
Lions
Electric
Socks
Underwear
Bounce House
Electric
Blackman Park
CFH Immunizations
1st Congregational Church
1st Umc Back to School Blast 7/27/23
South
Jackson St
North

FIRST29 OP ID: MB

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
03/14/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Shilton & Associates, Inc. Dave Shilton 660 Cascade West Parkway, SE Grand Rapids, MI 49546 David W. Shilton	CONTACT NAME: PHONE (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS:
INSURED First United Methodist 275 West Michigan Avenue Jackson, MI 49201	INSURER(S) AFFORDING COVERAGE / NAIC # INSURER A : Brotherhood Mutual INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	GENERAL LIABILITY X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY PRO-JECT LOC	X		21M5A0425394	07/01/2022	07/01/2023	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 2,000,000 $ 1,000,000 $ 10,000 $ 2,000,000 $ 6,000,000 $ 6,000,000
	AUTOMOBILE LIABILITY ANY AUTO ALL OWNED AUTOS SCHEDULED AUTOS HIRED AUTOS NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (PER ACCIDENT)	$ $ $ $
	UMBRELLA LIAB OCCUR EXCESS LIAB CLAIMS-MADE DED RETENTION $						EACH OCCURRENCE AGGREGATE	$ $
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y / N If yes, describe under DESCRIPTION OF OPERATIONS below	N / A					WC STATU-TORY LIMITS OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ $ $

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

City of Jackson and Jackson Downtown Development Authority are included as additional insureds for general liability with regards to the Back to School Blast community event on July 27, 2023. Commercial General Liability Additional Insured City of Jackson and Jackson Downtown Development Authority, subject to the coverage provided by the referenced policy.

CERTIFICATE HOLDER

CITYJ-2

City of Jackson & Downtown Development Authority
161 W Michigan Ave
Jackson, MI 49201

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

David Shilton

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CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Council Members

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Special Event Application: 2023 Walk to End Alzheimer's

---

Recommendation:

Approve a request from the Alzheimer's Disease & Related Disorders Association to host their 2023 Walk to End Alzheimer's on October 14, 2023 on the streets of downtown Jackson.

Attached is a memo and supporting paperwork from Coyn Speiser regarding the Special Event Application for the 2023 Walk to End Alzheimer's.

I recommend approval of the special event application for the 2023 Walk to End Alzheimer's. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Coyn Speiser, Executive Director, DDA

DATE: April 25, 2023

RECOMMENDATION: Approve a request from the Alzheimer's Disease & Related Disorders Association to host their 2023 Walk to End Alzheimer's on October 14, 2023 on the streets of downtown Jackson.

SUMMARY: A fundraising, family-friendly, community event in support of the Alzheimer's Association and their continued work/research.

DEPARTMENTAL APPROVAL SUMMARY

Approvals noted below by each department indicate they have been made aware of the request and the capacity of their department has been met. Conditions of their approval and special considerations are noted.

DEPARTMENT	APPROVAL	DENIAL	ECONOMIC IMPACT
DDA	X		$0.00
Engineering	X		$0.00
Fire	X		$0.00
Community Development	X		$0.00
Parks & Recreation	X		$0.00
Police	X		$130.00
Public Works	X		$200.00
		TOTAL	***$330.00***

CONDITIONS & CONSIDERATIONS

None

INSURANCE STATUS

Approved and on-file with the DDA and City Attorney

ATTACHMENTS: Special Event Application: 2023 Walk to End Alzheimer's

JACKSON
Founded 1829

City of Jackson Downtown Development Authority
161 W Michigan Ave, Jackson Michigan, MI 49201
Contact for questions at 517-768-6411 or aecon@cityofjackosn.org

SPECIAL EVENT APPLICATION

Application must be submitted 60 days PRIOR to event

Application Attachments

☒ $50 Application Fee
☐ $25 Late/Rush Fee
☒ Insurance documentation for sponsoring organization
☒ Event Map –*Please indicate the location of all items*
☐ Liquor License & Liquor Liability Insurance (if applicable)
☐ Carnival Ride Permit (*if applicable*)
☐ Insurance documentation for all vendors (if applicable)

Make checks payable to "Downtown Development Authority"

Special Event Application Policy

Additional charges may occur if policies are broken.

1. The applicant or representative of any business, group, or organization that seeks approval to conduct a special event must be 21 years of age or older.
2. No ground stakes are allowed on City property. Tents and inflatables must be weighted down.
3. Glitter and confetti are prohibited at all events.
4. No plugging into outlets without prior approval.
5. For events utilizing street space, all fixtures (tents, vehicles, trucks, etc.) must be placed near the curbs to allow for emergency vehicle access.
6. No alcoholic beverages allowed unless proper paperwork is provided along with City Council approval. Alcoholic beverages must be consumed within the area in which they are served. No containers, open or closed, may leave the event area unless approval is granted.
7. Only a removable medium, such as chalk and/or tape, can be used to mark event area or routes. No paint of any kind is permitted. Tape must be removed once event is over.
8. One temporary sign/banner is permitted with your event, provided it measures no more than 12 ft^2 and does not block any intersections, driveways, or right-of-ways.

Applicant Information

Sponsoring Organization Legal Name: Alzheimer's Disease & Related Disorders Association, INC.Alzheimer's Disease & Related Disorders Association, INC.		
Address: 225 N. Michigan Ave, Floor 17, Chicago IL 60601		Phone: ( )
Tax ID#: 13-3039609	Website: www.alz.org	
Contact Name: Sue Prynn	Phone: 313.522.5813	Email: smprynn@alz.org
Contact Name: Kyle Leonard	Phone: 248.996.1044	Email: kleonard@alz.org
Contact Name During Event: Sue Prynn		Phone: (313) 522.5813

Event Information

Event Name: 2023 Walk to End Alzheimer's - Jackson, MI

Event Date(s):	Set up Time:	Start Time:	End Time:	Tear Down Time:
Saturday, 10/14/23	7 am	Registration 10 am Opening Ceremony 11 am Walk at 11:15 am	12:30 pm	12:30 pm - 1:30 pm

Has this event occurred before? ☒Yes, (if yes, how many previous years? 27 years ☐No

Do you expect this event to occur again next year? Yes What is the expected attendance for this event? 300

Type of Event (*please check all that apply*)

☒Walk/Run ☐Festival ☐March/Parade ☐Other:_____

Event Location – *Choose any of the following that apply. For parks, include a map of the area being used.*

☒Horace Blackman Park

☐Bucky Harris Park

☐Ella Sharp Park *(requires Ella Sharp Board approval)*

☐GrandRiver Farmers Market Pavilion

☐CP Federal City Square (Stage)

☐MLK Equality Trail

☐Other Location:_____

☐ Streets:_____

☐Other Park:_____

Brief description of Event

This description will be posted on the Special Events Calendar on our website. Please attach an additional sheet if necessary.

The Jackson Walk to End Alzheimer's is a fundraising, family friendly, community event where approximately 300 participants fundraise throughout the year to support the Alzheimer's Association. They will then come together on October 14th, to show their support to their loved ones, to other families with Alzheimer's and other dementias, to the caregivers of those caring for those with Alzheimer's, and to our mission, To Be A World Without Alzheimer's and Other Dementias. There is, approximately, a 1 mile and 2 mile route throughout Downtown Jackson. We focus the route to highlight the Bright Walls and Downtown Jackson. The starting and gathering point is at Horace Blackman Park. There are refreshments and snacks available for all participants. Our community sponsors will have tables to showcase their business and provide information. We have music entertainment, that changes every year prior to our opening ceremonies at 11:00 am.

Street Closure– *Please indicate all street closures on your map.*

Street Name: Hayes (Both Ends of Hayes) Cross Streets W. Michigan & Pearl St.

Closure Start Date: 10/14/23 Time: 7:00 a.m. Closure End Date: 10/14/23 Time: 1 p.m.

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

Street Name:_____ Cross Streets _____

Closure Start Date:_____ Time:_____ Closure End Date:_____ Time:_____

In the past the police did rolling closers along the walk route where the walkers crossed the street. No streets were comp indicates where the walkers will be crossing streets.

City Resources Requests

Not all resources may be available at your requested site.

Please be specific and list any additional information or requests. Such requests might include assistance from the Police Department, Fire Department, Parks and Recreation Department, Public Works Department, etc. Attach additional pages, if needed.

☒ **Electrical Power:** Indicate electrical requirements: To power equipment for our DJ/MC
Amount of electrical wattage needed: 15-20-amp circuit outlets Amount of plug ins: 2
Locations of where plugs are needed: CP Federal City Square Ampitheatre
****All electrical lines MUST be covered to limit tripping hazards. ****

☐ **Water Needs**: Indicate water requirements: _____
Amount of water needed: _____ Locations of where water is needed: _____

☐ **Food/Vendors**: Indicate vendors requirements: _____
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____ Number of vendors: _____

☐ **Alcohol Sales**: (If yes attach liquor license and liquor liability insurance)
Start Time: _____ End Time: _____

☐ **Amusement or Carnival Rides**: If yes indicate electrical requirements: _____
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ **Fireworks**: If yes indicate electrical requirements: _____
Amount of electrical wattage needed: _____ Amount of plug ins: _____
Locations of where plugs are needed: _____

☐ Traffic Cones ☐ Mobile Stage (*please circle* **15-foot** or **25-foot** *version*)

☐ Other: _____

Insurance

Please request the following documentation from your insurance carrier.

Insurance Type	Requirements
Certificate of Liability Insurance *(MUST also be provided by all vendors)*	• Showing a liability coverage of at least $1,000,000 • Identifying "City of Jackson" & " Jackson Downtown Development Authority as additional insured
Liquor Liability Insurance *(if needed)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured
XCU Fireworks Liability Insurance *(if needed; required for all fireworks displays)*	• Identifying "City of Jackson" & "Jackson Downtown Development Authority" as additional insured

☐ *I am a Level 1 Special Event (low resources), and would like to be considered for eligibility to enter a Hold Harmless Agreement with The City of Jackson in lieu of providing the above-required insurance documentation.*

Event Map *Details of all event activities MUST be included.*

☑ Route Plan	☐ Emergency Vehicle Access	☑ Restroom Locations
☐ Vendor Locations	☐ Dispersal Locations	☑ Tables
☑ Tent Locations	☐ Trash Receptacles	☐ Requested Reserved Parking
☐ Assembly Locations	☐ Requested Street Closures	☐ Electrical Wires & Outlets

If these details change, a revised map must be provided seven days prior to event.
Revised maps cannot include any additional street use, reserved parking, or additional space reservations.

Special Event Application

Certification & Signature

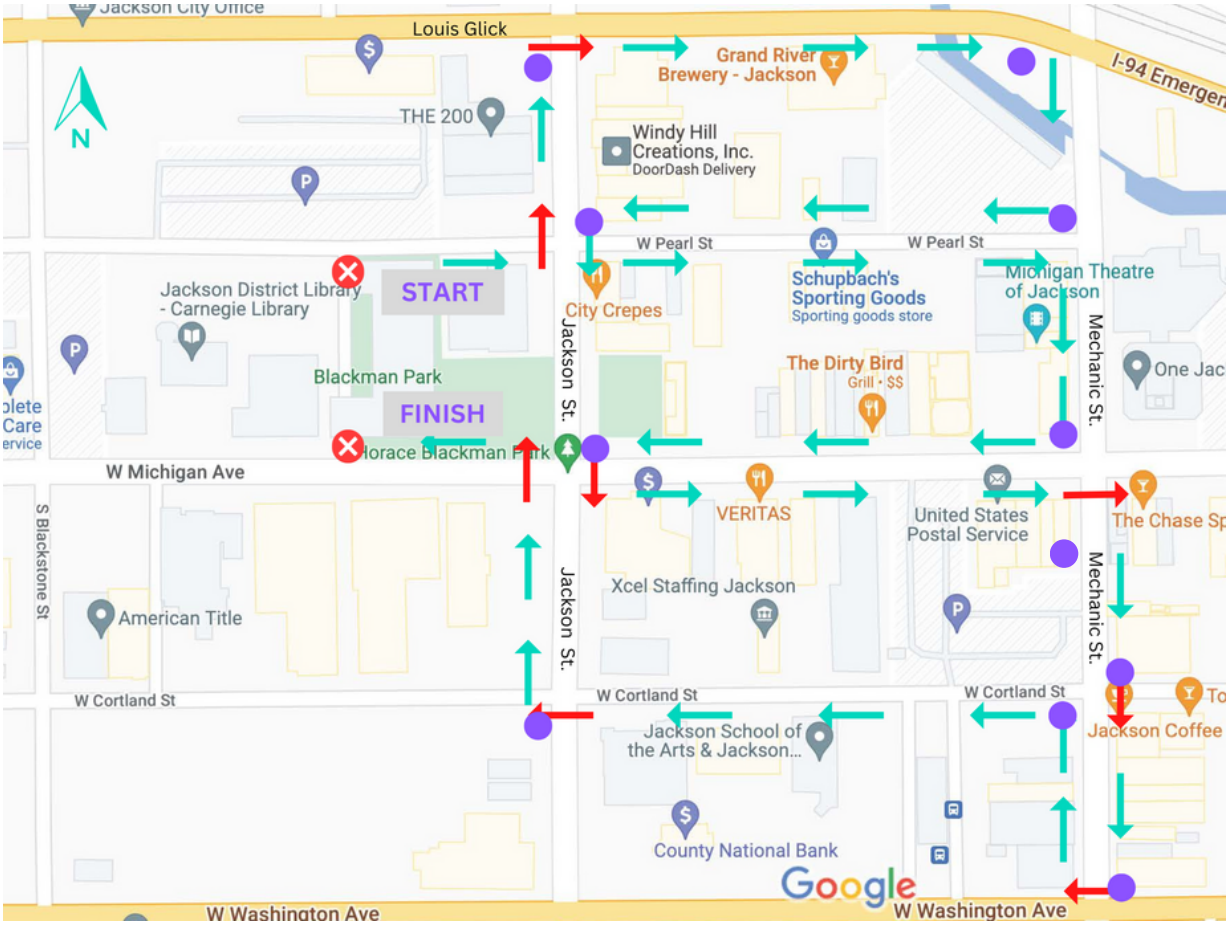
1. I am the person with authority to act on behalf of the sponsoring organization.
2. I have submitted all required documents in support of the Special Event application
3. A Special Event Application Fee is submitted along with this application.
4. Only the activities listed on the application will be permitted at the event. If additional activities are added, I will immediately contact the City of Jackson. I understand that the approval of my application may be withdrawn or additional action required.
5. All food vendors must be approved by the Jackson County Health Department and each food and other vendor must provide the City of Jackson with a Certificate of Insurance which names the City of Jackson and the Downtown Development Authority as additional insured parties on the policy.
6. Fire Department permit and approval is required for events including display fireworks. Extreme Close-Up (XCU) fireworks liability insurance is required for all fireworks display.
7. The approval of this special event may include additional requirements, limitations, or fees based on the City's review of the application.
8. If I, or my organization, fail to clean up and repair damages to the event area, my organization may be billed for City services, and that failure to clean up and repair damage will be considered for future applications.
9. As the duly authorized agent of the sponsoring organization applying for approval of the Special Event, I affirm the above understandings and agree that my sponsoring organization will comply with the terms of the written confirmation of approval and all City requirements, ordinances and other laws which apply to this Special Event.
10. By signing this Special Event Application, I declare I am 21 years of age or older.
11. If required to provide liability insurance, the sponsoring organization will add the City of Jackson and the Downtown Development Authority as additional insured parties on the sponsoring organization's liability policy.
12. On behalf of the sponsoring organization, I agree that the sponsoring organization will defend, indemnify, and hold harmless the City of Jackson, its officers, employees and agents from and against any claim, demand, suit, loss, cost or expense, or any damage, which may be asserted, claimed, or recovered against or from the City of Jackson, its officers, employees, and agent, by reason of any damage to property, bodily injury, or death, sustained by any person whomsoever, and which damage, injury, or death arises out of or is incident to or in any way connected with or related to this Special Event.
13. The City of Jackson reserves the right to waive any requirements of this policy in the interests of the health, safety, and welfare of the citizens of Jackson.

Signature: Susan Prynn

Date: 2/2/23

Office Use ONLY
Application Received: Date: Time: A&E By:
Application Fee Received:

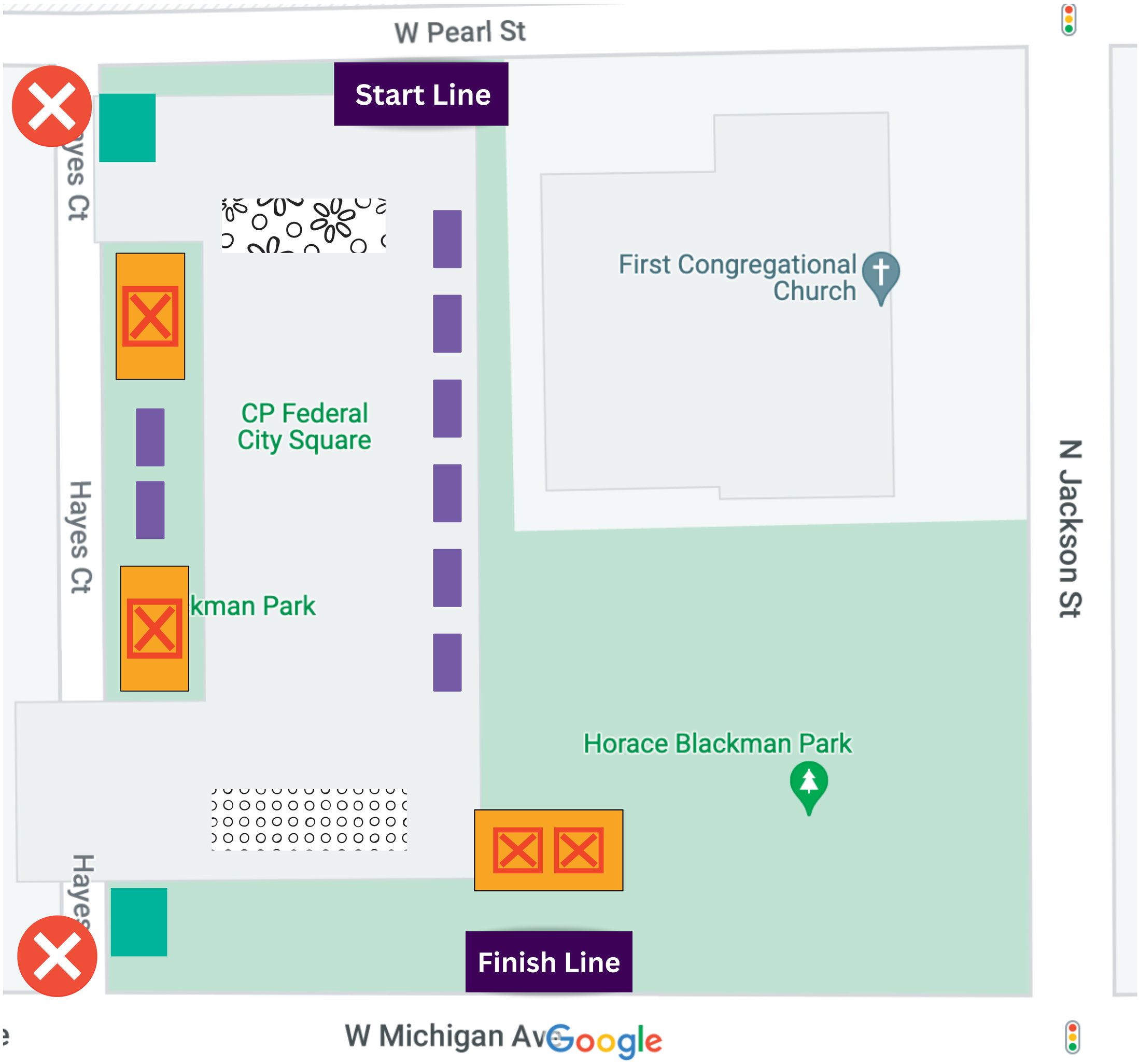
Application Requirements
Application MUST be submitted 60 days PRIOR to event *****NO EXCEPTIONS***** Application MUST be submitted along with all required attachments to: City of Jackson Downtown Development Authority Office 161 W Michigan Ave, 5th Floor Jackson Michigan, MI 49201 or cmays@cityofjackson.org (517) 768-6410
Prohibited Items *Additional fees may apply if policies are not followed*
No ground stakes No confetti or glitter No use of outlets without prior approval



Route:

- Exit to the **North** side of the Park to the **RIGHT** of the amphitheater heading east on W. Pearl St. towards Jackson St.
- Turn **LEFT** at the corner of Jackson St. and Pearl St. and **CROSS** W. Pearl St.
- Head north on Jackson St. to Louis Glick Hwy.
- Turn **RIGHT** at Louis Glick Hwy and **CROSS** Jackson St.
- Head east on Louis Glick Hwy. to Mechanic St. Turn **RIGHT** at Mechanic St. (DO NOT CROSS STREET.) Head south on Mechanic towards W. Pearl St.
- Turn **RIGHT** at W. Pearl St. (DO NOT CROSS STREET.) and head west on W. Pearl St. towards Jackson St.
- Turn **LEFT** at Jackson St. and **CROSS** W. Pearl St. Turn **LEFT** and head east on Pearl St. to Mechanic St.
- Turn **LEFT** on Mechanic St. (DO NOT CROSS STREET) Head south on Mechanic towards W. Michigan Ave.
- Turn **RIGHT** at W. Michigan Ave (DO NOT CROSS STREET). Head west on W. Michigan Ave towards Jackson Street.
- Turn **LEFT** on Jackson St. and **CROSS** W. Michigan Ave. Turn **RIGHT** and head east on W. Michigan Ave towards Mechanic St.
- **CROSS** street at Mechanic St. then turn **RIGHT** and head south on Mechanic towards Cortland St.
- **CROSS** Cortland St. and continue south towards W. Washington Ave.
- Turn **RIGHT** at W. Washington Ave. AND **CROSS** street at Mechanic St.
- Turn **RIGHT** and head north on Mechanic St. towards Cortland St.
- Turn **LEFT** at Cortland St. (DO NOT CROSS STREET) and head west on Cortland St. toward Jackson St.
- **CROSS** street at Jackson St. and turn **RIGHT** and **CROSS** Cortland St. heading north towards W. Michigan Ave.
- **CROSS** street at W. Michigan Ave. and head back to Horace Blackman Park to FINISH LINE!

→ = Walkers will cross the street.
⊗ = Need Street Blocked off
● = We will provide Route Marshalls



= Restrooms (1 - Handicapp/1-regular)

= 10 x 10 Tents

= 10 x 20 Tent

= Road blocks

= Kid Zone

= Tables wih chairs

= Promise Garden

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 4/11/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME: Sandy Crespin	
Inszone Insurance Services 1101 Perimeter Drive, Suite 500 Schaumburg IL 60173	PHONE (A/C, No, Ext): 847-719-7877	FAX (A/C, No): 847-398-7077
	E-MAIL ADDRESS: screspin@inszoneins.com	

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Philadelphia Indemnity Insurance Company	18058
INSURER B : Hartford Insurance Group	29424
INSURER C :	
INSURER D :	
INSURER E :	
INSURER F :	

INSURED ALZHE-2
Alzheimer's Disease & Related Disorders Association, Inc.
225 N. Michigan Ave Ste 1700
Chicago IL 60601

COVERAGES **CERTIFICATE NUMBER:** 1772087308 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X **COMMERCIAL GENERAL LIABILITY** [ ] CLAIMS-MADE [X] OCCUR X Sex Abuse/Molest X Soc Serv Prof GEN'L AGGREGATE LIMIT APPLIES PER: X POLICY [ ] PRO-JECT [ ] LOC [ ] OTHER:	Y	Y	PHPK2528522	3/11/2023	3/11/2024	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG 	$ 1,000,000 $ 1,000,000 $ 20,000 $ 1,000,000 $ 3,000,000 $ 3,000,000 $
A	**AUTOMOBILE LIABILITY** X ANY AUTO [ ] OWNED AUTOS ONLY [ ] SCHEDULED AUTOS X HIRED AUTOS ONLY [X] NON-OWNED AUTOS ONLY	Y	Y	PHPK2528522	3/11/2023	3/11/2024	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident) UM/UIM	$ 1,000,000 $ $ $ $ 1,000,000
A	X **UMBRELLA LIAB** [X] OCCUR **EXCESS LIAB** [ ] CLAIMS-MADE [ ] DED [X] RETENTION $ 10,000			PHUB854853	3/11/2023	3/11/2024	EACH OCCURRENCE AGGREGATE 	$ 10,000,000 $ 10,000,000 $
B	**WORKERS COMPENSATION AND EMPLOYERS' LIABILITY** Y / N ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? [ ] **(Mandatory in NH)** If yes, describe under DESCRIPTION OF OPERATIONS below	N / A	Y	83WEBU6934	3/11/2023	3/11/2024	[ ] PER STATUTE [ ] OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	 $ 1,000,000 $ 1,000,000 $ 1,000,000
A A	D&O, EPLI PROFESSIONAL LIABILITY			PHSD1782707 PHPK2528522	3/11/2023 3/11/2023	3/11/2024 3/11/2024	D&O $50/EPLI $50K RET OCC 1,000,000/AGGR	10,000,000 3,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Michigan Chapter
RE: Jackson Walk to End Alzheimer's Event held October 14, 2023 at Horace Blackman Park
Downtown Development Authority and the City of Jackson are Additional Insured for operations conducted by the insured. Subject to policy terms and conditions.
**Bounce Houses and other rebounding devices are excluded from any liability coverage on this policy.

CERTIFICATE HOLDER

City of Jackson
161 W Michigan Ave
Jackson MI 49201

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

© 1988-2015 ACORD CORPORATION. All rights reserved.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED – DESIGNATED PERSON OR ORGANIZATION

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

Name Of Additional Insured Person(s) Or Organization(s):
City of Jackson 161 W Michigan Ave Jackson, MI 49201-1315
Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

A. **Section II – Who Is An Insured** is amended to include as an additional insured the person(s) or organization(s) shown in the Schedule, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:

1. In the performance of your ongoing operations; or
2. In connection with your premises owned by or rented to you.

However:

1. The insurance afforded to such additional insured only applies to the extent permitted by law; and
2. If coverage provided to the additional insured is required by a contract or agreement, the insurance afforded to such additional insured will not be broader than that which you are required by the contract or agreement to provide for such additional insured.

B. With respect to the insurance afforded to these additional insureds, the following is added to **Section III – Limits Of Insurance:**

If coverage provided to the additional insured is required by a contract or agreement, the most we will pay on behalf of the additional insured is the amount of insurance:

1. Required by the contract or agreement; or
2. Available under the applicable Limits of Insurance shown in the Declarations;

whichever is less.

This endorsement shall not increase the applicable Limits of Insurance shown in the Declarations.

© Insurance Services Office, Inc., 2012

Hello Team,

After a lot of self-reflection and internal debate, I've made the decision to resign from the Public Arts Commission due to having so many present commitments. I've served on the commission since 2018 and have had the privilege to watch our group approve some pretty amazing projects including:

- Bright Walls - 2018, 2019, 2020, 2021, 2022
-Sand Hill Crane Sculptures
-Change of the Jackson Seal
-BLM street art downtown
-BLM street art on South Side
-Murals in Jackson of prominent people
-Nite Lite mural of Jackson's Benny Poole
-MLK installment with addition of adding another Ward 1 sculpture

Even though I will not be able to commit the time moving forward, I am excited to see what work the commission continues to approve. I hope to someday join again if time permits. Keep doing the great work!

Best wishes,
Angela Edward

CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: February 7, 2023

SUBJECT: **Changes to the Standard Lighting Contract for streetlights with Consumers Energy for the installation of two streetlights**

Recommendation:

Approve the Resolution for Changes to the Standard Lighting Contract for two streetlight installations with Consumers Energy and authorize the Mayor and City Clerk to execute the appropriate documents.

Attached is a report from Jon Dowling, City Engineer accompanied by a resolution, contract change authorization form, and plan sheet from Consumers Energy regarding the installation of two streetlights.

I recommend adoption of the resolution for the change to the Standard Lighting Contract for streetlights with Consumers Energy. Your consideration and concurrence is appreciated.

JG

T:\Street Lights\Consumers Streetlight Contract Changes\contract change Consumers CC_04-25-23 High St Bridge_cover memo.docx

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Jon H. Dowling, P.E., City Engineer

DATE: April 25, 2023

RECOMMENDATION: **Approve the Resolution for Changes to the Standard Lighting Contract for two streetlight installations with Consumers Energy and authorize the Mayor and City Clerk to execute the appropriate documents.**

SUMMARY

Consumers Energy needs to install two streetlights to replace two that were removed during the 2022 High Street bridge replacement project. Attached is an Authorization for Change in Standard Lighting Contract form, a Resolution for City Council Adoption, and additional information from Consumers.

BUDGETARY CONSIDERATIONS

There is no charge for these installations.

HISTORY, BACKGROUND and DISCUSSION

During the 2022 High Street bridge replacement project over the Grand River, two old high pressure sodium lights needed to be removed for access to the construction site. They are now to be replaced with new LED lights.

DISCUSSION OF THE ISSUE

The City of Jackson is responsible for the streetlight system within the City. The City contracts with Consumers Energy to provide streetlights on their wood utility poles within the City's neighborhoods.

POSITIONS

I request approval of the attached Resolution for Changes to the Standard Lighting Contract for two streetlight installations with Consumers Energy and authorization for the City Manager and City Clerk to execute the appropriate documents.

ATTACHMENTS

Form 547 11-2014

RESOLUTION

RESOLVED, that it is hereby deemed advisable to authorize Consumers Energy Company to make changes in the lighting service as provided in the Standard Lighting Contract between the Company and the City of JACKSON, dated 10/1/2018, in accordance with the Authorization for Change in Standard Lighting Contract dated 4/25/2023,

heretofore submitted to and considered by this ☐ commission ☒ council ☐ board; and

RESOLVED, further, that the City Clerk be and are authorized to execute such authorization for change on the behalf of the City.

STATE OF MICHIGAN
COUNTY OF JACKSON

I, Andrea Muray, clerk of the City of JACKSON do hereby certify that the foregoing resolution was duly adopted by the

☐ commission ☒ council ☐ board of said municipality, at the meeting held on 4/25/2023.

Dated:

Municipal Customer Type: City

Form 547 11-2014

AUTHORIZATION FOR CHANGE IN STANDARD LIGHTING CONTRACT(COMPANY-OWNED) FORM 547

Contract Number: 103033105687
Consumers Energy Company is authorized as of 4/25/2023 by the City of JACKSON, to make changes, as listed below, in the lighting system(s) covered by the existing Standard Lighting Contract between the Company and the City of JACKSON, dated 10/1/2018.

Lighting Type: General Unmetered Light Emitting Diode Lighting Rate GU-LED

Except for the changes in the lighting system(s) as herein authorized, all provisions of the aforesaid Standard Lighting Contract dated 10/1/2018 shall remain in full force and effect.

Notification Number(s): 1065144688

Comments: installing 2 led lights ....previously removed 2 hps lights for a bridge reconstruction project

City of JACKSON

By: _____

(Signature)

Daniel Mahoney

(Printed)

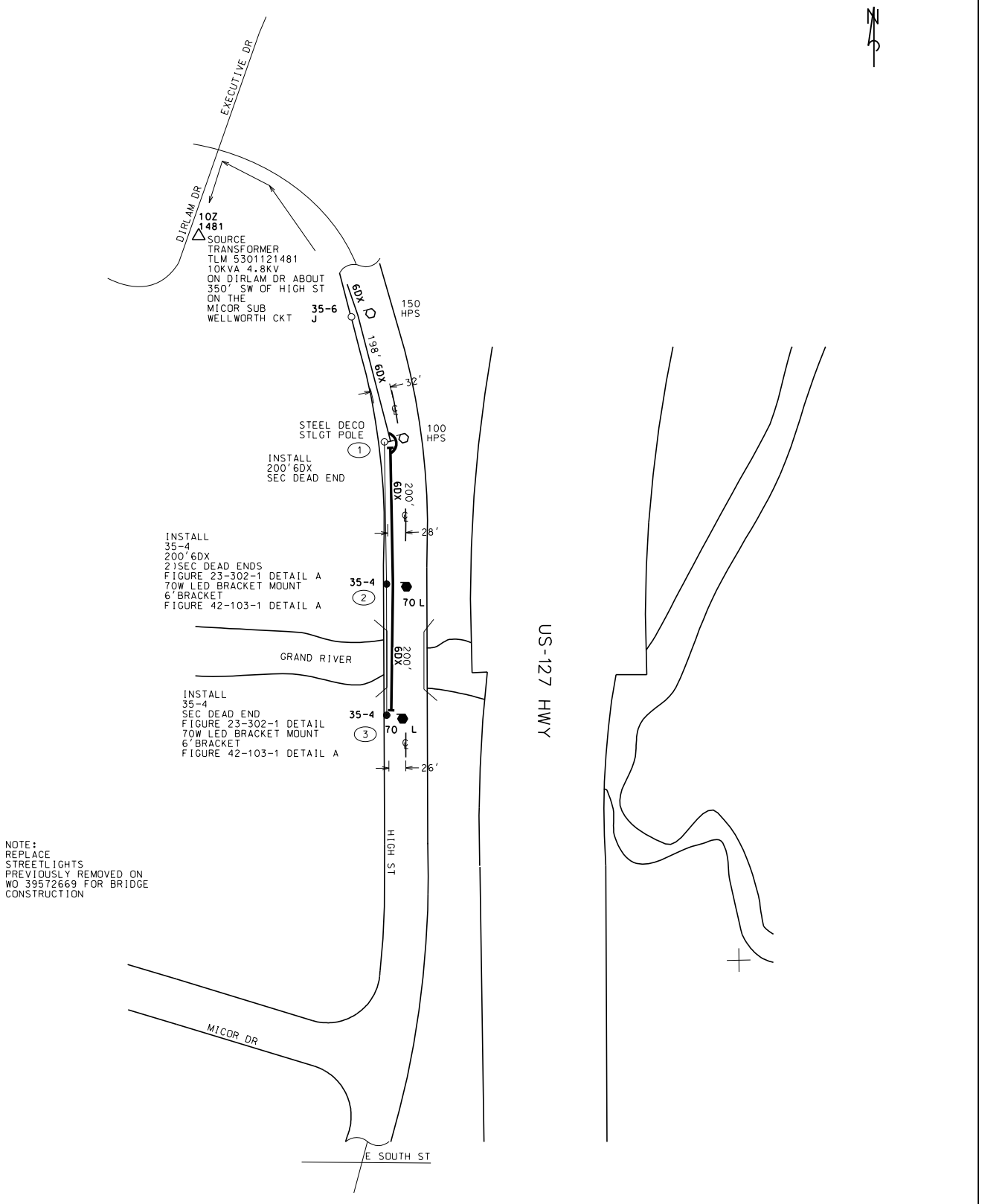
Its: Mayor

(Title)

This Agreement may be executed and delivered in counterparts, including by a facsimile or an electronic transmission thereof, each of which shall be deemed an original. Any document generated by the parties with respect to this Agreement, including this Agreement, may be imaged and stored electronically and introduced as evidence in any proceeding as if original business records. Neither party will object to the admissibility of such images as evidence in any proceeding on account of having been stored electronically.

GENERAL UNMETERED LIGHT EMITTING DIODE LIGHTING RATE GU-LED

- (2) 70 watt LED Cobrahead Cutoff to Install at location High st Bridge over the Grand River;



METER ORDER NUMBER	SUBSTATION	WD NO.
	MICOR	0992
METER NUMBER	CIRCUIT	CKT NO.
	WELLWORTH	01
READ		
METER LOCATION		

Consumers Energy — A CMS Energy Company — ELECTRIC

TLM NUMBER	# OF RODS	OHMS
53510723		

CE STAKING REQ'D [X] Yes [ ] No

FORESTRY REQ'D [ ] Yes [X] No

THDPY22 RLOC High St Bridge Streetlights

CM NO.100007102155

ORDER TYPE	MAT. TYPE	NOTIFICATION NUMBER	DESIGN NUMBER	ORDER NUMBER
ECNC	STL	1065144688	11457369	

JOB PURPOSE:
REPLACE 2 STREETLIGHTS AND POLES REMOVED DURING BRIDGE CONSTRUCTION

UPSTREAM SECTIONALIZING DEVICE:
TLM 1481 XMFR FUSE

LOCATION:
ON DIRLAM DR
350' SW OF HIGH ST

CONSUMERS ENERGY CONTACTS

DEPARTMENT	NAME	NUMBER
COORDINATOR	DAVID SOUTHWARD	517-673-1072
DESIGNER	SAME	

SHEET C | SHEET 1 OF 1 | SCALE 1"=100'

JACKSON CO — JACKSON CITY TWP | T 03S R 01E SEC. 07

ELECTRIC CAD TITLE BLOCK (2020)
04-06-2023 08:59:58 SA_BOUD_JS_PROD_Design1958952.dgn

CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Confirm Community Development Block Grant (CDBG) and HOME Investment Partnerships (HOME) Projects for Fiscal Year 2023 – 2024 and Final Funding Allocations for those Projects

---

Recommendation:

Confirm CDBG and HOME projects for Fiscal Year 2023 – 2024 and final funding allocations for those projects.

Attached is a memorandum from Shane LaPorte, Director of the Community Development Department, requesting that City Council confirm CDBG and HOME projects for Fiscal Year 2023 – 2024 and final funding allocations for those projects.

I recommend approval of the request. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Shane LaPorte, Community Development Department

DATE: April 25, 2023

RECOMMENDATION: Confirm Community Development Block Grant (CDBG) and HOME Investment Partnerships (HOME) Projects for Fiscal Year 2023 – 2024 and Final Funding Allocations for those Projects

SUMMARY

Confirm CDBG and HOME projects for Fiscal Year 2023 – 2024 and final funding allocations for those projects.

BUDGETARY CONSIDERATIONS

The U.S. Department of Housing and Urban Development (HUD) published its annual formula allocations to entitlement communities and participating jurisdictions on February 27, 2023. The actual allocations compared to the estimates used during the preliminary allocation process are as follows:

	CDBG	HOME
Estimated Grant Funds	$1,255,133	$345,730
Actual Formula Allocation	$1,276,248	$330,992
Difference:	**$ 21,115**	**-$ 14,738**

With the addition of anticipated program income with each grant source, the total amounts available for final funding allocations are as follows:

	CDBG	HOME
2023-2024 Formula Allocation	$1,276,248	$330,992
Estimated Program Income	$75,200	$20,200
2022-2023 Grant Revenue:	**$1,351,448**	**$351,192**

DISCUSSION OF THE ISSUE

Attached are spreadsheets delineating City Council's preliminary allocations, made on February 21, 2023, and staff's final requested allocations based upon final formula allocation amounts received from The U.S. Department of Housing and Urban Development (HUD). Staff reminds City Council that once it establishes preliminary allocations and the Action Plan is distributed for public comment, no activities can be added or deleted without triggering a substantial amendment. A substantial amendment requires public notification with a reasonable timeframe and opportunity to comment, which could thus result in a late submission of the Action Plan to HUD and, in turn, delay the onset of project funding.

POSITIONS

Requested action is for City Council to confirm staff's recommendation for Fiscal Year 2023 – 2024 projects and final funding levels.

Attachments: 2023 – 2024 CDBG and HOME Preliminary Allocation Spreadsheets (2)

2023-2024 Community Development Block Grant

Allocation Process

Program	Recommendations	Prelim Allocations (Feb 21, 2023)	Final Staff Recommendation	Final Allocations (April 25, 2023)
Public Service				
	$ -			
Public Service Subtotal:	**$ -**	**$ -**		**$ -**
Public Service Cap: $202,717				
Administration and Planning				
General Administration	$ 150,000.00	$ 150,000.00	$ 150,000.00	
Admin/Planning Subtotal:	**$ 150,000.00**	**$ 150,000.00**	**$ 150,000.00**	**$ -**
Admin/Planning Cap: $270,289				
Other Projects				
Community Development Dept.				
Rehabilitation	$ 250,000.00	$ 250,000.00	$ 250,000.00	
Rehabilitation Administration	$ 150,000.00	$ 150,000.00	$ 150,000.00	
Demolition	$ 200,000.00	$ 200,000.00	$ 200,000.00	
City Attorney's Office				
Code Enforcement (AHB)	$ 25,000.00	$ 25,000.00	$ 25,000.00	
DPW				
Streetscape	$ 175,000.00	$ 175,000.00	$ 175,000.00	
Parks & Rec				
Boos Center Rehab	$ 380,333.00	$ 380,333.00	$ 401,448.00	
Other Projects Subtotal:	**$ 1,180,333.00**	**$ 1,180,333.00**	**$ 1,201,448.00**	**$ -**
Total:	**$ 1,330,333.00**	**$ 1,330,333.00**	**$ 1,351,448.00**	**$ -**
Available Funding:	**$ 1,330,333.00** (Estimate)	**$ 1,347,580.00** (Estimate)	**$ 1,351,448.00** (Actual)	**$ -** (Actual)

Actual Funding: $1,276,248 CDBG + $75,200 program income = $1,351,448

2023-2024 HOME Investment Partnerships Program

Allocation Process

Projects	Recommendations	Prelim Allocations (Feb 21, 2023)	Final Staff Recommendation	Final Allocations (April 25, 2023)
Community Development Dept.				
Administration[1]	$ 36,500	$ 36,500	$ 35,100	
Community Housing Development Organization (CHDO)				
CHDO Reserve[2]	$ 329,430	$ 329,430	$ 316,092	
CHDO Operating Expenses[3]				
Total:	**$ 365,930**	**$ 365,930**	**$ 316,092**	**$ -**
Available Funding:	**$ 365,930** (Estimate)	**$ 365,930** (Estimate)	**$ 351,192** (Actual)	(Actual)

Actual Funding: $330,992 HOME + $20,200 program income = $351,192

Restrictions

[1]Administration - no more than 10% of allocation ($35,119)

[2]CHDO Reserve - no less than 15% of allocation ($52,679)

[3] CHDO Operating Expenses - no more than 5% of allocation ($17,559)

CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Funding Letters for Pension Systems

Recommendation:

Receive the actuarial valuations as of June 30, 2022 for the Act 345 Policemen's & Firemen's Retirement Plan, the Employees Retirement System and the Policemen's and Firemen's Retirement System, and approve the actuarial funding necessary for the fiscal year 2023-2024.

Attached is a report from Heather Ehnis, Finance Director, regarding funding necessary for the fiscal year 2023-2024 per the actuarial valuations for the retirement systems.

I recommend approval of the funding letters. Your consideration and concurrence is appreciated.

JG

DEPARTMENTAL REPORT

MEMO TO: Jonathan Green, City Manager

FROM: Heather Ehnis, Finance Director

DATE: April 25, 2023

RECOMMENDATION: Receive the actuarial valuations as of June 30, 2022 for the Act 345 Policemen's & Firemen's Retirement Plan, the Employees Retirement System and the Policemen's and Firemen's Retirement System, and approve the actuarial funding necessary for the fiscal year 2023-2024.

SUMMARY

Attached with this report are letters of funding from the three City retirement systems, along with the valuation reports through June 30, 2022.

BUDGETARY CONSIDERATIONS

The recommended actuarial funding amounts for the City (employer contributions) approved by the pension boards are as follows:

Act 345 Policemen's & Firemen's Retirement Plan	$5,922,297
Employees Retirement System	$1,066,460
Policemens and Firemens Retirement System	$ 274,544

HISTORY, BACKGROUND and DISCUSSION

Actuarial valuations are performed as of the end of each fiscal year to measure the pension systems' funding progress, to determine the employer contribution rate for the next fiscal year end (June 30, 2024), and to determine the actuarial information for Governmental Accounting Standards Board (GASB) Statement No. 67.

DISCUSSION OF THE ISSUE

Each year, the three City retirement systems (the Act 345 Retirement Plan, Employees Retirement System and Policemen's and Firemen's Retirement System), as required by the Act 345 of 1937 of Michigan, City of Jackson Code of Ordinances and City Charter, respectively, are required to certify to the City Council, for approval, the recommended contribution amounts to be made by the City to be paid into the funds.

POSITIONS

Requested action is to receive the actuarial reports and approve the letters of funding.

HE/sms

ATTACHMENTS

CITY OF
JACKSON
Founded 1829

Act 345 Policemen's & Firemen's Retirement Plan

161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 768-6382 • Facsimile: (877) 509-5389

April 25, 2023

The Honorable Mayor and
Members of the City Council
Jackson, Michigan

In accordance with Rule 15.1 of the City of Jackson Act 345 Retirement System, the Board of Trustees must certify to the City Council each year the amount of public funds needed to meet the requirements for annuities, benefits and other payments of the Retirement System for the ensuing fiscal year.

The adopted actuarial valuation of June 30, 2022 recommends that the 2023/24 contribution be as follows:

Employer (City) Contribution at 97.88% of payroll $5,922,297

The computed employer contribution for the fiscal year ending June 30, 2024 is $5,922,297, or 97.88% of total gross payrolls of the Police and Fire Department employees who are members of the Act 345 Retirement System. This is an increase of $247,380 from the fiscal year ending June 30, 2023 contribution amount of $5,674,911, which was 107.99% of total gross payrolls.

The return on actuarial value for the fiscal year was 5.40% compared to the assumed rate of return of 6.00%. The prior fiscal year's return on actuarial value was 11.1 % compared to the assumed rate of 6.00%

As of the valuation date, the Unfunded Actuarial Accrued Liability (UAAL) was $28,748,288, and the funded ratio (the ratio of the Actuarial Value of Assets to the Actuarial Accrued Liability) was 65.6%. At the time of last year's valuation, the UAAL was $31,931,143, and the funded ratio was 61.8%.

The City is presently levying 8.7 mills to finance the Act 345 Retirement System. The tentative millage rate required to meet the recommended City contribution for the fiscal year 2023/2024 is 8.6081 mills.

The Board of Trustees of the City of Jackson's Act 345 Retirement System hereby certifies to the City Council the amount of appropriation needed to operate said retirement system.

Sincerely,

Jason Ganzhorn
Chairman

JG/sms

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CITY OF
JACKSON
Founded 1829

Employees Retirement System

161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 768-6382 • Facsimile: (877) 509-5389

April 25, 2023

The Honorable Mayor and
Members of the City Council
Jackson, Michigan

In accordance with the Jackson City Code, Chapter 2, Section 2.534, the Board of Trustees of the City of Jackson Employees Retirement System shall annually certify to the City Council the contributions necessary to meet the requirements for annuities, benefits and other payments of the Retirement System for the ensuing fiscal year.

The adopted actuarial valuation of June 30, 2022 recommends that the 2023/24 contribution be as follows:

Employer (City) Contribution at 10.18 % of payroll $1,066,460

The computed employer contribution for the fiscal year ending June 30, 2024 is $1,066,460, or 10.18% of expected covered payroll. This is an increase of $11,026 from the fiscal year ending June 30, 2023, which had a contribution amount of $1,055,434, or 11.01% of covered payroll.

The return on actuarial value for the fiscal year was 5.2% compared to assumed rate of return of 6.85%. The prior fiscal year's return on actuarial value was 10.9% compared to assumed rate of return of 6.85%.

As of the valuation date, the Unfunded Actuarial Accrued Liability (UAAL) is $13,158,822, and the funded ratio (the ratio of the Actuarial Value of Assets to the Actuarial Accrued Liability) is 76.7%. At the time of last year's valuation, the UAAL was $13,326,416, and the funded ratio was 76.3%.

The Board of Trustees of the City of Jackson Employees Retirement System hereby certifies to the City Council the amount of appropriation needed to operate the retirement system.

Sincerely,

Jonathan Greene, Chairman
City of Jackson Employees Retirement System

JG/ss

CITY OF JACKSON
Founded 1829

Policemens & Firemens Retirement System

161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 768-6382 • Facsimile: (877) 509-5389

April 25, 2023

The Honorable Mayor and
Members of the City Council
Jackson, Michigan

In accordance with Serial Section 231, Section 19(f) of the City Charter, the Board of Trustees of the City of Jackson Policemen's & Firemen's Pension Fund must certify to the City Council each year the amount of public funds needed to meet the requirements for said Fund for the ensuing fiscal year.

The adopted actuarial valuation of June 30, 2022 recommends that the 2023/24 contribution be as follows:

Employer (City) Contribution $274,544

The computed employer contribution for the fiscal year ending June 30, 2024 is $274,544. This compares with the employer contribution for the fiscal year ending June 30, 2023 of $260,185 –an increase of $14,359.

The return on actuarial value for the fiscal year was 4.7% compared to the assumed rate of return of 6.0%. The prior fiscal year's return on actuarial value was 12.0%.

As of the valuation date, the Unfunded Actuarial Accrued Liability (UAAL) is $1,146,773 and the funded ratio (the ratio of the Actuarial Value of Assets to the Actuarial Accrued Liability) is 75.5%. At the time of last year's valuation, the UAAL was $1,596,158 and the funded ratio was 69.1%.

The Board of Trustees of the City of Jackson's Policemen's and Firemen's Pension Fund hereby certifies to the City Council the amount of $274,544 as the appropriation needed to operate said Fund in accordance with the City Charter and the State Constitution and in accordance with the computations of the actuary for the Fund.

Sincerely,

4-5-23

Jason Ganzhorn, Chairman
City of Jackson Policemen's and Firemen's Pension Fund

JG/sms 4-5-23

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City of Jackson Act 345 Policemen and Firemen Retirement System

Actuarial Valuation Report
as of June 30, 2022

Outline of Contents
Actuarial Valuation Report as of June 30, 2022

Pages	Items
- -	Cover Letter
1-5	**Executive Summary**
	Valuation Results and Comparative Information
A-1	Funding Objective and Contribution Rates
A-2	Contributions to Fund Benefits
A-3	Determining Employer Dollar Contributions
A-4	Experience Gain (Loss)
A-5	Development of Actuarial Value of Retirement System Assets
A-6	Valuation Results Comparative Schedule
A-7	Funded Ratio Projection
A-8	Projected Future Employer Contribution Schedule
A-9	Summary Statement of System Resources and Obligations
A-10	Other Observations
A-11/12	Risk Measures
	Summary of Benefit Provisions and Valuation Data
B-1/4	Summary of Act 345 Benefit Conditions
B-5/7	Retired Life Data
B-8/9	Active Members Data
B-10	Asset Information Submitted for Valuation
	Funding Objective, Summary of Valuation Process, Methods and Assumptions
C-1/2	Basic Funding Objective and Operation of the Retirement System
C-3/4	Actuarial Valuation Process
C-5/6	Actuarial Cost Method
C-7/11	Actuarial Assumptions
C-12	Miscellaneous and Technical Assumptions
C-13	Glossary

800.521.0498 | P: 248.799.9000 | www.grsconsulting.com

January 27, 2023

Board of Trustees
City of Jackson Act 345 Policemen and
Firemen Retirement System
Jackson, Michigan

Re: City of Jackson Act 345 Policemen and Firemen Retirement System
Actuarial Valuation as of June 30, 2022

Dear Board Members:

The results of the June 30, 2022 Annual Actuarial Valuation of the City of Jackson Act 345 Policemen and Firemen Retirement System are presented in this report.

This report was prepared at the request of the Board and is intended for use by the Retirement System and those designated or approved by the Board. This report may be provided to parties other than the System only in its entirety and only with the permission of the Board. GRS is not responsible for unauthorized use of this report.

The purposes of the valuation are to measure the System's funding progress and to determine the employer contribution rate for the fiscal year ending June 30, 2024 (beginning July 1, 2023). Information required by Statement Nos. 67 and 68 of the Governmental Accounting Standards Board (GASB) are provided in separate reports. This report should not be relied on for any purpose other than the purposes described herein. Determinations of financial results associated with the benefits described in this report for purposes other than those identified above may be significantly different.

The contribution amount in this report is determined using the actuarial assumptions and methods disclosed in Section C of this report. This report includes risk measures on pages A-11 and A-12 but does not include a more robust assessment of the risks of future experience not meeting the actuarial assumptions. Additional assessment of risks was outside the scope of this assignment. We encourage a review and assessment of investment and other significant risks that may have a material effect on the System's financial condition.

This valuation assumed the continuing ability of the plan sponsor to make the contributions necessary to fund this plan. A determination regarding whether or not the plan sponsor is actually able to do so is outside our scope of expertise and was not performed.

The findings in this report are based on data and other information through June 30, 2022. This valuation was based upon information furnished by the City, concerning Retirement System benefits, financial statements, plan provisions and active members, terminated members, retirees and beneficiaries. We checked for internal reasonability and year-to-year consistency, but did not audit the data. We are not responsible for the accuracy or completeness of the information provided by the City.

This report was prepared using assumptions adopted by the Board. All actuarial assumptions used in this report are reasonable for the purposes of this valuation.

This report was prepared using our proprietary valuation model and related software which, in our professional judgment, has the capability to provide results that are consistent with the purposes of the valuation and has no material limitations or known weaknesses. We performed tests to ensure that the model reasonably represents that which is intended to be modeled.

This report has been prepared by actuaries who have substantial experience valuing public employee retirement systems. To the best of our knowledge, the information contained in this report is accurate and fairly presents the actuarial position of the System as of the valuation date. All calculations have been made in conformity with generally accepted actuarial principles and practices, and with the Actuarial Standards of Practice issued by the Actuarial Standards Board.

Abra D. Hill, James R. Sparks and Derek Henning are Members of the American Academy of Actuaries (MAAA) and meet the Academy's Qualification Standards to render the actuarial opinions contained herein.

The signing actuaries are independent of the plan sponsor.

Gabriel, Roeder, Smith & Company will be pleased to review this valuation report with the Board of Trustees and to answer any questions pertaining to the valuation.

Respectfully submitted,
Gabriel, Roeder, Smith & Company

Abra D. Hill, ASA, FCA, MAAA

James R. Sparks, ASA, FCA, MAAA

Derek Henning, ASA, EA, FCA, MAAA

ADH/JRS/DH:sc

EXECUTIVE SUMMARY

Executive Summary

Valuation Date	June 30, 2021	June 30, 2022
Contribution for Fiscal Year Ending	June 30, 2023	June 30, 2024
Assumed Investment Rate of Return	6.00%	6.00%
Recommended Employer Contributions		
Annual Amount	$ 5,674,911	$ 5,922,297
Percentage of Projected Covered Payroll	107.99%	97.88%
Membership		
Number of		
Active Members	67	77
Retirees and Beneficiaries	178	178
Inactive, Non-retired Members	4	4
Total	249	259
Total Active Member Payroll	$ 4,953,225	$ 5,703,179
Total Pensions Being Paid	$ 5,505,933	$ 5,573,595
Assets		
Market Value	$58,190,807	$52,454,860
Actuarial Value	51,724,559	54,938,592
Return on Market Value	26.9%	(10.5%)
Return on Actuarial Value	11.1%	5.4%
Ratio - Actuarial Value to Market Value	88.9%	104.7%
Actuarial Information		
Normal Cost %	17.47%	16.29%
Actuarial Accrued Liability (AAL)	$83,655,702	$83,686,880
Unfunded Actuarial Accrued Liability (UAAL)	31,931,143	28,748,288
Funded Ratio	61.8%	65.6%
Amortization Period (Active UAAL as of 6/30/2015)	8 years	7 years
Amortization Period (Retired UAAL as of 6/30/2015)	4 years	3 years
Amortization Period (Future (Gains)/Losses on UAAL)	15 years	15 years

Highlights/Changes

- Experience during the year was near expectations. In aggregate, it slightly less favorable than expected:
  - Investment return for the year was -10.5% on a market value basis. The rate of return on an Actuarial Value of Assets basis was 5.4% versus 6.0% assumed, resulting in a small loss;
  - There were less primary benefit recipient deaths than assumed (2 actual vs 5 expected), resulting in a small loss;
  - There were less retirements than expected (2 actual vs 3 expected), resulting in a small gain.

- A substantial number of new hires to the System increased the total active member payroll. While the Recommended Employer Contribution from the 2023 to the 2024 fiscal year increased in dollars by 4.4%, the rate as a percentage of payroll decreased by about 10%.

The Executive Summary gives an overview of the report. It cannot be used as a substitute for a thorough reading of the full report.

Executive Summary

Actuarial Valuation

This report presents the actuarial valuation of the City of Jackson Act 345 Policemen and Firemen Retirement System prepared as of June 30, 2022. Valuations are prepared annually.

The primary purposes of the valuation report are to measure the System's liabilities, to determine the required employer contribution rate based upon the System's funding policy and to analyze changes in the System's actuarial position.

In addition, the report provides summaries of the member data, financial data, plan provisions, and actuarial assumptions and methods.

Financing Objectives

The System is supported by member contributions, employer contributions, and net earnings on the investments of the fund. The employer contribution is determined by the actuarial valuation.

The combined member and employer contributions are intended to be sufficient to pay the normal cost and to amortize the Unfunded Actuarial Accrued Liability (UAAL). The UAAL as of June 30, 2022 is financed over multiple level percent of pay closed periods of no greater than 15 years. Unfunded liabilities associated with experience deviations, benefit changes, or assumption changes in future years are to be amortized over a closed period not exceeding 15 years beginning with the valuation year in which they arise. The sources and financing of the UAAL are shown on page A-2.

Amortization Policy

In conjunction with the Funding Policy Study dated April 11, 2016, the Board approved an alternate funding policy. The newly adopted funding policy reduced the 20-year open level percent of pay amortization for the Active UAAL as of 6/30/2015 to a 15-year closed amortization period. The 12-year closed amortization period for the Retiree UAAL as of 6/30/2015 was unchanged at that time.

In conjunction with the Funding Policy Study dated March 21, 2018, the Board adopted to reduce the above amortization periods (13-years and 10-years remained as of the June 30, 2017 valuation) down one additional year to 12-year and 9-year closed amortizations respectively.

In conjunction with the Assumption Review Study dated January 18, 2019, the Board adopted to reduce the remaining 9-year closed amortization for the Retiree UAAL as of 6/30/2015 to an 8-year closed amortization (as of June 30, 2017 Actuarial Valuation, but not effective until the June 30, 2018 Actuarial Valuation). The 12-year closed amortization period for the Active UAAL as of 6/30/2015 was unchanged at that time.

As of the June 30, 2022 Actuarial Valuation, the closed amortization for the Retiree UAAL as of 6/30/2015 is now at 3 years and the amortization for the Active UAAL as of 6/30/2015 is now at 7 years. Additional (increases)/decreases in the UAAL beyond 6/30/2015 were amortized over separate 15-year closed periods beginning in the year they arose.

Future (increases)/decreases to the UAAL will be amortized separately ("new layers") over 15-year closed amortization periods. This "layered amortization" approach developed an "amortization schedule" of contribution rates which can be viewed at the bottom of page A-2. The most recent layer was created during this past 2022 Fiscal Year. This schedule may require periodic review by the Board.

Executive Summary

Contribution Requirement

The recommended employer contribution for the fiscal year ending June 30, 2024 (beginning July 1, 2023) is $5,922,297, or 97.88% of projected covered payroll. The employer contribution as a percent of pay decreased by 10.11% of pay from 107.99% of pay. However, the employer contribution as a dollar amount increased by 4.4% from the prior year's recommended employer contribution (the dollar amount is expected to increase by 3.0% if all assumptions are met). This increase above expectations can be largely attributed to the increase in total active member employment during the year. See page A-2 for a detailed breakdown of the recommended employer contribution.

This valuation assumes that the plan sponsor will be able to make future contributions on a timely basis. Failure to receive the recommended employer contributions on a timely basis could jeopardize the sustainability of the System. We did not perform an analysis of the ability of the plan sponsor to make future contributions. Such an analysis is not within the scope of our assignment or within our analytical skill set.

Assets

The Actuarial Value of Assets is a smoothed Market Value. A smoothed value is used in order to dampen some of the year-to-year fluctuations in valuation results that would occur if the Market Value were used each year. The Actuarial Value of Assets (AVA) as of June 30, 2022 was $54,938,592. The Market Value of Assets ($52,454,860) is currently lower than the Actuarial Value of Assets by $2,483,732 as of the valuation date (see page A-5). The unrecognized investment losses for the 2022 fiscal year will continue to be recognized over the next three years.

Currently, there is no limit set by the Board for how far the Actuarial Value of Assets may deviate from the Market Value of Assets. The Board may wish to implement a "corridor," which restricts the Actuarial Value of Assets to a range of the Market Value of Assets (such as +/- 20%). In the current environment, restricting the Actuarial Value of Assets to between 80% and 120% of the Market Value of Assets will not change the Actuarial Value of Assets, as it is already between 80% and 120%.

Funded Status

As of the valuation date, the Actuarial Accrued Liability (AAL) was $83,686,880 and the Actuarial Value of Assets (AVA) was $54,938,592, resulting in an Unfunded Actuarial Accrued Liability (UAAL) of $28,748,288. The funded ratio (the ratio of the Actuarial Value of Assets to the Actuarial Accrued Liability) was 65.6%. At the time of last year's valuation, the UAAL was $31,931,143, and the funded ratio was 61.8%. Currently, the Actuarial Value of Assets is 104.7% of the Market Value of Assets. On a Market Value of Assets basis, the funded ratio would have been 62.7%. See page A-6 for a historical schedule of funded ratios.

The Funded Status and Unfunded Actuarial Accrued Liability are not appropriate for assessing the sufficiency of plan assets to cover the estimated cost of settling the plan's benefit obligations. By themselves, these measures are not appropriate for assessing the need for or the amount of future employer contributions.

Executive Summary

Plan Provisions

Effective July 1, 2012, new hires enter into a hybrid defined benefit and defined contribution plan.

Effective July 1, 2016, additional plan provision changes adjusted the retirement eligibility, benefit formula, and member contribution rates of members hired prior to and after the implementation of the hybrid plan. See Section B of the report for a summary of the updated benefit provisions. Further information regarding the new labor agreements can be found in the supplemental actuarial valuation dated December 1, 2017.

The June 30, 2022 Actuarial Valuation is based upon the current labor agreements that are in effect.

Actuarial Assumptions and Methods

No changes in actuarial assumptions or methods were made for the June 30, 2022 Actuarial Valuation.

In determining costs and liabilities, actuaries use assumptions about the future, such as rates of salary increase, probabilities of retirement, termination, death and disability, and an investment return assumption. The Board of Trustees sets the actuarial assumptions and methods considering recommendations made by the plan's actuary and other advisors. Actuarial assumptions were most recently reviewed and adopted by the Board of Trustees for the June 30, 2018 Actuarial Valuation. The rationale for the economic and mortality assumptions is described in the report dated January 18, 2019.

We recommended that the Board complete a full review of all actuarial assumptions prior to the next annual Actuarial Valuation cycle. We further recommend that the Board set a policy for regular reviews of the actuarial assumptions, such as every 5 years. This period is industry standard and complies with Public Act 202.

Actuarial Experience

Net experience of the Retirement System was unfavorable during the year ending June 30, 2022, resulting in a loss of about $562,000 (0.7% of the prior year's Actuarial Accrued Liabilities). About $311,000 of the $562,000 loss is attributable to recognized investment return (on the Actuarial Value of Assets) below the assumed rate of 6.00%. The remaining $251,000 is attributable to liability losses on System experience during the year.

The investment rate of return for the fiscal year ending 2022 on a Market Value basis was -10.52%, and 5.40% on an Actuarial Value basis. The reason these figures differ is because the Actuarial Value of Assets smooths prior investment gains and losses over a four-year period.

The primary source of System experience losses during the year was a result of lower than expected retiree mortality (2 primary benefit recipient deaths vs 5 expected).

Executive Summary

Looking Ahead

Future employer contributions in the absence of actuarial gains or losses are expected to remain fairly level as a percent of payroll over the next three years (fiscal years ending 2024-2026). After three years, the computed employer contribution rate is expected to nearly halve.

Additionally, the total Normal Cost for new hires is expected to be lower than that of current active members hired prior to July 1, 2012. As new hires replace the current active population, the total contribution rate is expected to further decline. See page A-7 and A-8 for projected future contributions based upon the Board's Funding Policy.

Public Act 202

Public Act 202 (PA 202) was signed into law December 20, 2017 and requires local units of government to electronically submit Form 5572 to the Michigan Department of Treasury (DOT) on an annual basis to evaluate the funded status of the retirement pension system. The local unit of government is considered underfunded if the actuarial accrued liability of a retirement pension system is less than 60% funded, and if the annual required contribution for all of the retirement systems of the local unit of government is greater than 10% of annual general fund operating revenues. An underfunded local unit of government is required to develop and submit for approval a corrective action plan for the local unit of government.

The Michigan State Treasurer has established uniform actuarial assumptions as required by PA 202 for use with the annual Form 5572 (Retirement System Annual Report). The use of the uniform assumptions for reporting was first required for the 2020 fiscal year.

The current valuation assumptions and/or methods used by the System match or fall in the range of uniform assumptions established by the Treasurer for PA 202 reporting purposes.

SECTION A

VALUATION RESULTS AND COMPARATIVE INFORMATION

Funding Objective

The funding objective of the Retirement System is to establish and receive contributions throughout the working lifetime of the members which, when combined with investment earnings, are sufficient to provide benefits during retirement.

Contribution Rates

The Retirement System is supported by member contributions, City contributions and investment income from Retirement System assets.

Contributions which satisfy the funding objective are determined by the annual actuarial valuation and are sufficient to:

(1) Cover the actuarial present value of benefits allocated to the current year by the actuarial cost method described in Section C (the normal cost); and

(2) Finance over a period of future years the actuarial present value of benefits not covered by the actuarial value of assets and anticipated future normal costs (Unfunded Actuarial Accrued Liability).

Computed contribution rates for the fiscal year beginning July 1, 2023 are shown on page A-2.

Contributions to Fund Benefits
Expressed as Percent of Active Member Payroll
for the Fiscal Year Ending June 30

Contributions For Fiscal Year Ending June 30,	2023	2024
Normal Cost		
Age & service	14.28 %	13.23 %
Casualty	2.15	2.10
Refunds	1.04	0.96
Total	17.47	16.29
Member contributions*	8.40	7.84
Employer Normal Cost	9.07	8.45
Unfunded Actuarial Accrued Liability		
Retirants and beneficiaries (as of 6/30/2015)	56.00	50.22
Active members (as of 6/30/2015)	32.53	29.10
Experience (Gain)/Loss in Fiscal Years 2016+	(3.23)	(2.07)
Changes in Benefit Provisions	(1.98)	(1.77)
Changes in Actuarial Assumptions/Methods	15.61	13.97
Total	98.92	89.43
Recommended Employer Contribution Rate	**107.99** %	**97.88** %
Recommended Employer Contribution Dollar Amount	**$5,674,911**	**$5,922,297**

* *Computed as an average rate based upon expected average contributions for the 2022 and 2023 fiscal years, respectively. This rate is anticipated to decline as Non-Hybrid members are replaced with Hybrid members.*

Detailed Illustration of Employer Contribution for Unfunded Actuarial Accrued Liability

	Amortization Period (Yrs)		Unfunded Actuarial Accrued Liability (UAAL)		UAAL Contribution for Fiscal Year Ending June 30, 2024	
Year Established	Initial	Remaining	Initial Amount*	Amount as of Valuation Date June 30, 2022	Dollar	% of Pay
Retiree Unfunded Actuarial Accrued Liability as of 6/30/2015						
6/30/2015	12	3	$ 21,017,653	$ 10,958,542	$ 3,038,287	50.22%
Active Unfunded Actuarial Accrued Liability as of 6/30/2015						
6/30/2015	15	7	$ 16,718,160	$ 12,038,661	$ 1,760,426	29.10%
(Gain)/Loss Amortization Layers (Fiscal Years 6/30/2016 and thereafter)						
Changes from Experience						
6/30/2016	15	9	$ (46,697)	$ (41,158)	$ (4,949)	(0.08)%
6/30/2017	15	10	(160,450)	(148,539)	(16,460)	(0.27)%
6/30/2018	15	11	797,719	769,583	79,241	1.31%
6/30/2019	15	12	805,286	806,154	77,663	1.28%
6/30/2020	15	13	(89,709)	(92,644)	(8,400)	(0.14)%
6/30/2021	15	14	(3,321,864)	(3,521,176)	(301,974)	(4.99)%
6/30/2022	15	15	$562,032	$562,032	$49,603	0.82%
Changes from Benefit Provisions						
6/30/2017	15	10	$ (1,046,749)	$ (969,041)	$ (107,382)	(1.77)%
Changes from Actuarial Assumptions/Methods & Non-recurring Items						
6/30/2018	15	11	$ 6,672,309	$ 6,436,970	$ 662,790	10.95%
6/30/2019	15	12	1,889,080	1,891,117	182,185	3.01%
Total UAAL Contribution				**$ 28,690,501**	**$ 5,411,029**	**89.43%**

* *A negative UAAL initial amount represents actuarial gains or other reductions to liabilities versus expectations.*

Determining Employer Dollar Contributions

For any period of time, the percent-of-payroll contribution rate needs to be converted to dollars.

The recommended procedure when the population is stable is: (1) at the end of each payroll period, multiply the active member payroll for the period by the employer contribution percent; and (2) promptly contribute the dollar amount so determined.

The total active member payroll used for this valuation was $5,703,179. Applying the computed employer contribution rate of 97.88% to this payroll and adjusting for the time lag between the valuation date and the assumed contribution period (July 1, 2023 to June 30, 2024) produces a recommended employer contribution of $5,922,297 for the 2024 fiscal year.

In an environment when the population is projected to decline by the time contributions are made, we recommend contributing the dollar amount shown above.

Actual employer contributions made to the trust for the last completed fiscal year were $5,939,831.

For Illustrative Purposes, the Actuarial Value of Assets of $54,938,592 were allocated as shown below. Please see page A-5 for information concerning the derivation of the Actuarial Value of Assets.

	Present Valuation Assets Applied to			
Reserves for	Member Actuarial Accrued Liability	Retired Life Actuarial Liability	Contingency Reserve	Totals
Employees' Contributions	$5,022,972			$ 5,022,972
Employer Contributions		$98,074,971		98,074,971
Retired Benefit Payments		(48,159,351)		(48,159,351)
Totals	**$5,022,972**	**$49,915,620**	**none**	**$54,938,592**

Experience Gain (Loss)
June 30, 2022

	Actuarial Accrued Liability (A)	Actuarial Value of Assets (B)	Unfunded Actuarial Accrued Liability (C) = (A) - (B)
(1) Value at start of year	$83,655,702	$51,724,559	$31,931,143
(2) Normal cost	891,288	N/A	891,288
(3) Actual contributions	N/A	6,387,167	(6,387,167)
(4) Disbursements	(5,978,335)	(5,978,335)	-
(5) Interest accrual	4,866,731	3,115,739	1,750,992
(6) Expected value before changes	83,435,386	55,249,130	28,186,256
(7) Increase due to plan amendment	-	-	-
(8) Increase due to revised assumptions	-	-	-
(9) Expected value after changes	83,435,386	55,249,130	28,186,256
(10) Actual value at end of year	83,686,880	54,938,592	28,748,288
(11) Gain/(loss) *(9) - (10) for Liabilities (10) - (9) for Assets*	**$ (251,494)**	**($310,538)**	**($562,032)**

The total experience loss of $(562,032) is to be amortized over a level percent-of-pay closed 15-year period (with a negative amortization payment). See the section titled Amortization Policy on page 2 a description of the amortization policy.

Valuation Date June 30,	Total Actuarial Gain/(Loss)
2013	$ 696,000
2014	2,300,160
2015	(666,196)
2016	(46,697)
2017	(160,450)
2018	797,719
2019	805,286
2020	89,709
2021	3,321,864
2022	(562,032)

Development of Actuarial Value of Retirement System Assets

Year Ended June 30:	2021	2022	2023	2024	2025
A. Actuarial Value Beginning of Year	$47,343,222	$51,724,559			
B. Market Value End of Year	58,190,807	52,454,860			
C. Market Value Beginning of Year	46,605,620	58,190,807			
D. Non-Investment Net Cash Flow	(835,752)	$408,832			
D1. Projected Rate of Return	6.00%	6.00%			
E. Investment Income					
E1. Market Total: B – C – D	12,420,939	(6,144,779)			
E2. Amount for Immediate Recognition: D1 * (A + D / 2)	2,815,521	3,115,739			
E3. Amount for Phased-In Recognition: E1-E2	9,605,418	(9,260,518)			
F. Phased-In Recognition of Investment Income					
F1. Current Year: 0.25 x E3	2,401,355	(2,315,130)			
F2. First Prior Year	(341,049)	2,401,355	$ (2,315,130)		
F3. Second Prior Year	(55,714)	(341,049)	2,401,355	$ (2,315,130)	
F4. Third Prior Year	396,976	(55,714)	(341,048)	2,401,353	$(2,315,128)
F5. Total Recognized Investment Gain: F1 + F2 + F3 + F4	2,401,568	(310,538)	(254,823)	86,223	(2,315,128)
G. Actuarial Value End of Year: A + D + E2 + F5	51,724,559	54,938,592			
H. Difference Between Market & Actuarial Value	6,466,248	(2,483,732)			
I. Ratio of Actuarial to Market Value of Assets	88.9%	104.7%			
J. Recognized Rate of Return	11.12%	5.40%			
K. Market Rate of Return	26.89%	(10.52%)			

The Actuarial Value of Assets recognizes assumed investment income (line E2) fully each year. Differences between actual and assumed investment income (line E3) are phased-in over a four-year period. During periods when investment performance exceeds the assumed rate, Actuarial Value of Assets will tend to be less than Market Value. During periods when investment performance is less than the assumed rate, Actuarial Value of Assets will tend to be greater than market value. The Actuarial Value of Assets is intended to be unbiased with respect to market Value.

Valuation Results
Comparative Schedule

Valuation Date June 30,	Valuation Payroll	Actuarial Accrued Liability (AAL)	Actuarial Value of Assets (AVA)	Unfunded Actuarial Accrued Liability (UAAL)	Funded Ratio	Amortization Periods of UAAL: Total/ Active	Retired	(Gain)/Loss^	Computed Employer Contribution: FYE	%	Recommended	Actual
1986	$ 1,907,000	$ 13,147,141	$ 4,291,075	$ 8,856,066	32.6 %	30 yrs.			1988	33.62 %	$ 694,603	$ 701,708
1987 (a)	2,038,000	14,468,307	5,493,437	8,974,870	38.0	29			1989	33.50	739,880	739,880
1988	2,381,000	16,096,433	6,164,578	9,931,855	38.3	28			1990	33.07	853,381	853,381
1989	2,660,000	19,379,056	6,723,554	12,655,502	34.7	27			1991	36.18	1,042,702	1,042,702
1990 (b)	3,801,000	26,202,014	7,793,748	18,408,266	29.7	26			1992	38.43	1,582,581	1,582,581
1991 (a)	4,049,000	27,711,002	8,334,922	19,376,080	30.1	25			1993	39.18	1,719,200	1,719,200
1992	4,299,000	29,780,358	9,670,249	20,110,109	32.5	24			1994	39.28	1,829,821	1,829,821
1993	4,502,000	31,421,808	10,423,845	20,997,963	33.2	23			1995	40.05	1,953,923	1,953,923
1994 (a)	4,778,000	34,594,939	11,429,000	23,165,939	33.0	22			1996	40.81	2,097,978	2,097,978
1995	5,119,000	36,641,978	13,099,449	23,542,529	35.7	21			1997	40.39	2,224,513	2,224,513
1996	5,381,000	38,080,137	15,136,941	22,943,196	39.8	20			1998	39.46	2,284,381	2,284,381
1997	5,498,000	39,109,052	17,657,404	21,451,648	45.1	19			1999	38.38	2,270,386	2,270,386
1998 (a)	5,697,000	39,553,492	21,277,144	18,276,348	53.8	18			2000	33.63	2,051,490	2,051,490
1999	5,598,000	40,911,155	24,372,290	16,538,865	59.6	17			2001	32.72	1,970,575	1,970,575
2000	5,772,726	42,660,487	27,747,780	14,912,707	65.0	16			2002	30.88	1,882,139	1,882,139
2001	5,942,253	44,125,761	29,554,922	14,570,839	67.0	15			2003	29.86	1,895,548	1,895,548
2002 (a)	6,071,301	45,681,002	28,905,621	16,775,381	63.3	14			2004	33.81	2,192,507	2,192,507
2003 (a)	6,213,210	47,131,125	27,836,691	19,294,434	59.1	13			2005	37.16	2,466,634	2,466,634
2004 (a)	6,138,055	49,059,955	27,218,077	21,841,878	55.5	12			2006	41.89	2,807,991	2,327,991
2005 (a)	6,321,086	51,434,111	27,760,835	23,673,276	54.0	11			2007	44.89	3,098,776	3,098,776
2006	6,598,038	53,569,342	29,893,085	23,676,257	55.8	10			2008	45.66	3,289,972	3,289,972
2007 (a)	6,420,709	56,554,037	33,249,631	23,304,406	58.8	10	10 yrs.		2009	45.74	3,191,716	3,191,716
2008 (a)	6,655,270	59,227,859	36,002,509	23,225,350	60.8	10	9		2010	46.53	3,256,531	3,256,531
2009 (a)	6,767,459	61,904,907	35,907,494	25,997,413	58.0	15	15		2011	37.7	2,772,800	2,772,800
2010 (a)	6,235,955	62,210,658	35,632,432	26,578,226	57.3	15	15		2012	43.74	2,843,528	2,843,528
2011	4,629,536	62,431,199	33,801,498	28,629,701	54.1	15	15		2013	57.05	2,870,342	2,870,342
2012 (c)	4,548,146	65,436,998	32,257,445	33,179,553	49.3	20	15		2014	60.94	3,012,344	3,012,344
2013 (a)	4,975,503	70,374,532	33,995,966	36,378,565	48.3	20	14		2015	66.96	3,534,236	3,534,236
2014	4,998,321	70,668,317	36,656,819	34,011,498	51.9	20	13		2016	62.99	3,339,966	3,709,507
2015 (a)(d)	4,643,191	75,272,788	37,536,975	37,735,813	49.9	15	12		2017	83.20	4,098,288	4,098,288
2016	4,487,630	75,729,167	38,847,990	36,881,177	51.3	14	11	15 yrs.	2018	88.63	4,219,714	4,219,714
2017 (a)	4,688,436	74,700,336	40,355,727	34,344,609	54.0	12	9	14-15	2019	88.91	4,422,430	4,422,430
2018 (a)	4,882,939	81,919,369	41,781,894	40,137,475	51.0	11	7	13-15	2020	107.32	5,559,682	5,559,682
2019 (a)	5,185,126	85,118,886	43,866,351	41,252,535	51.5	10	6	12-15	2021	107.55	5,916,061	5,916,061
2020	5,184,829	85,820,123	47,343,222	38,476,901	55.2	9	5	11-15	2022	107.99	5,939,831	5,939,831
2021	4,953,225	83,655,702	51,724,559	31,931,143	61.8	8	4	10-15	2023	107.99	5,674,911	
2022	**5,703,179**	**83,686,880**	**54,938,592**	**28,748,288**	65.6	**7**	**3**	**9-15**	**2024**	**97.88**	**5,922,297**	

(a) After changes in benefit provisions and/or actuarial assumptions and actuarial cost methods.

(b) Includes transfers from Old Police-Fire plan through March 1991.

(c) After issuance of the June 30, 2012 valuation report, the Board requested a change in the amortization period. These results reflect the new methodology.

(d) After closure to the Active & Retired amortization policies and creation of the Gain/(Loss) Amortization schedule.

* *An additional $480,000 is held in the City's General Fund.*

^ *In valuation years 2016 and thereafter, Actuarial (Gains)/Losses on the Unfunded Actuarial Accrued Liability for System experience, benefit changes, assumption and method changes in a given year are amortized over a new level percent-of-pay closed 15-year periods.*

Funded Ratio Projection
Based Upon Current Amortization Layers and
6.0% Return on Actuarial Value of Assets

Valuation Date June 30,	Actuarial Accrued Liability (AAL)	Actuarial Value of Assets (AVA)	Unfunded Actuarial Accrued Liability (UAAL)	Funded Ratio	Remaining Amortization Periods of UAAL			During Upcoming Fiscal Year		
					Active	Retired	(Gain)/Loss	Projected Total Contributions	Projected Benefit Payments	Assumed Investment Return on AVA
2022	$ 83,629,093	$ 54,938,592	$ 28,690,501	66%	7 yrs.	3 yrs.	9-15 yrs.	$ 6,107,292	$ 5,856,176	$ 3,303,776
2023	83,573,033	58,493,484	25,079,549	70%	6	2	8-14	6,336,501	5,894,839	3,522,730
2024	83,470,414	62,457,877	21,012,538	75%	5	1	7-13	6,506,443	5,969,960	3,763,411
2025	83,292,123	66,757,771	16,534,352	80%	4	-	6-12	6,696,938	6,009,821	4,025,880
2026	83,086,075	71,470,767	11,615,308	86%	3	-	5-11	3,557,113	6,041,365	4,214,442
2027	82,843,396	73,200,957	9,642,439	88%	2	-	4-10	3,632,185	6,178,292	4,316,416
2028	82,442,370	74,971,266	7,471,104	91%	1	-	3-9	3,724,725	6,184,131	4,425,210
2029	82,024,063	76,937,071	5,086,992	94%	-	-	2-8	3,827,553	6,155,455	4,547,065
2030	81,631,097	79,156,234	2,474,863	97%	-	-	1-7	1,774,779	6,101,837	4,620,823
2031	81,297,909	79,450,000	1,847,910	98%	-	-	1-6	1,827,244	6,030,256	4,642,134
2032	81,049,198	79,889,122	1,160,076	99%	-	-	1-5	1,885,468	5,961,510	4,672,254
2033	80,885,696	80,485,333	400,362	100%	-	-	1-4	2,107,309	5,877,764	4,717,105
2034	80,830,790	81,431,983	(601,192)	101%	-	-	1-3	1,120,656	5,847,645	4,745,486
2035	80,814,532	81,450,480	(635,949)	101%	-	-	1-2	771,189	5,851,144	4,736,110
2036	80,815,372	81,106,636	(291,264)	100%	-	-	1	789,900	5,826,733	4,716,761
2037	80,859,449	80,786,563	72,886	100%	-	-	-	1,259,077	5,781,744	4,712,831
2038	80,976,728	80,976,728	-	100%	-	-	-	1,205,970	5,734,901	4,724,055

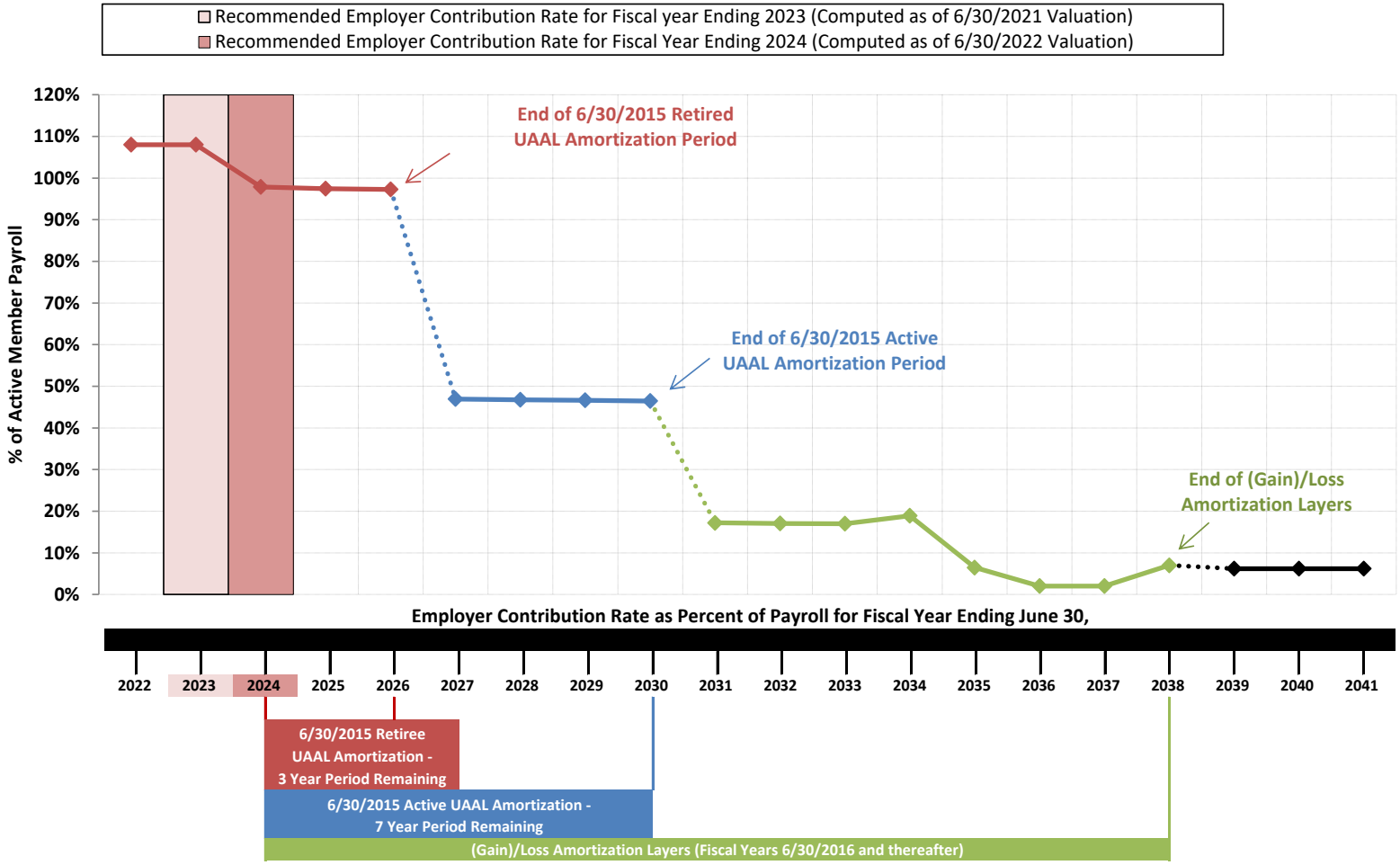
Projection Notes:

This projection is a visualization of how the System will achieve 100% funded status if all future actuarial assumptions are met. Actuarial assumptions may or may not materialize over time.

This projection should not be construed as a forecast of actual cash flows or investment returns anticipated in the future. Specifically, projected benefit payments versus actual can deviate materially as a result of members' electing annuity withdrawal benefit options upon retirement.

In the near term, Actuarial Accrued Liabilities are expected to remain about level, or even decrease, as a result of hybrid members replacing non-hybrid members in the System.

Projected Future Employer Contributions as a Percentage of Expected Active Member Payroll



NOTE: Future (Gain)/Loss UAAL Amortization schedules are excepted to be $0 if all Actuarial Assumptions are met. In reality, experience will deviate from assumptions. The (Gain)/Loss UAAL amounts are expected to float both above and below zero in any given year. These amounts are amortized over new independent 15-Year periods to smooth changes to future employer contributions as a result of System experience.

Summary Statement of System Resources and Obligations

Present Resources and Expected Future Resources

	June 30, 2021	June 30, 2022
A. Present valuation assets		
1. Net assets from the System's financial statements	$58,190,807	$52,454,860
2. Transfer from old plan	0	0
3. Market value adjustment	(6,466,248)	2,483,732
4. Actuarial Value of Assets	$51,724,559	$54,938,592
B. Actuarial present value of expected future employer contributions		
1. For normal costs	$ 4,067,998	$ 4,705,091
2. For unfunded actuarial accrued liability	31,931,143	28,748,288
3. Total	$35,999,141	$33,453,379
C. Actuarial present value of expected future member contributions	$ 3,845,103	$ 4,381,928
D. Total present and expected future resources	$91,568,803	$92,773,899

Actuarial Present Value of Expected Future Benefit Payments

A. To retirants and beneficiaries		
1. Annual pensions	$65,489,900	$65,656,309
2. Reserve	none	none
3. Total	$65,489,900	$65,656,309
B. To vested terminated members	1,630,601	1,554,499
C. To present active members		
1. Allocated to service rendered prior to valuation date - actuarial accrued liability	$16,535,201	$16,476,072
2. Allocated to service likely to be rendered after valuation date	7,913,101	9,087,019
3. Transfer from old plan	none	none
4. Total	$24,448,302	$25,563,091
D. Total actuarial present value of expected future benefit payments	$91,568,803	$92,773,899

Other Observations

General Implications of the Contribution Allocation Procedure or Funding Policy on Future Expected Contributions and Funded Status

Given the System's contribution allocation procedure, if all actuarial assumptions are met (including the assumption of the Retirement System earning 6.00%), it is expected that:

1. The employer normal cost is sufficient to cover the cost of benefits accruing each year;
2. The Unfunded Actuarial Accrued Liabilities (UAAL) will continue to be fully amortized; and
3. The funded status of the Retirement System will continue to increase gradually towards a 100% funded ratio.

Limitations of Funded Status Measurements

Unless otherwise indicated, a funded status measurement presented in this report is based upon the Actuarial Accrued Liability (AAL) and the Actuarial Value of Assets (AVA). Unless otherwise indicated, with regard to any funded status measurements presented in this report:

1. The measurement is inappropriate for assessing the sufficiency of Retirement System assets to cover the estimated cost of settling the Retirement System's benefit obligations; for example, transferring the liability to an unrelated third party in a market value type transaction.
2. The measurement is dependent upon the Actuarial Cost Method which, in combination with the Retirement System's amortization policy, affects the timing and amounts of future contributions. The amounts of future contributions will most certainly differ from those assumed in this report due to future actual experience differing from assumed experience based upon the actuarial assumptions. Even if the funded status measurement in this report was 100%, it would not be synonymous with no required future contributions. The Retirement System would still require future normal cost contributions (i.e., contributions to cover the cost of active membership accruing an additional year of service credit).
3. The measurement would produce a different result if the Market Value of Assets (MVA) were used instead of the AVA, unless the MVA is used in the measurement.

Limitations of Project Scope

Actuarial standards do not require the actuary to evaluate the ability of the plan sponsor or other contributing entities to make required contributions to the plan when due. Such an evaluation was not within the scope of this project and is not within the actuary's domain of expertise. Consequently, the actuary performed no such evaluation.

Risks to Future Employer Contribution Requirements

There are ongoing risks to future employer contribution requirements to which the Retirement System is exposed, such as:

Actual and Assumed Investment Rate of Return
Actual and Assumed Mortality Rates
Amortization Policy

Risk Measures – Risks Associated with Measuring the Accrued Liability and Actuarially Determined Contribution

The determination of the accrued liability and the actuarially determined contribution requires the use of assumptions regarding future economic and demographic experience. Risk measures, as illustrated in this report, are intended to aid in the understanding of the effects of future experience differing from the assumptions used in the course of the actuarial valuation. Risk measures may also help with illustrating the potential volatility in the accrued liability and the actuarially determined contribution that result from the differences between actual experience and the actuarial assumptions.

Future actuarial measurements may differ significantly from the current measurements presented in this report due to such factors as the following: plan experience differing from that anticipated by the economic or demographic assumptions; changes in economic or demographic assumptions due to changing conditions; increases or decreases expected as part of the natural operation of the methodology used for these measurements (such as the end of an amortization period, or additional cost or contribution requirements based on the System's funded status); and changes in plan provisions or applicable law. The scope of an actuarial valuation does not include an analysis of the potential range of such future measurements.

Examples of risk that may reasonably be anticipated to significantly affect the plan's future financial condition include:

1. **Investment Risk** – actual investment returns may differ from the expected returns;
2. **Asset/Liability Mismatch** – changes in asset values may not match changes in liabilities, thereby altering the gap between the accrued liability and assets and consequently altering the funded status and contribution requirements;
3. **Contribution Risk** – actual contributions may differ from expected future contributions. For example, actual contributions may not be made in accordance with the plan's funding policy or material changes may occur in the anticipated number of covered employees, covered payroll, or other relevant contribution base;
4. **Salary and Payroll Risk** – actual salaries and total payroll may differ from expected, resulting in actual future accrued liability and contributions differing from expected;
5. **Longevity Risk** – members may live longer or shorter than expected and receive pensions for a period of time other than assumed; and
6. **Other Demographic Risks** – members may terminate, retire or become disabled at times or with benefits other than assumed resulting in actual future accrued liability and contributions differing from expected.

The effects of certain trends in experience can generally be anticipated. For example, if the investment return since the most recent actuarial valuation is less (or more) than the assumed rate, the cost of the plan can be expected to increase (or decrease). Likewise, if longevity is improving (or worsening), increases (or decreases) in cost can be anticipated.

The computed contribution shown on page A-2 may be considered as a minimum contribution rate that complies with the Board's funding policy. The timely receipt of the actuarially determined contributions is critical to support the financial health of the plan. Users of this report should be aware that contributions made at the actuarially determined rate do not necessarily guarantee benefit security.

Risk Measures

($ in Thousands)

Actuarial Valuation Date (6/30)	(1) Actuarial Value of Assets (AVA)	(2) Actuarial Accrued Liability (AAL)	(3) Unfunded AAL (UAAL) (2) - (1)	(4) Payroll	(5) Funded Ratio (1) / (2)	(6) Retiree Liabilities (RetLiab)	(7) RetLiab / AAL (6)/(2)	(8) AAL / Payroll (2) / (4)	(9) Assets / Payroll (1) / (4)	(10) UAAL / Payroll (3) / (4)	(11) Non-Invest. Cash Flow (NICF)	(12) NICF / Assets (11)/(1)	(13) Market Rate of Return	(14) 5-year Trailing Geometric Average
2017	$ 40,356	$ 74,700	$ 34,344	$ 4,688	54.0%	$ 55,874	74.8%	1,593.4%	860.8%	732.6%	$ (1,261)	(3.1)%	14.5%	N/A
2018 *	41,782	81,919	40,137	4,883	51.0%	58,396	71.3%	1,677.6%	855.7%	822.0%	(810)	(1.9)%	10.9%	N/A
2019 *	43,866	85,119	41,253	5,185	51.5%	60,195	70.7%	1,641.6%	846.0%	795.6%	(230)	(0.5)%	5.3%	5.5%
2020	47,343	85,820	38,477	5,185	55.2%	61,222	71.3%	1,655.2%	913.1%	742.1%	210	0.4%	2.8%	5.4%
2021	51,725	83,656	31,931	4,953	61.8%	65,490	78.3%	1,689.0%	1,044.3%	644.7%	(836)	(1.6)%	26.9%	11.8%
2022	54,939	83,687	28,748	5,703	65.6%	65,656	78.5%	1,467.4%	963.3%	504.1%	409	0.7%	(10.5)%	6.4%

* *Revised actuarial assumptions or methods were made from the prior year.*

(5). The funded ratio is the most widely known measure of a plan's financial strength, but the trend in the funded ratio is much more important than the absolute ratio. The funded ratio should trend to 100%. As it approaches 100%, it is important to re-evaluate the level of investment risk in the portfolio and potentially to re-evaluate the assumed rate of return.

(6) and (7). The ratio of retiree liabilities to total accrued liabilities gives an indication of the maturity of the system. As the ratio increases, cash flow needs increase, and the liquidity needs of the portfolio change. A ratio on the order of 50% indicates a maturing system.

(8) and (9). The ratio of liabilities and assets to payroll gives an indication of both maturity and volatility. Many systems have ratios between 500% and 700%. Ratios significantly above that range may indicate difficulty in supporting the benefit level as a level % of payroll.

(10). The ratio of unfunded liability to payroll gives an indication of the plan sponsor's ability to actually pay off the unfunded liability. A ratio above approximately 300% or 400% may indicate difficulty in discharging the unfunded liability within a reasonable time frame.

(11) and (12). The ratio of Non-Investment Cash Flow to assets is an important measure of sustainability. Negative ratios are common and expected for a maturing system. In the longer term, this ratio should be on the order of approximately -3% based upon the current plan assumptions. A ratio that is significantly more negative than that for an extended period could be a leading indicator of potential exhaustion of assets.

(13) and (14). Investment return is probably the largest single risk that most systems face. The year-by-year return and the five-year geometric average both give an indication of the reasonableness of the system's assumed return. Of course, past performance is not a guarantee of future results. Market rate shown is based on actuarial estimation method and will differ modestly from figures reported by the investment consultant.

SECTION B

SUMMARY OF BENEFIT PROVISIONS AND VALUATION DATA

Brief Summary of Act 345 Benefit Conditions (June 30, 2022)

Service Retirement

Eligibility:

Police Command – in the unit as of February 28, 2016:
25 years of service

Police Command – hired on or before June 30, 2012 and promoted to unit after March 1, 2016:
25 years of service and 50 years of age

Police Command – hired after June 30, 2012 and before June 30, 2016:
28 years of service and 53 years of age

Police Command – hired on or after July 1, 2016:
30 years of service and 54 years of age.

Police Officers – hired on or before December 31, 1998:
25 years of service

Police Officers – hired between January 1, 1999 and June 30, 2012:
25 years of service and 50 years of age

Police Officers – hired between July 1, 2012 and June 30, 2016:
28 years of service and 53 years of age

Police Officers – hired on or after July 1, 2016:
30 years of service and 54 years of age

Fire Fighters – hired on or before December 31, 2003:
25 years of service

Fire Fighters – hired between January 1, 2004 and June 30, 2012:
28 years of service

Fire Fighters – hired between July 1, 2012 and June 30, 2016:
29 years of service

Fire Fighters – hired on or after July 1, 2016:
33 years of service

Amount:

Police Command – hired by the city on or before June 30, 2012:
3-year AFC (5-year AFC if entering the bargaining unit after October 10, 2016) times 2.9% for service accrued on or after July 1, 2007 and 2.5% for service accrued through June 30, 2007 for the first 25 years of service and 1.0% for service in excess of 25. 71% pension cap if promoted into the unit before February 28, 2016, 70% pension cap after. AFC is limited to only include up to 175 hours of overtime per year.

Police Command – hired by the city on or after July 1, 2012:
3-year AFC (5-year AFC if entering the bargaining unit after October 10, 2016) times 1.5% for the first 25 years of service and 1.0% for service in excess of 25 years. 50% pension cap. AFC is limited to only include up to 175 hours of overtime per year.

Police Officers – hired on or before June 30, 2012:
2.9% of 4-year (5-year if hired after January 1, 1999) AFC times first 25-years of service plus 1% of AFC times years of service in excess of 25 years. 71% pension cap if hired before December 31, 1998, 70% pension cap after.

Police officers – hired on or after July 1, 2012:
6-year AFC times 1.5% for the first 25 years of service and 1.0% for service in excess of 25 years. 60% pension cap.

Fire Fighters – hired on or before June 30, 2012:
3-year (4-year if hired after June 30, 2003) AFC times 2.9% for service accrued on or after February 1, 2009 and 2.75% for service accrued through February 1, 2009 for the first 25 years of service and 1.0% for service in excess of 25 years. 73% pension cap if hired before December 31, 2003, 75% pension cap after.

Fire Fighters – hired on or after July 1, 2012:
4-year (6 years if hired after July 1, 2016) AFC times 1.5% for the first 25 years of service and 1.0% for service in excess of 25 years. 50% pension cap.

Brief Summary of Act 345 Benefit Conditions (June 30, 2022)

Deferred Retirement

Eligibility: 10 or more years of service.

Amount: Computed as service retirement but based upon service, AFC and benefit in effect at termination. Benefit begins at date retirement would have occurred had member remained in employment.

Death after Retirement Survivor's Pension

Eligibility: Payable to a surviving spouse, if any, upon the death of a retired member who was receiving a straight life pension which was effective July 1, 1975 or later (effective July 1, 1991 or later for a disability retirant).

Amount: Spouse's pension equals 60% of the straight life pension the deceased retirant was receiving. (50% of a regular service retirement pension for the spouse of a disability retirant who dies prior to age 55.)

Non-Duty Death-in-Service Survivor's Pension

Eligibility: Payable to a surviving spouse, if any, upon the death of a member with 20 (10 for Fire Fighters) or more years of service.

Amount: Accrued straight life pension actuarially reduced in accordance with an Option I election.

Duty Death-in-Service Survivor's Pension

Eligibility: Payable upon the expiration of worker's compensation to the survivors of a member who died in the line of duty.

Amount: Same amount that was paid by worker's compensation.

Brief Summary of Act 345 Benefit Conditions (June 30, 2022)

Non-Duty Disability

Eligibility: Payable upon the total and permanent disability of a member with 5 or more years of service.

Amount: **Pre July 1, 2012 Hires:**

To age 55: 2.5% of AFC times years of service. For IAFF: 2.75% of AFC times years of service earned on or before June 30, 2009, and 2.9% of AFC times years of service earned on or after July 1, 2009.

At Age 55: Same as Service Pension.

Post July 1, 2012 Hires:

To Age 55: 1.5% of AFC times years of service for first 25 years and 1.0% of AFC times years of service in excess of 25 years.

At Age 55: Same as Service Pension.

Duty Disability

Eligibility: Payable upon the total and permanent disability of a member in the line of duty.

Amount: To age 55: 66-2/3% of AFC (33-1/3% of AFC for Hybrid Plan members and IAFF members hired post July 1, 2012).
At age 55: Same as Service Retirement.
Pension with service credit from date of disability to age 55.

Member Contributions

Amount:

Police Command – hired on or before June 30, 2012 and promoted to unit before March 1, 2016:
11.50%

Police Command – hired on or before June 30, 2012 and promoted to unit after March 1, 2016:
12.50%

Police Command – hired on or after July 1, 2012:
6.00% for defined benefit plan

Police Officers – hired on or before June 30, 2012:
12.00%

Police Officers – hired on or after July 1, 2012:
6.00% for defined benefit plan

Fire Fighters – hired on or before June 30, 2012:
13.00%

Fire Fighter – hired on or after July 1, 2012:
4.75% for defined benefit plan

Brief Summary of Act 345 Benefit Conditions (June 30, 2022)

Annuity Withdrawal

At retirement, an employee may elect to withdraw their employee contributions (with interest) and the employee's annual or monthly pension benefit shall be reduced by the actuarial equivalent of the amount withdrawn as calculated by the City's actuary, using the rate of assumed investment return for immediate annuities as determined below:

Police Command – retiring on or before December 31, 2021:
3.00%

Police Command – members of the unit as of March 1, 2016 but withdraws on or after January 1, 2022:
6.00%

Police Command – members entering the unit on or after March 1, 2016:
8.50%

Police Officers – hired on or before December 31, 1998:
2.25% on contributions made on or before December 31, 2003 and 8.00% on contributions made on or after January 1, 2004. If retiring in calendar years 2017-2021 with a full-service retirement, 2.25% will be used for all contributions.

Police Officers – hired between January 1, 1999 and June 30, 2012:
5.50% on contributions made on or before December 31, 2003 and 8.25% on contributions made on or after January 1, 2004.

Police Officers – hired between July 1, 2012 and June 30, 2016:
8.25% on all contributions

Police Officers – hired on or after July 1, 2016:
8.50% on all contributions

Fire Fighters – hired on or before December 31, 2003:
1.50% on contributions made on or before January 31, 2009 and 5.25% on contributions made thereafter.

Fire Fighters – hired between January 1, 2003 and October 1, 2016:
1.85% on contributions made on or before January 31, 2009 and 6.75% on contributions made thereafter.

Fire Fighters – hired on or after July 1, 2016:
8.00% on all contributions

Retiree and Beneficiary Comparative Schedule

Year Ended June 30	No. Trans. During Year	Added to Rolls No.	Added to Rolls Annual Pensions*	Removed from Rolls No.	Removed from Rolls Annual Pensions	Rolls End of Year No.	Rolls End of Year Annual Pensions	% Incr. in Annual Pensions	Average Pension	Discounted Value of Pensions in Payment Status Total	Discounted Value of Pensions in Payment Status Average
1998		2	$55,252	1	$ 38,556	113	$2,151,193	0.8 %	$19,037	$24,045,700	$212,794
1999	3	13	311,785	2	33,488	124	2,429,489	12.9	19,592	27,262,964	219,863
2000		3	147,992	1	16,233	126	2,561,248	5.4	20,327	28,281,473	224,456
2001		3	80,305	3	71,841	126	2,569,712	0.3	20,395	28,325,844	224,808
2002		4	124,746	1	9,347	129	2,685,111	4.5	20,815	29,398,266	227,894
2003		5	128,515	2	36,009	132	2,777,617	3.4	21,043	30,196,106	228,758
2004		5	100,650	1	11,293	136	2,866,974	3.2	21,081	30,921,701	227,365
2005		2	26,569	3	58,835	135	2,834,708	(1.1)	20,998	30,138,240	223,246
2006		1	10,994	2	36,346	134	2,809,356	(0.9)	20,965	29,461,802	219,864
2007		6	211,110	2	31,343	138	2,989,123	6.4	21,660	31,120,638	225,512
2008		5	144,654	2	49,720	141	3,084,057	3.2	21,873	31,791,641	225,473
2009		7	248,242	4	68,425	144	3,263,874	5.8	22,666	33,631,944	233,555
2010		7	247,487	3	34,389	148	3,476,972	6.5	23,493	35,719,893	241,351
2011		15 #	554,196 #	5	88,641	158	3,942,527	13.4	24,953	40,603,656	256,985
2012		6	263,910	1	18,603	163	4,187,834	6.2	25,692	42,966,261	263,597
2013		6	165,744	3	68,144	166	4,285,434	2.3	25,816	46,209,772	278,372
2014		6	143,053	8	121,272	164	4,307,215	0.5	26,264	46,115,204	281,190
2015		8	385,651	3	34,057	169	4,658,809	8.2	27,567	52,319,784	309,585
2016		5	174,283	5	80,477	169	4,752,615	2.0	28,122	52,993,123	313,569
2017		10	360,741	8	140,552	171	4,972,804	4.6	29,081	55,873,577	326,746
2018		2	97,190	1	30,949	172	5,039,045	1.3	29,297	58,396,288	339,513
2019		2	34,111	2	22,158	172	5,050,998	0.2	29,366	60,194,938	349,971
2020		5	194,187	6	98,774	171	5,146,411	1.9	30,096	61,221,569	358,021
2021		14	483,767	7	124,245	178	5,505,933	7.0	30,932	65,489,900	367,921
2022		4	130,814	4	63,152	178	5,573,595	1.2	31,312	65,656,309	368,856

** Includes pension adjustments, when applicable.*

 # Includes alternate payee of an active member, per Eligible Domestic Relations Order.

Retirees and Beneficiaries June 30, 2022
Tabulated by Type of Pension Being Paid

Type of Pensions Being Paid	No.	Annual Pensions
Age and Service Pensions		
Regular-benefit terminating at death of retirant	23	$ 686,405
Regular-automatic benefit to spouse of deceased retirant	124	4,324,065
Option I-100% of benefit to spouse of deceased retirant	1	44,526
Survivor beneficiary	22	260,365
Total age and service pensions	**170**	**$ 5,315,361**
Casualty Pensions		
Non-duty disability pension	1	$ 35,238
Duty disability pension	5	179,511
Survivor beneficiary	2	43,485
Total casualty pensions	**8**	**$ 258,234**
Total pensions being paid	**178**	**$ 5,573,595**

Retirees and Beneficiaries June 30, 2022
Tabulated by Attained Age

Attained Age	Age & Service No.	Age & Service Annual Allowances	Disability and Death-in-Service No.	Disability and Death-in-Service Annual Allowances	Totals No.	Totals Annual Allowances
45 - 49	3	$ 165,696	0	$ 0	3	$ 165,696
50 - 54	18	781,737	0	0	18	781,737
55 - 59	14	610,733	3	131,414	17	742,147
60 - 64	17	761,869	3	89,378	20	851,247
65 - 69	33	1,123,775	1	24,617	34	1,148,392
70 - 74	20	588,467	0	0	20	588,467
75 - 79	37	788,327	1	12,824	38	801,151
80	1	19,680	0	0	1	19,680
81	3	57,263	0	0	3	57,263
82	3	54,276	0	0	3	54,276
83	2	38,668	0	0	2	38,668
84	4	65,290	0	0	4	65,290
85	3	60,449	0	0	3	60,449
86	5	106,623	0	0	5	106,623
87	1	22,097	0	0	1	22,097
88	1	7,515	0	0	1	7,515
89	2	19,635	0	0	2	19,635
91	1	12,154	0	0	1	12,154
92	2	31,108	0	0	2	31,108
Totals	**170**	**$ 5,315,362**	**8**	**$ 258,233**	**178**	**$ 5,573,595**

Average Age at Retirement: 50.3 years

Average Age Now: 69.8 years

Four (4) vested terminated members are currently being valued with deferred service pensions.

Active Members in Valuation
Comparative Schedule

Valuation Date June 30	No.	No. of Transfers Incl.	Valuation Payroll	Average Pay	Average % Incr.	Average Age	Average Service
1988	76	3	$ 2,381,388	$ 31,334	10.7 %	34.9 yrs.	9.3 yrs.
1989	80	4	2,659,581	33,245	6.1	35.3	9.5
1990 #	113	18	3,800,291	33,631	-	36.5	10.8
1991	112	0	4,049,332	36,155	8.8	36.4	10.6
1992	117	10	4,298,912	36,743	1.6	35.5	9.8
1993	113	0	4,502,216	39,843	8.4	35.2	9.6
1994	113	3	4,778,047	42,284	6.1	36.3	10.7
1995	112	0	5,118,907	45,705	8.1	36.7	11
1996	119	0	5,380,560	45,215	1.1	36.1	10.6
1997	120	0	5,498,077	45,817	1.3	36.2	10.1
1998	119	0	5,697,163	47,875	4.5	36.6	10.7
1999	117	0	5,597,521	47,842	(0.1)	36.4	9.9
2000	115	0	5,772,726	50,198	4.9	37	10.2
2001	114	0	5,942,253	52,125	3.8	37.9	11
2002	115	0	6,071,301	52,794	(1.3)	37.8	10.9
2003	115	0	6,213,210	54,028	2.3	38.1	11.1
2004	110	0	6,138,055	55,801	3.3	38.9	12.2
2005	110	0	6,321,086	57,464	3.0	39.9	13.1
2006	109	0	6,598,038	60,532	5.3	41.1	14.1
2007	104	0	6,420,709	61,738	2.0	41	14.0
2008	105	0	6,655,270	63,384	2.7	40.9	14.1
2009	101	0	6,767,459	67,005	5.7	41.09	14.2
2010	94	0	6,235,955	66,340	(1.0)	41.3	14.6
2011	70	0	4,629,536	66,136	(0.3)	42.2	15.9
2012	62	0	4,548,146	73,357	10.9	42.2	15.9
2013	72	0	4,975,503	69,104	(5.8)	40.1	13.5
2014	72	0	4,998,321	69,421	0.5	40.4	13.8
2015	68	0	4,643,191	68,282	(1.6)	39.5	12.8
2016	63	0	4,487,630	71,232	4.3	39.5	13.0
2017	69	0	4,688,436	67,948	(4.6)	37.9	11.0
2018	70	0	4,882,939	69,756	2.7	37.6	10.9
2019	70	0	5,185,126	74,073	6.2	38.8	11.6
2020	66	0	5,184,829	78,558	6.1	38.6	11.6
2021	67	0	4,953,225	73,929	(5.9)	35.8	8.8
2022	77	0	5,703,179	74,067	0.2	34.2	7.9

 # Includes transfers from Old Plan through March, 1991.

Active Members June 30, 2022
Tabulated by Valuation Divisions

Valuation Divisions	No.	Annual Payroll
Non-Hybrid		
Police Command	9	$977,527
Police	5	453,396
Fire	7	697,331
Total Non-Hybrid	**21**	**2,128,254**
Hybrid		
Police Command	2	$ 168,732
Police	30	2,038,998
Fire	24	1,367,195
Total Hybrid	**56**	**3,574,925**
Total Active members	**77**	**$5,703,179**

Active Members June 30, 2022
by Attained Age and Years of Service

Attained Age	Years of Service to Valuation Date							No.	Valuation Payroll
	0-4	5-9	10-14	15-19	20-24	25-29	30 Plus		
20-24	14							14	760,138
25-29	15	1						16	956,424
30-34	6	7						13	922,312
35-39	3	6	2	1				12	937,593
40-44	1	1	4	1	3			10	897,961
45-49		2			5	1		8	829,117
50-54						1		1	92,216
55-59				1	1			2	185,572
64							1	1	121,846
Totals	**39**	**17**	**6**	**3**	**9**	**2**	**1**	**77**	**$5,703,179**

While not used in the financial computations, the following group averages are computed and shown because of their general interest.

Age:	34.2
Service:	7.9
Annual Pay:	$74,067

Asset Information
Submitted for the Valuation

Valuation Assets - Market Value		Reserves for	
Cash & equivalents	$ 1,762,476	Employees' contributions	$ 5,022,972
Receivables & accruals	6,519	Employer contributions	95,591,239
Stocks	31,507,790	Retired benefit payments	(48,159,351)
Bonds	16,826,000		
Real Estate	2,817,039		
Account payable	(464,964)		
Total Current Assets	**$ 52,454,860**	**Total Reserves**	**$52,454,860**

Revenues and Expenditures

Balance - July 1, 2021	$58,190,807
Revenues	
Employees' contributions	447,336
Employer contributions	5,939,831
Investment income	(5,971,217)
Expenditures	
Benefit payments	5,978,335
Refund of member contributions	0
Expenses	173,562
Balance - June 30, 2022	$52,454,860

These amounts do not reflect the actuarial value adjustment of $2,483,732. The derivation of this adjustment is on page A-5.

SECTION C

FUNDING OBJECTIVE, SUMMARY OF VALUATION PROCESS, METHODS AND ASSUMPTIONS

Basic Funding Objective and Operation of the Retirement System

Benefit Promises Made Which Must Be Paid For. A retirement system is an orderly means of handing out, keeping track of, and financing contingent pension promises to a group of employees. As each member of the retirement system acquires a unit of service credit the member is, in effect, handed an "IOU" which reads: "Your Act 345 Retirement System promises to pay you one unit of retirement benefits, payments in cash commencing when you retire."

The principal related financial question is: ***When shall the money required to cover the "IOU" be contributed?*** This year, when benefit of the member's service is received? Or, some future year when the "IOU" becomes a cash demand?

The Constitution of the State of Michigan is directed to the question:

> "Financial benefits arising on account of service rendered in each fiscal year shall be funded during that year and such funding shall not be used for financing unfunded accrued liabilities."

Section 9(2) of Act 345 is also directed to the question:

> "Sec. 9(2). - - - For the purpose of creating and maintaining a fund for the payment of the pensions and other benefits payable hereunder, the said city, village or municipality, subject to the provisions of this act, shall appropriate, at the end of such regular intervals as may be adopted, quarterly, semi-annually, or annually, an amount sufficient to maintain actuarially determined reserves covering pensions payable or which might be payable on account of service performed and to be performed by active members and pensions being paid retired members and beneficiaries - - ."

Translated into actuarial terminology, the constitutional and Act 345 level percent-of-payroll contribution objective means that the contribution rate must total at least:

> ***Normal Cost*** (the current value of benefits likely to be paid on account of members' service being rendered in the current year)
>
> . . . plus . . .
>
> ***Interest on Unfunded Actuarial Accrued Liability*** (unfunded actuarial accrued liability is the actuarial present value of benefits not covered by present assets and anticipated future normal costs).

If contributions to the Retirement System are less than the preceding amount, the difference, plus investment earnings not realized thereon, will have to be contributed at some later time, or benefits will have to be reduced, to satisfy the fundamental fiscal equation under which all retirement systems must operate; that is:

B = C + I - E

> **Benefit** payments to any group of members and their beneficiaries cannot exceed the sum of:
>
> **Contributions** received on behalf of the group.
>
> . . . plus . . .
>
> **Investment** earnings on contributions received and not required for immediate cash payment of benefits.
>
> . . . minus . . .
>
> **Expenses** incurred in operating the system.

A by-product of level percent-of-payroll financing is the accumulation of invested assets. Investment income becomes a major contributor to the Retirement System, and the amount is directly related to the amount of contributions and investment performance.

Computed Contribution Rate Needed to Finance Benefits. From a given schedule of benefits and from the data furnished, the contribution rate is calculated ***– by means of an actuarial valuation*** – the technique of assigning monetary values to the risks assumed in operating a retirement program.

Actuarial Valuation Process

An actuarial valuation is the process by which a balance between revenues (participant contributions, employer contributions and investment income) and obligations (benefits and expenses) is determined and its actuarial condition is measured.

The flow of activity constituting the valuation may be summarized as follows:

A. ***Covered person information about***:

- each person receiving pension payments
- each former participant with a vested pension not yet payable
- each former participant who is not vested and has not claimed a member contribution refund
- each active participant

B. + ***Financial Information*** (assets, revenues, and expenditures)

C. + ***Benefit Provisions***

D. + ***Experience Estimates*** about the volume and incidence of future activities

E. + ***Actuarial Cost Method*** for allocating costs to time periods

F. + ***Mathematically combining the person information, financial information, benefit provisions, experience estimates and actuarial cost method***

G. = Determination of:

- contribution rate for the plan year
- current funded condition

Items A, B and C are furnished by the pension office and constitute the current knowns about the System. Since the majority of activities will occur in the future, estimates must be made about these future activities (Item D).

Demographic assumptions are generally selected on the basis of the System's historical activity, modified for expected future differences. Past activity of funds which are similar in nature to the fund being valued may be utilized if fund data or activities are insufficient to be reliable.

Fiscal assumptions, on the other hand, do not lend themselves to prediction on the basis of historical activity -- the reason being that both salary increases and investment return are impacted by inflation. Inflation defies reliable prediction. Fiscal assumptions are generally selected on the basis of what would be expected to occur in an inflation-free environment and then both are increased by some provision for long-term inflation.

This is a case where two wrongs may make a right. If inflation is higher than expected it will probably result in actual rates of salary increase and investment return which exceed the assumed rates. Salaries increasing faster than expected result in unexpected costs. Investment returns exceeding the assumed rate result in unanticipated assets. To a large degree, the additional assets will offset the additional cost over the long-term.

Once items A, B, C and D are available, the actuarial valuation process begins. The first step is to determine the plan's ***total actuarial present value*** for individuals in each of the 3 covered person categories.

> ***Retired members*** now receiving monthly payments;
> ***Vested terminated members*** not yet at retirement age; and
> ***Active members***.

The actuarial present value is the value today after taking into account the probabilities of payment and the effect of time of System promises to pay benefits in the future on the basis of both services already completed and projected future service.

Actuarial Cost Method

In addition to the actuarial assumptions, the actuary also makes use of an Actuarial Cost Method to allocate costs to particular years. In common with most public-sector plans, the City of Jackson Act 345 Policemen and Firemen Retirement System uses the Entry Age Normal method. Theoretically, this method produces a level pattern of funding over time, (as a percentage of member payroll) and thereby provides equity between various generations of tax payers. We continue to believe this method is appropriate for the City of Jackson Act 345 Policemen and Firemen Retirement System.

The total actuarial present value is allocated between projected future service and completed service by the actuarial cost method (Item E) – the ***individual entry-age*** method is being utilized for this valuation. The portion of the total actuarial present value allocated to projected future service is the ***actuarial present value of future normal cost*** -- normal cost being the series of annual costs, from entry age to retirement age, which will accumulate to the actuarial present value of the individual's benefit at the time of retirement or death. The remainder of the total actuarial present value is the ***actuarial accrued liability***.

At this stage determination has been made of:

1. The total actuarial present value;
2. The actuarial present value of future normal cost; and
3. The actuarial accrued liability.

In the typical plan, the actuarial accrued liability may not be covered by the plan's Actuarial Value of Assets – leaving an ***unfunded actuarial accrued liability*** (see page C-6 for further discussion on unfunded actuarial accrued liability).

The Actuarial Value of Assets used for funding purposes is derived as follows: prior year Actuarial Value of Assets are increased by contribution and expected investment income and reduced by refunds and benefit payments. To this amount is added 25% of the difference between expected and actual investment income for each of the previous four years.

The next step in the valuation process is a determination of the contribution rate (Item G) required to support fund benefits in accordance with the funding objective (page A-1).

The contribution rate is determined in two basic components:

1. The normal cost component; and
2. The component which will finance (pay-off) the unfunded actuarial accrued liability over the period indicated on page A-2.

The Unfunded Actuarial Accrued Liability (UAAL) was determined using the Actuarial Value of Assets and Actuarial Accrued Liability calculated as of the valuation date. The UAAL amortization payment (one component of the contribution requirement) is the level percent of pay required to fully amortize the UAAL. The UAAL attributed to active members effective June 30, 2015 was amortized over a 15-year closed period and the UAAL attributed to current retirees and beneficiaries was amortized over a 12-year closed period effective June 30, 2015. As of June 30, 2022, these amortization periods are at 7 and 3 years respectively.

Gains or losses to the UAAL that have occurred after June 30, 2015 and the current valuation date are amortized over 15-year closed periods. This UAAL payment reflects any payments expected to be made between the valuation date and the date contributions determined by this report are scheduled to begin. In future years, new gains and losses (experience along with other changes such as assumptions or benefit provisions) will be amortized separately ("new layers") as they occur (over 15-year closed amortization periods). This will create an "amortization schedule" of contribution rates. This schedule will require periodic review by the Board.

Actuarial Assumptions Used for the Valuation

Funding objective contribution requirements and actuarial present values are calculated by applying estimates of future System activities (actuarial assumptions) to the benefit provisions and people information of the fund, using the actuarial cost method described on page C-5.

The principal areas of activity which require estimates are:

(i) rates of inflation impacting assets of the System and active member pays

(ii) long-term rates of investment return to be generated by the assets of the fund

(iii) rates of salary increases to members

(iv) rates of mortality among members, retirants and beneficiaries

(v) rates of withdrawal of active members

(vi) rates of retirement due to age and service

(vii) rates of disability among members

In a valuation, the monetary effect of each activity is calculated for as long as a present covered person survives – a period of time which can be as long as a century.

Actual activities of the Retirement System will not coincide exactly with estimated activities due to the nature of the activities. Each valuation provides a complete recalculation of estimated future activities and takes into account the effect of differences between estimated and actual activities to date. The result is a continual series of adjustments (usually small) to the computed contribution rate.

From time-to-time, one or more of the estimates are modified to reflect experience trends (but not random or temporary year-to-year fluctuations).

The Board of Trustees sets the assumptions. Actuarial assumptions were most recently reviewed and adopted by the Board of Trustees for the June 30, 2018 Actuarial Valuation. The rationale for the economic and mortality assumptions is described in the report dated January 18, 2019. We recommend that the Board set a policy for regular reviews of the actuarial assumptions such as every five years.

All actuarial assumptions are expectations of future experience, not market measures.

The rate of net investment return used was 6.00% a year, compounded annually net of expenses. The assumed rate of price inflation is 2.25% per year resulting in a real rate of return of 3.75% per year. These rates were first used in the June 30, 2018 Actuarial Valuation. The assumed rate of wage inflation and payroll growth is 3.0% per year. This is the same payroll growth assumption used to amortize unfunded actuarial accrued liability.

This assumption was used to discount the value of future payments due at different points in time. Approximate investment returns, for the purpose of comparisons with assumed returns, have been as follows:

	Year Ended June 30					5-Year
	2022	2021	2020	2019	2018	Average*
Nominal rate	(10.5%)	26.9%	2.8%	5.3%	10.9%	6.4 %
Inflation rate	9.1%	5.4%	0.6%	1.6%	2.9%	3.9 %
Real rate	(19.6%)	21.5%	2.2%	3.7%	8.0%	2.3 %

* *Compound average annual rate of increase.*

The nominal rate of return (i.e., Market Value of Assets Rate of Investment Return) was computed using the approximate formula i = I divided by 1/2 (A + B - I), where I is actual realized investment income net of expenses plus market value adjustments, A is the beginning of year market asset value, and B is the end of year market asset value.

These rates of return should not be used for measurement of an investment advisor's performance or for comparisons with other pension funds – to do so will mislead.

The rates of salary increase used are in accordance with the following graded table.

The merit and longevity assumption was first used for the June 30, 2018 valuation. Beginning with the June 30, 2013 valuation, a 3.00% assumption was used in recognition of wage inflation. This, combined with a graded allowance for promotion and longevity, is used to project current salaries to those upon which pension amounts will be based.

Years of Service	Annual Rate of Pay Increase		
	Base (Economic)	Merit & Longevity	Total
0 to 1	3.00 %	9.00 %	12.00 %
1 to 2	3.00	8.00	11.00
2 to 3	3.00	7.00	10.00
3 to 4	3.00	6.00	9.00
4 to 5	3.00	5.00	8.00
5 to 6	3.00	4.00	7.00
6 to 7	3.00	3.00	6.00
7 to 8	3.00	2.00	5.00
8 to 9	3.00	1.00	4.00
9 to 10	3.00	0.00	3.00
10+	3.00	0.00	3.00

Actual valuation payroll has increased at the following rate:

	Year Ended June 30					5-Year
	2022	2021	2020	2019	2018	Average*
Total payroll	15.1 %	(4.5) %	0.0 %	6.2 %	4.1 %	4.2 %
Average pay	0.2	(5.9)	6.1	6.2	2.7	1.9

* *Compound average annual rate of increase.*

The mortality table used was the RP-2014 Healthy Annuitant Mortality Table adjusted for mortality improvements using projection scale MP-2018 on a fully generational basis. This mortality basis was first used for the June 30, 2019 valuation. Sample values follow:

Sample Attained Ages in 2022	Probability of Dying Next Year		Future Life Expectancy (Years)	
	Male	Female	Male	Female
50	0.41%	0.27%	34.48	37.10
55	0.57	0.38	29.76	32.18
60	0.81	0.58	25.21	27.42
65	1.18	0.86	20.89	22.89
70	1.73	1.29	16.83	18.58
75	2.71	2.09	13.08	14.55
80	4.53	3.58	9.72	10.91
Ref:	2135 x 1.00	2136 x 1.00		

This assumption is used to measure the probabilities of each benefit payment being made after service retirement.

The RP-2014 Disabled Annuitant Mortality Table adjusted for mortality improvements using projection scale MP-2018 on a fully generational basis is used to measure the probabilities of each benefit payment being made after disability retirement.

The RP-2014 Employees Mortality Table adjusted for mortality improvements using projection scale MP-2018 from 2006 on a fully generational basis is used to measure the probabilities of members dying before retirement.

The weighting of duty and ordinary deaths-in-service is 50%/50%.

The Annuity Withdrawal Provision is explicitly modeled in the valuation for active members. The rate of assumed investment return to determine reduced monthly pension benefit are as follows:

Police Command Hired before 1997:	3.00%
Police Patrol Hired before 1997:	3.00%
Fire Hired before 2004:	3.00%
Police Command Hired on or after 1997:	6.00%
Police Patrol Hired on or after 1997:	6.00%
Fire Hired on or after 2004:	6.00%

An assumed investment rate of return for calculating the reduction in benefit due to annuity withdrawal of 6.00% is actuarially cost neutral to the System. In reality, if the member's effective rate is greater than 6.00%, the System will experience an actuarial liability gain in the event the member elects the annuity withdrawal option.

The rates of retirement used to measure the probability of eligible members retiring during the next year were as follows:

Years of Service	Percents of Active Members Retiring within Next Year
25	50 %
26	50
27	50
28	50
29	50
30+	100

Sample Ages	Percents of Active Members Retiring within Next Year
45	50 %
46	50
47	50
48	50
49	50
50	50
51	50
52	50
53	50
54	50
55	50
56	50
57	50
58	50
59	50
60+	100

100% of members are assumed to retire at age 60 with 10 years of service.

These rates were first used for the June 30, 2018 valuation.

Rates of separation from active membership are shown below (rates do not apply to members eligible to retire and do not include separation on account of death or disability). This assumption measures the probabilities of members remaining in employment. These rates were first used for the June 30, 2018 valuation.

Sample Ages	Years of Service	% of Active Members Separating within Next Year
ALL	0	16.00 %
	1	14.00
	2	12.00
	3	10.00
	4	8.00
	5	6.00
	6	5.00
	7	4.00
	8	3.00
	9	2.00
	10+	0.40

The interest rate currently being credited on refunds of accumulated contributions paid to terminating members was assumed to be 2% per annum.

Rates of disability were weighted 50% duty and 50% ordinary disability and are shown as follows:

Sample Ages	% of Active Members Becoming Disabled within Next Year
20	0.15 %
25	0.18
30	0.20
35	0.29
40	0.42
45	0.65
50	1.05
55	1.84
60	3.06

Miscellaneous and Technical Assumptions

Marriage Assumption	90% of all members are assumed to be married for purposes of death-in-service benefits and 80% for deaths after retirement.
Pay Increase Timing	Beginning of (Fiscal) year. This is equivalent to assuming that reported pays represent amounts paid to members during the year ended on the valuation date.
Decrement Timing	Decrements of all types are assumed to occur mid-year.
Eligibility Testing	Eligibility for benefits is determined based upon the age nearest birthday and service nearest whole year on the date the decrement is assumed to occur.
Benefit Service	Exact fractional service is used to determine the amount of benefit payable.
Decrement Relativity	Decrement rates are used directly from the experience study, without adjustment for multiple decrement table effects.
Decrement Operation	Disability and mortality decrements do not operate during the first 5 years of service. Disability and withdrawal do not operate during retirement eligibility.
Normal Form of Benefit	The assumed normal form of benefit is the 60% joint and survivor for married members and straight life for non-married members.
Liability Adjustments	None.
Incidence of Contributions	Contributions are assumed to be received continuously throughout the year based upon the computed percent-of-payroll shown in this report, and the actual payroll payable at the time contributions are made. New entrant normal cost contributions are applied to the funding of new entrant benefits.
Option Factors	Option factors are based upon 6.50% interest and the RP-2000 Combined Healthy Annuitant Mortality Table Projected to 2017 with Scale BB and 100% Unisex.
Data Adjustments	Accumulated member contributions are not reported for the annual valuation, but only the member contributions made during the prior year. Accumulated member contribution balances are estimated by applying interest (2% assumed) on the balance from the prior year and adding the member contributions reported for the valuation.

Glossary

Accrued Service – The service credited under the plan which was rendered before the date of the actuarial valuation.

Actuarial Accrued Liability – The difference between (i) the actuarial present value of future plan benefits, and (ii) the actuarial present value of future normal cost. Sometimes referred to as "accrued liability" or "past service liability."

Actuarial Assumptions – Estimates of future plan experience with respect to rates of mortality, disability, turnover, retirement, rate or rates of investment income and salary increases. Decrement assumptions (rates of mortality, disability, turnover and retirement) are generally based on past experience, often modified for projected changes in conditions. Economic assumptions (salary increases and investment income) consist of an underlying rate in an inflation-free environment plus a provision for a long-term average rate of inflation.

Actuarial Cost Method – A mathematical budgeting procedure for allocating the dollar amount of the "actuarial present value of future plan benefits" between the actuarial present value of future normal cost and the actuarial accrued liability. Sometimes referred to as the "actuarial funding method."

Actuarial Equivalent – A single amount or series of amounts of equal value to another single amount or series of amounts, computed on the basis of the rate(s) of interest and mortality tables used by the plan.

Actuarial Present Value – The amount of funds presently required to provide a payment or series of payments in the future. It is determined by discounting the future payments at a predetermined rate of interest, taking into account the probability of payment.

Amortization – Paying off an interest-bearing liability by means of periodic payments of interest and principal, as opposed to paying it off with a lump sum payment.

Experience Gain (Loss) – A measure of the difference between actual experience and that expected based upon a set of actuarial assumptions during the period between two actuarial valuation dates, in accordance with the actuarial cost method being used.

Normal Cost – The annual cost assigned, under the actuarial funding method, to current and subsequent plan years. Sometimes referred to as "current service cost." Any payment toward the unfunded actuarial accrued liability is not part of the normal cost.

Reserve Account – An account used to indicate that funds have been set aside for a specific purpose and are not generally available for other uses.

Unfunded Actuarial Accrued Liability – The difference between the actuarial accrued liability and actuarial value of assets. Sometimes referred to as "unfunded accrued liability."

Actuarial Value of Assets – The value of current plan assets recognized for valuation purposes.

City of Jackson
Employees Retirement System
Actuarial Valuation Report
as of June 30, 2022



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Report of June 30, 2022 Actuarial Valuation

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January 27, 2023

Board of Trustees
City of Jackson Employees Retirement System
Jackson, Michigan

Re: City of Jackson Employees Retirement System Actuarial Valuation as of June 30, 2022 Actuarial Disclosures

Dear Board Members:

The results of the June 30, 2022 Annual Actuarial Valuation of the City of Jackson Employees Retirement System are presented in this report.

This report was prepared at the request of the Board and is intended for use by the Retirement System and those designated or approved by the Board. This report may be provided to parties other than the System only in its entirety and only with the permission of the Board. GRS is not responsible for unauthorized use of this report.

The purposes of the valuation are to measure the System's funding progress and to determine the employer contribution rate for the fiscal year ending June 30, 2024 (beginning July 1, 2023). Information required by Statement Nos. 67 and 68 of the Governmental Accounting Standards Board (GASB) are provided in separate reports. This report should not be relied on for any purpose other than the purposes described herein. Determinations of financial results, associated with the benefits described in this report, for purposes other than those identified above may be significantly different.

The contribution amount in this report is determined using the actuarial assumptions and methods disclosed in Section C of this report. This report includes risk metrics on pages A-12 and A-13 but does not include a more robust assessment of the risks of future experience not meeting the actuarial assumptions. Additional assessment of risks was outside the scope of this assignment. We encourage a review and assessment of investment and other significant risks that may have a material effect on the System's financial condition.

This valuation assumed the continuing ability of the plan sponsor to make the contributions necessary to fund this plan. A determination regarding whether or not the plan sponsor is actually able to do so is outside our scope of expertise and was not performed.

The findings in this report are based on data and other information through June 30, 2022. This valuation was based upon information furnished by the City, concerning Retirement System benefits, financial transactions, plan provisions and active members, terminated members, retirees and beneficiaries. We checked for internal reasonability and year-to-year consistency, but did not audit the data. We are not responsible for the accuracy or completeness of the information provided by the City.

This report was prepared using assumptions adopted by the Board. All actuarial assumptions used in this report are reasonable for the purposes of this valuation.

This report was prepared using our proprietary valuation model and related software which, in our professional judgment, has the capability to provide results that are consistent with the purposes of the valuation and has no material limitations or known weaknesses. We performed tests to ensure that the model reasonably represents that which is intended to be modeled.

This report has been prepared by actuaries who have substantial experience valuing public employee retirement systems. To the best of our knowledge, the information contained in this report is accurate and fairly presents the actuarial position of the City of Jackson Employees Retirement System as of the valuation date. All calculations have been made in conformity with generally accepted actuarial principles and practices and with the Actuarial Standards of Practice issued by the Actuarial Standards Board.

Abra D. Hill, Derek Henning and James R. Sparks are Members of the American Academy of Actuaries (MAAA). These actuaries meet the Academy's Qualification Standards to render the actuarial opinions contained herein.

The signing actuaries are independent of the plan sponsor.

Gabriel, Roeder, Smith & Company will be pleased to review this valuation and report with the Board of Trustees and to answer any questions pertaining to the valuation.

Respectfully submitted,
Gabriel, Roeder, Smith & Company



Abra D. Hill, ASA, FCA, MAAA



Derek Henning, ASA, EA, MAAA



James R. Sparks, ASA, FCA, MAAA

ADH/DH/JRS:sc

EXECUTIVE SUMMARY

Executive Summary

Valuation Date	June 30, 2021	June 30, 2022
Contribution for Fiscal Year Ending	June 30, 2023	June 30, 2024
Recommended Employer Contributions:		
Percentage of Projected Covered Payroll	11.01%	10.18%
Estimated Annual Amount	$ 1,055,434	$ 1,066,460
Membership		
Number of		
Active Members	154	161
Retirees and Beneficiaries	192	187
Inactive, Non-Retired Members	22	23
Total	368	371
Total Active Member Payroll	$ 9,035,853	$ 9,876,429
Total Pensions Being Paid	$ 3,625,122	$ 3,589,013
Assets		
Market Value	$47,877,576	$40,503,270
Actuarial Value	42,827,484	43,306,900
Return on Market Value	27.9%	-12.0%
Return on Actuarial Value	10.9%	5.2%
Ratio - Actuarial Value to Market Value	89.5%	106.9%
Actuarial Information		
Normal Cost %	9.35%	8.95%
Actuarial Accrued Liability (AAL)	$56,153,900	$56,465,722
Unfunded Actuarial Accrued Liability (UAAL)	13,326,416	13,158,822
Funded Ratio	76.3%	76.7%
Amortization Period (DROP UAAL as of 6/30/2007)	1 years	N/A
Amortization Period (Non-DROP UAAL as of 6/30/2016)	25 years	24 years
Amortization Period (Gain/(Loss) on UAAL)	30 years	30 years

Unfunded Actuarial Accrued Liability was financed as level percents of member payroll. Please refer to page A-3 for a schedule of financing periods.

Highlights/Changes

- The Recommended Employer Contribution declined (as a percent of pay) for the 2024 fiscal year as a result of the DROP UAAL as of 6/30/2007 amortization layer being fully amortized.
- Effective for the 2024 fiscal year, employee contribution rates are based upon fixed percentages, as adopted by the Board. On average, this lowered the employees' contribution requirements in the near term, placing upward pressure on the Recommended Employer Contribution.
- Experience during the year was slightly unfavorable in the aggregate, placing upward pressure on the Recommended Employer Contribution.

The Executive Summary gives an overview of the entire report. It cannot be used as a substitute for a thorough reading of the full report.

Executive Summary

Actuarial Valuation

This report presents the actuarial valuation of the City of Jackson Employees Retirement System prepared as of June 30, 2022. Valuations are prepared annually.

The primary purposes of this valuation report are to measure the System's liabilities, to determine the required employer contribution rate based upon the System's funding policy and to analyze changes in the System's actuarial position.

In addition, this report provides summaries of the member data, financial data, plan provisions, and actuarial assumptions and methods.

Financing Objectives

The System is supported by member contributions, employer contributions, and net earnings on the investments of the fund. The total contribution is determined by the actuarial valuation. Effective July 1, 2023 the member contribution rates were set to fixed rates, as approved by the Board of Trustees at the November Board Meeting. The employer contribution is the remainder of the total computed contribution. Previously (and until June 30, 2023), the member contribution rate was set at one-half of the total computed contribution less amounts for the DROP which are contributed by the City (not to exceed the respective benefit tier's normal cost rate).

The combined member and employer contributions are intended to be sufficient to pay the normal cost and to amortize the Unfunded Actuarial Accrued Liability (UAAL). The UAAL as of June 30, 2022 is financed over multiple level percent of pay closed periods of no greater than 30 years (a method commonly referred to as layered amortization). Unfunded liabilities associated with experience deviations, benefit changes, or assumption changes in future years are to be amortized over a closed period not exceeding 30 years beginning with the valuation year in which they arise. The sources and financing of the UAAL are shown on page A-3.

Amortization Policy

For the June 30, 2016 valuation, the Board adopted an Amortization Policy to finance the Unfunded Actuarial Accrued Liability (UAAL). The cost of the DROP was amortized over a closed 15-year period (which is fully amortized as of June 30, 2023). The Non-DROP UAAL as of the June 30, 2016 valuation is financed over a closed period of 30 years starting with the contribution for the fiscal year ending June 30, 2018 (with 24 years remaining as of the contribution for the 2024 fiscal year). Unfunded liabilities associated with experience deviations, benefit changes, or assumption changes are to be amortized over a closed period not exceeding 30 years beginning with the valuation year in which they arise. The sources and financing of the UAAL are shown on page A-3. The most recent layers were created during this past 2022 Fiscal Year.

The single equivalent level-percent of payroll amortization period based upon the computed UAAL Contribution rate shown on page A-3 would be about 25 years. This schedule should be periodically reviewed by the Board.

Executive Summary

Contribution Requirement

The computed employer contribution for the fiscal year ending June 30, 2024 is 10.18% of covered payroll ($1,066,460 estimated in dollars). This compares with an employer contribution for the fiscal year ending June 30, 2023 of 11.01% of covered payroll ($1,055,434 estimated in dollars).

This valuation assumes that the plan sponsor will be able to make future contributions on a timely basis. Failure to receive the recommended employer contributions on a timely basis could jeopardize the sustainability of the System. We did not perform an analysis of the ability of the plan sponsor to make future contributions. Such an analysis is not within the scope of our assignment or within our analytical skill set.

Assets

The Actuarial Value of Assets is a smoothed Market Value. A smoothed value is used in order to dampen some of the year-to-year fluctuations in valuation results that would occur if the Market Value were used each year. The Actuarial Value of Assets (AVA) as of June 30, 2022 was $43,306,900. The Market Value of Assets ($40,503,270) is currently lower than the Actuarial Value of Assets by $2,803,630 as of the valuation date (see page A-5). The unrecognized investment losses for the 2022 fiscal year will continue to be recognized over the next three years.

The investment return rate for the plan year ending June 30, 2022 on a Market Value basis was -12.03%, while it was 5.23% on an Actuarial Value basis. These figures differ because of the asset valuation procedure described above.

Funded Status

As of the valuation date, the Actuarial Accrued Liability (AAL) was $56,465,722 and the Actuarial Value of Assets (AVA) was $43,306,900, resulting in an Unfunded Actuarial Accrued Liability (UAAL) of $13,158,822. The funded ratio (the ratio of the Actuarial Value of Assets to the Actuarial Accrued Liability) is 76.7%. At the time of last year's valuation, the UAAL was $13,326,416, and the funded ratio was 76.3%. The Market Value of Assets is 71.7% of the Actuarial Accrued Liability. See page A-10 for the development of the actuarial gain or loss over the last year and page A-6 for a history of the funded ratios.

The Funded Status and Unfunded Actuarial Accrued Liability are not appropriate for assessing the sufficiency of plan assets to cover the estimated cost of settling the plan's benefit obligations. By themselves, these measures are not appropriate for assessing the need for or the amount of future employer contributions.

Executive Summary

Benefit Provisions

At the November 2, 2022 Board of Trustees meeting, the Board adopted updated member contribution rates to be effective July 1, 2023. Specifically, 8.0% for Non-Hybrid MAPE members, 7.5% for Non-Hybrid Non-Union members, 6.5% for Hybrid MAPE members and 5.5% for Hybrid Non-Union members. These rates are intended to remain level in future years, but will continue to be monitored by the Board.

Please see the Summary of Benefits in Section B, for full detail on the current plan provisions.

Actuarial Assumptions and Methods

There were no changes to assumptions or methods for the current valuation. The assumptions and methods are fully described in Section C.

In determining costs and liabilities, actuaries use assumptions about the future, such as rates of salary increase, probabilities of retirement, termination, death and disability, and an investment return assumption. The Board of Trustees sets the actuarial assumptions and methods considering recommendations made by the plan's actuary and other advisors. Actuarial assumptions were most recently reviewed and adopted by the Board of Trustees for the June 30, 2018 Actuarial Valuation. The rationale for the economic and mortality assumptions is described in the report dated January 11, 2019.

We recommended that the Board complete a full review of all actuarial assumptions prior to the next annual actuarial valuation cycle. We further recommend that the Board set a policy for regular reviews of the actuarial assumptions, such as every five years. This period is industry standard and complies with Michigan Public Act 202.

Actuarial Experience

Net experience of the Retirement System was slightly unfavorable during the year ending June 30, 2022, resulting in a loss of $165,000 (0.3% of the prior year's Actuarial Accrued Liabilities). Most of the unfavorable experience came from investment losses totaling $680,000 attributable to recognized investment return (on the Actuarial Value of Assets) below the assumed rate of 6.85%. This loss was partially offset by demographic gains. The majority of the demographic gains were attributable to lower expected retirements (1 vs 6.4 expected) and greater mortality than expected for the year.

The investment rate of return for the fiscal year ending 2022 on a Market Value basis was -12.03%, and 5.23% on an Actuarial Value basis. The reason these figures differ is because the Actuarial Value of Assets smooth prior investment gains and losses over a four-year period.

The experience gains and losses are derived on page A-10.

Looking Forward

The total normal cost for new tier members (Hybrid members) hired on and after July 1, 2012 will be lower than the average normal cost for members hired prior to June 30, 2012 (non-hybrid members). This means that the total contribution rate is expected to decline as new tier members replace the current members.

Stabilization Reserve

Beginning with the June 30, 2016 valuation, which was the basis for the contributions during the fiscal year ending June 30, 2018, the Board of Trustees established a Stabilization Reserve to stabilize anticipated fluctuations of future member contribution rates.

As of the June 30, 2022 actuarial valuation, the Member Stabilization Reserve has been depleted.

Michigan Public Act 202

Michigan Public Act 202 (PA 202) was signed into law December 20, 2017 and requires local units of government to electronically submit Form 5572 to the Michigan Department of Treasury (DOT) on an annual basis to evaluate the funded status of the retirement pension system. The local unit of government is considered underfunded if the actuarial accrued liability of a retirement pension system is less than 60% funded, and if the annual required contribution for all of the retirement systems of the local unit of government is greater than 10% of annual general fund operating revenues. An underfunded local unit of government is required to develop and submit for approval a corrective action plan for the local unit of government.

The Michigan State Treasurer has established uniform actuarial assumptions as required by PA 202 for use with the annual Form 5572 (Retirement System Annual Report). The use of the uniform assumptions for reporting will be required for the 2019 fiscal year (note that the Department of Treasury is encouraging early adoption).

The current valuation assumptions and/or methods used by the System match or fall in the range of uniform assumptions established by the Treasurer for PA 202 reporting purposes.

Reserve Transfers

The June 30, 2022 actuarial present value of retirement allowances exceeded the balance in the Reserve for Retired Benefit Payments. In order to maintain a balance between the assets and the liabilities allocated to retired lives, the following transfer **to** the Reserve for Retired Benefit Payments **from** the Reserve for Employer Contributions is assumed:

Transfers to the Reserve for Retired Benefit Payments from the Reserve for Employer Contributions

General	Water and Sewage
$148,963	$0

SECTION A

VALUATION RESULTS

Funding Objective

The funding objective of the Retirement System is to establish and receive contributions, expressed as percents of active member payroll, which will remain approximately level from year-to-year and will not have to be increased for future generations of citizens.

Contribution Rates

The Retirement System is supported by member contributions, City contributions and investment income from Retirement System assets.

Contributions, which satisfy the funding objective, are determined by the annual actuarial valuation and are sufficient to:

(1) Cover the actuarial present value of benefits allocated to the current year by the actuarial cost method described in Section C (the normal cost); and

(2) Finance over a period of future years the actuarial present value of benefits not covered by the actuarial value of assets and anticipated future normal costs (unfunded actuarial accrued liability).

Computed contribution rates for the fiscal year ending June 30, 2024 are shown on page A-2.

Contributions to Fund Benefits
Expressed as Percents of Active Member Payroll

Contributions for	Fiscal Year Ending June 30, 2024 Non-Hybrid	Hybrid	Total Weighted Averages
Normal Cost			
Age and Service Allowances	8.92 %	5.93 %	7.14 %
Disability and Survivor	0.77	0.53	0.63
Refunds of Member Contributions	1.34	1.07	1.18
Total Normal Cost	11.03	7.53	8.95
Unfunded Actuarial Accrued Liability (UAAL)	7.85	7.85	7.85
Total Computed Contribution (Member+Employer)	18.88 %	15.38 %	16.80 %
Less Weighted Average Member Contributions	7.74 %	5.87 %	6.62 %
Recommended Employer Contributions			
as Percentage of Payroll	**11.14 %**	**9.51 %**	**10.18 %**
Total Dollar Contribution			**$ 1,066,460**

Notes

Please refer to page A-3 for a detailed breakdown of the sources and financing periods of UAAL (7.85%).

Financing of the Unfunded Actuarial Accrued Liability

Year Established	Amortization Period (Yrs) Initial	Remaining	Unfunded Actuarial Accrued Liability (UAAL) Initial Amount	Amount as of Valuation Date June 30, 2022	UAAL Contribution for Fiscal Year Ending June 30, 2024 Dollar	% of Pay
DROP Unfunded Actuarial Accrued Liability Closed Amortization						
6/30/2007	15	0	N/A	$ 174,449	$ -	0.00%
Unfunded Actuarial Accrued Liability as of June 30, 2016						
6/30/2016	30	24	$ 8,954,539	$ 9,013,884	$ 573,130	5.47%
(Gain)/Loss Amortization Layers (Fiscal Years 6/30/2017 and thereafter)						
Changes from Experience						
6/30/2017	30	25	$ (147,142)	$ (163,293)	$ (10,187)	(0.10)%
6/30/2018	30	26	270,468	297,480	18,148	0.17%
6/30/2019	30	27	(288,828)	(314,983)	(18,815)	(0.18)%
6/30/2020	30	28	194,596	210,175	12,308	0.12%
6/30/2021	30	29	(2,177,302)	(2,326,447)	(133,696)	(1.28)%
6/30/2022	30	30	$164,584	$164,584	$9,812	0.09%
Changes from Benefit Provisions						
6/30/2017	30	25	$ (127,091)	$ (141,041)	$ (8,798)	(0.08)%
6/30/2018	30	26	125,916	138,491	8,449	0.08%
6/30/2021	30	29	$166,829	$178,257	$10,244	0.10%
6/30/2022	30	30	(97,234)	(97,234)	(5,797)	(0.06)%
Changes from Actuarial Assumptions/Methods						
6/30/2018	30	26	$ 5,477,460	$ 6,024,501	$ 367,528	3.51%
Totals				**$ 13,158,822**	**$ 822,325**	**7.85%**

Subsequent to the June 30, 2007 valuation, the Board adopted a DROP to be funded by employer contributions for 15 years beginning July 1, 2008. This percentage is based on a closed 15-year amortization of the estimated change in UAAL plus the change in normal cost associated with the DROP. As of June 30, 2023, this basis is fully amortized.

The single equivalent level percent-of-payroll amortization period based upon the above computed UAAL Contribution rate would be about 25 years. This schedule should be periodically reviewed by the Board.

Financing of the Actuarial Accrued Liability

In financing the actuarial accrued liability, the actuarial value of assets of $43,306,900 were distributed as shown below. Please see page A-5 for information concerning the derivation of the actuarial value of assets.

	Present Valuation Assets Applied to			
Reserves	Member Actuarial Accrued Liability	Retired Life Actuarial Liability	Contingency Reserve	Totals
Employees' Contributions	$ 7,570,220			$ 7,570,220
Employer Contributions	607,031	$ 148,963		755,994
Retired Benefit Payments		34,980,686	none	34,980,686
Totals	$ 8,177,251	$ 35,129,649	none	$ 43,306,900

Assets were applied against actuarial accrued liability in determining unfunded actuarial accrued liability as follows:

	Retired Lives	Active Members	Totals
Computed Actuarial Accrued Liability	$ 35,129,649	$ 21,336,073	$ 56,465,722
Applied Assets	35,129,649	8,177,251	43,306,900
Unfunded Actuarial Accrued Liability	$ none	$ 13,158,822	$ 13,158,822

Development of Actuarial Value of Retirement System Assets

Year Ended June 30:	2019	2020	2021	2022	2023	2024	2025
A. Actuarial Value Beginning of Year	$39,885,637	$39,887,893	$40,465,579	$42,827,484			
B. Market Value End of Year	39,948,240	39,166,667	47,877,576	40,503,270			
C. Market Value Beginning of Year	40,299,277	39,948,240	39,166,667	47,877,576			
D. Non-Investment Net Cash Flow							
D1. Net Cash Flow (NCF)	(2,371,807)	(1,958,603)	(1,930,510)	(1,716,658)			
D2. NCF/Market Value Beginning of Year: D1 / C	(5.9)%	(4.9)%	(4.9)%	(3.6)%			
E. Investment Income							
E1. Market Total: B - C - D1	2,020,770	1,177,030	10,641,419	(5,657,648)			
E2. Amount for Immediate Recognition	2,650,932	2,665,239	2,705,772	2,874,887			
E3. Amount for Phased-In Recognition: E1-E2	(630,162)	(1,488,209)	7,935,647	(8,532,535)			
F. Phased-In Recognition of Investment Income							
F1. Current Year: 0.25 x E3	(157,541)	(372,052)	1,983,912	(2,133,134)			
F2. First Prior Year	132,325	(157,541)	(372,052)	1,983,912	$(2,133,134)		
F3. Second Prior Year	268,318	132,325	(157,541)	(372,052)	1,983,912	$(2,133,134)	
F4. Third Prior Year	(519,971)	268,318	132,324	(157,539)	(372,053)	1,983,911	$(2,133,133)
F5. Total Recognized Investment Gain: F1 + F2 + F3 + F4	(276,869)	(128,950)	1,586,643	(678,813)	(521,275)	(149,223)	(2,133,133)
G. Actuarial Value End of Year: A + D1 + E2 + F5	39,887,893	40,465,579	42,827,484	43,306,900			
H. Difference Between Market & Actuarial Value	60,347	(1,298,912)	5,050,092	(2,803,630)			
I. Recognized Rate of Return	6.13%	6.52%	10.87%	5.23%			
J. Market Rate of Return	5.17%	3.02%	27.86%	(12.03)%			
K. Ratio of Actuarial Value to Market Value: G / B	99.8%	103.3%	89.5%	106.9%			

The Actuarial Value of Assets recognizes assumed investment income (line E2) fully each year. Differences between actual and assumed investment income (line E3) are phased-in over a closed four-year period. During periods when investment performance exceeds the assumed rate, Actuarial Value of Assets will tend to be less than Market Value. During periods when investment performance is less than the assumed rate, Actuarial Value of Assets will tend to be greater than Market Value. The Actuarial Value of Assets is unbiased with respect to Market Value. At any time, it may be either greater or less than Market Value. If actual and assumed rates of retirement income are exactly equal for four consecutive years, the Actuarial Value will become equal to Market Value.

Valuation Results
Comparative Statement

Valuation Date	(1) Actuarial Value of Assets	(2) Valuation Payroll	(3) Actuarial Accrued Liability (AAL)	(4) Unfunded Actuarial Accrued Liability (UAAL)	(5) Amortization Period Years^	(6) Funded Ratio (1) / (3)	(7) Gain (Loss)
6/30/02	$ 35,151	$ 9,257	$ 29,372	$ (5,779)	N/A	119.7	$ (2,937)
6/30/03(a)	33,229	9,691	29,902	(3,327)	N/A	111.1	(3,368)
6/30/04(a)	32,919	9,600	31,417	(1,502)	N/A	104.8	(1,788)
6/30/05	32,395	9,600	33,016	621	N/A	98.1	(1,899)
6/30/06	31,867	10,091	35,019	3,152	30	91.0	(2,449)
6/30/07(a)	34,236	10,119	38,091	3,855	30	89.9	381
6/30/08(a)	35,618	10,295	40,907	5,289	30	87.1	(469)
6/30/09	34,971	10,184	42,855	7,884	30	81.6	(2,485)
6/30/10(a)	34,124	8,969	43,283	9,159	30	78.8	(1,518)
6/30/11	32,986	8,169	43,916	10,930	30	75.1	(1,466)
6/30/12(a)	32,117	8,479	48,321	16,204	30	66.5	(2,084)
6/30/13	33,538	7,970	48,773	15,235	30	68.8	1,539
6/30/14	35,921	7,609	49,373	13,452	30	72.8	1,953
6/30/15	37,072	7,211	48,882	11,810	30	75.8	1,702
6/30/16(a)	38,406	7,292	48,224	9,818	30	79.6	784
6/30/17(a)	39,624	7,533	48,898	9,274	29-30	81.0	147
6/30/18(a)	39,886	8,102	54,888	15,002	28-30	72.7	(270)
6/30/19	39,888	8,424	54,960	15,072	27-30	72.6	289
6/30/20	40,466	8,503	55,757	15,291	26-30	72.6	(195)
6/30/21(a)	42,827	9,036	56,154	13,327	25-30	76.3	2,177
6/30/22	**43,307**	**9,876**	**56,563**	**13,256**	**24-30**	**76.6**	**(165)**
6/30/22(a)	**43,307**	**9,876**	**56,466**	**13,159**	**24-30**	**76.7**	**(165)**

(a) After changes in benefit provisions and/or actuarial assumptions and actuarial cost methods.

^ *The UAAL associated with the DROP was amortized as a level percent-of-payroll over a closed period of 15 years beginning July 1, 2008. For fiscal year ending June 30, 2024, there are no years left in the amortization period. The UAAL associated with the June 30, 2016 Valuation was amortized as a level percent-of-payroll contribution over a closed period of 30 years for fiscal year ending June 30, 2018. For fiscal year ending June 30, 2024, there are 24 years left in the amortization period. Unfunded liabilities associated with experience deviations, benefit changes, or assumption changes are to be amortized over a closed period not exceeding 30 years beginning with the valuation year in which they arise.*

Recommended and Actual Contributions
Comparative Statement

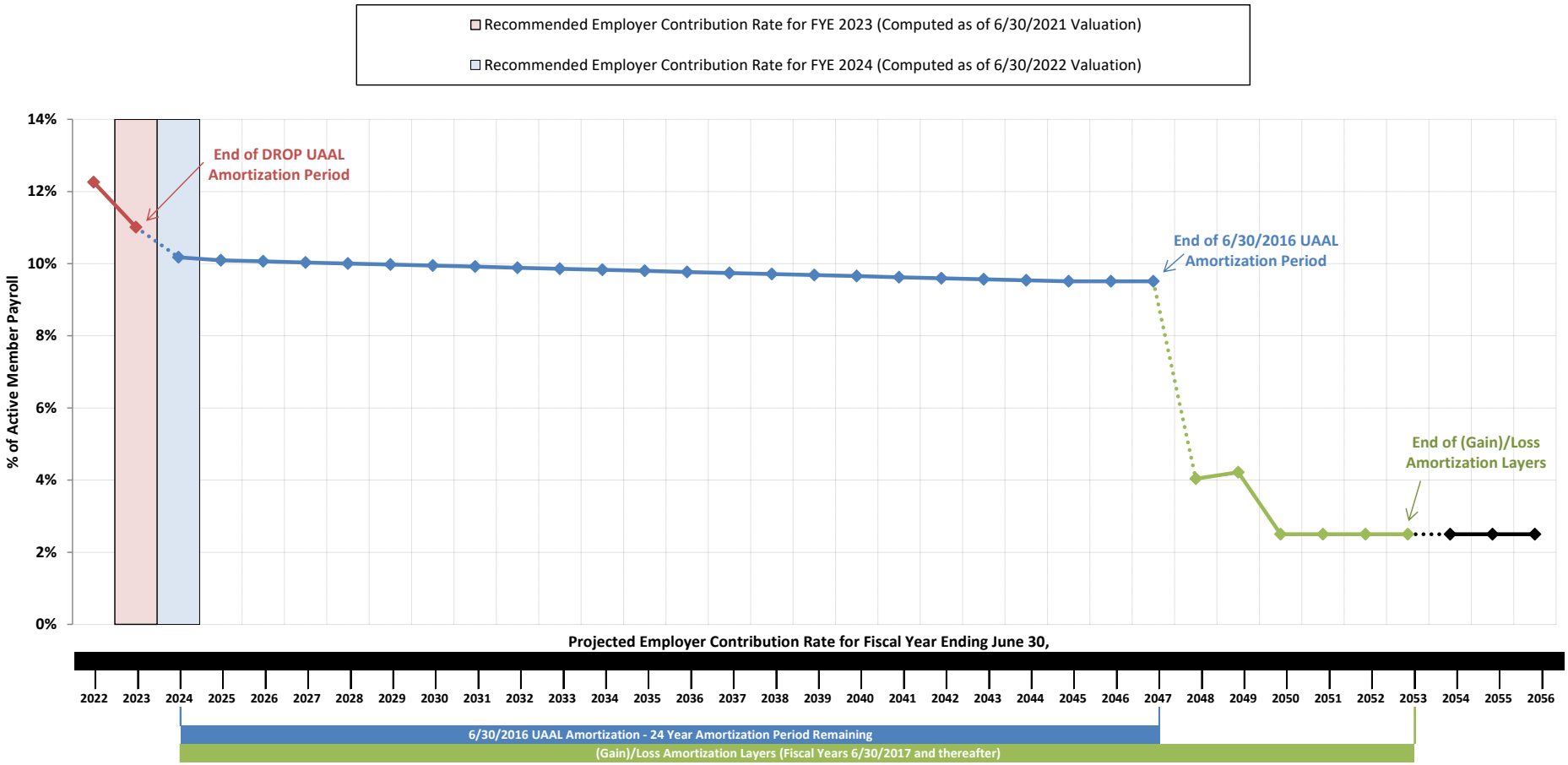
Fiscal Year	Valuation Date	Dollar Contributions		% of Payroll Contributions*		Percentage Contributed
		Projected^	Actual	Recommended	Actual	
03/04	6/30/02	$ 391,420	$ 383,883	3.93 %	3.93 %	100
04/05 (a)	6/30/03	413,924	388,706	3.93	3.93	100
05/06 (a)	6/30/04	584,257	572,520	5.60	5.60	100
06/07	6/30/05	721,955	722,422	6.92	6.92	100
07/08	6/30/06	832,376	803,042	7.59	7.59	100
08/09 (a)	6/30/07	841,320	793,649	7.65	7.65	100
09/10 (a)	6/30/08	863,777	750,439	7.72	7.72	100
10/11	6/30/09	945,179	786,824	8.54	8.54	100
11/12 (a)	6/30/10	861,134	817,748	9.21	9.21	100
12/13	6/30/11	880,750	845,595	9.92	9.92	100
13/14 (a)	6/30/12	1,126,236	986,872	12.52	12.52	100
14/15	6/30/13	1,033,247	947,436	12.22	12.22	100
15/16	6/30/14	958,228	889,235	11.87	11.87	100
16/17	6/30/15	938,653	933,208	12.27	12.27	100
17/18 (a)	6/30/16	774,365	821,020	10.01	10.01	100
18/19 (a)	6/30/17	779,188	835,541	9.75	9.75	100
19/20 (a)	6/30/18	1,067,587	1,058,427	12.42	12.42	100
20/21	6/30/19	1,073,343	1,068,745	12.01	12.01	100
21/22	6/30/20	1,106,863	1,222,458	12.27	12.27	100
22/23	6/30/21	1,055,434		11.01		
23/24 (a)	**6/30/22**	**1,066,460**		**10.18**		

(a) After changes in benefit provisions and/or actuarial assumptions and actuarial cost methods.

* *Minimum employer contributions of 2.5% of payroll pursuant to Ordinance amendments effective July 1, 1990, 1991, and 2007 plus a contribution for Early Retirement Window and for DROP (until fiscal year 22/23).*

^ *Projected dollar contributions are based on a projected payroll and will not match dollar contributions when pay increases differ from assumptions.*

Current and Future Projected Employer Contributions as a Percentage of Expected Active Member Payroll



NOTE: Any Future (Gain)/Loss UAAL Amortization schedules are excepted to be $0 if all Actuarial Assumptions are met. In reality, experience deviates from assumptions. The (Gain)/Loss UAAL amounts are expected to float both above and below zero in any given year. These amounts are amortized over new independent 30-Year periods to smooth changes to future employer contributions as a result of System experience. The minimum employer contribution is 2.5% of payroll.

Summary Statement of System Resources and Obligations

Present Resources and Expected Future Resources

	June 30, 2021			June 30, 2022		
	General	Water & Sewage	Totals	General	Water & Sewage	Totals
A. Present value of System assets						
1. Net assets from financial statements	$41,395,796	$ 6,481,780	$47,877,576	$33,840,559	$ 6,662,711	$40,503,270
2. Reduction for contribution stabilization	0	0	0	0	0	0
3. Market value adjustment	(4,366,399)	(683,693)	(5,050,092)	2,342,438	461,192	2,803,630
4. Actuarial Value of Assets	37,029,397	5,798,087	42,827,484	36,182,997	7,123,903	43,306,900
B. Present value of expected future employer contributions						
1. For normal costs	$ 1,912,546	$ 641,502	$ 2,554,048	$ 1,244,638	$ 377,205	$ 1,621,843
2. For unfunded actuarial accrued liability	6,063,125	7,263,291	13,326,416	7,041,344	6,117,478	13,158,822
3. Total	7,975,671	7,904,793	15,880,464	8,285,982	6,494,683	14,780,665
C. Actuarial present value of expected future member contributions	$ 3,246,201	$ 927,665	$ 4,173,866	$ 3,970,707	$ 1,303,226	$ 5,273,933
D. Total	$48,251,269	$14,630,545	**$62,881,814**	$48,439,686	$14,921,812	**$63,361,498**

Actuarial Present Value of Expected Future Benefit Payments

	June 30, 2021			June 30, 2022		
	General	Water & Sewage	Totals	General	Water & Sewage	Totals
A. To retirants and beneficiaries	$27,277,938	$ 8,867,011	$36,144,949	$26,594,033	$ 8,535,616	$35,129,649
B. To vested terminated members	2,251,106	475,338	2,726,444	2,417,403	839,098	3,256,501
C. To present active members						
1. Allocated to service rendered prior to valuation date	13,563,478	3,719,029	17,282,507	14,212,905	3,866,667	18,079,572
2. Allocated to service likely to be rendered after valuation date	5,158,747	1,569,167	6,727,914	5,215,345	1,680,431	6,895,776
3. Total	18,722,225	5,288,196	24,010,421	19,428,250	5,547,098	24,975,348
D. Total	$48,251,269	$14,630,545	**$62,881,814**	$48,439,686	$14,921,812	**$63,361,498**

Active Member Experience Gain (Loss)
Year Ended June 30, 2022

	Actuarial Accrued Liability (A)	Actuarial Value of Assets (B)	Unfunded Actuarial Accrued Liability (C) = (A) - (B)
(1) Value at start of year	$56,153,900	$42,827,484	$13,326,416
(2) Normal cost from last valuation	923,446	N/A	923,446
(3) Actual contributions	N/A	2,033,239	(2,033,239)
(4) Disbursements	(3,749,897)	(3,749,897)	-
(5) Interest accrual [(1) + [(2)+(3)+(4)]1/2]*6.85%	3,749,736	2,874,887	874,849
(6) Expected value before changes (1)+(2)+(3)+(4)+(5)	57,077,185	43,985,713	13,091,472
(7) Increase/(decrease) due to plan amendments	(97,234)	-	(97,234)
(8) Increase/(decrease) due to method changes	-	-	-
(9) Increase/(decrease) due to revised assumptions	-	-	-
(10) Expected value after changes (6)+(7)+(8)+(9)	56,979,951	43,985,713	12,994,238
(11) Actual value at end of year	56,465,722	43,306,900	13,158,822
(12) Gain/(loss) (10)-(11) [(Gain)/loss for assets]	514,229	678,813	(164,584)

Valuation Date June 30,	Actuarial Gain/(Loss) (in Thousands)
2014	$1,953
2015	1,702
2016	784
2017	147
2018	(270)
2019	289
2020	(195)
2021	2,177
2022	(165)

Other Observations

General Implications of the Contribution Allocation Procedure or Funding Policy on Future Expected Contributions and Funded Status

Given the System's contribution allocation procedure, if all actuarial assumptions are met (including the assumption of the Retirement System earning 6.85%), it is expected that:

1. The employer normal cost is sufficient to cover the cost of benefits accruing each year;
2. The Unfunded Actuarial Accrued Liabilities (UAAL) will continue to be fully amortized; and
3. The funded status of the Retirement System will continue to increase gradually towards a 100% funded ratio.

Limitations of Funded Status Measurements

Unless otherwise indicated, a funded status measurement presented in this report is based upon the Actuarial Accrued Liability (AAL) and the Actuarial Value of Assets (AVA). Unless otherwise indicated, with regard to any funded status measurements presented in this report:

1. The measurement is inappropriate for assessing the sufficiency of Retirement System assets to cover the estimated cost of settling the Retirement System's benefit obligations; for example, transferring the liability to an unrelated third party in a market value type transaction.
2. The measurement is dependent upon the Actuarial Cost Method which, in combination with the Retirement System's amortization policy, affects the timing and amounts of future contributions. The amounts of future contributions will most certainly differ from those assumed in this report due to future actual experience differing from assumed experience based upon the actuarial assumptions. Even if the funded status measurement in this report was 100%, it would not be synonymous with no required future contributions. The Retirement System would still require future normal cost contributions (i.e., contributions to cover the cost of active membership accruing an additional year of service credit).
3. The measurement would produce a different result if the Market Value of Assets (MVA) were used instead of the AVA, unless the MVA is used in the measurement.

Limitations of Project Scope

Actuarial standards do not require the actuary to evaluate the ability of the plan sponsor or other contributing entities to make required contributions to the plan when due. Such an evaluation was not within the scope of this project and is not within the actuary's domain of expertise. Consequently, the actuary performed no such evaluation.

Risks to Future Employer Contribution Requirements

There are ongoing risks to future employer contribution requirements to which the Retirement System is exposed, such as:

- Actual and Assumed Investment Rate of Return
- Actual and Assumed Mortality Rates
- Amortization Policy

Risk Measures – Risks Associated with Measuring the Accrued Liability and Actuarially Determined Contribution

The determination of the accrued liability and the actuarially determined contribution requires the use of assumptions regarding future economic and demographic experience. Risk measures, as illustrated in this report, are intended to aid in the understanding of the effects of future experience differing from the assumptions used in the course of the actuarial valuation. Risk measures may also help with illustrating the potential volatility in the accrued liability and the actuarially determined contribution that result from the differences between actual experience and the actuarial assumptions.

Future actuarial measurements may differ significantly from the current measurements presented in this report due to such factors as the following: plan experience differing from that anticipated by the economic or demographic assumptions; changes in economic or demographic assumptions due to changing conditions; increases or decreases expected as part of the natural operation of the methodology used for these measurements (such as the end of an amortization period, or additional cost or contribution requirements based on the System's funded status); and changes in plan provisions or applicable law. The scope of an actuarial valuation does not include an analysis of the potential range of such future measurements.

Examples of risk that may reasonably be anticipated to significantly affect the plan's future financial condition include:

1. **Investment Risk** – actual investment returns may differ from the expected returns;
2. **Asset/Liability Mismatch** – changes in asset values may not match changes in liabilities, thereby altering the gap between the accrued liability and assets and consequently altering the funded status and contribution requirements;
3. **Contribution Risk** – actual contributions may differ from expected future contributions. For example, actual contributions may not be made in accordance with the plan's funding policy or material changes may occur in the anticipated number of covered employees, covered payroll, or other relevant contribution base;
4. **Salary and Payroll Risk** – actual salaries and total payroll may differ from expected, resulting in actual future accrued liability and contributions differing from expected;
5. **Longevity Risk** – members may live longer or shorter than expected and receive pensions for a period of time other than assumed; and
6. **Other Demographic Risks** – members may terminate, retire or become disabled at times or with benefits other than assumed resulting in actual future accrued liability and contributions differing from expected.

The effects of certain trends in experience can generally be anticipated. For example, if the investment return since the most recent actuarial valuation is less (or more) than the assumed rate, the cost of the plan can be expected to increase (or decrease). Likewise, if longevity is improving (or worsening), increases (or decreases) in cost can be anticipated.

The computed contribution shown on page A-2 may be considered as a minimum contribution rate that complies with the Board's funding policy. The timely receipt of the actuarially determined contributions is critical to support the financial health of the plan. Users of this report should be aware that contributions made at the actuarially determined rate do not necessarily guarantee benefit security.

Risk Measures

($ in Thousands)

Actuarial Valuation Date (6/30)	(1) Actuarial Value of Assets (AVA)	(2) Actuarial Accrued Liability (AAL)	(3) Unfunded AAL (UAAL) (2) - (1)	(4) Payroll	(5) Funded Ratio (1) / (2)	(6) Retiree Liabilities (RetLiab)	(7) RetLiab / AAL (6)/(2)	(8) AAL / Payroll (2) / (4)	(9) Assets / Payroll (1) / (4)	(10) UAAL / Payroll (3) / (4)	(11) Non-Invest. Cash Flow (NICF)	(12) NICF / Assets (11)/(1)	(13) Market Rate of Return	(14) 5-year Trailing Geometric Average
2018 *	$ 39,886	$ 54,888	$ 15,002	$ 8,102	72.7%	$ 35,078	63.9%	677.5%	492.3%	185.2%	$ (2,300)	(5.8)%	9.0%	N/A
2019	39,888	54,960	15,072	8,424	72.6%	35,669	64.9%	652.4%	473.5%	178.9%	(2,372)	(5.9)%	5.2%	6.2%
2020	40,466	55,757	15,291	8,503	72.6%	36,267	65.0%	655.7%	475.9%	179.8%	(1,959)	(4.8)%	3.0%	5.9%
2021	42,827	56,154	13,327	9,036	76.3%	36,145	64.4%	621.4%	474.0%	147.5%	(1,931)	(4.5)%	27.9%	10.8%
2022	43,307	56,466	13,159	9,876	76.7%	35,130	62.2%	571.7%	438.5%	133.2%	(1,717)	(4.0)%	(12.0)%	5.8%

** Revised actuarial assumptions.*

(5). The funded ratio is the most widely known measure of a plan's financial strength, but the trend in the funded ratio is much more important than the absolute ratio. The funded ratio should trend to 100%. As it approaches 100%, it is important to re-evaluate the level of investment risk in the portfolio and potentially to re-evaluate the assumed rate of return.

(6) and (7). The ratio of retiree liabilities to total accrued liabilities gives an indication of the maturity of the system. As the ratio increases, cash flow needs increase, and the liquidity needs of the portfolio change. A ratio on the order of 50% indicates a maturing system.

(8) and (9). The ratio of liabilities and assets to payroll gives an indication of both maturity and volatility. Many systems have ratios between 500% and 700%. Ratios significantly above that range may indicate difficulty in supporting the benefit level as a level % of payroll.

(10). The ratio of unfunded liability to payroll gives an indication of the plan sponsor's ability to actually pay off the unfunded liability. A ratio above approximately 300% or 400% may indicate difficulty in discharging the unfunded liability within a reasonable time frame.

(11) and (12). The ratio of Non-Investment Cash Flow to assets is an important measure of sustainability. Negative ratios are common and expected for a maturing system. In the longer term, this ratio should be on the order of approximately -4% based upon current plan assumptions. A ratio that is significantly more negative than that for an extended period could be a leading indicator of potential exhaustion of assets.

(13) and (14). Investment return is probably the largest single risk that most systems face. The year-by-year return and the five-year geometric average both give an indication of the reasonableness of the system's assumed return. Of course, past performance is not a guarantee of future results. Market rate shown is based on actuarial estimation method and will differ modestly from figures reported by the investment consultant.

SECTION B

SUMMARY OF BENEFIT PROVISIONS AND VALUATION DATA

Summary of Benefit Provisions Evaluated or Considered (June 30, 2022)

Voluntary Retirement (no reduction for age)

MAPE Members

Eligibility –

Hired on or before June 30, 2016		
Retiring on or before December 31, 2021	**Retiring on or after January 1, 2022**	**Hired on or after July 1, 2016**
Age 60 & 10 years of service	Age 65 & 10 years of service	Age 65 & 10 years of service
Age 58 & 25 years of service	Age 62 & 25 years of service	37 years of service
30 years of service	Age 56 & 30 years of service	

Final Average Compensation - Retiring on or before October 31, 2024: Average of annual compensations for the period of 3 consecutive years producing the highest average and contained within the last 10 years immediately preceding retirement. **Retiring after October 31, 2024:** Average of annual compensations for the last 5 consecutive years of credited service.

Non-Union Members

Eligibility –

Retiring on or before October 31, 2029
Age 62 & 10 years of service
Age 58 & 27 years of service
32 years of service

Retiring on or after November 1, 2029	
Hired before December 31, 2018	**Hired between January 1, 2018 and December 31, 2019**
Age 64 & 10 years of service	Age 68 & 10 years of service
Age 59 & 27 years of service	39 years of service
Age 58 & 32 years of service	

Hired between January 1, 2020 and December 31, 2021	**Hired on or after January 1, 2022**
Age 70 & 10 years of service	Age 72 & 10 years of service
40 years of service	41 years of service

Summary of Benefit Provisions Evaluated or Considered (June 30, 2022)

Final Average Compensation

Hired before December 31, 1996: The average of the employee's last three consecutive years of credited service.

Hired on or after January 1, 1997 and before June 30, 2012: The average of the employee's last four consecutive years of credited service.

Hired on or after July 1, 2012 and before December 31, 2016: The average of the employee's last six consecutive years of credited service.

Hired on or after January 1, 2017: The average of the employees last eight consecutive years of service.

Hired on or after January 1, 2018: The average of the employees last nine consecutive years of service.

Annual Amount (MAPE & Non-Union) – Total service times 2.0% of Final Average Compensation (FAC). Members hired on or after July 1, 2012 receive total service times 1.25% of FAC (1.50% for MAPE members).

Pension Cap (MAPE) – No annual pension of future retirements shall equate to more than 72% of the FAC.

Pension Cap (Non-Union) – The maximum annual pension amount shall be determined in accordance to the following table:

General Employees Retirement Plan (Hired before June 30, 2012)		Hybrid Pension Plan (Hired on or after July 1, 2012)	
Years of Service	**Pension Cap as a Percentage of FAC**	**Years of Service**	**Pension Cap as a Percentage of FAC**
Over 10 and less than 20	35%	Over 10 and less than 20	24%
Over 20 and less than 25	47%	Over 20 and less than 25	28%
Over 25 and less than 30	54%	Over 25 and less than 30	32%
Over 30 and less than 32	62%	Over 30 and less than 35	41%
Over 32 and less than 35	68%	Over 35 and less than 40	45%
Over 35 and less than 36	70%	40 and over	47%
Over 36 and less than 38	71%		
Over 38	73%		

Summary of Benefit Provisions Evaluated or Considered (June 30, 2022)

Deferred Retirement (vested benefit)

Eligibility – Termination of City employment at any age after 10 years of credited service.

Annual Amount – Accrued regular retirement amount based on credited service and FAC at time of termination.

The deferred benefit is payable at the following ages based on hire date:

Hire Date	Benefit Payable at Age
Hired prior to December 31, 2011	56
Hired between January 1, 2012 and December 31, 2017	60
Hired between January 1, 2018 and December 31, 2023	64
Hired after January 1, 2024	68

Deferred Retirement Option Plan (DROP)

The DROP Program has been closed as of June 30, 2015.

Duty Disability Retirement

Eligibility – Total and permanent disability incurred in line of duty with the City for which worker's compensation is being paid.

Annual Amount – Computed in the same manner as the regular retirement amount based on FAC and credited service at time of disability retirement. Minimum is $150 per month for benefit group (MAPE); minimum is 10% of the first $4,200 of FAC plus 15% of FAC in excess of $4,200 for benefit group general. At expiration of worker's compensation period, amount is recomputed to include years during which worker's compensation was paid.

Non-Duty Disability Retirement

Eligibility – Total and permanent disability after 10 or more years of credited service.

Annual Amount – Computed in same manner as the regular retirement amount based on FAC and credited service at the time of disability retirement; minimum is $150 per month for benefit group (MAPE); minimum is 10% of first $4,200 of FAC plus 15% of FAC in excess of $4,200 for other members.

Summary of Benefit Provisions Evaluated or Considered (June 30, 2022)

Duty Death before Retirement

Eligibility – Death in line of duty with the City.

Annual Amount – To the spouse: One-third of member's final compensation. To one or two children: One-fourth of member's final compensation. To three or more children: An equal share of one-half of the member's final compensation. Amount to spouse continues to remarriage or death; amount to children continues to earlier of marriage, adoption, death, or attainment of age 18. Maximum total amount payable – $2,100 per year.

Non-Duty Death before Retirement

Eligibility – 10 or more years of credited service.

Annual Amount – Computed in the same manner as regular retirement based on credited service and FAC at time of death actuarially reduced for a 100% joint and survivor election. Amount is payable to designated beneficiary; otherwise, automatically to surviving spouse.

Member Contributions

Prior to the 2024 Fiscal Year, members contributed one-half of total computed contribution less amounts associated with early retirement windows or the DROP Program which are contributed by the City. In no event will the member or City contribution be less than 2.50%.

Effective July 1, 2023, members contribute the below contribution rates:

Division	Member Contribution Rate
Non-Hybrid MAPE Members	8.00%
Non-Hybrid Non-Union Members	7.50%
Hybrid MAPE Members	6.50%
Hybrid Non-Union Members	5.50%

Other Benefits

Military Service Buyback – Up to six years of military service may be purchased at no cost to the System.

Service Credit Purchase Option – A contractual employee may be eligible to purchase service credits at no cost to the System.

Annuity Withdrawal Option – For MAPE and Non-Union: Actuarial reduction of the member's monthly retirement benefit for such withdrawals. All such annuities shall be calculated at a discount rate that is no less than cost neutral (approximately 8%).

Summary of Benefit Provisions Evaluated or Considered (June 30, 2022)

The former description of Voluntary Retirement is listed here for comparison purposes to current benefit provisions.

Voluntary Retirement (no reduction for age) – before Changes

Eligibility – 30 or more years of service, or age 55 with 25 or more years of service, or age 60 with 10 or more years of service.

Annual Amount – Total service times 2.0% of Final Average Compensation (FAC). Members hired on or after July 1, 2012 receive total service times 1.25% of FAC.

Final Average Compensation – *MAPE Members:* Average of annual compensations for the period of 3 consecutive years producing the highest average and contained within the last 10 years immediately preceding retirement. *Non-Union Members:* Average of annual compensations for the last 3 consecutive years of credited service.

Retirants and Beneficiaries
Comparative Schedule

Year Ended June 30	Added to Rolls		Removed from Rolls		Rolls End of Year		Active Per Retired	Average Allowances	Discounted Value of Allowances	
	No.	Annual Allowances	No.	Annual Allowances	No.	Annual Allowances			Total	Average
1998	8 *	$ 94,502	8	$ 47,606	140	$ 1,049,472	1.6	$ 7,496	$ 8,759,984	$ 62,571
1999	9	132,738	5	51,966	144	1,130,244	1.6	7,849	9,645,640	66,984
2000	8	89,189	9	72,390	143	1,147,043	1.6	8,021	9,985,860	69,831
2001	10	315,129	4	34,351	149	1,427,821	1.5	9,583	11,663,240	78,277
2002	3	25,078	6	72,356	146	1,380,543	1.6	9,456	11,250,485	77,058
2003	8	151,848	9	122,197	145	1,410,194	1.6	9,725	11,543,221	79,608
2004	5	137,576	10	55,440	140	1,492,330	1.6	10,660	12,546,008	89,614
2005	10	160,093	6	62,364	144	1,590,059	1.5	11,042	13,296,443	92,336
2006	3	47,969	4	19,433	143	1,618,595	1.5	11,319	13,411,809	93,789
2007	12	237,858	5	90,787	150	1,765,666	1.4	11,771	15,258,928	101,726
2008	13	237,891	15	112,425	148	1,891,132	1.4	12,778	16,609,084	112,224
2009	12	252,745	5	67,914	155	2,075,963	1.3	13,393	18,296,979	118,045
2010	16	363,025	4	20,738	167	2,418,251	1.1	14,481	21,354,990	127,874
2011	14	268,775	11	90,471	170	2,596,555	1.0	15,274	22,839,916	134,352
2012	7	117,332	4	95,693	173	2,618,194	1.0	15,134	24,416,337	141,135
2013	16	365,285	8	120,395	181	2,863,084	0.9	15,818	26,671,859	147,358
2014	10	164,865	8	97,152	183	2,930,797	0.8	16,015	27,282,134	149,083
2015	17	367,099	13	230,032	187	3,067,864	0.7	16,406	29,088,408	155,553
2016	13	296,180	12	135,161	188	3,228,883	0.8	17,175	30,646,556	163,014
2017	7	205,713	5	56,448	190	3,378,148	0.7	17,780	31,706,913	166,878
2018	10	223,662	7	128,506	193	3,473,304	0.7	17,996	35,077,887	181,751
2019	10	264,651	8	175,768	195	3,562,187	0.8	18,268	35,668,923	182,918
2020	7	164,434	8	124,228	194	3,602,393	0.8	18,569	36,267,170	186,944
2021	8	179,869	10	157,140	192	3,625,122	0.8	18,881	36,144,949	188,255
2022	7	155,033	12	191,141	187	3,589,014	0.9	19,193	35,129,649	187,859

* *Reflects retirements due to the Early Retirement Window provision.*

Retirants and Beneficiaries as of June 30, 2022
Tabulated by Type of Allowances Being Paid

Type of Allowances Being Paid	No.	Annual Retirement Benefits
Age and Service Allowances		
Regular allowances - benefit terminating at death of retirant	70	$ 1,411,712
Option I allowance - cash refund annuity plus pension terminating at death of retirant	2	37,973
Option II allowance - joint and survivor benefit	45	858,201
Option III allowance - modified joint and survivor benefit	42	909,334
Allowance to survivor beneficiary of deceased retirant	23	315,368
Total age and service allowances	182	$ 3,532,588
Casualty Allowances		
Disability		
Regular	1	$ 9,225
Option I	0	-
Option II	1	9,392
Option III	0	-
Disability allowance		
Survivor beneficiary	2	25,311
Allowance to survivor beneficiary of deceased member	1	12,498
Total casualty allowances	5	$ 56,426
Total Allowances Being Paid	187	$ 3,589,014

Retirants and Beneficiaries as of June 30, 2022
Tabulated by Attained Age

Attained Age	Age & Service No.	Age & Service Annual Allowances	Casualty No.	Casualty Annual Allowances	Totals No.	Totals Annual Allowances
50 - 54	0	$ 0	1	$ 12,498	1	$ 12,498
55 - 59	9	311,087	0	0	9	311,087
60 - 64	18	438,631	2	31,729	20	470,360
65 - 69	42	910,827	1	9,225	43	920,052
70 - 74	48	998,769	0	0	48	998,769
75 - 79	29	474,675	1	2,974	30	477,649
80	3	35,453	0	0	3	35,453
81	1	6,640	0	0	1	6,640
82	3	29,056	0	0	3	29,056
83	7	96,130	0	0	7	96,130
84	4	40,395	0	0	4	40,395
85	4	46,045	0	0	4	46,045
86	4	45,444	0	0	4	45,444
87	3	32,758	0	0	3	32,758
88	1	2,893	0	0	1	2,893
89	2	17,638	0	0	2	17,638
90	1	7,443	0	0	1	7,443
93	2	9,603	0	0	2	9,603
95	1	29,100	0	0	1	29,100
Totals	**182**	**$ 3,532,587**	**5**	**$ 56,426**	**187**	**$ 3,589,013**

Inactive Members as of June 30, 2022
Tabulated by Attained Age

Included in the valuation were 23 inactive members. An inactive member is a member who has left City employment with entitlement to a retirement allowance after attaining eligible retirement age.

Attained Age	No.	Annual Estimated Allowances
36	1	$ 12,917
41	1	9,490
43	1	17,334
47	2	39,872
48	1	12,361
49	1	18,324
53	2	50,471
55	2	52,694
56	3	72,424
57	1	15,773
58	3	60,760
59	2	23,082
60	1	7,572
66	1	14,205
75	1	610
Totals	**23**	**$ 407,889**

Active Members as of June 30, 2022
Tabulated by Valuation Divisions

Valuation Divisions	No.	Annual Payroll
General members	42	$3,172,006
Water & Sewage members	11	820,794
Hybrid Plan - General	81	4,375,116
Hybrid Plan - Water & Sewage	27	1,508,513
Total Active members	161	$9,876,429

Number Added to and Removed from Active Membership

Year Ended June 30	Number Added During Year		Terminations During Year: Normal Retirement		Disability Retirement		Died-in-Service		Other Withdrawal		Active Members End of Year
	A	E	A	E	A	E	A	E	A	E	
2008	15	16	8	4.7	0	0.6	1	0.4	7	7.3	212
2009	8	17	10	5.3	0	0.6	0	0.4	7	8.0	203
2010	6	27	14	4.9	1	0.6	0	0.4	12	7.5	182
2011	11	22	11	4.9	1	0.5	0	0.4	10	6.5	171
2012	10	12	5	3.1	0	0.4	0	0.3	7	6.4	169
2013	3	16	10	6.1	0	0.4	0	0.3	6	4.9	156
2014	11	26	7	4.9	0	0.4	0	0.3	19	5.1	141
2015	22	27	12	10.7	0	0.3	0	0.3	15	5.4	136
2016	19	14	6	2.7	0	0.4	0	0.2	9	7.1	141
2017	10	13	4	2.7	0	0.4	0	0.2	9	8.3	138
2018	27	22	5	2.5	0	0.4	0	0.2	17	7.8	143
2019	23	19	7	5.4	0	0.2	0	0.1	12	12.4	147
2020	18	17	4	5.3	0	0.2	0	0.1	13	13.8	148
2021	24	18	2	5.5	0	0.1	0	0.1	16	13.2	154
2022	**25**	**18**	**1**	**6.4**	**0**	**0.1**	**0**	**0.1**	**17**	**14.0**	**161**
15-Yr Total	232	284	106	75.1	2	5.6	1	3.8	176	127.7	

A Represents actual number.
E Represents expected number.

Comparative Schedule

Valuation Date June 30	Active Members General	Water & Sewage (W&S)	Hybrid Plan General	Hybrid Plan Water & Sewage	Totals	Valuation Payroll	Average Age	Service	Pay
1998	169	50			219	$ 7,339,189	43.7 yrs.	10.2 yrs.	$ 33,512
1999	175	49			224	7,784,073	43.8	10.0	34,750
2000	175	49			224	8,338,326	43.9	10.2	37,225
2001	177	47			224	8,532,237	44.6	10.5	38,090
2002	181	53			234	9,256,930	45.1	10.8	39,560
2003	182	51			233	9,691,157	45.7	11.3	41,593
2004	174	52			226	9,599,830	46.4	12.0	42,477
2005	169	51			220	9,599,573	46.7	12.4	43,634
2006	169	51			220	10,090,797	47.5	12.8	45,867
2007	163	50			213	10,119,228	47.8	13.1	47,508
2008*	160	52			212	10,295,133	47.6	13.0	48,562
2009*	156	47			203	10,183,663	47.9	13.2	50,166
2010*	139	43			182	8,968,814	48.3	13.3	49,279
2011*	127	44			171	8,169,376	47.7	13.2	47,774
2012*	127	42			169	8,479,118	48.0	13.5	50,172
2013*	114	39	3		156	7,970,005	48.0	13.7	51,090
2014*	96	31	14		141	7,609,280	48.3	13.5	53,967
2015	78	26	26	6	136	7,210,840	47.5	12.2	53,021
2016	70	25	36	10	141	7,291,841	46.6	11.4	51,715
2017	63	23	39	13	138	7,532,921	46.7	11.2	54,586
2018	56	21	46	20	143	8,102,276	46.2	10.4	56,659
2019	52	15	57	23	147	8,424,050	45.7	9.5	57,306
2020	47	14	66	21	148	8,503,052	46.1	9.4	57,453
2021	45	12	73	24	154	9,035,853	46.8	9.3	58,674
2022	42	11	81	27	161	9,876,429	46.8	9.0	61,344

** DROP participants are included in the Active demographic data.*

General Active Members
(Hired before July 1, 2012)
as of June 30, 2022
by Attained Age and Years of Service

Attained Age	Years of Service to Valuation Date							Totals	
	0-4	5-9	10-14	15-19	20-24	25-29	30 Plus	No.	Valuation Payroll
40-44	0	0	1	0	0	0	0	1	$ 83,902
45-49	0	0	3	1	6	0	0	10	657,634
50-54	0	0	1	5	3	0	0	9	794,651
55-59	0	0	1	3	2	2	4	12	890,902
60	0	0	0	0	1	1	0	2	139,328
61	0	0	0	1	0	0	0	1	78,823
62	0	0	0	0	1	0	0	1	60,206
63	0	0	0	2	1	0	0	3	227,438
64	0	0	0	0	1	0	0	1	54,444
65	0	0	1	0	0	1	0	2	184,678
Totals	**0**	**0**	**7**	**12**	**15**	**4**	**4**	**42**	**$3,172,006**

While not used in the financial computations, the following group averages are computed and shown because of their general interest.

Age: 54.3 years
Service: 21.3 years
Annual Pay: $75,524

Water and Sewage Active Members
(Hired before July 1, 2012)
as of June 30, 2022
by Attained Age and Years of Service

Attained Age	Years of Service to Valuation Date							Totals	
	0-4	5-9	10-14	15-19	20-24	25-29	30 Plus	No.	Valuation Payroll
35-39	0	0	0	1	0	0	0	1	$ 73,900
40-44	0	0	0	0	1	0	0	1	71,290
45-49	0	0	1	1	0	0	0	2	148,581
50-54	0	0	0	0	0	0	1	1	83,902
55-59	0	0	1	0	0	2	0	3	267,656
61	0	0	0	0	1	0	0	1	60,237
62	0	0	0	1	0	0	0	1	54,444
70	0	0	1	0	0	0	0	1	60,784
Totals	**0**	**0**	**3**	**3**	**2**	**2**	**1**	**11**	**$820,794**

While not used in the financial computations, the following group averages are computed and shown because of their general interest.

Age: 53.8 years
Service: 20.4 years
Annual Pay: $74,618

Hybrid Plan – General Active Members
(Hired on or after July 1, 2012)
as of June 30, 2022
by Attained Age and Years of Service

Attained Age	Years of Service to Valuation Date							Totals	
	0-4	5-9	10-14	15-19	20-24	25-29	30 Plus	No.	Valuation Payroll
15-19	1	0	0	0	0	0	0	1	$ 42,036
20-24	6	0	0	0	0	0	0	6	260,789
25-29	6	1	0	0	0	0	0	7	314,629
30-34	10	1	0	0	0	0	0	11	503,803
35-39	5	2	0	0	0	0	0	7	348,620
40-44	7	2	0	0	0	0	0	9	513,240
45-49	8	3	0	0	0	0	0	11	793,195
50-54	11	2	0	0	0	0	0	13	737,285
55-59	6	1	0	0	0	0	0	7	372,101
60	1	0	0	0	0	0	0	1	95,916
62	2	1	0	0	0	0	0	3	117,147
63	2	0	0	0	0	0	0	2	123,099
65	0	2	0	0	0	0	0	2	112,846
75	1	0	0	0	0	0	0	1	40,410
Totals	**66**	**15**	**0**	**0**	**0**	**0**	**0**	**81**	**$ 4,375,116**

While not used in the financial computations, the following group averages are computed and shown because of their general interest.

Age: 43.0 years

Service: 2.9 years

Annual Pay: $54,014

Hybrid Plan – Water and Sewage Active Members
(Hired on or after July 1, 2012)
as of June 30, 2022
by Attained Age and Years of Service

Attained Age	Years of Service to Valuation Date							Totals	
	0-4	5-9	10-14	15-19	20-24	25-29	30 Plus	No.	Valuation Payroll
20-24	2	0	0	0	0	0	0	2	$ 105,702
25-29	2	0	0	0	0	0	0	2	89,806
30-34	2	0	0	0	0	0	0	2	112,799
35-39	3	0	0	0	0	0	0	3	179,354
40-44	4	2	0	0	0	0	0	6	286,264
45-49	3	3	0	0	0	0	0	6	373,418
50-54	0	0	0	0	0	0	0	0	0
55-59	2	1	0	0	0	0	0	3	167,663
64	1	1	0	0	0	0	0	2	150,782
65	1	0	0	0	0	0	0	1	42,725
Totals	**20**	**7**	**0**	**0**	**0**	**0**	**0**	**27**	**$ 1,508,513**

While not used in the financial computations, the following group averages are computed and shown because of their general interest.

Asset Information
Submitted for the Valuation

Reported Assets - Market Value	
Cash & Equivalents	$ 1,275,961
Receivables & Accruals	44,119
Stocks	18,694,941
Bonds	11,558,294
International Securities	5,862,505
Real Estate	3,067,450
Accounts Payable	0
Total Current Assets	$ 40,503,270

Reserve for	
Employees' Contributions	
General	$ 5,752,606
Water & Sewage	1,817,614
Total Employee Contributions	7,570,220
Employer Contributions	
General	1,642,883
Water & Sewage	(3,690,519)
Total Employer Contributions	(2,047,636)
Retired Benefit Payments	34,980,686
Undistributed Investment Income	none
Total Reserve Accounts	$40,503,270

Revenues and Expenditures

	Total System
Balance - July 1, 2021	$47,877,576
Revenues	
Employees' Contributions	810,781
Employer Contributions	1,222,458
Investment Income	(5,371,117)
Expenditures	
Benefit Payments	3,604,307
Refund of Member Contributions	145,590
Expenses	286,531
Balance - June 30, 2022	$40,503,270

These amounts do not reflect the funding value adjustment of $2,803,630. The derivation of this adjustment is on page A-5.

SECTION C

FUNDING OBJECTIVE, SUMMARY OF VALUATION PROCESS, METHODS AND ASSUMPTIONS

Basic Funding Objective and Operation of the Retirement System

Benefit Promises Made Which Must Be Paid For. A retirement system is an orderly means of handing out, keeping track of, and financing contingent pension promises to a group of employees. As each member of the retirement system acquires a unit of service credit they are, in effect, handed an "IOU" which reads: *"The Employees Retirement System promises to pay you one unit of retirement benefits, payments in cash commencing when you retire."*

The principal related financial question is: When shall the money required to cover the "IOU" be contributed? This year, when the benefit of the member's service is received? Or, some future year when the "IOU" becomes a cash demand?

The Constitution of the State of Michigan is directed to the question:

> *"Financial benefits arising on account of service rendered in each fiscal year shall be funded during that year and such funding shall not be used for financing unfunded accrued liabilities."*

This Retirement System meets this constitutional requirement by having the following ***Funding Objective: To establish and receive contributions (expressed as a percentage of active member payroll) which will remain approximately level from year-to-year*** and will not have to be increased for future generations of taxpayers.

Translated into actuarial terminology, a level percent-of-payroll contribution objective means that the contribution rate must be at least:

> ***Normal Cost*** (the current value of benefits likely to be paid on account of members' service being rendered in the current year)
>
> . . . plus . . .
>
> ***Interest of the Unfunded Actuarial Accrued Liability*** (the difference between the actuarial accrued liability and current system assets).

If contributions to the Retirement System are less than the preceding amount, the difference, plus investment earnings not realized thereon, will have to be contributed at some later time, or, benefits will have to be reduced, to satisfy the fundamental fiscal equation under which all retirement systems must operate; that is:

B = C + I – E

Benefit payments to any group of members and their beneficiaries cannot exceed the sum of:

Contributions received on behalf of the group

. . . plus . . .

Investment earnings on contributions received and not required for immediate payment of benefits

. . . minus . . .

Expenses incurred in operating the System.

There are retirement systems designed to defer the bulk of contributions far into the future. Lured by artificially low present contributions, the inevitable consequence of a relentlessly increasing contribution rate – to a level greatly in excess of the level percent-of-payroll rate – is ignored. ***This method of financing is prohibited in Michigan by the state constitution***.

A by-product of the level percent-of-payroll contribution objective is the accumulation of invested assets for varying periods of time. Investment income becomes a major contributor to the Retirement System, and the amount is directly related to the amount of contributions and investment performance.

Computed Contribution Rate Needed to Finance Benefits. From a given schedule of benefits and from the data furnished, the contribution rate is calculated by means of an actuarial valuation – the technique of assigning monetary values to the risks assumed in operating a retirement system.

Actuarial Valuation Process

An actuarial valuation is the process by which a balance between revenues (participant contributions, employer contributions and investment income) and obligations (benefits and expenses) is determined and its actuarial condition is measured.

The flow of activity constituting the valuation may be summarized as follows:

A. ***Covered person information about***:

- each person receiving pension payments
- each former participant with a vested pension not yet payable
- each former participant who is not vested and has not claimed a member contribution refund
- each active participant

B. + ***Financial Information*** (assets, revenues, and expenditures)

C. + ***Benefit Provisions*** (Retirement Ordinance)

D. + ***Experience Estimates*** about the volume and incidence of future activities

E. + ***Actuarial Cost Method*** for allocating costs to time periods

F. + ***Mathematically combining the person information, financial information, benefit provisions, experience estimates and actuarial cost method***

G. = Determination of:

- contribution rate for the plan year
- current funded condition

Items A, B and C are furnished by the pension office and constitute the current known information about the System. Since the majority of activities will occur in the future, estimates must be made about these future activities (Item D).

Demographic assumptions are generally selected on the basis of the System's historical activity, modified for expected future differences. Past activity of funds which are similar in nature to the fund being valued may be utilized if fund data or activities are insufficient to be reliable.

Fiscal assumptions, on the other hand, do not lend themselves to prediction on the basis of historical activity – the reason being that both salary increases and investment return are impacted by inflation. Inflation defies reliable prediction. Fiscal assumptions are generally selected on the basis of what would be expected to occur in an inflation-free environment and then both are increased by some provision for long-term inflation.

This is a case where two wrongs may make a right. If inflation is higher than expected it will probably result in actual rates of salary increase and investment return which exceed the assumed rates. Salaries increasing faster than expected result in unexpected costs. Investment return exceeding the assumed rate result in unanticipated assets. To a large degree the additional assets will offset the additional cost over the long-term.

Once items A, B, C and D are available, the actuarial valuation process begins. The first step is to determine the plan's ***total actuarial present value*** for individuals in each of the 3 covered person categories.

Retired members now receiving monthly payments;
Vested terminated members not yet at retirement age; and
Active members.

The actuarial present value is the value today, after taking into account the probabilities of payment and the effect of time, of System promises to pay benefits in the future on the basis of both services already completed and projected future service.

Actuarial Cost Method

The total actuarial present value is allocated between projected future service and completed service by the actuarial cost method (Item E) -- the ***individual entry-age*** method is being utilized for this valuation. The portion of the total actuarial present value allocated to projected future service is the ***actuarial present value of future normal cost*** -- normal cost being the series of annual costs, from entry-age to retirement age, which will accumulate to the actuarial present value of the individual's benefit at the time of retirement or death. The remainder of the total actuarial present value is the ***actuarial accrued liability***.

At this stage, determination has been made of:

1. The total actuarial present value;
2. The actuarial present value of future normal cost; and
3. The actuarial accrued liability.

In the typical plan, the actuarial accrued liability may not be covered by the plan's accrued assets – leaving an ***unfunded actuarial accrued liability***. If the plan's accrued assets equal or exceed the actuarial accrued liability, the plan's accrued obligations are said to be "fully funded."

The next step in the valuation process is a determination of the contribution rate (Item G) required to support System benefits in accordance with the funding objective (page A-1).

The contribution rate is determined in two basic components:

1. The normal cost component; and
2. The component which will finance (pay off) the unfunded actuarial accrued liability over the periods indicated on page A-2.

The Unfunded Actuarial Accrued Liability (UAAL) was determined using the Actuarial Value of Assets and Actuarial Accrued Liability calculated as of the valuation date. The UAAL amortization payment (one component of the contribution requirement) is the level percent of pay required to fully amortize the UAAL. The UAAL attributed to the Deferred Retirement Option Plan is amortized over a 15-year period being effective with the June 30, 2008 valuation (fully amortized as of the June 30, 2022 actuarial valuation). The UAAL attributed to the June 30, 2016 valuation is amortized over a 30-year closed period effective with the June 30, 2016 valuation (24 years remain as of June 30, 2022).

Gains or losses to the UAAL that have occurred after June 30, 2016 and the current valuation date are amortized over 30-year closed periods. This UAAL payment reflects any payments expected to be made between the valuation date and the date contributions determined by this report are scheduled to begin. In future years, new gains and losses (experience along with other changes such as assumptions or benefit provisions) will be amortized separately (“new layers”) as they occur (over 30-year closed amortization periods). This will create an “amortization schedule” of contribution rates. This schedule will require periodic review by the Board.

Actuarial Assumptions Used for the Valuation

Funding objective contribution requirements and actuarial present values are calculated by applying estimates of future System activities (actuarial assumptions) to the benefit provisions and people information of the fund, using the actuarial cost method described on page C-5.

The principal areas of activity which require estimates are:

(i) Rates of inflation impacting assets of the System and active member pays

(ii) Long-term rates of investment return to be generated by the assets of the System

(iii) Rates of salary increase to members

(iv) Rates of mortality among members, retirants and beneficiaries

(v) Rates of withdrawal of active members

(vi) Rates of retirement due to age and service

(vii) Rates of disability among members

In making a valuation, the monetary effect of each activity is calculated for as long as a present covered person survives – a period of time which can be as long as a century.

Actual activities of the Retirement System will not coincide exactly with estimated activities due to the nature of the activities. Each valuation provides a complete recalculation of estimated future activities and takes into account the effect of differences between estimated and actual activities to date. The result is a continual series of adjustments (usually small) to the computed contribution rate. From time-to-time one or more of the estimates are modified to reflect experience trends (but not random or temporary year-to-year fluctuations).

The Board of Trustees sets the assumptions. Actuarial assumptions were most recently reviewed and adopted by the Board of Trustees for the June 30, 2018 actuarial valuation. The rationale for the economic and mortality assumptions is described in the report dated January 11, 2019. Other assumptions are based in part on plan experience and reviewed from time-to-time. We recommend the Board set a policy for regular reviews of the actuarial assumptions, such as every five years.

All actuarial assumptions are expectations of future experience, not market measures.

The investment return rate used for valuation calculations was 6.85% net of expenses, compounded annually. The assumed rate of price inflation is 2.25% per year resulting in a real rate of return of 4.6% per year. The assumed rate of wage inflation and payroll growth is 3.0% per year. This is the same payroll growth assumption used to amortize unfunded actuarial accrued liability.

This assumption is used to equate the value of payments due at different points in time and was first used for the June 30, 2018 valuation. Approximate investment returns, for the purpose of comparisons with assumed returns, have been as follows:

	Year Ended June 30				
	2022	2021	2020	2019	2018
Nominal rate	(12.0) %	27.9 %	3.0 %	5.2 %	9.0 %
Inflation rate	9.1	5.4	0.6	1.6	2.9
Real rate	(21.1)	22.5	2.4	3.6	6.1

The nominal rate of return (i.e., Market Value of Assets Rate of Investment Return) was computed using the approximate formula i = I divided by 1/2 (A + B - I), where I is actual realized investment income net of expenses plus market value adjustments, A is the beginning of year market asset value, and B is the end of year market asset value.

These rates of return should not be used for measurement of an investment advisor's performance or for comparisons with other pension funds – to do so will mislead.

Salary increase rates used to project current pays to those upon which a benefit will be based are represented by the following table and were first used for the June 30, 2012 valuation.

	Annual Rate of Salary Increase for Sample Ages	
Sample Ages	Base Economic	Merit and Longevity
20	3.00 %	4.00 %
25	3.00	3.50
30	3.00	2.90
35	3.00	2.30
40	3.00	1.70
45	3.00	1.20
50	3.00	1.00
55	3.00	0.50
60	3.00	0.00

Changes actually experienced in average pay and total payroll have been as follows:

	Year Ending					5-Year
	2022	2021	2020	2019	2018	Average
Average pay (all members)	4.5%	2.1%	0.3%	1.1%	3.8%	2.4%
Total payroll	9.3%	6.3%	0.9%	4.0%	7.6%	5.6%
Average pay (continuing members)	7.8%	4.1%	4.7%	5.5%	5.6%	5.5%

The mortality table used was the RP-2014 Healthy Annuitant Mortality Table adjusted for mortality improvements using projection scale MP-2018 from 2006 on a fully generational basis. This table was first used for the June 30, 2018 valuation. Sample values follow:

Sample Ages in 2022	Probability of Dying Next Year		Future Life Expectancy (Years)	
	Male	Female	Male	Female
50	0.41%	0.27%	34.48	37.10
55	0.57	0.38	29.76	32.18
60	0.81	0.58	25.21	27.42
65	1.18	0.86	20.89	22.89
70	1.73	1.29	16.83	18.58
75	2.71	2.09	13.08	14.55
80	4.53	3.58	9.72	10.91
Ref:	2135 x 1.00	2136 x 1.00		

This assumption is used to measure the probabilities of each benefit payment being made after service retirement.

The RP-2014 Disabled Annuitant Mortality Table adjusted for mortality improvements using projection scale MP-2018 from 2006 on a fully generational basis is used to measure the probabilities of each benefit payment being made after disability retirement.

The RP-2014 Employees Mortality Table adjusted for mortality improvements using projection scale MP-2018 from 2006 on a fully generational basis is used to measure the probabilities of members dying before retirement.

The rates of retirement used to measure the probability of eligible members retiring during the next year are listed below. These tables were first used for the June 30, 2018 valuation.

For MAPE members hired **before** July 1, 2016 or Non-Union members hired **before** January 1, 2016:

Retirement Ages	Percent Retiring
50	18 %
51	18
52	18
53	18
54	18
55	18
56	18
57	18
58	18
59	20
60	20
61	20
62	25
63	20
64	20
65	40
66	40
67	40
68	40
69	40
70	100

Additionally, MAPE members hired **before** July 1, 2016 or Non-Union members hired **before** January 1, 2016 retiring with 30 or more years of service (and an age depending on eligibility requirements):

Service Years	Proposed Table Percent Retiring
30	50 %
31	50
32	50
33	50
34	50
35	100

For MAPE members hired **after** July 1, 2016 or Non-Union members hired **after** January 1, 2016 retiring under the age 65+ and 10 years of service condition:

Retirement Ages	Proposed Table Percent Retiring
65	50 %
66	50
67	50
68	50
69	50
70	100

For MAPE members hired after July 1, 2016, **100%** are assumed to retire after reaching 37 or more years of service.

For Non-Union members hired after January 1, 2016, **100%** are assumed to retire after reaching 38 or more years of service.

Rates of separation from active membership are represented by the following table (rates do not apply to members eligible to retire and do not include separation on account of death or disability). This assumption measures the probabilities of members remaining in employment. This table was first used for the June 30, 2018 valuation.

Basis		% of Active Members Separating within Next Year
Service Based		
Years of Service:	0	25.00 %
	1	20.00
	2	15.00
	3	12.50
	4	10.00
Age Based		
Sample Ages:	25	8.40
	30	7.70
	35	6.16
	40	2.59
	45	1.75
	50	1.75
	55	1.75
	60	1.75

Rates of disability are represented by the following table. This assumption measures the probabilities of active members becoming disabled. This table was first used for the June 30, 2018 valuation.

Sample Ages	% of Active Members Separating from Disability	
	Male	Female
35	0.04 %	0.05 %
40	0.10	0.18
45	0.13	0.20
50	0.25	0.28
55	0.45	0.38
60	0.71	0.51
65	0.83	0.62

Miscellaneous and Technical Assumptions

Marriage Assumption	90% for purposes of death-in-service benefits and 80% for deaths after retirement.
Pay Increase Timing	Beginning of (Fiscal) year. This is equivalent to assuming that reported pays represent amounts paid to members during the year ended on the valuation date.
Decrement Timing	Decrements of all types are assumed to occur mid-year.
Eligibility Testing	Eligibility for benefits is determined based upon the age nearest birthday and service nearest whole year on the date the decrement is assumed to occur.
Benefit Service	Exact fractional service is used to determine the amount of benefit payable.
Decrement Relativity	Decrement rates are used directly from the experience study, without adjustment for multiple decrement table effects.
Decrement Operation	Disability and mortality decrements do not operate during the first 5 years of service. Disability and turnover do not operate during retirement eligibility.
Normal Form of Benefit	The normal form of benefit is the straight life form. 1/2 year of benefit service added to service for retirees to simulate a load for service purchase.
Option Factors	Option factors are based upon 7.5% interest and the RP-2000 Mortality Table projected to 2017 using scale BB, with 64% unisex blend.
Incidence of Contributions	Contributions are assumed to be received continuously throughout the year based upon the Board adopted contribution rates, and the actual payroll payable at the time contributions are made.
Data Adjustments	None.

Glossary

Accrued Service: Service credited under the System which was rendered before the date of the actuarial valuation.

Actuarial Accrued Liability: The difference between the actuarial present value of future benefit payments and the actuarial present value of future normal costs. Also referred to as "accrued liability" or "past service liability."

Actuarial Assumptions: Estimates of expected future experience with respect to rates of mortality, disability, turnover, retirement, rate or rates of investment income and salary increases. Decrement assumptions (rates of mortality, disability, turnover and retirement) are generally based on past experience, often modified for projected changes in conditions. Economic assumptions (salary increases and investment income) consist of the underlying rate in an inflation-free environment plus a provision for a long-term average rate of inflation.

Actuarial Cost Method: A mathematical budgeting procedure for allocating the dollar amount of the "actuarial present value of future benefit payments" between future normal costs and actuarial accrued liabilities. Sometimes referred to as the "actuarial cost method."

Actuarial Equivalent: A single amount or series of amounts of equal actuarial present value to another single amount or series of amounts, computed on the basis of appropriate actuarial assumptions.

Actuarial Present Value: The amount of funds currently required to provide a payment or series of payments in the future. It is determined by discounting future payments at predetermined rates of interest, and by probabilities of payment. Also referred to as "present value."

Amortization: Paying off an interest-discounted amount with periodic payments of interest and principal – as opposed to paying it off with a lump sum payment.

Experience Gain (Loss): The difference between actual costs and assumed actuarial costs – during the period between two valuation dates.

Funding Value (of Assets): The value of assets used in the actuarial valuation. Typically, cost value with an adjustment toward market.

Normal Cost: The actuarial cost allocated to the current year by the actuarial cost method. Sometimes referred to as "current service cost."

Unfunded Actuarial Accrued Liability: The difference between the actuarial accrued liabilities and the actuarial value of system assets. Sometimes referred to as "unfunded past service liability," "unfunded accrued liability" or "unfunded supplemental present value."

City of Jackson Policemen's and Firemen's Pension Fund

Actuarial Valuation Report
as of June 30, 2022



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Actuarial Valuation Report as of June 30, 2022

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	Summary of Benefit Provisions and Valuation Data Submitted by the Pension Fund
B-1/2	Summary of Benefit Provisions Evaluated and/or Considered
B-3	Summary of Asset Information
B-4/7	Retiree and Beneficiary Data
B-8	Active Member Data
	Actuarial Cost Methods, Actuarial Assumptions and Definitions of Technical Terms
C-1	Actuarial Cost Methods
C-2/3	Actuarial Assumptions
C-4	Definitions of Technical Terms

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January 27, 2023

Board of Trustees
City of Jackson Policemen's and Firemen's
Pension Fund
Jackson, Michigan

Re: City of Jackson Policemen's and Firemen's Pension Fund Actuarial Valuation as of June 30, 2022

The results of the June 30, 2022 Annual Actuarial Valuation of the City of Jackson Policemen's and Firemen's Pension Fund are presented in this report.

This report was prepared at the request of the Board and is intended for use by the Pension Fund and those designated or approved by the Board. This report may be provided to parties other than the Fund only in its entirety and only with the permission of the Board. GRS is not responsible for unauthorized use of this report.

The purpose of the valuation is to measure the Fund's funding progress and to determine the employer contribution rate for the fiscal year ending June 30, 2024 (beginning July 1, 2023). Information required by Statement Nos. 67 and 68 of the Governmental Accounting Standards Board (GASB) are provided in separate reports. This report should not be relied on for any purpose other than the purposes described herein. Determinations of financial results, associated with the benefits described in this report, for purposes other than those identified above may be significantly different.

This report includes risk metrics on pages A-9 and A-10 but does not include a more robust assessment of the risks of future experience not meeting the actuarial assumptions. Additional assessment of risks was outside the scope of this assignment.

This valuation assumed the continuing ability of the plan sponsor to make the contributions necessary to fund this plan. A determination regarding whether or not the plan sponsor is actually able to do so is outside our scope of expertise and was not performed. Continued receipt of employer contributions on a timely basis is essential for the sustainability of the Fund.

This report was prepared using our proprietary valuation model and related software which, in our professional judgment, has the capability to provide results that are consistent with the purposes of the valuation and has no material limitations or known weaknesses. We performed tests to ensure that the model reasonably represents that which is intended to be modeled.

The findings in this report are based on data and other information through June 30, 2022. This valuation was based upon information furnished by the Plan Administrator, concerning Pension Fund benefits, financial transactions, plan provisions and active members, terminated members, retirees and beneficiaries. We checked for internal reasonability and year-to-year consistency, but did not audit the data. We are not responsible for the accuracy or completeness of the information provided by the Plan Administrator.

This report has been prepared by individuals who have substantial experience valuing public employee retirement systems. To the best of our knowledge, the information contained in this report is accurate and fairly presents the actuarial position of the Fund as of the valuation date. All calculations have been made in conformity with generally accepted actuarial principles and practices, and with the Actuarial Standards of Practice issued by the Actuarial Standards Board.

Abra D. Hill, James R. Sparks and Derek Henning are Members of the American Academy of Actuaries (MAAA) and meet the Academy's Qualification Standards to render the actuarial opinions contained herein.

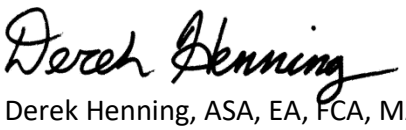
The signing actuaries are independent of the plan sponsor.

Gabriel, Roeder, Smith & Company will be pleased to review this valuation report with the Board of Trustees and to answer any questions pertaining to the valuation.

Respectfully submitted,
Gabriel, Roeder, Smith & Company


Abra D. Hill, ASA, FCA, MAAA


James R. Sparks, ASA, FCA, MAAA


Derek Henning, ASA, EA, FCA, MAAA

ADH/JRS/DH:sc

C0027

EXECUTIVE SUMMARY

Executive Summary

Valuation Date	June 30, 2021	June 30, 2022
Contribution For Fiscal Year Ending	June 30, 2023	June 30, 2024
Investment Rate of Return (net of expenses)	6.0%	6.0%
Computed Annual Employer Contributions	$ 260,185	$ ~~218,402~~
Membership		
Number of		
Active Members	0	0
Retirees and Beneficiaries	13	11
Inactive, Non-Retired Members	0	0
Total	13	11
Total Pensions Being Paid	$ 576,414	$ 502,511
Assets		
Market Value (MVA)	$3,997,008	$3,308,783
Actuarial Value (AVA)	3,576,789	3,538,581
Return on Actuarial Value	12.0%	4.7%
Return on Market Value	25.8%	(12.5)%
Ratio - Actuarial Value to Market Value	89.5%	106.9%
Actuarial Information		
Normal Cost %	0%	0%
Actuarial Accrued Liability (AAL)	$5,172,947	$4,685,354
Unfunded Actuarial Accrued Liability (UAAL)	1,596,158	1,146,773
Funded Ratio on Actuarial Value of Assets	69.1%	75.5%
Amortization Period	6 years	5 years

Highlights

- The Fund's experience for the 2022 Fiscal Year was favorable in comparison to expectations. Actuarial gains occurred as a result of:
  - Greater than expected mortality for the past year (2 benefit recipients deceased - $119k gain); and
  - COLA increases lower than the assumed 3% per year ($99k gain).

  These gains were partially offset by a loss from lower than expected return on the Actuarial Value of Assets (4.7% recognized vs 6% expected - $43k loss).
- The UAAL of $1,146,773 million as of June 30, 2022 is amortized over a 5-year closed level-dollar period.
- Based on the Market Value of Assets, the UAAL would be $1,367,571. The Computed Annual Employer Contributions for the Fiscal Year ending June 30, 2024 on a Market Value basis would be $274,544.

This Executive Summary gives an overview of the entire report. It should not be used as a substitute for a thorough reading of the full report.

Executive Summary

Actuarial Valuation

This report presents the actuarial valuation of the City of Jackson Policemen's and Firemen's Pension Fund prepared as of June 30, 2022. Valuations are prepared annually as of July 1 of each year; the first day of the City of Jackson Policemen's and Firemen's Pension Fund plan and fiscal year.

The primary purposes of this valuation report are to measure the plan's liabilities to determine the required employer contribution rate based upon the Fund's funding policy and to analyze changes in the City of Jackson Policemen's and Firemen's Pension Fund's actuarial position.

In addition, this report provides summaries of the member data, financial data, plan provisions, and actuarial assumptions and methods.

Financing Objectives

The City of Jackson Policemen's and Firemen's Pension Fund is a very mature plan with no active members and is supported only by employer contributions and net earnings on the investments of the Fund. The employer contribution is determined by the actuarial valuation.

The employer contributions were intended to be sufficient to amortize the Unfunded Actuarial Accrued Liability (UAAL) over a 10-year level-dollar closed period for liabilities beginning with the June 30, 2017 valuation. As of June 30, 2022, the remaining amortization period for retired liabilities is 5 years**.** The current amortization policy of financing the UAAL over a closed 5-year period projects employer contributions plus expected investment return on Fund assets (6.0% per annum) to offset expected annual benefit payments ($ inflows = $ outflows).

Plan Experience

Net experience for the Pension Fund was favorable during the year ending June 30, 2022. The sources of gains or (losses) on the UAAL are:

Item	Impact on UAAL	
Actuarial Value of Assets Gain/(Loss)	$	(43,710)
COLA Gain/(Loss)		99,009
Mortality Gain/(Loss)		119,099
Total Experience Gain/(Loss)	$	174,398

The recognized rate of return on the Actuarial Value of Assets was 4.7% versus the assumed rate of investment return of 6.0%, resulting in an asset loss of $43,710.

The assumed cost-of-living adjustment increases are 3.00% for all retirees. Actual cost-of-living-adjustment increases granted for most retirees was 1.50% for 6 members and 0.0% for 5 members. On average the increase was below the 3.00% assumption, which resulted in a gain for the year ($99,009).

Two benefit recipients deceased during the last fiscal year (versus about 1 expected). This resulted in a liability mortality gain of $119,099.

Executive Summary

Funded Status

The funded ratio of the Fund continued to improve thanks to continued employer contributions to fund the Unfunded Actuarial Accrued Liability and favorable plan experience. The Funded Status on an Actuarial Value of Assets basis improved to 75.5% as of June 30, 2022 versus 69.1% as of June 30, 2021 (assuming a 6.0% investment rate of return).

The funded status on a market value basis (i.e., If all future unrecognized investment gains were to be recognized immediately – item H of page A-3) would have been 70.6% as of June 30, 2022 (a 6.7% decrease from 77.3% as of June 30, 2021).

Given the maturity of the Fund, it may be in the Board's interest to use the Market Value of Assets for future actuarial valuations (rather than the current Actuarial Value of Assets method). As of June 30, 2022, the funded status on a Market Value of Assets basis is about 6% less than the funded status on an Actuarial Value of Assets basis. At this time, the Actuarial Value of Assets has maintained fairly level over the past decade ($3 to $4 million range). We believe the Actuarial Valuation of Assets is still a reasonable method for Funding purposes so long as the asset base continues to hold level.

The Funded Status is not appropriate for assessing the sufficiency of Fund assets to cover the estimated cost of settling the plan's benefit obligations. By itself, this measure is not appropriate for assessing the need for or the amount of future employer contributions.

Assumptions and Methods:

As of the June 30, 2015 Actuarial Valuation, the long-term investment rate of return net of expenses was decreased from 7.5% to 6.0% and the closed amortization period was increased from 9 to 11 (see the Alternate Funding Policy supplemental dated March 17, 2016).

As of the June 30, 2017 Actuarial Valuation, the closed amortization period was increased from 9 years to 10 years (see the letter dated February 9, 2018).

The above changes were approved by the Board prior to adoption. As of June 30, 2022, this amortization period has 5 years remaining.

Closed retirement system's with maturity levels similar to that of this Fund often seek funding objectives that minimize return volatility and make sure the system remains sufficiently liquid to continue to pay benefits. These objectives may require changes to the asset allocation of the system which in turn may require that a lower investment rate of return be assumed. This could place upward pressure on the liabilities and employer contributions in the future.

Executive Summary

Looking Ahead

The net cash flow (contributions less benefit payments) was about -6% of assets for the prior fiscal year. The 6.0% assumed rate of investment return is expected to mostly offset this negative cash flow in the near future. As a consequence, the projected assets are expected to remain somewhat level for the next 5 to 10 years with continued receipt of employer contributions and if all assumptions are met.

The current level of benefit payments, $502,511, is large relative to the market value of assets of $3,308,783 as of June 30, 2022 (about 1/6 of assets). The amount of benefit payments, the value of funds in the trust, and the trust investment vehicles all should be monitored closely to avoid any short-term cash flow problems. Page A-5 shows projections under the current assumptions and amortization policies. **It is important to understand that these projections are not forecasts, but rather projections based upon the valuation's assumptions, specifically, a 6.00% assumed rate of investment return.**

As previously discussed, the Actuarial Value of Assets is greater than the Market Value of Assets (by $229,798 – see page A-3 for the development of the Actuarial Value of Assets). This difference will be recognized over the next three years in the absence of offsetting losses/gains. In the absence of future investment gains, this recognition will place downward pressure on the current funded status.

The asset methodology should be reviewed annually to asses it's reasonableness. At this time, we believe the Actuarial Valuation of Asset methodology is still reasonable.

GASB Accounting Standards

In June 2012, the GASB approved two new accounting standards for public sector retirement systems and governments, Statements No. 67 and No. 68. These new standards are a significant departure from the current standards. The GASB has stated that accounting standards should be separate from funding standards. In our view, the funding of the Pension Fund may continue unchanged. Separate reports were issued to the City with GASB Statement Nos. 67 and 68 information as of June 30, 2022.

Recommendation

We have the following recommendations:

1. ***The Board should consider*** using the Market Value of Assets as the basis for development of the Computed Annual Employer Contribution for the fiscal year ending June 30, 2024. The computed dollar contribution based upon a Market Value of Assets basis would be $274,544 ($56,142 higher than $***218,402***, which was computed based upon an Actuarial Value of Assets).

2. ***The Board may wish to consider*** switching from a 5-year closed level-dollar amortization period to a 5-year open level-dollar amortization period. This would have no impact to the Computed Annual Employer Contribution for the fiscal year ending June 30, 2024. Projected employer contributions in future years as a result of this proposed change (in addition to item 1 above) can be seen on page A-6 of this report.

3. ***The Board may wish to review*** the current funding objectives of the Pension Fund and determine if any additional changes should be considered for the investment and/or funding policy.

SECTION A

VALUATION RESULTS AND COMPARATIVE INFORMATION

Contributions Needed to Finance Benefits of the Pension Fund for the Fiscal Year Beginning July 1, 2023

The computed employer contribution for the fiscal year beginning July 1, 2023 is $218,402 (based upon the Actuarial Value of Assets). The computed employer contribution based upon a market Value of Assets basis would be $274,544.

Continued timely receipt of employer contributions are critical to the well-being of the City of Jackson Policemen's and Firemen's Pension Fund.

The contribution is solely to pay for the Unfunded Actuarial Accrued Liability (UAAL). Currently the UAAL (based upon the Actuarial Value of Assets) is $1,146,773. The Unfunded Actuarial Accrued Liability was financed over a period of 5 years. The future employer contributions are assumed to be level-dollar amounts needed to amortize the unfunded actuarial accrued liability over a 5-year period. Contribution amounts are assumed to be paid midway through the fiscal year. Dollar amounts are adjusted for the time lag between June 30, 2022 and the assumed contribution date.

The current amortization policy of financing the UAAL over a closed 5-year period projects that employer contributions plus expected investment return on Fund assets (6.0% per annum) will mostly offset expected annual benefit payments ($ inflows = $ outflows). The assumed rate of return of 6.0% per annum is considered a reasonable assumption based upon the condition the current asset base is sustainable.

In a cash flow deficient environment (absent employer contributions), the assumed rate of return of 6.0% per annum may become unsustainable.

Comparative contribution amounts for prior fiscal years are shown on page A-4.

Comparative Schedule ($ Amounts in Thousands)

Valuation Date June 30	(AAL) Actuarial Accrued Liability	(AVA) Actuarial Value of Assets	Unfunded Actuarial Accrued Liability (UAAL) Dollar Amount	Funded Status (on AVA Basis)	Amortization Period (Yrs.) Actives	Amortization Period (Yrs.) Retired Lives	Experience Gain/(Loss)
1998 (a)	$ 13,879	$ 8,997	$ 4,882	64.8%	35	18	$ 1,731
1999	13,537	9,845	3,692	72.7%	34	17	1,005
2000 (a)	11,747	11,518	229	98.1%	N/A	10	3,367
2001	11,428	10,845	583	94.9%	N/A	9	(641)
2002	11,267	9,355	1,912	83.0%	N/A	8	(1,286)
2003	10,901	7,745	3,156	71.0%	N/A	7	(1,190)
2004	10,753	6,418	4,335	59.7%	N/A	6	(1,256)
2005	10,172	5,622	4,550	55.3%	N/A	5	(438)
2006 (a)	10,931	5,560	5,371	50.9%	N/A	10	(413)
2007	10,682	5,848	4,834	54.7%	N/A	10	(29)
2008	9,769	5,512	4,257	56.4%	N/A	10	303
2009 (a)	9,867	4,294	5,573	43.5%	N/A	19.65	(717)
2010 (a)	9,464	4,029	5,435	42.6%	N/A	20.93	(220)
2011	8,904	3,575	5,329	40.2%	N/A	13	(32)
2012	8,123	3,245	4,878	39.9%	N/A	12	308
2013	8,189	3,200	4,989	39.1%	N/A	11	(7)
2014	8,165	3,286	4,879	40.2%	N/A	10	376
2015	7,625	3,292	4,333	43.2%	N/A	9	259
2016	7,912	3,305	4,606	41.8%	N/A	10	(13)
2017	7,467	3,295	4,172	44.1%	N/A	10	129
2018 (a)	7,362	3,281	4,081	44.6%	N/A	9	(54)
2019	6,933	3,238	3,695	46.7%	N/A	8	123
2020	5,815	3,334	2,480	57.3%	N/A	7	888
2021	5,173	3,577	1,596	69.1%	N/A	6	524
2022	4,685	3,539	1,147	75.5%	N/A	5	174

(a) After changes in assumptions and/or methods.

Development of Actuarial Value of Assets

Year Ended June 30:	2021	2022	2023	2024	2025
A. Actuarial Value Beginning of Year	$3,334,482	$3,576,789			
B. Market Value End of Year	3,997,008	3,308,783			
C. Market Value Beginning of Year	3,311,403	3,997,008			
D. Non-Investment Net Cash Flow	(149,433)	(203,015)			
D1. Projected Rate of Return	6.00%	6.00%	6.00%		
E. Investment Income					
E1. Market Total: B - C - D	835,038	(485,210)			
E2. Amount for Immediate Recognition	195,586	208,517			
E3. Amount for Phased-In Recognition E1-E2	639,452	(693,727)			
F. Phased-In Recognition of Investment Income					
F1. Current Year: 0.25 x E3	159,863	(173,432)			
F2. First Prior Year	(29,231)	159,863	$ (173,432)		
F3. Second Prior Year	(912)	(29,231)	159,863	$ (173,432)	
F4. Third Prior Year	66,434	(910)	(29,229)	159,863	$ (173,431)
F5. Total Recognized Investment Gain	196,154	(43,710)	(42,798)	(13,569)	(173,431)
G. Actuarial Value					
G1. Preliminary Funding Value End of Year: A + D + E2 + F5	3,576,789	3,538,581			
G2. Upper Corridor Limit: B x 1.2	4,796,410	3,970,540			
G3. Lower Corridor Limit: B x 0.8	3,197,606	2,647,026			
G4. Final Funding Value	**3,576,789**	**3,538,581**			
H. Difference between Market & Funding Value	420,219	(229,798)			
I. Recognized Rate of Return - Funding Value	12.0%	4.7%			
J. Recognized Rate of Return - Market Value	25.8%	(12.5)%			
K. Ratio of Funding Value to Market Value	89.5%	106.9%			

The Actuarial Value of Assets recognizes assumed investment income (line E2) fully each year. Differences between actual and assumed investment income (line E3) are phased-in over a closed four-year period. During periods when investment performance exceeds the assumed rate, Actuarial Value of Assets will tend to be less than Market Value. During periods when investment performance is less than the assumed rate, Actuarial Value of Assets will be greater than Market Value. The Actuarial Value of Assets is unbiased with respect to Market Value. At any time, Actuarial Value of Assets may be either greater or less than Market Value. If actual and assumed rates of retirement income are exactly equal for three consecutive years, the Actuarial Value will become equal to Market Value.

Actuarial Value of Assets is restricted to the range of 80% to 120% of Market Value.

City's Computed Contributions – Comparative Schedule

Fiscal Year Ended June 30	Valuation Date June 30	Dollar Contributions Computed		Dollar Contributions Actual
2000	1998	$ 372,183		$ 372,183
2001	1999	293,241		293,241
2002	2000	-		-
2003	2001	86,992		86,992
2004	2002	301,041		301,041
2005	2003	528,199		528,199
2006	2004	806,276		806,276
2007	2005	934,667		934,667
2008	2006	612,545		612,545
2009	2007	641,212		641,212
2010	2008	722,537	@	722,537
2011	2009	500,000	@	500,000
2012	2010	500,000	@	500,000
2013	2011	599,431	@	599,431
2014	2012	606,096	@	606,096
2015	2013	607,009		607,009
2016	2014	604,690	@	604,690
2017	2015	565,463	@	565,463
2018	2016	567,276		567,276
2019	2017	506,251		506,251
2020	2018	543,093	@	543,093
2021	2019	524,841		524,841
2022	2020	363,236		363,236
2023	2021	260,185		
2024	2022	218,402	#	

@ After changes in assumptions and/or methods.

 # Based upon Actuarial Value of Assets. The computed dollar contribution on a Market Value of Assets Basis would be $274,544.

Cash Flow Projection 1 – Current Board Approved Policy
5-Year Closed Amortization (Actuarial Value of Assets Basis)
Assuming 6.0% Return on Actuarial Value of Assets

Valuation Date June 30,	Actuarial Accrued Liability (AAL)	Actuarial Value of Assets (AVA)	Unfunded Actuarial Accrued Liability (UAAL)	Funded Ratio	Remaining Amortization Years of UAAL	During Upcoming Fiscal Year: Projected Total Contributions	Projected Benefit Payments	Assumed Investment Return on AVA
2022	$ 4,685,354	$ 3,538,581	$ 1,146,773	76%		$ 260,185	$ (494,020)	$ 205,516
2023	4,457,851	3,510,262	947,589	79%	5	218,402	(489,627)	202,693
2024	4,221,220	3,441,730	779,490	82%	4	218,402	(482,997)	198,777
2025	3,977,218	3,375,913	601,305	85%	3	218,402	(473,979)	195,095
2026	3,727,860	3,315,431	412,429	89%	2	218,402	(462,467)	191,806
2027	3,475,393	3,263,172	212,221	94%	1	218,402	(448,416)	189,086
2028	3,222,244	3,222,244	-	100%	1	-	(431,861)	180,568
2029	2,970,951	2,970,951	-	100%	1	-	(412,934)	166,049
2030	2,724,067	2,724,067	-	100%	1	-	(391,876)	151,859
2031	2,484,050	2,484,050	-	100%	1	-	(369,021)	138,134
2032	2,253,163	2,253,163	-	100%	1	-	(344,789)	124,997
2033	2,033,371	2,033,371	-	100%	1	-	(319,685)	112,551
2034	1,826,237	1,826,237	-	100%	1	-	(294,240)	100,876
2035	1,632,873	1,632,873	-	100%	1	-	(268,983)	90,020
2036	1,453,911	1,453,911	-	100%	1	-	(244,383)	80,010
2037	1,289,538	1,289,538	-	100%	1	-	(220,804)	70,845
2038	1,139,579	1,139,579	-	100%	1	-	(198,541)	62,505
2039	1,003,543	1,003,543	-	100%	1	-	(177,797)	54,956
2040	880,702	880,702	-	100%	1	-	(158,691)	48,151
2041	770,162	770,162	-	100%	1	-	(141,271)	42,033
2042	670,925	670,925	-	100%	1	-	(125,502)	36,545
2043	581,968	581,968	-	100%	1	-	(111,276)	31,628
2044	502,321	502,321	-	100%	1	-	(98,439)	27,229
2045	431,111	431,111	-	100%	1	-	(86,839)	23,299
2046	367,571	367,571	-	100%	1	-	(76,331)	19,798
2047	311,038	311,038	-	100%	1	-	(66,787)	16,688
2048	260,939	260,939	-	100%	1	-	(58,104)	13,939
2049	216,773	216,773	-	100%	1	-	(50,196)	11,522
2050	178,100	178,100	-	100%	1	-	(42,995)	9,415
2051	144,520	144,520	-	100%	1	-	(36,461)	7,593
2052	115,652	115,652	-	100%	1	-	(30,551)	6,036
2053	91,137	91,137	-	100%	1	-	(25,237)	4,722
2054	70,622	70,622	-	100%	1	-	(20,515)	3,631
2055	53,738	53,738	-	100%	1	-	(16,379)	2,740
2056	40,099	40,099	-	100%	1	-	(12,824)	2,027
2057	29,302	29,302	-	100%	1	-	(9,830)	1,468
2058	20,940	20,940	-	100%	1	-	(7,363)	1,039
2059	14,615	14,615	-	100%	1	-	(5,381)	718
2060	9,952	9,952	-	100%	1	-	(3,832)	484
2061	6,604	6,604	-	100%	1	-	(2,657)	318
2062	4,265	4,265	-	100%	1	-	(1,789)	203
2063	2,679	2,679	-	100%	1	-	(1,169)	126
2064	1,636	1,636	-	100%	1	-	(741)	76
2065	971	971	-	100%	1	-	(455)	45
2066	561	561	-	100%	1	-	(270)	26
2067	317	317	-	100%	1	-	(155)	14
2068	176	176	-	100%	1	-	(86)	8
2069	98	98	-	100%	1	-	(46)	5
2070	57	57	-	100%	1	-	(24)	3
2071	35	35	-	100%	1	-	(13)	2
2072	24	24	-	100%	1	-	(13)	1
2073	12	12	-	100%	1	-	(7)	1
2074	6	6	-	100%	1	-	(3)	0
2075	3	3	-	100%	1	-	(2)	0
2076	1	1	-	100%	1	-	(1)	0

The assumed rate of investment return is net of expenses.

Cash Flow Projection 2 – Alternate Policy
5-Year Open Amortization (Market Value of Assets Basis)
Assuming 6.0% Return on Market Value of Assets

Valuation Date June 30,	Actuarial Accrued Liability (AAL)	Market Value of Assets (MVA)	Unfunded Actuarial Accrued Liability (UAAL)	Funded Ratio	Remaining Amortization Years of UAAL	During Upcoming Fiscal Year: Projected Total Contributions	Projected Benefit Payments	Assumed Investment Return on AVA
2022	$ 4,685,354	$ 3,308,783	$ 1,376,571	71%		$ 260,185	$ (494,020)	$ 191,728
2023	4,457,851	3,266,676	1,191,175	73%	5	274,544	(489,627)	189,762
2024	4,221,220	3,241,356	979,865	77%	5	225,841	(482,997)	186,978
2025	3,977,218	3,171,178	806,040	80%	5	185,778	(473,979)	181,832
2026	3,727,860	3,064,808	663,052	82%	5	152,821	(462,467)	174,801
2027	3,475,393	2,929,964	545,429	84%	5	125,711	(448,416)	166,313
2028	3,222,244	2,773,573	448,672	86%	5	103,411	(431,861)	156,750
2029	2,970,951	2,601,872	369,079	88%	5	85,066	(412,934)	146,457
2030	2,724,067	2,420,461	303,606	89%	5	69,976	(391,876)	135,742
2031	2,484,050	2,234,303	249,747	90%	5	57,562	(369,021)	124,876
2032	2,253,163	2,047,720	205,443	91%	5	47,351	(344,789)	114,091
2033	2,033,371	1,864,373	168,998	92%	5	38,951	(319,685)	103,580
2034	1,826,237	1,687,219	139,018	92%	5	32,041	(294,240)	93,496
2035	1,632,873	1,518,516	114,357	93%	5	26,357	(268,983)	83,950
2036	1,453,911	1,359,840	94,070	94%	5	21,682	(244,383)	75,016
2037	1,289,538	1,212,155	77,383	94%	5	17,835	(220,804)	66,737
2038	1,139,579	1,075,923	63,655	94%	5	14,671	(198,541)	59,126
2039	1,003,543	951,180	52,363	95%	5	12,069	(177,797)	52,177
2040	880,702	837,628	43,074	95%	5	9,928	(158,691)	45,864
2041	770,162	734,729	35,433	95%	5	8,167	(141,271)	40,152
2042	670,925	641,778	29,147	96%	5	6,718	(125,502)	34,998
2043	581,968	557,991	23,977	96%	5	5,526	(111,276)	30,356
2044	502,321	482,597	19,723	96%	5	4,546	(98,439)	26,182
2045	431,111	414,886	16,224	96%	5	3,739	(86,839)	22,438
2046	367,571	354,225	13,346	96%	5	3,076	(76,331)	19,089
2047	311,038	300,059	10,979	96%	5	2,530	(66,787)	16,105
2048	260,939	251,908	9,031	97%	5	2,082	(58,104)	13,459
2049	216,773	209,344	7,429	97%	5	1,712	(50,196)	11,128
2050	178,100	171,989	6,111	97%	5	1,409	(42,995)	9,091
2051	144,520	139,493	5,027	97%	5	1,159	(36,461)	7,326
2052	115,652	111,517	4,135	96%	5	953	(30,551)	5,816
2053	91,137	87,735	3,402	96%	5	784	(25,237)	4,542
2054	70,622	67,824	2,798	96%	5	645	(20,515)	3,482
2055	53,738	51,436	2,302	96%	5	531	(16,379)	2,618
2056	40,099	38,206	1,894	95%	5	436	(12,824)	1,926
2057	29,302	27,744	1,558	95%	5	359	(9,830)	1,385
2058	20,940	19,658	1,281	94%	5	295	(7,363)	971
2059	14,615	13,561	1,054	93%	5	243	(5,381)	662
2060	9,952	9,085	867	91%	5	200	(3,832)	438
2061	6,604	5,891	713	89%	5	164	(2,657)	280
2062	4,265	3,678	587	86%	5	135	(1,789)	172
2063	2,679	2,196	483	82%	5	111	(1,169)	101
2064	1,636	1,239	397	76%	5	92	(741)	55
2065	971	645	327	66%	5	75	(455)	27
2066	561	292	269	52%	5	62	(270)	11
2067	317	96	221	30%	5	57	(155)	3
2068	176	-	176	0%	5	86	(86)	0
2069	98	-	98	0%	5	46	(46)	0
2070	57	-	57	0%	5	24	(24)	0
2071	35	-	35	0%	5	13	(13)	0
2072	24	-	24	0%	5	13	(13)	0
2073	12	-	12	0%	5	7	(7)	0
2074	6	-	6	0%	5	3	(3)	0
2075	3	-	3	0%	5	2	(2)	0
2076	1	-	1	0%	5	1	(1)	0

The assumed rate of investment return is net of expenses.

Development of Gain/(Loss)

	A. Actuarial Accrued Liability	B. Actuarial Value of Assets	C. Unfunded Actuarial Accrued Liability (A. - B.)
(1) Value at start of year	$5,172,947	$3,576,789	$1,596,158
(2) Normal cost from last valuation	N/A	N/A	N/A
(3) Actual contributions	N/A	363,236	(363,236)
(4) Expected vs. Actual Disbursements	(562,973)	(566,251)	3,278
(5) Interest accrual [(1) + [(2) + (3) + (4)] / 2] x 6.00%	293,488	208,517	84,971
(6) Expected value before changes (1) + (2) + (3) + (4) + (5)	$4,903,462	$3,582,291	$1,321,171
(7) Increase due to plan amendments	-	-	-
(8) Increase due to assumption changes	-	-	-
(9) Expected value after changes (6) + (7) + (8)	$4,903,462	$3,582,291	$1,321,171
(10) Actual value at end of year	4,685,354	3,538,581	1,146,773
(11) Gain/(loss) (9) - (10) [(10) - (9) for assets]	$ 218,108	($43,710)	$ 174,398

Other Observations

General Implications of the Contribution Allocation Procedure or Funding Policy on Future Expected Contributions and Funded Status

Given the Fund's contribution allocation procedure, if all actuarial assumptions are met (including the assumption of the Fund earning 6.00%), it is expected that:

1. The Unfunded Actuarial Accrued Liabilities (UAAL) will be fully amortized; and
2. The funded status of the Fund will continue to increase gradually towards a 100% funded ratio.

Limitations of Funded Status Measurements

Unless otherwise indicated, a funded status measurement presented in this report is based upon the Actuarial Accrued Liability (AAL) and the Funding Value of Assets (FVA). Unless otherwise indicated, with regard to any funded status measurements presented in this report:

1. The measurement is inappropriate for assessing the sufficiency of Fund assets to cover the estimated cost of settling the Fund's benefit obligations; for example, transferring the liability to an unrelated third party in a market value type transaction.
2. The measurement is dependent upon the Actuarial Cost Method which, in combination with the Fund's amortization policy, affects the timing and amounts of future contributions. The amounts of future contributions will most certainly differ from those assumed in this report due to future actual experience differing from assumed experience based upon the actuarial assumptions.
3. The measurement would produce a different result if the Market Value of Assets (MVA) were used instead of the FVA, unless the MVA is used in the measurement.

Limitations of Project Scope

Actuarial standards do not require the actuary to evaluate the ability of the plan sponsor or other contributing entities to make required contributions to the plan when due. Such an evaluation was not within the scope of this project and is not within the actuary's domain of expertise. Consequently, the actuary performed no such evaluation.

Risks to Future Employer Contribution Requirements

There are ongoing risks to future employer contribution requirements to which the Pension Fund is exposed, such as:

- Actual and Assumed Investment Rate of Return
- Actual and Assumed Mortality Rates
- Amortization Policy

Risk Measures – Risks Associated with Measuring the Accrued Liability and Actuarially Determined Contribution

The determination of the accrued liability and the actuarially determined contribution requires the use of assumptions regarding future economic and demographic experience. Risk measures, as illustrated in this report, are intended to aid in the understanding of the effects of future experience differing from the assumptions used in the course of the actuarial valuation. Risk measures may also help with illustrating the potential volatility in the accrued liability and the actuarially determined contribution that result from the differences between actual experience and the actuarial assumptions.

Future actuarial measurements may differ significantly from the current measurements presented in this report due to such factors as the following: Fund experience differing from that anticipated by the economic or demographic assumptions; changes in economic or demographic assumptions due to changing conditions; increases or decreases expected as part of the natural operation of the methodology used for these measurements (such as the end of an amortization period, or additional cost or contribution requirements based on the Fund's funded status); and changes in plan provisions or applicable law. The scope of an actuarial valuation does not include an analysis of the potential range of such future measurements.

Examples of risk that may reasonably be anticipated to significantly affect the plan's future financial condition include:

1. **Investment Risk** – actual investment returns may differ from the expected returns;
2. **Asset/Liability Mismatch** – changes in asset values may not match changes in liabilities, thereby altering the gap between the accrued liability and assets and consequently altering the funded status and contribution requirements;
3. **Contribution Risk** – actual contributions may differ from expected future contributions. For example, actual contributions may not be made in accordance with the Fund's funding policy; and
4. **Longevity Risk** – members may live longer or shorter than expected and receive pensions for a period of time other than assumed.

The effects of certain trends in experience can generally be anticipated. For example, if the investment return since the most recent actuarial valuation is less (or more) than the assumed rate, the cost of the plan can be expected to increase (or decrease). Likewise, if longevity is improving (or worsening), increases (or decreases) in cost can be anticipated.

The computed contribution shown on page 1 of the Executive Summary may be considered as a minimum contribution rate that complies with the Board's funding policy. The timely receipt of the actuarially determined contributions is critical to support the financial health of the plan. Users of this report should be aware that contributions made at the actuarially determined rate do not necessarily guarantee benefit security.

Risk Measures

Actuarial Valuation Date (6/30)	(1) Actuarial Value of Assets	(2) Actuarial Accrued Liability (AAL)	(3) Unfunded AAL (UAAL) (2) - (1)	(4) Funded Ratio (1) / (2)	(5) Non-Invest. Cash Flow (NICF)	(6) NICF / Assets (5)/(1)	(7) Market Rate of Return	(8) 5-year Trailing Geometric Average
2016	$ 3,305,211	$ 7,911,702	$ 4,606,491	41.8%	$ (210,061)	(6.4)%	(5.8)%	N/A
2017	3,295,481	7,467,298	4,171,817	44.1%	(246,916)	(7.5)%	15.3%	N/A
2018 *	3,281,146	7,362,477	4,081,331	44.6%	(215,601)	(6.6)%	14.4%	N/A
2019	3,238,459	6,933,093	3,694,634	46.7%	(266,065)	(8.2)%	5.5%	6.3%
2020	3,334,482	5,814,802	2,480,320	57.3%	(194,008)	(5.8)%	2.1%	6.0%
2021	3,576,789	5,172,947	1,596,158	69.1%	(149,433)	(4.2)%	25.8%	12.3%
2022	3,538,581	4,685,354	1,146,773	75.5%	(203,015)	(5.7)%	(12.5)%	6.3%

* *Revised actuarial assumptions.*

(4). The funded ratio is the most widely known measure of a plan's financial strength, but the trend in the funded ratio is much more important than the absolute ratio. The funded ratio should trend to 100%. As it approaches 100%, it is important to re-evaluate the level of investment risk in the portfolio and potentially to re-evaluate the assumed rate of return.

(5) and (6). The ratio of Non-Investment Cash Flow to assets is an important measure of sustainability. Negative ratios are common and expected for a maturing system such as the City of Jackson Policemen's and Firemen's Pension Fund. A ratio that is more negative than the assumed investment rate of return for an extended period could be a leading indicator of potential exhaustion of assets in the future.

(7) and (8). Investment return is probably the largest single risk that most systems face. The year-by-year return and the five-year geometric average both give an indication of the reasonableness of the system's assumed return. Of course, past performance is not a guarantee of future results. Market rate shown is based on an actuarial estimation method and will differ modestly from figures reported by the investment consultant.

SECTION B

SUMMARY OF BENEFIT PROVISIONS AND VALUATION DATA SUBMITTED BY PENSION FUND

Summary of Benefit Provisions Evaluated and/or Considered (June 30, 2022)

Regular Retirement (no reduction factor for age)

Eligibility – Age 55 with 25 years of credited service, or age 65 regardless of credited service.

Mandatory Retirement Age – Age 65.

Annual Amount – 2% of Final Average Salary (FAS) for each year of credited service, to a maximum of 60% of FAS.

Type of Final Average Salary – Average of annual salary for the five highest consecutive years of service within last 10 years preceding retirement.

Duty Disability Retirement

Eligibility – Total and permanent disability incurred in line of duty with the City.

Annual Amount – 66-2/3% of current salary at date of disability. Amount is offset by Worker's Compensation.

Non-Duty Disability Retirement

Eligibility – Total and permanent disability after 10 years of credited service and under the age of 55 years.

Annual Amount – 1-2/3% of final average salary for each year of credited service. Minimum is 20% of FAS; maximum is 50% of FAS.

Duty Death before Retirement

Eligibility – Death in line of duty with the City.

Annual Amount – 50% of final salary to surviving spouse, until remarriage or death, plus 10% to each unmarried child under age 18; maximum to spouse and children is 66-2/3% of final salary. Amounts are offset by Worker's Compensation.

Summary of Benefit Provisions Evaluated and/or Considered (June 30, 2022)

Non-Duty Death before Retirement

Eligibility – Death after 10 years of credited service.

Annual Amount – 1-1/2% of final average salary to eligible spouse (married at least 1 year to deceased member) for each year of credited service, payable beginning no earlier than age 45. Minimum is 20% of FAS; maximum is 40% of FAS. To each unmarried child under age 18, 10% of FAS with maximum of 50% of FAS for all minor children; total for spouse and children not to exceed 66-2/3% of FAS.

Automatic Death Benefit after Retirement

Upon the Death of a Regular Retiree the surviving spouse receives a benefit equal to 66-2/3% of the benefit ***at retirement***. Upon the death of the Duty Disability retiree, the surviving spouse receives a benefit equal to 75% of the benefit the retiree received ***at death***. These survivorship benefits will continue to increase with Post-Retirement Cost-of Living Adjustments.

Post-Retirement Cost-of-Living Adjustments

Pensions adjusted by same percent as increase in the pay of the rank last occupied.

Member Contributions

7% plus 1/2 of 1% for post-retirement cost-of-living adjustments.

Summary of Asset Information Submitted for Valuation

Balance Sheet

Reported Assets - Market Value		Reserves for	
Cash & equivalents	$ 87,415	Members' contributions	$ 0
Receivables & accruals	(2,557)	Employer's contributions	29,396,009
Stocks	1,284,654	Retired benefit payments	(26,087,226)
Bonds	1,287,745		
International stocks	651,526		
Total Current Assets	**$3,308,783**	**Total Reserves**	**$ 3,308,783**

Revenues and Expenditures

Reported Balance - 6/30/2021	$3,997,008
Revenues	
Members' contributions	0
Employer contributions	363,236
Investment income	(460,647)
Expenditures	
Benefit payments	566,251
Refund of member contributions	none
Administrative & Investment expenses	24,563
Reported Balance - 6/30/2022	**$3,308,783**

Retiree and Beneficiary Comparative Schedule
(Annual Pensions Include Escalation)

Year Ended June 30	Added to Rolls			Removed from Rolls		Rolls End of Year		% Incr. in Annual Pensions	Average Pension	Discounted Value of Pensions		
		Annual Pensions*			Annual		Annual					
	No.	New	COLAs	No.	Pensions	No	Pensions			Total		Average
1998		$ 42,629		6	$ 83,160	72	$1,397,523	(2.8) %	$19,410	$13,478,231		$187,198
1999	1	44,820		4	54,045	69	1,388,298	(0.7)	20,120	13,126,607		190,241
2000	1	69,894		5	107,373	65	1,350,819	(2.7)	20,782	11,747,323		180,728
2001		44,704		4	79,319	61	1,316,204	(2.6)	21,577	11,427,707		187,339
2002		38,818		2	24,168	59	1,330,854	1.1	22,557	11,267,420		190,973
2003	3	105,612		6	148,099	56	1,288,367	(3.2)	23,007	10,900,752		194,656
2004			$ 41,628	2	18,616	54	1,311,379	1.8	24,285	10,753,134		199,132
2005			42,898	4	91,966	50	1,262,311	(3.7)	25,246	10,172,322		203,446
2006			47,031	4	30,670	46	1,278,672	1.3	27,797	10,930,809		237,626
2007			43,468	2	66,876	44	1,255,264	(1.8)	28,529	10,681,885		242,770
2008	3	22,947	39,671	5	121,543	42	1,196,339	(4.7)	28,484	11,055,950	@	263,237
2009	1	31,172	30,500	7	179,762	36	1,078,249	(9.9)	29,951	9,866,752		274,076
2010			28,465	3	43,249	33	1,063,465	(1.4)	32,226	9,463,639		286,777
2011	2	70,213	4,675	3	125,298	32	1,013,055	(4.7)	31,658	8,904,371		278,262
2012			7,083	3	46,283	29	973,855	(3.9)	33,581	8,481,396	@	292,462
2013	0		13,234	1	5,871	28	981,217	0.8	35,043	8,189,493		292,482
2014	3	72,389	10,934	5	208,826	26	855,714	(12.8)	32,912	8,165,218		314,047
2015			10,114	2	53,498	24	812,330	(5.1)	33,847	8,213,377	@+	342,224
2016			6,862	1	5,613	23	813,579	0.2	35,373	7,911,702		343,987
2017			7,480	2	54,805	21	766,254	(5.8)	36,488	7,467,298		355,586
2018			16,257	1	13,037	20	769,474	0.4	38,474	7,362,477	@	368,124
2019			15,930	2	49,349	18	736,055	(4.3)	40,892	6,933,093		385,172
2020			14,650	3	114,165	15	636,540	(13.5)	42,436	5,814,802		387,653
2021	1	45,408	13,505	3	119,039	13	576,414	(9.4)	44,340	5,172,947		397,919
2022			4,163	2	78,065	11	502,511	(12.8)	45,683	4,685,354		425,941

* *Beginning in the 2004 valuation, changes in the annual pension are separated into benefits for the new members and cost-of-living adjustments for existing members. 2011 includes estimated benefits for one unreported surviving spouse.*

@ After changes in assumptions and/or methods.

+ Alternate Funding Policy supplemental actuarial report dated March 17, 2016.

Retirees and Beneficiaries on Rolls
Comparative Statement

Valuation Date June 30	No. on Rolls	Initial Pensions	Escalation Pensions	Total	Initial as Percent of Total
1998	72	$ 625,412	$ 772,111	$ 1,397,523	44.8 %
1999	69	609,245	779,053	1,388,298	43.9
2000	65	610,280	740,539	1,350,819	45.2
2001	61	591,432	724,772	1,316,204	44.9
2002	59	583,398	747,456	1,330,854	43.8
2003	56	601,739	686,628	1,288,367	46.7
2004	54	590,490	720,889	1,311,379	45.0
2005	50	560,207	702,104	1,262,311	44.4
2006	46	541,856	736,816	1,278,672	42.4
2007	44	529,973	725,291	1,255,264	42.2
2008	42	514,630	681,709	1,196,339	43.0
2009	36	464,420	613,829	1,078,249	43.1
2010	33	446,976	616,489	1,063,465	42.0
2011	32	444,354	568,701	1,013,055	43.9
2012	29	422,907	550,948	973,855	43.4
2013	28	418,926	562,291	981,217	42.7
2014	26	364,983	490,731	855,714	42.7
2015	24	341,918	470,412	812,330	42.1
2016	23	336,451	477,128	813,579	41.4
2017	21	302,959	463,295	766,254	39.5
2018	20	291,438	478,036	769,474	37.9
2019	18	278,670	457,385	736,055	37.9
2020	15	240,974	395,566	636,540	37.9
2021	13	206,871	369,543	576,415	35.9
2022	11	175,252	327,260	502,512	34.9

Retirees and Beneficiaries as of June 30, 2022
Tabulated by Type of Pensions Being Paid

Type of Pension Being Paid	No.	Escalator Pensions	Initial Pensions	Total Annual Pensions
Present Plan (1957) Pensions				
Age & Service Pensions:				
- Straight Life	1	$ 19,906	$ 29,921	$ 49,827
- Survivor Beneficiaries	3	90,179	26,874	117,054
- Totals	4	110,086	56,796	166,881
Casualty Pensions:				
- Disability	7	217,174	118,456	335,630
- Totals	7	217,174	118,456	335,630
Total Pensions Being Paid	**11**	**$327,260**	**$175,252**	**$502,511**

Retirees and Beneficiaries as of June 30, 2022
Tabulated by Attained Age

Attained Age	Present Plan No.	Present Plan Annual Pensions
65 - 69	1	$ 35,402
75 - 79	3	149,210
81	2	91,662
82	1	53,639
83	1	49,827
84	1	49,587
85	1	36,889
86	1	36,296
TOTALS	**11**	**$ 502,511**

Average Age at Retirement: 47.0 yrs.

Average Age Now: 80.7 yrs.

Active Members *
Comparative Schedule

Valuation Date June 30	Active Members	Valuation Payroll	Average Age	Average Service	Average Pay	Average % Incr.
1966	161	$1,120,927	N/A yrs.	N/A yrs.	$ 6,962	0.0 %
1967	154	1,112,452	38.8	12.3	7,224	3.8
1968	189	1,616,594	36.9	10.9	8,553	18.4
1969	171	1,491,991	37.8	11.7	8,725	2.0
1970	184	1,985,341	36.8	10.9	10,790	23.7
1971	181	2,069,097	37.4	11.7	11,431	5.9
1972	182	2,255,898	37.4	11.7	12,395	8.4
1973	172	2,245,755	37.3	11.7	13,057	5.3
1974	155	2,191,456	37.2	11.9	14,138	8.3
1975	153	2,561,103	38.1	12.7	16,739	18.4
1976	141	2,590,482	38.4	13.1	18,372	9.8
1977	124	2,356,400	38.4	13.0	19,003	3.4
1978	114	2,392,124	39.0	13.5	20,984	10.4
1979	110	2,466,966	40.3	14.7	22,427	6.9
1980	103	2,567,220	40.6	15.0	24,924	11.1
1981	90	2,562,461	41.6	16.0	28,472	14.2
1982	82	2,375,269	41.5	16.2	28,967	1.7
1983	73	2,216,742	41.9	16.7	30,366	4.8
1984	67	1,960,418	42.1	17.0	29,260	(3.6)
1985	56	1,680,335	42.1	17.2	30,006	2.5
1986	54	1,683,819	42.8	18.0	31,182	3.9
1987	51	1,652,602	43.6	18.8	32,404	3.9
1988	46	1,639,724	44.2	19.6	35,646	10.0
1989	33	1,285,310	44.9	20.3	38,949	9.3
1990	21	777,999	45.8	21.1	37,048	(4.9)
1991	6	251,480	47.8	22.0	41,913	13.1
1992	5	228,684	48.2	22.8	45,737	9.1
1993	5	237,750	49.2	23.8	47,550	4.0
1994	1	43,230	56.0	24.3	43,230	(9.1)
1995	1	43,139	57.0	25.3	43,139	(0.2)
1996	1	44,875	58.0	26.3	44,875	4.0
1997	1	50,098	59.0	27.3	50,098	11.6
1998	1	49,813	60.0	28.3	49,813	(0.6)
1999	1	51,016	60.8	29.3	51,016	2.4
2000	0	0	N/A	N/A	N/A	N/A

** As of the June 30, 2000 valuation, there are no longer active members.*

SECTION C

ACTUARIAL COST METHODS, ACTUARIAL ASSUMPTIONS AND DEFINITIONS OF TECHNICAL TERMS

Actuarial Cost Methods Used for the Valuation

Financing of Unfunded Actuarial Accrued Liabilities: Unfunded actuarial accrued liability was financed over a period of the average life expectancy of remaining members rounded down to whole years. The indicated dollar amounts were assumed to remain level over the closed 5-year amortization period. Contribution amounts were assumed to be paid midway through the fiscal year.

The ***Actuarial Value of Assets*** used for funding purposes is derived as follows: prior year valuation assets are increased by contribution and expected investment income and reduced by refunds, benefit payments and expenses. To this amount is added 25% of the difference between expected and actual investment income for each of the previous four years. Beginning with the June 30, 2008 valuation, Actuarial Value of Assets are restricted to the range of 80% to 120% of market value of assets.

Actuarial Assumptions Used for the Valuation

The contribution requirements and actuarial present values of a pension fund are calculated by applying actuarial assumptions to the benefit provisions and people information of the Fund.

The principal areas of risk which require actuarial assumptions about future experiences are:

(i) long-term rates of investment return to be generated by the assets of the Fund

(ii) patterns of pay increases to members

(iii) rates of mortality among members, retirees, and beneficiaries

(iv) rates of withdrawal of active members

(v) rates of disability among active members

(vi) the age patterns of actual retirements

The monetary effect of each assumption is calculated for as long as a present covered person survives – a period of time which can be as long as a century.

Actual experience of the Fund will not coincide exactly with assumed experience, regardless of the wisdom of the assumptions. Each valuation provides a complete recalculation of assumed future experience and takes into account all past differences between assumed and actual experience. The result is a continual series of adjustments (usually small) to the computed contribution rate.

From time-to-time one or more of the assumptions are modified to reflect experience trends (but not random or temporary year-to-year fluctuations).

All actuarial assumptions are expectations of future experience, not market measures.

The investment return rate (net of expenses) used for valuation calculations was 6.0% a year, compounded annually. The assumed rate of price inflation was updated in the June 30, 2018 Actuarial Valuation to 2.25% per year resulting in a real rate of return of 3.75% per year.

No specific price inflation assumption is currently used in the valuation since there are no benefits that are specifically linked to price inflation. However, a price inflation assumption of 2.25% per year was considered in the building block development of the investment rate of return.

The investment return assumption of 6.0% per year is used to equate the value of payments due at different points in time and was first used for the revised June 30, 2015 valuation supplemental to re-compute the 2017 fiscal year employer contribution. Approximate investment returns, for the purpose of comparisons with assumed returns, have been as follows:

	Year Ended June 30					5-Year
	2022	2021	2020	2019	2018	Average
Nominal rate	(12.5)%	25.8%	2.1%	5.5%	14.4%	6.3%

The nominal rate of return (i.e., Market Value of Assets Rate of Investment Return) was computed using the approximate formula i = I divided by 1/2 (A + B - I), where I is actual realized investment income net of expenses plus market value adjustments, A is the beginning of year market asset value, and B is the end of year market asset value.

These rates of return should not be used for measurement of an investment advisor's performance or for comparisons with other pension funds – to do so will mislead.

Assumed rate of pension escalation: 3.0% per annum, compounded annually.

The mortality table used was the RP-2014 Healthy Annuitant Mortality Table adjusted for mortality improvements using projection scale MP-2018 on a fully generational basis. This table was first used for the June 30, 2018 valuation. Sample values for calendar year 2022 follow:

Sample Attained Ages	Probability of Dying Next Year		Future Life Expectancy (Years)	
	Male	Female	Male	Female
60	0.81%	0.58%	25.21	27.42
65	1.18	0.86	20.89	22.89
70	1.73	1.29	16.83	18.58
75	2.71	2.09	13.08	14.55
80	4.53	3.58	9.72	10.91
85	7.94	6.43	6.89	7.82
90	14.01	11.50	4.74	5.43
95	21.99	18.75	3.33	3.77
Ref:	*2135 | 949*	*2136 | 950*		

No adjustment is made for retirees who were previously designated as disabled upon retirement.

Definitions of Technical Terms

Accrued Service: Service credited under the fund which was rendered before the date of the actuarial valuation.

Actuarial Accrued Liability: The difference between the actuarial present value of future benefit payments and the actuarial present value of future normal costs. Also referred to as "accrued liability" or "past service liability."

Actuarial Assumptions: Estimates of expected future experience with respect to rates of mortality, disability, turnover, retirement, rate or rates of investment income and salary increases. Decrement assumptions (rates of mortality, disability, turn-over and retirement) and generally based on past experience, often modified for projected changes in conditions. Economic assumptions (salary increases and investment income) consist of the underlying rates in an inflation-free environment plus a provision for a long-term average rate of inflation.

Actuarial Cost Method: A mathematical budgeting procedure for allocating the dollar amount of the "actuarial present value of future benefit payments" between future normal costs and actuarial accrued liabilities. Sometimes referred to as the "actuarial valuation cost method."

Actuarial Equivalent: A single amount or series of amounts of equal actuarial present value to another single amount or series of amounts, computed on the basis of appropriate actuarial assumptions.

Actuarial Present Value: The amount of funds currently required to provide a payment or series of payments in the future. It is determined by discounting future payments at predetermined rates of interest, and by probabilities of payment. Also referred to as "present value."

Amortization: Paying off an interest-discounted amount with periodic payments of interest and principal – as opposed to paying it off with a lump sum payment.

Experience Gain/(Loss): The difference between actual actuarial costs and assumed actuarial costs – during the period between two valuation dates.

Normal Cost: The actuarial cost allocated to the current year by the actuarial cost method. Sometimes referred to as "current service cost."

Unfunded Actuarial Accrued Liabilities: The difference between Actuarial Accrued Liabilities and the Actuarial Value of Assets. Sometimes referred to as "unfunded past service liability," "unfunded accrued liability" or "unfunded supplemental present value."

Most pension funds have unfunded actuarial accrued liabilities. They arise each time new benefits are added and each time an experience loss is realized.

The existence of unfunded actuarial accrued liabilities is not in itself bad, any more than a mortgage on a house is bad. Unfunded actuarial accrued liabilities do not represent a debt that is payable today. What is important is the ability to control the amount of unfunded actuarial accrued liabilities and the trend in their amount (after due allowance for devaluation of the dollar).

JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Telephone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 25th, 2023

SUBJECT: Approve the sale of City owned property located at 323 W Wesley Street for $12,000.

Recommendation: Approve the sale of City owned property located at 323 W Wesley Street, to North Shore Enterprise LLC. Authorize the City Manager to sign all sale documents associated with the Property Transfer and to make minor modifications.

.

Attachments: Purchase agreement, cost calculation and Real Estate Net sheet.

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Shane LaPorte, Director of Community Development

DATE: April 25th, 2023

RECOMMENDATION: Approve the sale of City owned property located at 323 W Wesley St, for $12,000.

SUMMARY

The City of Jackson owns real property located at 323 W Wesley St. This property was placed on the MLS by Real Estate Agent Rich Cook. On March 17th, 2023 an offer of $12,000 was submitted to purchase the property. According to the offer to purchase, closing date is set to take place on or before April 28th, 2023.

BUDGETARY CONSIDERATIONS

Total project cost associated with property cleanout, personnel time, maintenance, and real estate cost/fees $18,778.43 Sale price $12,000. Revenue generated $(6,778.43) upon sale the property will be placed back on the tax roll. Estimated cost to demolish $26,729.

HISTORY, BACKGROUND and DISCUSSION

Property located at 323 W Wesley St was obtained by the County of Jackson through tax foreclosure and deeded to the City of Jackson through right of first refusal. In an effort to make the structure marketable the Community Development Department oversaw pre-sale preparations such as property interior evaluation, exterior evaluation, property monitoring and cleanout of the structure. After completion of the property evaluation and cleanout, the house was placed on the Multiple Listing Service (MLS) by Real Estate Agent Rich Cook of ERA Reardon Realty. On March 17th, 2023 Richard Cook received an offer to purchase 323 W Wesley St St Ave from the Buyer North Shore Enterprise LLC (Ambs Messaging Service) for the amount of $12,000. Should Council agree to accept the bid amount, the closing is set on or before April 28th, 2023. North shore Enterprise LLC will remodel the house, which will then be offered for an employee of Ambs Messaging Service to reside.

POSITIONS

ATTACHMENTS: Purchase agreement, cost calculation and Real Estate Net sheet.

ERA REAL ESTATE REARDON REALTY

Property Address: **323 West Wesley Street** Date: **04/03/2023**

Seller Name(s): **City Of Jackson**

	Debit	Credit
Sale Price		12000
Brokerage Fee	2000	
Transfer Tax	103.2	
Tax Proration (Approximate)		
Title Insurance	425	
Home Warranty		
Well & Septic		
Transaction Fee		
Pest Inspection		
Wire Fees		
Doc. Preparation (Deed)	50	
Seller's Concession		
American title fee	250	
Subtotal	2828.2	12000
Net Credit/Debit	9171.8	
Less Mortgage Balance		
Total Net To Sellers	9171.8	

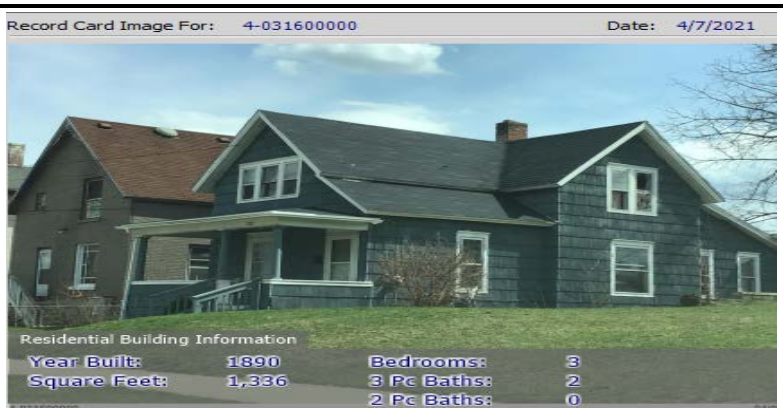
***These figures are estimates only, and subject to change.**

Seller _____ Seller _____

323 W. WESLEY ST.

PIN# 4-031600000

G/L: 101-571-000-818.571 (Expenses) \ #101-571-000-673.000 (Revenue Deposit)



Listing Date	4.3.23
Sales Price	$ 12,000.00
Est. Project Cost *	$ 18,778.43
Net Sale	**$ (6,778.43)**

Contracts				Cost	Pd to Date	Remaining Balance
Johnny's Tree Services						
	Tree/Brush Clean-up			$ -	$ -	$ -
Mohawk	Clean-up Services	Inv#2125	Pd 9.21.22 (ck#189766)	$ 200.00	$ 200.00	$ -
Grab-Bar Pro	Board-up	Inv#JAX-2022-4744-323	Pd 10.2022 #1	$ 197.00	$ 197.00	$ -
Grab-Bar Pro	Board-up	Inv#JAX-2022-4748-323	Pd 10.2022 #2	$ 383.00	$ 383.00	$ -
Mohawk	Clean-up Services #2	In Process	Pending	$ 3,200.00	$ -	$ 3,200.00
Subtotal	**Contract Amount(s)**			**$ 3,980.00**	**$ 780.00**	**$ 3,200.00**

Additional Project Cost					Cost	Pd to Date	Remaining Balance
Consumers - Acct		N/A					
					$ -	$ -	$ -
Water >							
	Meter Replace	N/A			$ -	$ -	$ -
	Billing #1	N/A			$ -	$ -	$ -
Procurement Card			Hammon Hardward	Entry Lock (anticipated)	$ 15.00	$ 15.00	$ -
Contingency						$ -	$ -
Miscellaneous					$ -	$ -	$ -
City Employee(s) Hrs.		Hrly Rate **		# of Hrs.			
	Brian Taylor	$	74.00	4.00	$ 296.00	$ 296.00	$ -
	Sven Harrison	$	53.98	1.00	$ 53.98	$ 53.98	$ -
	Mark Fish	$	67.75	N/A	$ -	$ -	$ -
	Kim Randell	$	50.05	N/A	$ -	$ -	$ -
	Sindy Foster	$	43.15	0.50	$ 21.58	$ 21.58	$ -
	Shannon Williams	$	56.29	1.00	$ 56.29	$ 56.29	$ -
	Shane LaPorte	$	82.30	1.00	$ 82.30	$ 82.30	$ -
County Tax Foreclosure / Chargeback Cost (Ward 5 - 2020) Estimated					$ 6,904.13	$ 6,904.13	$ -
Taxes			Summer / Winter	N/a	$ -	$ -	$ -
Special Assessment				N/a	$ -	$ -	$ -
Open Receivables			Multiple	Verified in Building.net 3.3.23	$ 4,087.18	$ -	$ 4,087.18
Open Utility			$453.77 balance	Verified in Building.net 3.3.23	$ 453.77	$ -	$ 453.77
Open DPW Invoices/Misc Receivables			$0.00 balance	Verified in Building.net 3.3.23	$ -	$ -	$ -
Net Real Estate Fees				Net Sheet	$ 2,828.20	$ -	$ 2,828.20
Subtotal	**Additional Cost**				**$ 14,798.43**	**$ 7,429.28**	**$ 7,369.15**

	Cost	Pd to Date	Remaining Balance
Total Project Cost	**$ 18,778.43**	$ 8,209.28	**$ 10,569.15**

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SALES CONTRACT

Listing Office: ERA Reardon Realty
Office License #:
Phone:
Listing Agent: Richard Cook
Listing Agent License #:
Phone: 5174747424
Email: cook087@msn.com
☐ Seller's Agent ☑ Dual Agent ☐ Transaction Coord.

Selling Office: ERA
Office License #:
Phone:
Selling Agent: Rich Cook
Selling Agent License #:
Phone:
Email:
☐ Seller's Agent ☐ Buyer's Agent ☑ Dual Agent ☐ Trans. Coord.

1. **THIS** offer made 03/17/2023 between (Buyer) North Shore Enterprise LLC. specify marital/legal status: _____ Address: 1825 Wandering Creek Dr. Jackson MI. 49201 and Seller Jonathan greene
2. **FOR** the purchase of the property commonly known as 323 West Wesley Street City Jackson, Zip 49201 or described as E 33 FT OF W 77 FT OF LOT 5 B4S R2W THE ORIGINAL PLAT OF THE VILLAGE OF JACKSONBURG located in the city of Jackson, County of Jackson County, State of Michigan; subject to all existing restrictions, easements, rights-of-way, zoning laws, the lien of taxes not yet due and payable at the time of closing, and land use regulations affecting the use of the property. ALL buildings, attached fixtures, improvements, built-in appliances, landscaping, and gas, oil, mineral rights, fuel oil or propane owned by Seller are included in the purchase price.
3. **PURCHASE PRICE**: _____ Dollars $ 12000
4. **PERSONAL PROPERTY**: The sale price includes items of personal property as follows: _____
5. **TERMS** of purchase to be indicated by "X" below (Other unmarked terms of purchase do not apply):
   ☑ **CASH**: The full purchase price upon execution and delivery of Warranty Deed. Buyer agrees to provide Buyer Agent / Dual Agent verification of funds within five (5) calendar days of the date this contract is fully executed, and consents to the disclosure of such information to Seller and/or Seller's Agent.

   ☐ **NEW MORTGAGE**: The full price upon the execution and delivery of a Warranty Deed, contingent upon Buyer's ability to obtain a _____ type mortgage for no less than _____ years, with a minimum down payment of _____% of the purchase price at no more than _____% interest per annum. Buyer will supply to Seller a pre-approval letter within _____ days from the acceptance. Buyer will make formal mortgage application and order appraisal through Buyer's lender within _____ days of the date of this acceptance.

   ☐ **LAND CONTRACT**: $_____ upon execution and delivery of a land contract with the balance payable in monthly principal and interest installments of $_____ or more. Interest at _____% per annum. Interest to start on date of closing and first payment due 30 calendar days after closing date. Land contract due in full no later than _____ after date of closing. At time of payoff, Seller shall provide a warranty deed and pay all county/state transfer taxes. Payment ☐ will ☐ will not include taxes and insurance in the monthly payment. Said Contract ☐ will ☐ will not have a due on sale clause. **BUYER** ☐ does ☐ does not request a land contract memo at the Buyer's expense. Additional terms: _____
6. **SELLER CONCESSIONS**: ☑ NO Seller Concessions ☐ Seller Concessions: Seller to pay $_____ or _____% of the sale price for purchaser's closing costs, discount points, or prepaid items to include escrow and any other costs to conform to lender guidelines.
7. **HOME SALE CONTINGENCY:** This contract is contingent upon ☑ NONE ☐ SALE AND CLOSE OF ☐ CLOSE OF: ADDRESS: _____

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RE: Property Address: 323 West Wesley Street, Jackson, MI 49201

8. **EARNEST MONEY**: Buyer herewith deposits $1000 in the form of check as earnest money to be held by atc as part of the purchase price or the down payment portion where applicable. If this contract is not accepted, or the conditions, contingencies, and/or any inspections specified are not satisfied, the earnest money shall be refunded to the Buyer. If the Seller defaults in the performance of this contract, Buyer may receive an immediate refund of all earnest money in full termination of this contract or may pursue specific performance of this contract. If Buyer defaults in the performance of this contract, all deposits shall be forfeited to Seller in full termination of this contract or may pursue specific performance of this contract. If sale is not closed, the REALTOR® may notify Buyer and Seller in writing, or REALTOR®'s intended disposition of the earnest money deposit. All parties shall be deemed to have agreed to the disposition of the earnest money deposit unless REALTOR® receives written objection from either party within ten (10) calendar days of receipt of notification. If a dispute occurs involving the deposit, in whole or in part, the non-prevailing party, as determined by the court, will reimburse the other party and Broker(s) for reasonable attorney's fees and expenses incurred in connection with the dispute, including interpleader actions. If a dispute exists between the Seller and Buyer, Seller and Buyer agree that the Selling Broker/Escrow Agent shall not release the Earnest Money Deposit without the written consent of both parties.
9. **FORM** of Conveyance:
    a. Seller shall pay for, convey, and transfer, by ☐ Warranty Deed or ☐ Land Contract, a marketable record title to the property and improvements as evidence by Owner's Title Insurance Policy with standard exceptions date in the amount of the purchase price, subsequent to this contract, and pay all county/state transfer tax.
    b. When applicable, insert the number of divisions and include in deed/land contract: "The grantor grants to the grantee the right to make all (insert number) division(s) under Section 108 of the land division act, Act. No. 288 of the Public Acts of 1967."
10. **CLOSE OF SALE:** Time is of the essence. Closing to occur once approved to close by the lender or receipt of final closing documents. However, close of sale shall be on or before 04/28/2023.
11. **PRORATIONS**: Rent and association fees, if any, are to be prorated as of the date of closing.
    ☐ Seller will escrow the sum of $ for final water and sewer bill with Title Company. Escrowed funds will be released to Seller upon verification that the final bill has been paid or will be used to pay the final bill upon receipt by the escrow agent. Any excess funds will be returned to Seller and Seller will be responsible for any shortage. Any unmetered Water and Sewer to be prorated to the date of closing.
12. **POSSESSION**: Seller will maintain the property in its present condition until the completion of the closing. Possession shall be delivered to Buyer, subject to rights of present tenants, if any: ☑ Immediate Possession at Time of Closing ☐ At _____ ☐a.m. ☐p.m. on the _____ day after completion of closing, during which time Seller will have the privilege to occupy the property and hereby agrees to pay the Buyer $_____ as an occupancy fee for this period, to be escrowed by title company at closing. If Seller occupies the property after closing, Seller will pay all utilities and be responsible for routine maintenance during such occupancy. Buyers will maintain the property structural components and mechanical systems during such occupancy. If any repairs or replacements necessitated by Seller's misuse, abuse, or neglect of the property, Seller will be responsible for the expense of such repairs and replacement. On the agreed possession date, Seller shall deliver the property free of trash and debris, in broom-clean condition, shall remove all personal property (unless otherwise agreed by the parties), make arrangements for final payment of all utilities, and shall deliver all keys and remote controls to Buyer. If Seller fails to deliver possession to Buyer on the agreed date, Buyer shall be entitled to immediate possession without any notice to Seller.
    Exceptions: _____

13. **TAXES**: are to be treated as if they cover the CALENDAR YEAR in which they are first billed. Taxes first billed in years prior to year of closing shall be paid by the SELLER. Taxes which are first billed in the year of closing shall be prorated so that SELLER shall pay taxes from the first of the year to closing date and BUYER shall pay taxes for the balance of the year, including the day of closing. If any bills for taxes is not issued as of the closing date, the current taxable value, homestead status and millage rate shall be used for proration purposes, plus collection fee, if any. If the current PRE is 0% and buyer's taxes will be adjusted based on 100% PRE in the same CALENDAR year as close, then taxes will be prorated based on 100%. **EXCEPT,** if taxes are unallocated as to the parcel being sold, Allocation to be determined prior to close.

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RE: Property Address: 323 West Wesley Street, Jackson, MI 49201

Taxes continued: **Buyer should not assume that buyer's future tax bills on the property will be the same as seller's present tax bills. Under Michigan law, real property tax obligations can change significantly when property is transferred.**

14. **ASSESSMENTS:** Seller shall pay all installments of special assessments due as of the closing date. Installments of existing special assessments due after the closing date shall be paid by the seller. (If the Buyer elects to assume existing special assessments and is obtaining a mortgage, Buyer should confirm with lender that the assessment can be assumed). Assessments levied after the closing date to be paid by Buyer. **Seller has no knowledge of any pending assessments and/or benefit charges that have not been disclosed in writing to the Buyer in this Agreement. Any exceptions shall be disclosed to Buyer in writing.**
15. **ACKNOWLEDGEMENT OF DISCLOSURES:**

Lead Based Paint: (For residential housing built prior to 1978 only): Buyer acknowledges that prior to signing this contract, Buyer has received a copy of the Lead-based Paint Seller Disclosure Form completed by the Seller on _____, the terms of which shall be part of this contract:

☐ Buyer shall have 10 days after the date of this contract to conduct an inspection of the property for the presence of lead-based paint and/or lead based paint hazards. (Federal regulations require a 10-day period or other mutually agreed upon period of time.) If Buyer is not satisfied with the results of this inspection, upon notice from Buyer to Seller within this period, this contract shall terminate and any deposit shall be refunded to Buyer.

☑ Buyer hereby waives his/her opportunity to conduct a risk assessment or inspection for the presence of lead-based paint and/or lead-based paint hazards.

Seller's Disclosure:

☑ Buyer acknowledges that a Seller's Disclosure Statement dated 03/17/2023 has been provided to Buyer in compliance with the Michigan Seller Disclosure Act.

☐ Seller shall provide Buyer with a Seller's Disclosure Statement with Seller's acceptance of this offer. Pursuant to the Seller Disclosure Act, MCL 559.951, *et seq.,* Buyer will have 72 hours after hand-delivery of the disclosure statement (or 120 hours after delivery by registered mail) to terminate this agreement by delivery of a written notice to Seller or Seller's agent.

16. **HOME WARRANTY**

☐ Buyer has been advised of the availability of a Home Warranty program. Said Home Warranty plan to be provided by _____ at _____ expense. ☑ Buyer waives Home Warranty.

17. **PROPERTY INSPECTIONS**: Buyer has personally inspected the property and accepts it in AS IS present condition and agrees that there are no additional written or oral understandings except as otherwise provided in this contract. The inspection(s) do not create a list of repairs for the Seller to correct. The negotiated price fairly reflects the present "AS-IS" condition of the property.

☐ This offer is contingent upon satisfactory inspections of the property, at Buyer's choice and at Buyer's expense, no later than 10 calendar days after the date of Acceptance. These inspections may include, but may not be limited to, mechanical, electrical, and structural inspections, as well as inspections for radon, mold and/or asbestos. Buyer agrees to return the property to its prior condition after any inspections or tests. If Buyer is not satisfied with the results of any inspection, Buyer shall, within the 10-day period, provide written notice of Buyer's dissatisfaction to Seller that shall include proposed revisions to the sales contract that will resolve Buyer's dissatisfaction with the inspections. Seller shall then have 5 days to accept, negotiate, or refuse to accept the proposed revisions in writing. Seller's failure to respond within the 5-day period constitutes a rejection of the proposed revision. If Seller agrees to the revision, the sale shall proceed to closing. If Seller refuses to respond or rejects the proposed revisions, Buyer may either withdraw its objections and proceed to closing or terminate the contract and have the earnest money deposit returned to Buyer. Buyer's failure to respond in writing to Seller's rejection within 5 days from Seller's notice of rejection, shall constitute a termination of this contract.

☑ Buyer acknowledges that Selling Broker/REALTOR® has recommended that Buyer obtain an inspection of the property by an inspector and/or licensed contractor. Buyer does not desire to obtain an inspection of the property.

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RE: Property Address: 323 West Wesley Street, Jackson, MI 49201

18. **WELL AND SEPTIC INSPECTIONS** – CONTINGENCY TO BE REMOVED WITHIN 10 DAYS OF ACCEPTANCE:
☑ **Connected to community water** ☑ **Connected to community sewer**
☐ **Buyer** ☐ **Seller** to furnish a written report stating that the water is potable.
☐ by a certified inspector.
☐ **Buyer** ☐ **Seller** to furnish a written report that the well system is in good working order.
☐ by a certified inspector
☐ **Buyer** ☐ **Seller** to furnish a written report stating that the septic system is in good working order.
☐ by a certified inspector
☐ **Buyer waives water/well/septic inspection.**
If any of the above reports regarding well and septic are found deficient, the Seller and the Buyer agree to negotiate in good faith the cost of the correction. Any request by Buyer to modify this contract based on the results of an inspection shall terminate this contract unless: (a) the request is agreed to by Seller in writing, or (b) the Buyer removes the inspection contingency in writing after Seller rejects Buyer's modification request or Seller fails to respond within 5 days of receiving Buyer's request.
19. **WOOD DESTROYING INSECT INSPECTION**: ☐ **Buyer** ☐ **Seller** ☑ **Buyer waives wood destroying insect inspection** – shall furnish at his expense, within 10 days of acceptance, an inspection by a pest control company for termites, powder post beetles, carpenter ants and carpenter bees. If active infestation is found, or evidence of previous untreated termite infestation, it shall be the option of the Seller, within 5 days from inspection to contract to treat and to contract to repair any ruined material resulting from termites, powder post beetles, carpenter ants, or carpenter bees. If the Seller does not contract to treat and repair, this contract may be declared null and void by the Buyer.
20. **SURVEY/MORTGAGE REPORT/PROPERTY IMPROVEMENT REPORT**:
☐ **Mortgage Report** – Buyer shall provide, at Buyer's expense, a current mortgage report certified to Buyer's **lender only if required by lender**. This report shall identify any buildings and improvements on the property as described with no boundary lines established.
☐ **Property Improvement Report** – Buyer shall furnish at Buyer's expense, a current property improvement report certified to the **Buyer**. This report shall identify any buildings and improvements on the property as described with **no** boundary lines established. (This document can be utilized in situations where the lender does **not** require a mortgage certificate.)
☐ **Boundary (Stake) Survey** - ☐ Buyer ☐ Seller shall furnish at their expense a current report identifying any buildings, encroachments and improvements within the boundaries of the described property. This survey shall show all boundaries and property shall be staked at all corners.
☑ Buyer waives stake survey, mortgage report, and property improvement report.
21. **CONDITION OF PROPERTY**: BUYER HAS PERSONALLY EXAMINED THIS PROPERTY AND AGREES TO ACCEPT SAME IN ITS "AS-IS" CONDITION AND SELLER AGREES NOT TO ADVERSELY ALTER THE PRESENT CONDITION. If said premises are damaged by fire or other casualty prior to closing, Buyer may elect to revoke this contract and be reimbursed for all earnest money hereunder, or conclude the sale on the payment to Buyer of such insurance proceeds necessary to repair the property to its condition at the time of this contract's acceptance. Buyer shall assume all risk of loss or damage not caused by acts of negligence of the Seller from date of closing. **WALK THROUGH INSPECTION**: Although the Buyer has the right to a walk-through inspection prior to closing, the sole purpose is to determine if it is in the same condition as when the Sales Contract was executed, and the included personal property remains on the premises.
22. **SELLER/BUYER HAS BEEN ADVISED TO SEEK LEGAL COUNSEL TO INSURE THAT:** 1) the details of the Sales Contract are being adhered to, 2) title is marketable, 3) Property complies with or is not affected by the Land Division Act, as amended, and 4) to determine how Buyer(s) will take title.
23. **ARBITRATION**: Any dispute over the disposition of any earnest money deposits or claim arising out of or related to the physical condition of any property covered by this contract, included without limitation, claims of fraud, misrepresentation, warranty and negligence, shall be settled in accordance with the rules, then in effect, adopted by the endorsed provider of arbitration services for the Michigan REALTORS®. This is a voluntary contract between the Buyer and Seller. Failure to agree to arbitrate does not affect the validity of the contract. A judgement of any circuit court shall be rendered on the award of determination made pursuant to this contract. This contract is specifically made subject to and incorporates the provisions of the Michigan Uniform Arbitration Act., MCL 691.1681, et seq. This contract is enforceable only as to parties and

dotloop signature verification: dtlp.us/Wmgo-F7Rz-qAmQ

SALES CONTRACT

RE: Property Address: 323 West Wesley Street, Jackson, MI 49201

arbitration continued: brokers/agents who have agreed to arbitrate as acknowledged by their initials below. The terms of this paragraph shall survive the closing.

INITIAL IF YOU AGREE TO ARBITRATE:

Buyer _____ _____ Seller _____ _____

24. **TRANSACTION FEE**: Buyer agrees to pay ERA Reardon Realty at Closing of Sale a transaction fee of $350.00.
25. **OTHER PROVISIONS:** Sold via quit claim deed. Buyer understands that he/she must obtain all building permits necessary for renovations from the city of Jackson. All renovations must be completed prior to occupancy. The home must be brought up to building code.
26. **MISCELLANEOUS**: The parties agree that a) there are no additional written, any oral agreements or understandings, b) the contract shall not be amended or modified unless both parties do so in writing, c) this contract shall be governed and construed in accordance with the laws of the State of Michigan, d) invalidation of one or more terms shall not affect the validity of the remaining terms, e) this contract shall survive the closing, the delivery of deeds, instruments or contracts and shall not merge into any such documents of conveyance provided for herein and f) information concerning the sale of property shall be reported to statistical and comparison purposes to the Jackson Area Association of REALTORS®. Parties waive any right to claim damage from the dissemination of such information.
27. **ELECTRONIC COMMUNICATION:** As an alternative to physical delivery, the parties agree that this contract, any amendment or modification of this contract and/or any written notice or communication in connection with this contract may be delivered to the Seller in care of the listing REALTOR® and the Buyer in care of the Selling REALTOR® via electronic mail or by facsimile via the contact information set forth above. Any such communication shall be deemed delivered at the time it is sent or transmitted. Seller represents and warrants that an electronic email address as been provided to Listing REALTOR® from which Seller may receive electronic mail. Buyer represents and warrants that an electronic email address has been provided to Selling REALTOR® from which Buyer may receive electronic mail. The parties agree that the electronic signatures and initials shall be deemed to be valid and binding upon the parties as if the original signatures or initials were present in the documents in the handwriting of each party.
28. Buyer gives the Seller until _____ ☐ a.m. ☐p.m. on 04/13/2023 for written acceptance of this contract and agrees that this contract, when accepted by Seller via original or facsimile signature, will constitute a binding contract between Buyer and Seller.

Ryan Ambs dotloop verified 03/18/23 11:11 AM EDT VLWT-1EGQ-9NJ5-PXNE
BUYER SIGNATURE DATE

BUYER SIGNATURE DATE

Ryan Ambs
Print Buyer's Legal Name

Print Buyer's Legal Name

29. Seller's Response:
☐ ACCEPT ☐ REJECT ☐ EXCEPT AS FOLLOWS: _____

And Seller gives the Buyer until _____ ☐ a.m. ☐p.m. on _____, to accept any changes. Receipt is acknowledged by Seller of a copy of this agreement.

SELLER SIGNATURE SELLER SIGNATURE SELLER MARITAL STATUS

30. Buyer's Receipt and Acceptance of Changes: Date: _____ _____ ☐ a.m. ☐p.m.
Receipt is acknowledged by Buyer of the Seller's acceptance of offer. If acceptance is subject to changes, Buyer agrees to accept changes; all other terms and conditions remain unchanged.

☐ ACCEPT/ACKNOWLEDGEMENT ☐ REJECT ☐ EXCEPT: SEE ADDENDUM: _____

Ryan Ambs dotloop verified 03/18/23 11:11 AM EDT M7PP-PL4T-SE07-CURD
BUYER SIGNATURE DATE

BUYER SIGNATURE DATE

DEPARTMENTAL REPORT
April 25,2023

MEMO TO: Honorable Mayor and City Council Members

FROM: Jonathan Greene, City Manager

DATE: **Council Meeting April 25th, 2023**

RECOMMENDATION: Approve the sale of four vacant residential City lots to the Welcome Home Organization. Lots are identified as; 1203 Woodbridge (Pin # 4-101900000), 1201 Woodbridge (Pin #4-115300000), 1226 Woodbridge (Pin # 4-115500000), 1227 Woodbridge (Pin #4-115600000). Authorize the City Manager to execute the Sale and Development agreement

SUMMARY

Local non-profit Welcome Home Organization (WHO) is requesting to purchase four vacant residential City lots for $1,200. Lots are identified as; 1203 Woodbridge (Pin # 4-101900000), 1201 Woodbridge (Pin #4-115300000), 1226 Woodbridge (Pin # 4-115500000), 1227 Woodbridge (Pin #4-115600000). WHO would like to acquire the lots to build 4 new homes to be used for transitional housing. The homes will help WHO fulfil the mission of the non-profit.

BUDGETARY CONSIDERATIONS

Selling the properties will reduce maintenance cost.
Sale income $300.00 per lot X 4 = $1,200.

HISTORY, BACKGROUND and DISCUSSION

The City of Jackson has a City lot home build program. WHO Board Director Vittoria Jimerson-Overmyer approached City Staff about the possibility of acquiring four City lots identified as ; 1203 Woodbridge (Pin # 4-101900000), 1201 Woodbridge (Pin #4-115300000), 1226 Woodbridge (Pin # 4-115500000), 1227 Woodbridge (Pin #4-115600000). The lots are directly across from the WHO main office and daycare center. WHO would like to acquire the lots to build 4 new homes to be used for transitional housing. WHO has already been in discussion with builders to acquire cost to build. An organization program plan for transitional housing is in progress. WHO has applied for grants with the State of Michigan to finance the build project. Acquiring the lots to build homes will help WHO with grant applications.

POSITIONS

Adopt the Resolution as proposed

JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Telephone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Honorable Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 25th,, 2023

SUBJECT: Sale of four vacant residential City lots to the Welcome Home Organization

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Recommendation: Approve the sale of four vacant residential City lots to the Welcome Home Organization. Lots are identified as; 1203 Woodbridge (Pin # 4-101900000), 1201 Woodbridge (Pin #4-115300000), 1226 Woodbridge (Pin # 4-115500000), 1227 Woodbridge (Pin #4-115600000). Authorize the City Manager to execute the Sale and Development agreement.

Your consideration and concurrence is appreciated.

JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Telephone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 25th, 2023

SUBJECT: Approve the sale of City owned property located at 1014 Woodbridge Street for $7,500.

Recommendation: Approve the sale of City owned property located at 1014 Woodbridge Street, to Kyle Brown for $7,500. Authorize the City Manager to sign all sale documents associated with the Property Transfer and to make minor modifications.

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Attachments: Purchase agreement, cost calculation and Real Estate Net sheet.

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Shane LaPorte, Director of Community Development

DATE: April 25th, 2023

RECOMMENDATION: Approve the sale of City owned property located at 1014 Woodbridge St, for $7,500.

SUMMARY

The City of Jackson owns real property located at 1014 Woodbridge St. This property was placed on the MLS by Real Estate Agent Rich Cook. On March 15th, 2023 an offer of $7,5000 was submitted to purchase the property. According to the offer to purchase, closing date is set to take place on or before April 28th, 2023.

BUDGETARY CONSIDERATIONS

Total project cost associated with property cleanout, personnel time, maintenance, and real estate cost/fees $18,337.91 Sale price $7,500. Revenue generated $(10,789.91) upon sale the property will be placed back on the tax roll.
Approximate Cost for the City to demolish the structure $33,760

HISTORY, BACKGROUND and DISCUSSION

Property located at 1014 Woodbridge St was obtained by the County of Jackson through tax foreclosure and deeded to the City of Jackson through right of first refusal. In an effort to make the structure marketable the Community Development Department oversaw pre-sale preparations such as property interior evaluation, exterior evaluation, property monitoring and cleanout of the structure. After completion of the property evaluation and cleanout, the house was placed on the Multiple Listing Service (MLS) by Real Estate Agent Rich Cook of ERA Reardon Realty. On March 15th , 2023 Richard Cook received an offer to purchase 1014 Woodbridge St Ave from the Buyer Kyle Brown for the amount of $7,500. Should Council agree to accept the bid amount, the closing is set on or before April 28 th, 2023. Council had previously authorized the sale of this property however the previous buyer Misael Ruiz backed out of the purchase

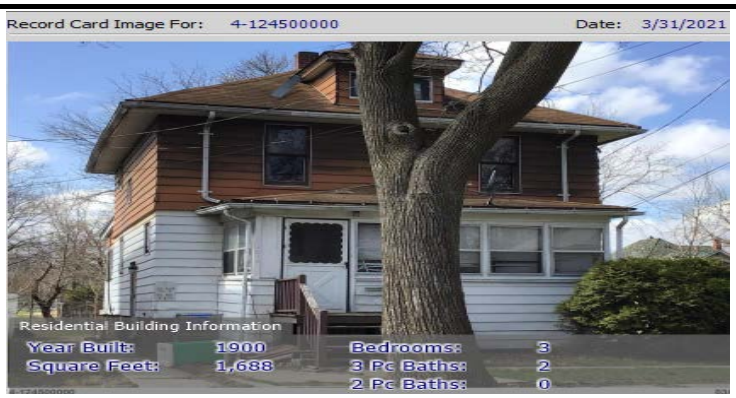
POSITIONS

ATTACHMENTS: Purchase agreement, cost calculation and Real Estate Net sheet.

1014 WOODBRIDGE

PIN# 4-124500000

G/L: 101-571-000-818.571 (Expenses) \ #101-571-000-673.000 (Revenue Deposit)



Closing Date	4.3.23
Sales Price	$ 7,500.00
Est. Project Cost *	$ 18,289.91
Net Sale	**$ (10,789.91)**

Contracts				Cost	Pd to Date	Remaining Balance
Johnny's Tree Services						
	Tree/Brush Clean-up	N/A	N/A	$ -	$ -	$ -
Mohawk	Clean-up Services	Inv#2120	Pd 5.2022	$ 4,500.00	$ 4,500.00	$ -
Grab-Bar Pro	*Board-up 2022*	*Inv#JAX-2021-4582-1014*	Pd 7.2021	$ 321.00	$ 321.00	$ -
Grab-Bar Pro	*Board-up 2022*	*Inv#JAX-2022-4691-1014*	Pd 5.2022	$ 135.00	$ 135.00	$ -
						$ -
Subtotal	**Contract Amount(s)**			**$ 4,956.00**	**$ 4,956.00**	**$ -**

Additional Project Cost				Cost	Pd to Date	Remaining Balance
Consumers - Acct		N/A	N/A			
				$ -	$ -	$ -
Water >						
	Meter Replace	N/A	N/A	$ -	$ -	$ -
	Billing #1	N/A	N/A	$ -	$ -	$ -
Procurement Card		Hammon Hardward	Entry Lock	$ 15.00	$ 15.00	$ -
Contingency				$ 500.00	$ -	$ 500.00
Miscellaneous				$ -	$ -	$ -
City Employee(s) Hrs.		Hrly Rate **	# of Hrs.			
	Brian Taylor	$ 74.00	3.00	$ 222.00	$ 222.00	$ -
	Sven Harrison	$ 53.98	2.00	$ 107.96	$ 107.96	$ -
	Mark Fish	$ 67.75	N/A	$ -	$ -	$ -
	Kim Randell	$ 50.05	N/A	$ -	$ -	$ -
	Sindy Foster	$ 43.15	0.50	$ 21.58	$ 21.58	$ -
	Shannon Williams	$ 56.29	1.00	$ 56.29	$ 56.29	$ -
	Shane LaPorte	$ 82.30	1.00	$ 82.30	$ 82.30	$ -
County Tax Foreclosure / Chargeback Cost (Ward 1 - 2018) Estimated				$ 6,667.35	$ 6,667.35	$ -
Taxes		Summer/Winter	Pd 2018	$ 825.82	$ 825.82	$ -
Special Assessment		N/A	N/A	$ -	$ -	$ -
Open Receivables		Multipole	Verified in Building.net 3.3.23	$ 1,612.07	$ -	$ 1,612.07
Open Utility		$434.04 balance	Verified in Building.net 3.3.23	$ 434.04	$ -	$ 434.04
Open DPW Invoices/Misc Receivables		$0.00 balance	Verified in Building.net 3.3.23	$ -	$ -	$ -
Net Real Estate Fees			Net Sheet	$ 2,789.50	$ -	$ 2,789.50
Subtotal	**Additional Cost**			**$ 13,333.91**	**$ 7,998.30**	**$ 5,335.61**

	Cost	Pd to Date	Remaining Balance
Total Project Cost	**$ 18,289.91**	$ 12,954.30	**$ 5,335.61**

ERA REAL ESTATE REARDON REALTY

Property Address: **1014 Woodbridge Street** Date: **04/03/2023**

Seller Name(s): **City Of Jackson**

	Debit	Credit
Sale Price		7500
Brokerage Fee	2000	
Transfer Tax	64.5	
Tax Proration (Approximate)		
Title Insurance	425	
Home Warranty		
Well & Septic		
Transaction Fee		
Pest Inspection		
Wire Fees		
Doc. Preparation (Deed)	50	
Seller's Concession		
American title fee	250	
Subtotal	2789.5	7500
Net Credit/Debit	4710.5	
Less Mortgage Balance		
Total Net To Sellers	4710.5	

***These figures are estimates only, and subject to change.**

Seller _____ Seller _____

SALES CONTRACT

Listing Office: ERA Reardon Realty
Office License #:
Phone:
Listing Agent: Richard Cook
Listing Agent License #:
Phone: 5174747424
Email: cook087@msn.com
☐ Seller's Agent ☑ Dual Agent ☐ Transaction Coord.

Selling Office: ERA
Office License #:
Phone:
Selling Agent: Rich Cook
Selling Agent License #:
Phone:
Email:
☐ Seller's Agent ☐ Buyer's Agent ☑ Dual Agent ☐ Trans. Coord.

1. **THIS** offer made 03/15/2023 between (Buyer) Kyle Brown specify marital/legal status: Address: 930 Bennett Jackson MI. 49201 and Seller city of Jackson
2. **FOR** the purchase of the property commonly known as 1014 Woodbridge Street City Jackson, Zip 49203 or described as N 1/2 OF LOT 7 BLK 9 HARWOOD'S ADD located in the of, County of Jackson County, State of Michigan; subject to all existing restrictions, easements, rights-of-way, zoning laws, the lien of taxes not yet due and payable at the time of closing, and land use regulations affecting the use of the property. ALL buildings, attached fixtures, improvements, built-in appliances, landscaping, and gas, oil, mineral rights, fuel oil or propane owned by Seller are included in the purchase price.
3. **PURCHASE PRICE**: Dollars $ 7500
4. **PERSONAL PROPERTY**: The sale price includes items of personal property as follows:
5. **TERMS** of purchase to be indicated by "X" below (Other unmarked terms of purchase do not apply):
   ☑ **CASH**: The full purchase price upon execution and delivery of Warranty Deed. Buyer agrees to provide Buyer Agent / Dual Agent verification of funds within five (5) calendar days of the date this contract is fully executed, and consents to the disclosure of such information to Seller and/or Seller's Agent.

   ☐ **NEW MORTGAGE**: The full price upon the execution and delivery of a Warranty Deed, contingent upon Buyer's ability to obtain a type mortgage for no less than years, with a minimum down payment of % of the purchase price at no more than % interest per annum. Buyer will supply to Seller a pre-approval letter within days from the acceptance. Buyer will make formal mortgage application and order appraisal through Buyer's lender within days of the date of this acceptance.

   ☐ **LAND CONTRACT**: $ upon execution and delivery of a land contract with the balance payable in monthly principal and interest installments of $ or more. Interest at % per annum. Interest to start on date of closing and first payment due 30 calendar days after closing date. Land contract due in full no later than after date of closing. At time of payoff, Seller shall provide a warranty deed and pay all county/state transfer taxes. Payment ☐ will ☐ will not include taxes and insurance in the monthly payment. Said Contract ☐ will ☐ will not have a due on sale clause. **BUYER** ☐ does ☐ does not request a land contract memo at the Buyer's expense. Additional terms:
6. **SELLER CONCESSIONS**: ☑ NO Seller Concessions ☐ Seller Concessions: Seller to pay $ or % of the sale price for purchaser's closing costs, discount points, or prepaid items to include escrow and any other costs to conform to lender guidelines.
7. **HOME SALE CONTINGENCY:** This contract is contingent upon ☑NONE ☐SALE AND CLOSE OF ☐CLOSE OF: ADDRESS:

Buyer Initials _____ _____ Seller Initials _____ KB

SALES CONTRACT

RE: Property Address: 1014 Woodbridge Street, Jackson, MI 49203

8. **EARNEST MONEY**: Buyer herewith deposits $1000 in the form of check as earnest money to be held by atc as part of the purchase price or the down payment portion where applicable. If this contract is not accepted, or the conditions, contingencies, and/or any inspections specified are not satisfied, the earnest money shall be refunded to the Buyer. If the Seller defaults in the performance of this contract, Buyer may receive an immediate refund of all earnest money in full termination of this contract or may pursue specific performance of this contract. If Buyer defaults in the performance of this contract, all deposits shall be forfeited to Seller in full termination of this contract or may pursue specific performance of this contract. If sale is not closed, the REALTOR® may notify Buyer and Seller in writing, or REALTOR®'s intended disposition of the earnest money deposit. All parties shall be deemed to have agreed to the disposition of the earnest money deposit unless REALTOR® receives written objection from either party within ten (10) calendar days of receipt of notification. If a dispute occurs involving the deposit, in whole or in part, the non-prevailing party, as determined by the court, will reimburse the other party and Broker(s) for reasonable attorney's fees and expenses incurred in connection with the dispute, including interpleader actions. If a dispute exists between the Seller and Buyer, Seller and Buyer agree that the Selling Broker/Escrow Agent shall not release the Earnest Money Deposit without the written consent of both parties.
9. **FORM** of Conveyance:
   a. Seller shall pay for, convey, and transfer, by ☐ Warranty Deed or ☐ Land Contract, a marketable record title to the property and improvements as evidence by Owner's Title Insurance Policy with standard exceptions date in the amount of the purchase price, subsequent to this contract, and pay all county/state transfer tax.
   b. When applicable, insert the number of divisions and include in deed/land contract: "The grantor grants to the grantee the right to make all (insert number) division(s) under Section 108 of the land division act, Act. No. 288 of the Public Acts of 1967."
10. **CLOSE OF SALE:** Time is of the essence. Closing to occur once approved to close by the lender or receipt of final closing documents. However, close of sale shall be on or before 04/28/2023.
11. **PRORATIONS**: Rent and association fees, if any, are to be prorated as of the date of closing.
    ☐ Seller will escrow the sum of $_____ for final water and sewer bill with Title Company. Escrowed funds will be released to Seller upon verification that the final bill has been paid or will be used to pay the final bill upon receipt by the escrow agent. Any excess funds will be returned to Seller and Seller will be responsible for any shortage. Any unmetered Water and Sewer to be prorated to the date of closing.
12. **POSSESSION**: Seller will maintain the property in its present condition until the completion of the closing. Possession shall be delivered to Buyer, subject to rights of present tenants, if any: ☑ Immediate Possession at Time of Closing ☐ At _____ ☐a.m. ☐p.m. on the _____ day after completion of closing, during which time Seller will have the privilege to occupy the property and hereby agrees to pay the Buyer $_____ as an occupancy fee for this period, to be escrowed by title company at closing. If Seller occupies the property after closing, Seller will pay all utilities and be responsible for routine maintenance during such occupancy. Buyers will maintain the property structural components and mechanical systems during such occupancy. If any repairs or replacements necessitated by Seller's misuse, abuse, or neglect of the property, Seller will be responsible for the expense of such repairs and replacement. On the agreed possession date, Seller shall deliver the property free of trash and debris, in broom-clean condition, shall remove all personal property (unless otherwise agreed by the parties), make arrangements for final payment of all utilities, and shall deliver all keys and remote controls to Buyer. If Seller fails to deliver possession to Buyer on the agreed date, Buyer shall be entitled to immediate possession without any notice to Seller.
    Exceptions: _____
13. **TAXES**: are to be treated as if they cover the CALENDAR YEAR in which they are first billed. Taxes first billed in years prior to year of closing shall be paid by the SELLER. Taxes which are first billed in the year of closing shall be prorated so that SELLER shall pay taxes from the first of the year to closing date and BUYER shall pay taxes for the balance of the year, including the day of closing. If any bills for taxes is not issued as of the closing date, the current taxable value, homestead status and millage rate shall be used for proration purposes, plus collection fee, if any. If the current PRE is 0% and buyer's taxes will be adjusted based on 100% PRE in the same CALENDAR year as close, then taxes will be prorated based on 100%. **EXCEPT,** if taxes are unallocated as to the parcel being sold, Allocation to be determined prior to close.

Buyer Initials _____ KB

Seller Initials _____ _____

RE: Property Address: 1014 Woodbridge Street, Jackson, MI 49203

Taxes continued: **Buyer should not assume that buyer's future tax bills on the property will be the same as seller's present tax bills. Under Michigan law, real property tax obligations can change significantly when property is transferred.**

14. **ASSESSMENTS:** Seller shall pay all installments of special assessments due as of the closing date. Installments of existing special assessments due after the closing date shall be paid by the all. (If the Buyer elects to assume existing special assessments and is obtaining a mortgage, Buyer should confirm with lender that the assessment can be assumed). Assessments levied after the closing date to be paid by Buyer. **Seller has no knowledge of any pending assessments and/or benefit charges that have not been disclosed in writing to the Buyer in this Agreement. Any exceptions shall be disclosed to Buyer in writing.**
15. **ACKNOWLEDGEMENT OF DISCLOSURES:**

Lead Based Paint: (For residential housing built prior to 1978 only): Buyer acknowledges that prior to signing this contract, Buyer has received a copy of the Lead-based Paint Seller Disclosure Form completed by the Seller on 03/15/2023, the terms of which shall be part of this contract:

☐ Buyer shall have 10 days after the date of this contract to conduct an inspection of the property for the presence of lead-based paint and/or lead based paint hazards. (Federal regulations require a 10-day period or other mutually agreed upon period of time.) If Buyer is not satisfied with the results of this inspection, upon notice from Buyer to Seller within this period, this contract shall terminate and any deposit shall be refunded to Buyer.

☑ Buyer hereby waives his/her opportunity to conduct a risk assessment or inspection for the presence of lead-based paint and/or lead-based paint hazards.

Seller's Disclosure:

☑ Buyer acknowledges that a Seller's Disclosure Statement dated 03/15/2023 has been provided to Buyer in compliance with the Michigan Seller Disclosure Act.

☐ Seller shall provide Buyer with a Seller's Disclosure Statement with Seller's acceptance of this offer. Pursuant to the Seller Disclosure Act, MCL 559.951, *et seq.*, Buyer will have 72 hours after hand-delivery of the disclosure statement (or 120 hours after delivery by registered mail) to terminate this agreement by delivery of a written notice to Seller or Seller's agent.

16. **HOME WARRANTY**

☐ Buyer has been advised of the availability of a Home Warranty program. Said Home Warranty plan to be provided by _____ at _____ expense. ☑ Buyer waives Home Warranty.

17. **PROPERTY INSPECTIONS**: Buyer has personally inspected the property and accepts it in AS IS present condition and agrees that there are no additional written or oral understandings except as otherwise provided in this contract. The inspection(s) do not create a list of repairs for the Seller to correct. The negotiated price fairly reflects the present "AS-IS" condition of the property.

☐ This offer is contingent upon satisfactory inspections of the property, at Buyer's choice and at Buyer's expense, no later than 10 calendar days after the date of Acceptance. These inspections may include, but may not be limited to, mechanical, electrical, and structural inspections, as well as inspections for radon, mold and/or asbestos. Buyer agrees to return the property to its prior condition after any inspections or tests. If Buyer is not satisfied with the results of any inspection, Buyer shall, within the 10-day period, provide written notice of Buyer's dissatisfaction to Seller that shall include proposed revisions to the sales contract that will resolve Buyer's dissatisfaction with the inspections. Seller shall then have 5 days to accept, negotiate, or refuse to accept the proposed revisions in writing. Seller's failure to respond within the 5-day period constitutes a rejection of the proposed revision. If Seller agrees to the revision, the sale shall proceed to closing. If Seller refuses to respond or rejects the proposed revisions, Buyer may either withdraw its objections and proceed to closing or terminate the contract and have the earnest money deposit returned to Buyer. Buyer's failure to respond in writing to Seller's rejection within 5 days from Seller's notice of rejection, shall constitute a termination of this contract.

☐ Buyer acknowledges that Selling Broker/REALTOR® has recommended that Buyer obtain an inspection of the property by an inspector and/or licensed contractor. Buyer does not desire to obtain an inspection of the property.

RE: Property Address: 1014 Woodbridge Street, Jackson, MI 49203

18. **WELL AND SEPTIC INSPECTIONS** – CONTINGENCY TO BE REMOVED WITHIN 10 DAYS OF ACCEPTANCE:
☑ **Connected to community water** ☑ **Connected to community sewer**
☐ **Buyer** ☐ **Seller** to furnish a written report stating that the water is potable.
☐by a certified inspector.
☐ **Buyer** ☐ **Seller** to furnish a written report that the well system is in good working order.
☐by a certified inspector
☐ **Buyer** ☐ **Seller** to furnish a written report stating that the septic system is in good working order.
☐by a certified inspector
☐ **Buyer waives water/well/septic inspection.**
If any of the above reports regarding well and septic are found deficient, the Seller and the Buyer agree to negotiate in good faith the cost of the correction. Any request by Buyer to modify this contract based on the results of an inspection shall terminate this contract unless: (a) the request is agreed to by Seller in writing, or (b) the Buyer removes the inspection contingency in writing after Seller rejects Buyer's modification request or Seller fails to respond within 5 days of receiving Buyer's request.
19. **WOOD DESTROYING INSECT INSPECTION:** ☐ **Buyer** ☐ **Seller** ☑ **Buyer waives wood destroying insect inspection** – shall furnish at his expense, within 10 days of acceptance, an inspection by a pest control company for termites, powder post beetles, carpenter ants and carpenter bees. If active infestation is found, or evidence of previous untreated termite infestation, it shall be the option of the Seller, within 5 days from inspection to contract to treat and to contract to repair any ruined material resulting from termites, powder post beetles, carpenter ants, or carpenter bees. If the Seller does not contract to treat and repair, this contract may be declared null and void by the Buyer.
20. **SURVEY/MORTGAGE REPORT/PROPERTY IMPROVEMENT REPORT:**
☐ **Mortgage Report** – Buyer shall provide, at Buyer's expense, a current mortgage report certified to Buyer's **lender only if required by lender**. This report shall identify any buildings and improvements on the property as described with no boundary lines established.
☐ **Property Improvement Report** – Buyer shall furnish at Buyer's expense, a current property improvement report certified to the **Buyer**. This report shall identify any buildings and improvements on the property as described with **no** boundary lines established. (This document can be utilized in situations where the lender does **not** require a mortgage certificate.)
☐ **Boundary (Stake) Survey** - ☐Buyer ☐Seller shall furnish at their expense a current report identifying any buildings, encroachments and improvements within the boundaries of the described property. This survey shall show all boundaries and property shall be staked at all corners.
☑ Buyer waives stake survey, mortgage report, and property improvement report.
21. **CONDITION OF PROPERTY:** BUYER HAS PERSONALLY EXAMINED THIS PROPERTY AND AGREES TO ACCEPT SAME IN ITS "AS-IS" CONDITION AND SELLER AGREES NOT TO ADVERSELY ALTER THE PRESENT CONDITION. If said premises are damaged by fire or other casualty prior to closing, Buyer may elect to revoke this contract and be reimbursed for all earnest money hereunder, or conclude the sale on the payment to Buyer of such insurance proceeds necessary to repair the property to its condition at the time of this contract's acceptance. Buyer shall assume all risk of loss or damage not caused by acts of negligence of the Seller from date of closing. **WALK THROUGH INSPECTION:** Although the Buyer has the right to a walk-through inspection prior to closing, the sole purpose is to determine if it is in the same condition as when the Sales Contract was executed, and the included personal property remains on the premises.
22. **SELLER/BUYER HAS BEEN ADVISED TO SEEK LEGAL COUNSEL TO INSURE THAT:** 1) the details of the Sales Contract are being adhered to, 2) title is marketable, 3) Property complies with or is not affected by the Land Division Act, as amended, and 4) to determine how Buyer(s) will take title.
23. **ARBITRATION:** Any dispute over the disposition of any earnest money deposits or claim arising out of or related to the physical condition of any property covered by this contract, included without limitation, claims of fraud, misrepresentation, warranty and negligence, shall be settled in accordance with the rules, then in effect, adopted by the endorsed provider of arbitration services for the Michigan REALTORS®. This is a voluntary contract between the Buyer and Seller. Failure to agree to arbitrate does not affect the validity of the contract. A judgement of any circuit court shall be rendered on the award of determination made pursuant to this contract. This contract is specifically made subject to and incorporates the provisions of the Michigan Uniform Arbitration Act., MCL 691.1681, et seq. This contract is enforceable only as to parties and

SALES CONTRACT

RE: Property Address: 1014 Woodbridge Street, Jackson, MI 49203

arbitration continued: brokers/agents who have agreed to arbitrate as acknowledged by their initials below. The terms of this paragraph shall survive the closing.

INITIAL IF YOU AGREE TO ARBITRATE:

Buyer _____ _____ Seller _____ _____

24. **TRANSACTION FEE**: Buyer agrees to pay ERA Reardon Realty at Closing of Sale a transaction fee of $350.00.
25. **OTHER PROVISIONS:** Sold via quit claim deed. Buyer understands that he/she must obtain all building permits necessary for renovations from the city of Jackson. All renovations must be completed prior to occupancy. The home must be brought up to building code.
26. **MISCELLANEOUS**: The parties agree that a) there are no additional written, any oral agreements or understandings, b) the contract shall not be amended or modified unless both parties do so in writing, c) this contract shall be governed and construed in accordance with the laws of the State of Michigan, d) invalidation of one or more terms shall not affect the validity of the remaining terms, e) this contract shall survive the closing, the delivery of deeds, instruments or contracts and shall not merge into any such documents of conveyance provided for herein and f) information concerning the sale of property shall be reported to statistical and comparison purposes to the Jackson Area Association of REALTORS®. Parties waive any right to claim damage from the dissemination of such information.
27. **ELECTRONIC COMMUNICATION:** As an alternative to physical delivery, the parties agree that this contract, any amendment or modification of this contract and/or any written notice or communication in connection with this contract may be delivered to the Seller in care of the listing REALTOR® and the Buyer in care of the Selling REALTOR® via electronic mail or by facsimile via the contact information set forth above. Any such communication shall be deemed delivered at the time it is sent or transmitted. Seller represents and warrants that an electronic email address as been provided to Listing REALTOR® from which Seller may receive electronic mail. Buyer represents and warrants that an electronic email address has been provided to Selling REALTOR® from which Buyer may receive electronic mail. The parties agree that the electronic signatures and initials shall be deemed to be valid and binding upon the parties as if the original signatures or initials were present in the documents in the handwriting of each party.
28. Buyer gives the Seller until _____ ☐ a.m. ☐p.m. on 04/14/2023 for written acceptance of this contract and agrees that this contract, when accepted by Seller via original or facsimile signature, will constitute a binding contract between Buyer and Seller.

BUYER SIGNATURE DATE BUYER SIGNATURE DATE

Kyle Brown

Print Buyer's Legal Name Print Buyer's Legal Name

29. Seller's Response:
☐ ACCEPT ☐ REJECT ☐ EXCEPT AS FOLLOWS: _____

And Seller gives the Buyer until _____ ☐ a.m. ☐p.m. on _____, to accept any changes. Receipt is acknowledged by Seller of a copy of this agreement.

SELLER SIGNATURE SELLER SIGNATURE SELLER MARITAL STATUS

30. Buyer's Receipt and Acceptance of Changes: Date: _____ _____ ☐ a.m. ☐p.m.
Receipt is acknowledged by Buyer of the Seller's acceptance of offer. If acceptance is subject to changes, Buyer agrees to accept changes; all other terms and conditions remain unchanged.

☐ ACCEPT/ACKNOWLEDGEMENT ☐ REJECT ☐ EXCEPT: SEE ADDENDUM: _____

BUYER SIGNATURE DATE BUYER SIGNATURE DATE

NOTICE TO BUYER
DISCLOSURE OF INFORMATION
This Addendum DOES NOT constitute a contingency to the Purchase Agreement.

ADDENDUM TO: ☑ **PURCHASE AGREEMENT** ☐ **LEASE AND/OR OPTION AGREEMENT** **ADDENDUM NO.** 1 **DATED** 03/15/2023

THIS ADDENDUM IS ATTACHED TO AND MADE PART OF A CERTAIN AGREEMENT/CONTRACT BETWEEN THE UNDER SIGNED PARTIES DATED _____, **COVERING REAL ESTATE INTEREST LOCATED IN THE** _____ **OF** Jackson, **COUNTY OF** Jackson County, **STATE OF MICHIGAN, KNOWN AS** 1014 Woodbridge Street, Jackson, MI 49203

Neither Selling Broker nor Listing Broker nor any of the respective real estate sales agents possess the expertise necessary to assess structural and mechanical matters, determine environmental risk or the presence of environmental contamination, nor many of the other matters herein set forth which may be material to the decision to purchase or to the amount of the purchase price. **Buyer and/or Seller may investigate several persons or companies and use the information obtained to make selections for the required services.**

1. **PROFESSIONAL INSPECTIONS AND INSPECTORS:** Inspections are readily available for reasonable fees by trained professionals. The Buyer(s) and/or inspector(s) hired by the Buyer(s) are permitted to fully inspect subject property. Inspections of the physical condition of subject property by a professional with Buyer's approval of the condition of the property, as disclosed by the inspection, are an important safeguard. Inspections may include, but not be limited to:

- Structural Condition
- Foundation, Retaining Walls
- Roof, Gutters
- Heating/Air Conditioning System
- Electrical and Plumbing Systems
- Lead Based Paint Hazards
- Emerald Ash Borer Infestation
- Fireplace and Chimney
- Pool, Pool Heater and Filtration System; Hot Tub and Spa
- Soil Drainage and Grading
- Identify and locate sources of Radon
- Mold, Mildew
- Well, Water Quality and Septic System
- Wood Destroying Insect Infestation

If Broker supplies Buyer and/or Seller with the names of any professional inspectors, lenders, title companies, or insurance companies, such suggestions do not constitute a recommendation or endorsement of any such individual, entity or company by the Broker.

2. **POTENTIAL HAZARDOUS SUBSTANCES:** There are numerous federal, state and local laws and regulations in existence which are intended to control and/or correct environmental contamination. These laws and regulations may expose owners, tenants and other users of property to liability for substantial damages and/or clean-up costs occasioned by environmental contamination, regardless of fault and regardless of when in time the contamination may have occurred. Accordingly, it is prudent for each party to a real estate transaction to seek legal and technical counsel from professionals experienced in such matters so that each may be better apprised of the respective rights and responsibilities in regard to environmental contamination, hazardous wastes disposed of on the property, or property that now has or had underground storage tanks.

The term "hazardous wastes or substances" as used in this agreement may include, but is not limited to, petroleum based products, paints and solvents, lead cyanide, DDT, printing inks, acids, pesticides, ammonium compounds, asbestos, PCB, mold or mold contaminated materials and other chemical products. For more information on Hazardous Substances, please contact local authorities.

3. **PROPOSAL A:** The 1994 constitutional amendment, known as Proposal A, states the following: (1) Assessments cannot exceed 50 percent of true cash value, defined as the **usual selling price of** property. (2) The system of county and state equalization has not been changed or eliminated. (3) The taxable value of **each parcel** shall not increase more than the lesser of the Consumers Price Index or 5 percent, except that adjustments are made for additions and losses. (The Consumers Price Index for the period of October 1 to September 30 will be published annually by the State Tax Commission.) And (4) when the ownership of property transfers, the taxes will be spread against 50 percent of the true cash value, as determined by the assessor in the year following the transfer.

The County Board of Commissioners will meet in April to adopt county equalized values for each class of real and personal property in each assessing unit in that county. In May, the State Tax Commission will adopt state equalized values for each class of real and personal property in each county in the state.

"Taxable value" is the value against which taxes will be spread starting in 1995. "Capped value" is the maximum amount to which the taxable value of each parcel could be increased in any given year. Taxable Value multiplied by Millage Rate equals Property Tax Bill.
Questions and Answers at: www.michigan.gov/documents/2856_11014_7.pdf. Check with local township authorities for homestead status and deadlines at the time of closing.

Buyer Initials [VK] Buyer Initials [ ] Seller Initials [ ] Seller Initials [ ]

4. **INVESTIGATE SCHOOLS:** If the quality or suitability of school facilities is material to the Buyer, the Buyer should obtain information directly from the appropriate school district.

5. **SEX OFFENDERS REGISTRATION ACT:** The Sex Offenders Registration Act, (AN ACT to require persons convicted of certain offenses to register; to prohibit certain individuals from engaging in certain activities within a student safety zone; to prescribe the powers and duties of certain departments and agencies in connection with that registration; and to prescribe fees, penalties, and sanctions.) MCL 28.721et seq., directs the Michigan State Police to develop and maintain a public registry and provides guidelines on the type of offender information available to the public. The legislature has determined that a person who has been convicted of committing an offense covered by this act poses a potential serious menace and danger to the health, safety, morals, and welfare of the people, and particularly the children, of this state. Please visit this registry website at http://www.mipsor.state.mi.us/.

6. **ZONING, BUILDING AND OTHER USE RESTRICTIONS:** It is the Buyer's responsibility to verify from the appropriate city, county and state authorities that zoning, building and other use restrictions are compatible with Buyer's intended use of the property.

7. **FLOOD HAZARD DISCLOSURE:** Buyer(s) should review Seller's Disclosure Statement where Seller has revealed their knowledge or lack thereof, as it pertains to flood insurance; flooding or inadequate drainage on subject property. Special Flood Hazard areas or government designated flood plains do exist. Buyer is advised that lenders may annually require flood plain insurance as a condition of procuring a mortgage. In a non – mortgage transaction, Buyer(s) are advised to determine whether property is in a flood plain or obtain flood plain certification. If the property is deemed to be in a flood plain, Buyer is advised to purchase flood insurance.

8. **PROPERTY SURVEYS:** If exact boundary lines of the property are material to either the decision to purchase or the amount of the purchase price, the parties should arrange to have a boundary/staked survey completed by a licensed land surveyor. A boundary/staked survey discloses the property's corners and verifies the location of existing corner markers or monuments, the location and distant of measurements for all buildings and other physical improvements as they relate to the property lines as well as the property boundary lines, and the physical location of any known encroachments, utility easements and other matters. Staked surveys may be used by a title company to issue an owner's title policy without exceptions. A mortgage report shows only the approximate location of the improvements or buildings and visible encroachments on the property, but does not show dimensions from buildings or improvements to property lines.

9. **OTHER:**

BUYER	BUYER	DATE
SELLER	SELLER	DATE

DISCLAIMER: This form is provided as a service of the Jackson Area Association of REALTORS. Users of this form are expected to review the form and the details of the transaction to ensure that each section of the form is appropriate for the transaction. The Jackson Area Association of REALTORS is not responsible for the use or misuse of this form, or for misrepresentations or warranties made in connection with this form.

dotloop signature verification: dotloop.com/?... EZFA-E3Q

Disclosure Regarding Real Estate Agency Relationships

Before you disclose confidential information to a real estate licensee regarding a real estate transaction, you should understand what type of agency relationship you have with that licensee. A real estate transaction is a transaction involving the sale or lease of any legal or equitable interest in real estate consisting of not less than 1 or not more than 4 residential dwelling units or consisting of a building site for a residential unit on either a lot as defined in section 102 of the land division act, 1967 PA 288, MCL 560.102, or a condominium unit as defined in section 4 of the condominium act, 1978 PA 59, MCL 599.104

(1) An agent providing services under any service provision agreement owes, at a minimum, the following duties to the client:
- (a) The exercise of a reasonable care and skill in representing the client and carrying out the responsibilities of the agency relationship.
- (b) The performance of the terms of the service provision agreement.
- (c) Loyalty to the interest of the client.
- (d) Compliance with the laws, rules, and regulations of this state and any applicable federal statutes or regulations.
- (e) Referral of the client to other licensed professionals for expert advice related to material matters that are not within the expertise of the licensed agent.
- (f) An accounting in a timely manner of all money and property received by the agent in which the client has or may have an interest.
- (g) Confidentiality of all information obtained within the course of the agency relationship, unless disclosed with the client's permission or as provided by law, including the duty not to disclose confidential information to any licensee who is not an agent of the client:

(2) A real estate broker or real estate salesperson acting pursuant to a service provision agreement shall provide the following services to his or her client:
- (a) When the real estate broker or real estate salesperson is representing a seller or lessor, the marketing of the client's property or the property in the manner agreed upon in the service provision agreement.
- (b) Acceptance of delivery and presentation of offers and counteroffers to buy, sell or lease the client's property or the property the client seeks to purchase or lease.
- (c) Assistance in developing, communicating, negotiating and presenting offers, counteroffers, and related documents or notices until a purchase or lease agreement is executed by all parties and all contingencies are satisfied or waived.
- (d) After execution of a purchase agreement by all parties, assistance as necessary to complete the transaction under the terms specified in the purchase agreement.
- (e) For a broker or associate broker who is involved at all the closing of a real estate or business opportunity transaction furnishing, or causing to be furnished, to the buyer and seller, a complete and detailed closing statement signed by the broker or associate broker showing each party all receipts and disbursements affecting that party.

Michigan law requires real estate licensees who are acting as agents of sellers or buyers of real property to advise the potential sellers or buyers with whom they work of the nature of their agency relationship.

Seller's Agents

A seller's agent, under a listing agreement with the seller, acts solely on the behalf of the seller. A seller can authorize a seller's agent to work with subagents, buyers' agents, and/or transaction coordinators. A subagent of the seller is one who has agreed to work with the listing agent, and who, like the listing agent, acts solely on the behalf of the seller. Sellers' agents and their subagents will disclose to the seller known information about the buyer which may be used to the benefit of the seller. The seller through execution of a limited service agreement may waive individual services. Only those services set forth in paragraph (2) (b),(c), and (d) above may be waived by the execution of a limited service agreement.

Buyer's Agents

A buyer's agent, under a buyers' agency agreement with the buyer, acts solely on the behalf of the buyer. A subagent of the buyer is one who has agreed to work with the buyer's agent with who, like the buyer's agent, acts solely on behalf of the buyer. Buyers' agents and their subagents will disclose to the buyer known information about the seller which may be used to benefit the buyer. Individual services may be waived by the buyer through execution of a limited service agreement. Only those services set forth in paragraph (2)(b), (c) or (d) above may be waived by the execution of a limited service agreement.

Dual Agents

A real estate licensee can be the agent of both the seller and the buyer in a transaction, but only with the knowledge and informed consent, in writing, of both the seller and the buyer. In such a dual agency situation, the licensee will not be able to disclose all known information to either the seller or the buyer. As a dual agent, the licensee will not be able to provide the full range of fiduciary duties to the seller or the buyer. The obligations of a dual agent are subject to any specific provisions set forth in any agreement between the dual agent, the seller and the buyer.

Transaction Coordinator

A transaction coordinator is a licensee who is not acting as an agent of either the seller or the buyer, yet is providing services to complete a real estate transaction. The transaction coordinator is not an agent for either party and therefore owes no fiduciary duty to either party.

Designated Agency

A buyer or seller with a designated agency agreement is represented only by agents specifically named in the agreement. Any agents of the firm, not named in the agreement do not represent the buyer or seller. The named "designated" agent acts solely on behalf of his or her client and may only share confidential information about the client with the agent's supervisory broker who is also named in the agreement. Other agents in the firm have no duties to the buyer or seller and may act solely on behalf of another party in the transaction.

Licensee Disclosure (check one)

I hereby disclose the agency status of the licensee named below is:

- ☐ Seller's Agent
- ☐ Buyer's Agent
- ☑ Dual Agent
- ☐ Transaction Coordinator (A licensee who is not acting as an agent of either the seller or the buyer)
- ☐ None of the Above
- ☐ Seller's Agent – Limited Service Agreement
- ☐ Buyer's Agent – Limited Service Agreement

Affiliated Licensee Disclosure (check one)

☐ Check here if acting as a designated agent. Only the licensee's broker and a named supervisory broker have the same agency relationship as the licensee named below. If the other party in a transaction is represented by an affiliated licensee, then the licensee's broker and all named supervisory brokers shall be considered disclosed consensual dual agents.

☐ Check here if not acting as a designated agent. All affiliated licensees have the same agency relationship as the licensee named below.

Further, this form was provided to the buyer or seller before disclosure of any confidential information.

Licensee: Richard Cook dotloop verified 03/15/23 7:31 PM EDT HUWI-AI4D-DSOO-MLM5 Date: _____

Licensee: _____ Date: _____

Acknowledgement

By signing below, the parties confirm that they have received and read the information in this agency disclosure statement and that this form was provided to them before the disclosure of any confidential information specific to the potential sellers or buyers.

☑ ☐ Potential Buyer / Seller (circle one) _____ Date: _____

☐ ☐ Potential Buyer / Seller (circle one) _____ Date: _____

Seller's Disclosure Statement

REALTOR®

Property address: 1014 Woodbridge Street, Jackson, MI 49203 — MICHIGAN
Street — City, Village, or Township

Purpose of Statement: This statement is a disclosure of the condition of the property in compliance with the Seller Disclosure Act. This statement is a disclosure of the condition and information concerning the property, known by the Seller. Unless otherwise advised, the Seller does not possess any expertise in construction, architecture, engineering or any other specific area related to the construction or condition of the improvements on the property or the land. Also, unless otherwise advised, the Seller has not conducted any inspection of generally inaccessible areas such as the foundation or roof. **This statement is not a warranty of any kind by the Seller or by any Agent representing the Seller in this transaction, and is not a substitute for any inspections or warranties the Buyer may wish to obtain.**

Seller's Disclosure: The Seller discloses the following information with the knowledge that even though this is not a warranty, the Seller specifically makes the following representations based on the Seller's knowledge at the signing of this document. Upon receiving this statement from the Seller, the Seller's Agent is required to provide a copy to the Buyer or the Agent of the Buyer. The Seller authorizes its Agent(s) to provide a copy of this statement to any prospective Buyer in connection with any actual or anticipated sale of property. The following are representations made solely by the Seller and are not the representations of the Seller's Agent(s), if any. **THIS INFORMATION IS A DISCLOSURE ONLY AND IS NOT INTENDED TO BE A PART OF ANY CONTRACT BETWEEN BUYER AND SELLER.**

Instructions to the Seller: (1) Answer ALL questions. (2) Report known conditions affecting the property. (3) Attach additional pages with your signature if additional space is required. (4) Complete this form yourself. (5) If some items do not apply to your property, check NOT AVAILABLE. If you do not know the facts, check UNKNOWN, FAILURE TO PROVIDE A PURCHASER WITH A SIGNED DISCLOSURE STATEMENT WILL ENABLE A PURCHASER TO TERMINATE AN OTHERWISE BINDING PURCHASE AGREEMENT.

Appliances/Systems/Services: The items below are in working order. (The items listed below are included in the sale of the property only if the purchase agreement so provides.)

	Yes	No	Unknown	Not Available
Range/Oven	☐	☐	☐	☐
Dishwasher	☐	☐	☐	☐
Refrigerator	☐	☐	☐	☐
Water softener/ conditioner	☐	☐	☐	☐
Disposal	☐	☐	☐	☐
TV antenna, TV rotor & controls	☐	☐	☐	☐
Electrical system	☐	☐	☐	☐
Garage door opener & remote control	☐	☐	☐	☐
Alarm system	☐	☐	☐	☐
Intercom	☐	☐	☐	☐
Central vacuum	☐	☐	☐	☐
Attic fan	☐	☐	☐	☐
Pool heater, wall liner & equipment	☐	☐	☐	☐
Microwave	☐	☐	☐	☐
Trash compactor	☐	☐	☐	☐
Ceiling fan	☐	☐	☐	☐
Sauna/hot tub	☐	☐	☐	☐
Washer	☐	☐	☐	☐

	Yes	No	Unknown	Not Available
Lawn sprinkler system	☐	☐	☐	☐
Water heater	☐	☐	☐	☐
Plumbing system	☐	☐	☐	☐
Hood/fan	☐	☐	☐	☐
Well & pump	☐	☐	☐	☐
Septic tank & drain field	☐	☐	☐	☐
Sump pump	☐	☐	☐	☐
City water system	☐	☐	☐	☐
City sewer system	☐	☐	☐	☐
Central air conditioning	☐	☐	☐	☐
Central heating system	☐	☐	☐	☐
Wall Furnace	☐	☐	☐	☐
Humidifier	☐	☐	☐	☐
Electronic air filter	☐	☐	☐	☐
Solar heating system	☐	☐	☐	☐
Fireplace & chimney	☐	☐	☐	☐
Wood burning system	☐	☐	☐	☐
Dryer	☐	☐	☐	☐

Explanations (attach additional sheets if necessary):

UNLESS OTHERWISE AGREED, ALL HOUSEHOLD APPLIANCES ARE SOLD IN WORKING ORDER EXCEPT AS NOTED, WITHOUT WARRANTY BEYOND DATE OF CLOSING.

Property conditions, improvements & additional information:

1. **Basement/Crawlspace**: Has there been evidence of water? ☐ yes ☐ no
   If yes, please explain:
2. **Insulation**: Describe if known:
   Urea Formaldehyde Foam Insulation (UFFI) is installed? ☐ unknown ☐ yes ☐ no
3. **Roof**: Leaks? ☐ yes ☐ no
   Approximate age if known:
4. **Well**: Type of well (depth/diameter, age and repair history, if known):
   Has the water been tested? ☐ yes ☐ no
   If yes, date of last report/results:
5. **Septic tanks/drain fields**: Condition if known:
6. **Heating system**: Type/approximate age:

BUYERS INITIALS
SELLERS INITIALS

Property address: 1014 Woodbridge Street, Jackson, MI 49203 MICHIGAN
Street City, Village, or Township

7. **Plumbing system:** Type: copper ☐ galvanized ☐ other ☐
   Any known problems? _____
8. **Electrical system:** Any known problems? _____
9. **History of infestation,** if any: (termites, carpenter ants, etc.) _____
10. **Environmental problems:** Are you aware of any substances, materials or products that may be an environmental hazard such as, but not limited to, asbestos, radon gas, formaldehyde, lead-based paint, fuel or chemical storage tanks and contaminated soil on property.
    unknown ☐ yes ☐ no ☐
    If yes, please explain: _____
11. **Flood Insurance:** Do you have flood insurance on the property? ..... unknown ☐ yes ☐ no ☐
12. **Mineral Rights:** Do you own the mineral rights? ..... unknown ☐ yes ☐ no ☐

Other Items: Are you aware of any of the following:

1. Features of the property shared in common with the adjoining landowners, such as walls, fences, roads and driveways, or other features whose use or responsibility for maintenance may have an effect on the property? ..... unknown ☐ yes ☐ no ☐
2. Any encroachments, easements, zoning violations or nonconforming uses? ..... unknown ☐ yes ☐ no ☐
3. Any "common areas" (facilities like pools, tennis courts, walkways, or other areas co-owned with others), or a homeowner's association that has any authority over the property? ..... unknown ☐ yes ☐ no ☐
4. Structural modifications, alterations, or repairs made without necessary permits or licensed contractors? unknown ☐ yes ☐ no ☐
5. Settling, flooding, drainage, structural, or grading problems? ..... unknown ☐ yes ☐ no ☐
6. Major damage to the property from fire, wind, floods, or landslides? ..... unknown ☐ yes ☐ no ☐
7. Any underground storage tanks? ..... unknown ☐ yes ☐ no ☐
8. Farm or farm operation in the vicinity; or proximity to a landfill, airport, shooting range, etc? ..... unknown ☐ yes ☐ no ☐
9. Any outstanding utility assessments or fees, including any natural gas main extension surcharge? ..... unknown ☐ yes ☐ no ☐
10. Any outstanding municipal assessments or fees? ..... unknown ☐ yes ☐ no ☐
11. Any pending litigation that could affect the property or the Seller's right to convey the property? ..... unknown ☐ yes ☐ no ☐

If the answer to any of these questions is yes, please explain. Attach additional sheets, if necessary: seller has no knowledge of property

The Seller has lived in the residence on the property from _____ (date) to _____ (date).
The Seller has owned the property since _____ (date).

The Seller has indicated above the condition of all the items based on information known to the Seller. If any changes occur in the structural/mechanical/applianc systems of this property from the date of this form to the date of closing, Seller will immediately disclose the changes to Buyer. In no event shall the parties hold the Broker liable for any representations not directly made by the Broker or Broker's Agent.

Seller certifies that the information in this statement is true and correct to the best of Seller's knowledge as of the date of Seller's signature.

BUYER SHOULD OBTAIN PROFESSIONAL ADVICE AND INSPECTIONS OF THE PROPERTY TO MORE FULLY DETERMINE THE CONDITION OF THE PROPERTY. THESE INSPECTIONS SHOULD TAKE INDOOR AIR AND WATER QUALITY INTO ACCOUNT, AS WELL AS ANY EVIDENCE OF UNUSUALLY HIGH LEVELS OF POTENTIAL ALLERGENS INCLUDING, BUT NOT LIMITED TO, HOUSEHOLD MOLD, MILDEW AND BACTERIA.

BUYERS ARE ADVISED THAT CERTAIN INFORMATION COMPILED PURSUANT TO THE SEX OFFENDERS REGISTRATION ACT, 1994 PA 295, MCL 28.7 TO 28.732 IS AVAILABLE TO THE PUBLIC. BUYERS SEEKING SUCH INFORMATION SHOULD CONTACT THE APPROPRIATE LOCAL LAW ENFORCEMENT AGENCY OR SHERRIF'S DEPARTMENT DIRECTLY.

BUYER IS ADVISED THAT THE STATE EQUALIZED VALUE OF THE PROPERTY, PRINCIPAL RESIDENCE EXEMPTION INFORMATION, AND OTHER REAL PROPERTY TAX INFORMATION IS AVAILABLE FROM THE APPROPRIATE LOCAL ASSESSOR'S OFFICE. **BUYER SHOULD NOT ASSUME THAT BUYER'S FUTURE TAX BILLS ON THE PROPERTY WILL BE THE SAME AS THE SELLER'S PRESENT TAX BILLS. UNDER MICHIGAN LAW, REAL PROPERTY OBLIGATIONS CAN CHANGE SIGNIFICANTLY WHEN PROPERTY IS TRANSFERRED.**

Seller _____ Date 3/3/23
Seller _____ Date _____

Buyer has read and acknowledges receipt of this statement.

Buyer _____ Date _____ Time _____
Buyer _____ Date _____ Time _____

Disclaimer: This form is provided as a service of the Midland Board of REALTORS®. Please review both the form and details of the particular transactions to ensure that each section is appropriate for the transaction. The Midland Board of REALTORS® is not responsible for the use or misuse of the form for misrepresentation of for warranties made in connection with the form.

LEAD-BASED PAINT SELLER'S/LANDLORD'S DISCLOSURE FORM

Lead Warning Statement **Property Address:** 1014 Woodbridge Street, Jackson, MI 49203

Every purchaser/Tenant of any interest in residential real property on which a residential dwelling was built prior to 1978 is notified that such property may present exposure to lead from lead-based paint that may place young children at risk of developing lead poisoning. Lead poisoning in young children may produce permanent neurological damage, including learning disabilities, reduced intelligence quotient, behavioral problems, and impaired memory. Lead poisoning also poses a particular risk to pregnant women. The seller/landlord of any interest in residential real property is required to provide the buyer/tenant with any information on lead-based paint hazards from risk assessments or inspections in the seller's/landlord's possession and notify the buyer/tenant of any known lead-based paint hazards. A risk assessment or inspection for possible lead-based paint hazards is recommended prior to purchase.

I. Seller's/Landlord's Disclosure (initial)

JR (a) Presence of lead-based paint and/or lead-based paint hazards (check one below):

☐ Known lead-based paint and/or lead-based paint hazards are present in the housing (explain):

☒ Seller/Landlord has no knowledge of lead-based paint and/or lead-based paint hazards in the housing.

KB (b) Records and reports available to the seller/landlord (check one below):

☐ Seller/Landlord has provided the purchaser with all available records and reports pertaining to lead-based paint and/or lead based paint hazards in the housing (list documents below):

☒ Seller/Landlord has no reports or records pertaining to lead-based paint and/or lead-based paint hazards in the housing.

Seller/Landlord certifies that to the best of his/her knowledge, the Seller's/Landlord's statements above are true and accurate.

Date: 2/3/23 (seller/landlord)

Date: (seller/landlord)

II. Agent's Acknowledgment (initial)

RC Agent has informed the seller/landlord of the seller's obligation under 42 U.X.C. 4852 d and is aware of his/her responsibility to ensure compliance.

Agent certifies that to the best of his/her knowledge, the Agent's statement above is true and accurate.

Date: Agent: Richard Cook dotloop verified 02/12/23 11:08 AM EST 0LPP-HHIT-QAUE-HMW3

III. Purchaser's/Tenant's Acknowledgment (initial)

KB (a) Purchaser/Tenant has received copies of all information listed above.

KB (b) Purchaser/Tenant has received the federally approved pamphlet *Protect Your Family From Lead In Your Home.*

KB (c) Purchaser/Tenant has (check one below):

☐ Received a 10-day opportunity (or other mutually agreed upon period) to conduct a risk assessment or inspection of the presence of lead-based paint or lead-based paint hazards; or

☑ Waived the opportunity to conduct a risk assessment or inspection for the presence of lead-based paint and/or lead-based paint hazards.

Purchaser/Tenant certifies to the best of his/her knowledge, the Purchaser's/Tenant's statements above are true and accurate.

Date: Purchaser(s)/Tenan

-OR- ☐ Seller/Landlord represents and warrants that the listed property was built in 1978 or later, and that, therefore, the federally-mandated lead-based paint disclosure regulations do not apply to this property.

Seller(s)/Landlord(s)		Purchaser(s)/Tenant(s)	
Date:	Seller(s)/Landlord(s)	Date:	Purchaser(s)/Tenants
Date:	Seller(s)/Landlord(s)	Date:	Purchaser(s)/Tenants

DISCLAIMER: This form is provided as a service of the Jackson Area Association of REALTORS. Users of this form are expected to review the form and the details of the transaction to ensure that each section of the form is appropriate for the transaction. The Jackson Area Association of REALTORS is not responsible for the use or misuse of this form, or for misrepresentations or warranties made in co connection with this form.

RESPONSIBILITIES OF SELLERS UNDER RESIDENTIAL LEAD-BASED PAINT HAZARD REDUCTION ACT

Property Address 1014 Woodbridge Street, Jackson, MI 49203

The disclosure requirements listed below are imposed on sellers of residential housing built **prior to 1978.**

1. Sellers must disclose the presence of any lead-based paint hazards actually known to the seller. *A Lead-Based Paint Seller's Disclosure Form* for providing such information is available from your REALTOR. This disclosure must be made prior to the sellers' acceptance of the purchasers' offer. An offer may not be accepted until after the disclosure requirements are satisfied and the purchasers have had an opportunity to review the disclosure language, and to amend their offer, if they wish.

   a. If the sellers are aware of the presence of lead-based paint and/or lead-based paint hazards in the property being sold, the disclosure must include any information available concerning the known lead-based paint and/or lead-based paint hazard, including the following:

      i. The sellers' basis for determining that lead-based paint and/or lead-based paint hazards exist;
      ii. The location of the lead-based paint and/or lead-based paint hazards; and
      iii. The condition of the painted surfaces.

   b. If a lead-based paint hazard is not known to the seller, the disclosure must include a statement disclaiming such knowledge.

   c. The sellers must provide a list of any records and reports available to the sellers pertaining to lead-based paint and/or lead-based paint hazards, copies of which must be provided to the purchasers. (If no such records or reports exist, the disclosure statement should affirmatively so state.)

   d. The disclosure must include the following government-mandated *Lead Warning Statement:*

      Every purchaser of any interest in residential real property on which a residential dwelling was built prior to 1978 is notified that such property may present exposure to lead from lead-based paint that may place young children at risk of developing lead poisoning. A Lead poisoning in young children may produce permanent neurological damage, including learning disabilities, reduced intelligence quotient, behavioral problems, and impaired memory. Lead poisoning also poses a particular risk to pregnant women. The seller of any interest in residential real property is required to provide the buyer with any information on lead-based paint hazards from risk assessments or inspections in the seller's possession and notify the buyer of any known lead-based paint hazards. A risk assessment or inspection or inspection for possible lead-based paint hazards is recommended prior to purchase.

2. Sellers must provide purchasers with a copy of the federal pamphlet entitled *Protect Your Family From Lead In Your Home.* Again, a copy of this pamphlet is available from your REALTOR.

3. Sellers must permit a purchaser a ten (10) day period (unless the parties mutually agree, in writing, upon a different period of time) to have the property tested for lead-based paint before purchasers become obligated under the purchase agreement.

The undersigned hereby acknowledge that the REALTOR named below has reviewed the contents of the *Responsibilities of Sellers Under Residential Lead-Based Paint Hazard Reduction Act* with me and provided me with a copy.

Seller(s)

Date: 3/3/23

REALTOR

Richard Cook

dotloop verified
02/12/23 11:08 AM EST
Q4CM-F3RO-MHJP-YQBG

Date: _____



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City of Jackson
Purchasing Manual

Resolution Adopted March 24, 2015
Modified August 11, 2015 – adding section 18.0
Modified April 10, 2018 – Section 7 revised
Modified May 20, 2020 – modifying Exhibit B Sale of ~~City Owned~~City-Owned Properties
Modified May 20, 2020 – adding Exhibit C Sale of City Owned Vacant Properties

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1.0 PURPOSE

1.1 The Purpose of this manual is to establish the purchasing policies and procedures of the City of Jackson.

The policies and procedures contained herein shall apply to all transactions where the City is a contractual party, or is not a contractual party but is involved in the bid process, and/or funds under the control of the City are used to pay for goods, services or work.

At such time any changes in policies or procedures are made, or a new procedure is put into effect, the Purchasing Agent will publish such changes or additions and distribute copies to all who have manuals. Each department receiving these changes or additions will be responsible for inserting them in the manual in proper sequence. All changes or additions to the text of this manual are subject to the approval of the City Council.

2.0 TERMINOLOGY

2.1 Definitions: The following words, terms and phrases, when used in this manual shall have the means ascribed to them in this section, except where the context clearly indicates a different meaning.

A. **Bid and Proposal:** Interchangeable words with the same meaning.

B. CUF (Commercially Useful Function) ~~(CUF)~~ (SEE: Responsible Bidder):
Those functions performed when a business does all the following: Is responsible for the execution of the work in a contract; Is the primary manager or supervisor of the work; Performs work in the contract that is its normal business, service or function; Does not subcontract out portions of the work that is greater than normal industry practices.
~~A.~~

C. **Construction:** The process of building, altering, repairing, improving or demolishing any City structure or building, or other City improvements of any kind to any City real property.

D. DBE (~~Disadvantaged~~ Business Enterprise): local business concerns where socially and economically disadvantaged individuals own at least a 51% interest and also control management and daily business operations. Groups included are African Americans; American Indian/Native Americans; Asians; Hispanics; Physically or mentally disabled individuals; Women; or A non-profit entity organized to promote the interests of physically or mentally disabled individuals. (SEE MBE and WBE).

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E. **Equal/Equity Business Opportunity (EBO):** The Certification, Construction, Professional Services, and Goods and Services policies adopted to promote equity in opportunity for historically underrepresented groups

F. Figurehead owner: (SEE – Responsible Bidder): A named owner who does not truly control, manage and/or own the business. The figurehead is installed in order to qualify for diversity programs. For example, a figurehead owner is the named owner of a business who may be a family member but does not actually manage and/or own the company.

G. Front Company (SEE Responsible Bidder): A company that wins a contract and passes the contract on to a MBE for a fee or does not provide a Commercially Useful Function (CUF).

~~B.~~

~~C.~~H. **Formal Purchases:** Procedures for purchases not less than $5,000 and not more than $50,000 that will require written quotes be obtained through the Purchasing Agent.

~~D.~~I. **Informal Purchases:** Procedures for purchases not less than $1,000 and not more than $5,000 that must be approved by the department head.

J. **MBE** (~~:~~ **Minority-owned Business Enterprise**): A local business which is at least 51% owned by one or more persons belonging to a Minority Group. In the case of a corporation, at least 51% of the stock is owned by one or more persons belonging to a Minority Gro,up, and the management and daily business operations are controlled by those persons. MBE firms are nationally- and state-certified by the National Minority Supplier Development Council (NMS,DC), or self- identified.~~business concerns where socially and historically, underrepresented individuals own at least a 51% interest and also control management and daily business operations. Groups included are: African Americans; American Indian/Native Americans; Asians; Hispanics; Physically or mentally disabled individuals; Women; or A non-profit entity organized to promote the interests of physically or mentally disabled individuals.~~

K. **Minority Group** - any of the following racial or ethnic groups:

- African-American: African-American or Black, persons having origins in any Black racial groups in Africa.
- Hispanic: Persons of Spanish-speaking culture with origins in Mexico, South or Central America or the Caribbean Islands, regardless of race.\
- Asian: Persons having origins in any of the original people of East Asia, Southeast Asia, the Indian subcontinent, or the Pacific Islands.
- Native American, Alaskan Native, Pacific Islander, Native Hawaiian: Persons descendant of the aboriginal people of any island or territory in the Pacific Ocean that is a possession of the United States.

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L. **MLBE (~~:~~ Micro Local Business Enterprise) ~~-~~ A~~-~~** A business certified for a period by the City of Jackson as meeting special business requirements such as being an established business, registered as a small business with the Small Business Administration; and meeting additional requirements for business size, location, and personal net worth of the controlling owners to qualify for bid discounts under the City's EBO policies.

~~E.~~

~~F.~~M. **Obsolete Material:** Material owned by the City of Jackson that may still be *useable* but for one reason or another no longer serves its intended purpose and needs to be disposed of.

N. **Purchase Order:** An order for consumable supplies.

~~G.~~

~~H.~~O. **Purchasing Agent:** The person designated by the City Manager who is responsible for the purchase and sale of all City property in accordance with the provisions of the City Charter and the direction of the City Manager.

~~I.~~P. **Responsible Bidder or Offeror:** A person who has the capability in all respects to perform fully the contract requirements and who fits the criteria defined in Section 3.2 (0) of this policy.

~~J.~~Q. **Responsive** Bidder: A person who has submitted a bid which conforms in all, material respects to the requirements set forth in the invitation for bids.

~~K.~~R. **Sealed Bids:** Procedures for purchases greater than $~~50,000 that~~50,000 **that** will require advertising for and obtaining sealed bids through the Purchasing Agent and final approval by the City Council.

S. **Sole (or single) Source:** A commodity or service that can only be purchased from one supplier, usually because of its technological, specialized or unique character.

~~L.~~T. ~~-~~**WBE ~~(:~~** Women~~-~~Owned ~~n's~~ Business Enterprise) ~~(SEE: DBE)~~ A local business which is at least 51% owned by one or more women, or, in the case of a corporation, where 51% of the stock is owned by one or more women, and whose management and daily business operations are controlled by one or more women. WBE firms are certified nationally by the ~~Women Business Enterprise National Council~~ National Minority Supplier Development Council (~~WBENC~~NMSDC), or self-identified.

3.0 PURCHASING AGENT/RESPONSIBILITIES

3.1 The Purchasing Agent shall be responsible for the purchase and sale of all City property in accordance with the provisions of the City Charter and the direction of the City Manager.

3.2 Responsibilities of the Purchasing Agent:

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A. To compile contract documents and prepare same for execution.

B. To purchase material and secure services for the City of Jackson, or assist other departments in doing so, in such a manner that the maximum value is obtained for every dollar spent.

C. To buy without prejudice; conduct all transactions on a strictly ethical basis, avoid all forms of commercial bribery and legal entanglements.

D. To handle complaints, claims and adjustments related to the purchase of goods or services handled by the City.

E. To explore markets for new sources; products and methods which will result of cost savings to the City.

F. To assist in the improvement and standardization of materials and supplies.

G. To conduct correspondence with suppliers relating to quotations, purchase orders, invoices and adjustments.

H. To dispose of all saleable scrap and obsolete material to the best advantage of the City of Jackson.

I. To inform the proper departments of lead time on principle items, price trends, availability and other matters of interest to them.

J. To continually compile, update, and report on a quarterly basis ~~To annually compile and update~~ an accurate and comprehensive listing of persons, firms or corporations wishing to do business with the City and including those who qualify as an MBE or WBE[*]. [*]

Economic relations between the City of Jackson and MBE's and WBE's shall be deemed adequate if there exists a purchasing contract award ratio for each of such group of at least ~~9.6~~20%.

K. To qualify by affidavit, investigation, and any other method he or she deems necessary, any business for inclusion on either of the vendor lists.

L. To monitor existing qualified MBE's and WBE's to assure compliance with qualification guidelines (SEE 3.2.J).

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[*] *The terms DBE ~~DEB~~ (Disadvantaged Business Enterprises ~~MBE~~), MBE (Minority Business Enterprise) and WBE (Women's Business Enterprise) shall have the same meaning as when used by the ~~Michigan Department of Civil Rights.~~National Minority Supplier Development Council.

[*] ~~*The terms MBE (Minority Business Enterprise) and WBE (Women's Business Enterprise), when used in this section, shall have the same meaning as when used by the Michigan Department of Civil Rights.~~

M. To annually report to the City Manager the results of his or her efforts in achieving the goal of enhanced MBE/WBE participation in economic relations with the City.

N. To review and recommend to the City Manager changes in the Purchasing Manual.

O. To determine the lowest responsible bidder. Contracts, except as otherwise provided in this policy, shall be awarded to the lowest responsible bidder ~~after a review of DBE, MBE, and/or WBE status~~. WBE, MBE, or DBE status will be reviewed and confirmed before the bidder is confirmed as such. In determining the lowest responsible bidder the Purchasing Agent shall consider in addition to price:

1. The ability, capacity and skill of the bidder to perform the contract or provide the service required;

2. Whether the bidder can perform the contract or provide the service promptly or within the time specified, without delay or interference;

~~2.~~

3. The character, integrity, reputation, judgment, experience and efficiency of the bidder;

4. The quality of performance of previous contracts or services;

5. The previous and existing compliance by the bidder with laws and ordinances relating to any contract or service;

6. The sufficiency of the financial resources and ability of the bidder to perform the contract or provide the service;

7. The quality, availability and adaptability of the supplies or contractual services to the particular use required;

8. The ability of the bidder to provide future maintenance and service for the use of the subject of the contract; and

9. The number and scope of conditions attached to the bid.

~~9.~~10. The DBE, MBE, or WBE status of the bidder.

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4.0 BLANKET PURCHASE ORDER

4.1 The use of blanket purchase orders ~~are~~is permitted where a direct advantage to the City of Jackson will result. Such blanket purchase orders shall cover no more than one year.

4.2 The standard form to be used as follows:

BLANKET PURCHASE to cover purchases from July 1, 20-- to June 30, —20 . This is not an offer purchase. This document is submitted for the sole purpose of establishing an account with your firm for billing purposes in connection with possible future orders.

5.0 PURCHASES OF $1,000 OR LESS

5.1 Purchases of supplies, materials, services, minor miscellaneous items which are estimated to be $1,000 or less, shall be made in the open market but shall, if practical, be based upon at least three competitive quotes and awarded to the lowest responsive and responsible bidder after a reviewand consideration of of the bidder's DBE, MBE, or DBE WBE status.

6.0 PURCHASE OR CONTRACTS

GREATER THAN $1,000 AND LESS THAN $5,00020,000

6.1 Informal Quotations:

Purchases of supplies, materials, services or equipment, the costs of which are estimated to be greater than $1,000 but less than $5,000 20,000, shall be handled using the following procedure:

A. The Department Head submits a purchase request form and plans and specifications to the Purchasing Agent.

B. Vendor quotes are requested by the Purchasing Agent through whatever methods appear to the Purchasing Agent to be in the best interest of the City. Quotations may be requested from Vendors on the list created, including DBEs (See 3.2.J), that provide the goods and/or services. Requesting Departments may solicit quotes if desired. Provided, however, the Purchasing Agent may verify quotes whenever they deem it necessary**. If requesting department solicits quotes they must submit a bid summary sheet together with copies of quotes received and a Request for Purchase.**

C. Once the quotes have been returned and analyzed, the contract will be awarded to the lowest responsive and responsible bidder.

D. Once the lowest responsive and responsible bidder is determined, a notice is sent to the accepted bidder stating the award of the contract. If the contract is a service contract, insurance requirements may also be mailed.

E. It shall be the goal of the City of Jackson to award to both MBE's and WBE's at least 9.620% of the City's total purchases of goods and services where the estimated cost of each purchase is less than $5,000 20,000.

GREATER THAN $5,000 20,000 AND LESS THAN $50,000

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6.2 Formal Quotations:

Purchase of supplies, materials, services or equipment, the costs of which are estimated to be greater than $~~5,000~~20,000 but less than $50,000, shall be handled using the following procedure.

A. All purchases may be made in the open market, without advertisement and without following the procedures described in Section 7.0.

B. The Department Head submits plans and specifications, to the Purchasing Agent. ~~—~~Department Heads shall prepare specifications for materials, supplies and equipment and submit them to the Purchasing Agent.

C. Vendor quotes shall be obtained by whatever means applicable; telephone, facsimile, written, or other methods deemed to be in the best interest of the City by the Purchasing Agent or department. MBE, WBE, and DBE v~~V~~endors on the list created, that provide the goods and/or services may be sent a request for quotation. If the department has received quotes, they must provide copies to purchasing.

D. Once the quotes have been ~~returned~~ received and analyzed, the contract will be awarded to the lowest responsive and responsible bidder after review of bidders MBE, WBE, and/or DBE status.

E. Once the lowest responsive and responsible bidder is determined, a notice is sent to the accepted bidder stating the award of the contract. If the contract is a service contract, insurance requirements may also be mailed.

F. ~~Department of Neighborhood & Economic Operations~~Community Development Director to award grant funded rehabilitation contracts to the lowest responsible bidder up to $75,000 and require City Council approval for contracts exceeding $75,000.

6.3 Sole Source:

The procedures described in Sections 6.1 and 6.2 shall be used unless it is determined to be a single (sole) source procurement by the Purchasing Agent, in his or her discretion.

A sole source procurement exists when:

A. There is a lack of responsible competition for a commodity or service which is vital to the operation and best interest of the City.

B. A vendor possesses exclusive and/or predominant capabilities.

C. A product or service is unique and easily established as one-of-a-kind.

D. There is a patented feature providing a superior utility not obtainable from similar products; or

E. A proprietary right exists and the product is available from only one prime source and not merchandised through wholesalers, jobbers or retailers.

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~~E.~~

7.0 PURCHASES OR CONTRACTS $50,000 OR MORE SEALED BIDS

7.1 All contracts or purchases of $50,000 or more, not considered service related, shall be awarded by the City Council, and shall involve the use of the following procedure:

A. Prior to initiating this procedure, the department involved shall determine whether there exists sufficient funds in the budget for the proposed purchase or contract.

B. The Department Head shall obtain the City Manager's approval to advertise for sealed bids. Once the City Manager's approval has been obtained, all contract specifications shall be submitted to the Purchasing Agent.

C. The Purchasing Agent will make a preliminary determination as to the sufficiency of the submitted materials. Among the things the Purchasing Agent and Director of Finance will consider are the following:

1. Whether the specifications are clear and completely describe the essential qualities of the products or services sought;

2. Whether all the factors that are to be considered in awarding a bid are stated either as a specification or condition of the award, i.e., service, compatibility with existing system, etc.;

~~2.~~

3. Any other matters deemed essential by the Purchasing Agent.

D. The Purchasing Agent shall advertise for sealed bids. The method of advertising shall be reasonably designed to give publicity to the proposed contract or purchase and thereby secure the utmost competition among bidders. By way of illustration, and not by limitation, "advertising" may

include use of city's website, newspapers, bulletin boards, trade journals, radio or television.

E. The Purchasing Agent shall maintain a list of prospective bidders and will issue an invitation to bid to bidders thereon, in addition to advertising publicly as indicated above.

The invitation to bid will advise bidders of a prebid meeting if one is to be conducted.

F. Pre-Opening Inquiries/Response:

Any explanation desired by a prospective bidder regarding the meaning or interpretation of contract documents associated with same, must be received by the Purchasing Agent prior to the deadline for submission of bids.

Any explanation or interpretation concerning contract documents shall be in writing and shall be furnished to all prospective bidders as an addendum. Receipt of such addenda shall be acknowledged on the bid documents. Oral explanations addressing nonsubstantive matters or procedural items relating to contract documents are allowed in order to assist a prospective bidder in submitting a bid

Notwithstanding any other provision contained herein, no oral explanation or instruction by any City employee, representative or official shall be binding upon the City unless such oral explanation or instruction is confirmed in writing by the City employee, agent, representative or official. If the City determines it necessary, it may reschedule the time for bid opening to allow adequate time for addenda to reach all bidders.

G. All sealed bid proposals received shall be date and time stamped upon receipt. ~~**Bids shall not be opened until one hour after the deadline for submission of bids.**~~

H. Sealed bid proposals ~~,~~ will be opened in public at the place and time designated in the bid documents. Attendance at any bid opening will not be denied or limited. The bids will be tabulated and checked by the Purchasing Agent for compliance with the specifications and for compliance with any and all conditions contained in the instructions to bidders. All bid files will be available for public inspection.

Late bids will not be accepted after sealed bids have been opened. Any bid received after the opening of sealed bids will be date and time stamped.

I. All Bid Security requirements shall be determined by the Purchasing Agent.

J. A bid that does not meet the specifications may be considered non-responsive and may be rejected.

K. The Purchasing Agent or Department Head shall send a written recommendation as to an award to the City Manager, who shall place same before the City Council for the award of a contract. The contract shall be awarded to the lowest responsive and responsible bidder~~.~~ after review of bidders DBE, MBE, or WBE status. If such recommendation does not involve an award to the lowest responsive and responsible bidder, it shall contain specific reasons for any variance therefrom. The Purchasing Agent shall notify the City Attorney of any deviations from the requirements of this policy he or she may have reason to believe have occurred.

L. The Purchasing Agent will send notice of award to the successful bidder after action by the City Council and finalize ~~contact~~ contract documents.

~~L.~~

M. The Attorney's Office shall then review any formal agreements that are necessary prior to signing by the representatives of the City. Such agreements shall then be signed by the Mayor and the City Clerk, and approved as to substance by the City Manager.

N. Once an agreement has been signed and approved as specified above, then the Purchasing Agent shall send notice to proceed to the successful bidder.

7.2 ~~Facsimile and~~ Email Procedures:

The City will accept bids or proposals (bid documents) by use of ~~facsimile communication equipment or~~ email, which shall be permitted under the following terms and conditions:

A. The ~~Facsimile or~~ email must be received by the City Purchasing Agent prior to the bid opening date and time specified in the contract documents. Any ~~Facsimile or~~ email received after such date and time will not be considered or processed by the City. All nonconforming bid documents shall be returned by the City by ordinary mail.

B. An ~~facsimile/~~email bid must be submitted as identified by the Instructions to Bidders. If required, a copy of a bid bond must accompany the bid documents. The bid documents must be signed by an authorized officer/employee of the company submitting same.

C. The sender of the ~~Facsimile or~~ email shall be responsible for delivering all original bid documents to the City's Purchasing Agent within three (3) business days of the ~~Facsimile/~~Email transmittal.

~~D.~~ All ~~Facsimile/~~Email transmissions must be addressed to the City of Jackson Purchasing Agent.

~~E.~~D. ~~Appropriate procedures will be utilized by the City to ensure that bids received via facsimile transmission shall not be divulged to other prospective bidders prior to the bid opening date and time.~~

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7.3 Discovery of Error:

Where a bid or proposal received from a bidder is determined by City staff to not comply with contract documents associated with same, the bidder submitting such bid or proposal shall not be contacted by any City employee, agent, representative or official to discuss changes or modifications to the bid or proposal, if the said changes or modifications could result in the occurrence of any one of the following:

A. A change in the dollar amount of the bid;

B. A change to the specifications or other contract documents which might deny other bidders or prospective bidders an equal opportunity to bid upon the changed specifications or other modified contract documents;

C. A change in the unit price or other elements used to determine the amount of a bid; or

D. The destruction of the competitive character of the bid process.

Exception: Upon the discovery of an obvious error in a bid, proposal or other contract document that could affect the amount of a bid, the Purchasing Agent shall contact the bidder in writing and advise the bidder that he/she/it has five working days to correct the error or withdraw their bid. This correction shall be in writing directed to the Purchasing Agent and shall be postmarked not later than seven working days from the date of the City's written correspondence notifying the bidder of the error.

If a bid correction or modification is not received in a timely fashion, then the Purchasing ~~Agent may~~Agent may reject the bid. If a correction is received and deemed to be appropriate and proper, the Purchasing Agent shall attach same to the original bid document and shall proceed to tabulate the bids as corrected.

7.4 Dollar Limitation:

No purchase shall be divided for the purpose of circumventing the dollar value limitation established herein. The Council may authorize the making of public improvements or the performance of any other City work by any City agency without competitive bidding. Additionally, the Council may authorize cooperative agreements or contracts between the City and other governmental units without the requirements of competitive bidding.

7.5 Default to the City: The Purchasing Agent shall not knowingly accept the bid of a person who is in default in the payment of any taxes, licenses, fees, permits or any other moneys due the City or who is in any other respects disqualified according to any Federal or State law, or any charter or ordinance provision. A contract with a person who is discovered to have been in default or disqualified at the time of the awarding of the contract shall be voidable at the option of the City.

7.6 City’s right to negotiate with two lowest bidders: In the best interests of the City,

after sealed bids are opened and analyzed in terms of compliance with specifications, the City reserves the right to negotiate terms and conditions, including price, with the two lowest bidders.

7.7 Rejection of Bids:

A. The City Council has the authority to reject any and all bids, and to accept or recommend the acceptance of other than the lowest responsive bid after a review of bidders DBE, MBE or WBE status or when the public interest is served thereby and such action is in the best interest of the City.

B. When the award is not given to the lowest responsive bidder, the City shall provide a full and complete statement of the reasons for placing the order elsewhere shall be prepared by the Purchasing Agent and filed with the other papers relating to the transaction.

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7.8 Sole Source

Formal sealed bidding shall be used for any purchase over $50,000 unless it is determined to be a single (sole) source procurement by the Purchasing Agent, in his or her discretion.

A sole source procurement exists when:

(A) There is a lack of responsible competition for a commodity or service which is vital to the operation and best interest of the City;

(B) A vendor possesses exclusive and/or predominant capabilities;

(C) A product or service is unique and easily established as one-of-a-kind;

(D) There is a patented feature providing a superior utility not obtainable from similar products;

(E) A proprietary right exists and the product is available from only one prime source and not merchandised through wholesalers, jobbers or retailers.

7.9 Professional or General Service Contracts:

The requirements and procedures established in Section 6.0 and 7.0 shall not apply to Professional or General Service Contracts.

8.0 MUNICIPAL, STATE OR FEDERAL COOPERATIVE

BIDDING AGREEMENT

8.1 The Purchasing Agent may join with other governmental units, including the State of Michigan, federal government or other municipalities, in cooperative purchasing plans where sealed competitive bids or a competitive procurement process was used by the original purchaser and an award was made.

9.0 CONTRACTS AND AGREEMENTS

9.1 All contracts and agreements will be submitted to the City Attorney for approval before execution by the City.

9.2 All original contracts will be filed in the City Clerk's office.

10.0 PERFORMANCE- BONDS AND PAYMENT BONDS

10.1 Pursuant to Act 213 of the Michigan Public Acts of 1963, as amended, all contracts exceeding $50,000 for the construction, alteration or repair of any public building or public work or improvement shall require a performance and payment bond for 100% of the contract amount. The successful bidder must submit a performance bond and a payment bond which are to be reviewed and approved by the City Attorney prior to the commencement of any work. If required by contract documents, a Maintenance & Guarantee Bond shall be submitted simultaneously with the Performance and Payment Bonds.

~~11.0 INSURANCE~~11.0 INSURANCE

11.1 Insurance: The Contractor will be required to show evidence of automobile and commercial general liability insurance, worker's compensation insurance and professional liability insurance (where applicable), which is acceptable to the City. Additional types of insurance may be required where necessary. The commercial general liability insurance policies shall name the City, its agents, representatives, ~~officers~~officers, and employees as additional insureds to protect their interests. Both bodily injury and property damage insurance must be on an occurrence basis; and said policies shall provide that the coverage afforded thereby shall be primary coverage to the full limits of liability stated in the declarations, and if said City, agents, representatives, ~~officers~~officers, or employees have other insurance against the loss covered by said policies, that other insurance shall be excess insurance only. The Contractor shall secure and maintain during the progress of the work such insurance ~~from financially~~from financially responsible insurance

companies, licensed in the State of Michigan, and approved by the City, that will protect the Contractor, its subcontractors, and the City from claims for bodily injury, death, or property damage which may arise from performance of the contract. The Contractor shall at the time of execution of the contract file with the City certificate(s) of insurance, which shall cover ~~all of~~all the insurance as required herein. The certificates shall reference the project or contract to which they apply. Upon request by the City, the Contractor shall submit all insurance policies for review. The amounts and types of such insurance shall be not less than the following:

1. ~~1.~~ Minimum required limits of liability:

(A) For jobs with an estimated contract cost of less than $50,000

(1) Comprehensive Commercial General Liability, limits of at least:

a. Bodily Injury, each occurrence $300,000
b. Bodily Injury, each aggregate.....$500,000
c. Property Damage, each occurrence $100,000
d. Property Damage, aggregate.....$100,000
(or in the alternative to a, b, c, d)
e. Bodily Injury and Property Damage Combined Single Limit each occurrence $500,000
and aggregate.....$500,000

.....
.....(2)

Automobile Liability Limits of at least:

a. Bodily Injury, each person.....$300,000
b. Bodily Injury, each occurrence $500,000
c. Property Damage, each occurrence $100,000
(or in the alternative to a, b, c)
d. Bodily Injury and Property Damage Combined Single Limit each occurrence $500,000

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(B.) For jobs with an estimated contract cost of $50,000 or greater and smaller jobs deemed to be dangerous in nature which shall include, but not necessarily limited to, demolition, blasting, excavating and tunneling or other underground work.

(1) Comprehensive Commercial General Liability of at least:

a. Bodily Injury, each occurrence $1,000,000
b. Bodily Injury, aggregate $1,000,000
c. Property Damage, each occurrence $500,000
d. Property Damage, aggregate..... $500,000
(or in the alternative to a, b, c, d)
e. Bodily Injury and Property Damage Combined Single Limit each occurrence $1,000,000
and aggregate.....$1,000,000

(2) Automotive Liability and Property Damage Insurance with limits of at least:

a. Bodily Injury, each person $1,000,000
b. Bodily Injury, each occurrence.....$1,000,000
c. Property Damage, each occurrence $1,000,000
(or in the alternative to a, b, c)
d. Bodily Injury and Property Damage Combined Single Limit each occurrence $1,000,000
~~d.~~

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NOTE: To comply with the required limits of liability, each insurance may be placed in more than one policy, including an excess umbrella type policy.

2. Worker's Compensation and Employer's Liability Insurance as required by the State of Michigan for all Contractor's employees and those of its subcontractors engaged in work under this contract. If Contractor is a sole proprietorship and as such is not eligible for Worker's Compensation Coverage, Contractor must submit proof of same, satisfactory to the City. If Contractor is otherwise not obligated to carry Worker's Compensation Coverage, Contractor must submit documentation from the Michigan Department of Labor (Form MDL 337 or its equivalent); and

3. If the contract requires any work procedures involving explosives, blasting, demolition, excavating, trenching, tunneling, underground work, or other dangerous activity as determined by the City, the property damage liability coverage shall include standard explosion, collapse and underground coverage (XCU) for property damage and bodily injury liability coverage with limits of $1,000,000 each occurrence and $1,000,000 aggregate; additionally, Contractor shall provide third party pollution liability insurance coverage with minimum limits of $1,000,000 per occurrence and $1,000,000 aggregate. The insurance shall name the City and its officers,

employees, agents and representatives as an additional insured party.

4. Each policy shall provide for thirty (30) days written notice of cancellation, expiration, termination, or change of policy to the City. The Contractor shall submit evidence of the coverage, to the City for review and approval. The City will, in writing, identify the policies and indicate its approval or disapproval. New policies shall be provided to the City in place of all policies disapproved. Insurances which expire before Contractor's work is accepted by the City shall be renewed and evidence of such renewal shall be submitted to the City for approval.

5. The Contractor shall advise all insurance companies to familiarize themselves with ~~all of~~all the conditions and provisions of the contract, and insurance companies shall waive the right to special notification for any change or modification of the contract, extension of time, decreased or increased work, cancellation or of any other act or acts by the City or its authorized employees or agents pertaining to the contract. Failure to so notify the aforesaid insurance companies of such changes shall in no way relieve the insurance companies of its obligation under the contract.

6. Nothing contained in these insurance requirements is to be construed as limiting the extent of the Contractor's responsibility for payment of damages resulting from its operations under this contract.

7. If the contract involves new construction, Contractor shall purchase and maintain an Owner's and Contractor's Protective Liability insurance policy and property insurance upon the Work at the site in the amount of the full replacement cost thereof. The insurance shall include the interests of the City, Contractor, Subcontractors, and if applicable, Engineer, Engineer's Consultant, each of whom is deemed to have an insurable interest and shall be listed as an insured or additional insured;

   Be written on a Builder's Risk "all-risk" or open peril or special causes of loss policy form that shall at least include insurance for physical loss and damage to the Work, temporary buildings, falsework, and Work in transit and shall insure against at least the following perils: fire, lightning, extended coverage, theft, vandalism and malicious mischief, earthquake, collapse, debris removal, demolition occasioned by enforcement of Laws and Regulations, water damage, and such other perils or causes of loss as may be specifically required by supplementary conditions. The form of policy for this coverage shall be Completed Value.

   Include expenses incurred in the repair or replacement of any insured property (including but not limited to fees and charges of engineers and architects);

   Cover materials and equipment in transit for incorporation in the Work or stored at the site or at another location that was agreed to in writing by City prior to being incorporated in the Work; and,

Be maintained in effect until payment is made unless otherwise agreed to in writing by City and Contractor with 30 days written notice to each other additional insured to whom a certificate of insurance has been issued.

The policies of insurance required to be purchased and maintained by Contractor in accordance with this paragraph must be approved by City prior to commencement of construction.

11.2 Each policy shall provide for thirty (30) days written notice of cancellation, expiration, termination, or change of policy to the City. The Contractor shall submit evidence of the coverage, to the City for review and approval. The City will, in writing, identify the policies and indicate its approval or disapproval. New policies shall be provided to the City in place of all policies disapproved. Insurances which expire before Contractor's work is accepted by the City shall be renewed and evidence of such renewal shall be submitted to the City for approval.

11.3 The Contractor shall advise all insurance companies to familiarize themselves with all of the conditions and provisions of the contract, and insurance companies shall waive the right to special notification for any change or modification of the contract, extension of time, decreased or increased work, cancellation or of any other act or acts by the City or its authorized employees or agents pertaining to the contract. Failure to so notify the aforesaid insurance companies of such changes shall in no way relieve the insurance companies of its obligation under the contract.

11.4 Nothing contained in these insurance requirements is to be construed as limiting the extent of the Contractor’s responsibility for payment of damages resulting from its operations under this contract.

12.0 PREQUALIFICATION PROCEDURE

12.1 Policy

A. At the discretion of the Department Head responsible for a public works construction project, bidders may be required to become prequalified prior to bidding such projects. When required, bidders shall demonstrate their ability to successfully complete the proposed work as provided below. The City is not required to consider a prequalification application if it submitted less than 10 days before the date for opening bids for a project on which the bidder desires to bid.

B. Equipment, experience, and key personnel - The bidder shall submit evidence of all of the following:
   (1) The availability of equipment required to perform work in the classifications for which the bidder seeks approval.
   (2) Experience of its key qualified personnel who will provide field supervision of the work in the classifications for which the bidder seeks approval.
   (3) Experience of the company or principals of the company, or both, in the work classifications requested.

C. Work classifications - The bidder shall identify the work classification or classifications for which it is requesting prequalification when submitting a prequalification application. A bidder will be classified for types of work on the basis of its experience and resources at the time of filing the prequalification application. When additional experience or resources have been obtained, the bidder may submit information for consideration by the Purchasing Agent to add work classifications.

D. Evidence of current prequalification with the Michigan Department of Transportation (MDOT) for the classifications of work involved in the contract will be sufficient evidence of qualification.

E. The Purchasing Agent shall have the right to adjust the prequalification list of bidders as he or she becomes aware of substantial changes in the information and circumstances of a bidder or if other reasonable cause exits such as unsatisfactory contract performance or failure to pay bills and/or claims. Should an applicant for prequalification disagree with the determination of the Purchasing Agent with regard to same, the City Manager shall within ten days of the receipt of a written request review the original information and/or such additional information as the applicant may choose to submit, and confirm in writing either the original determination of the Purchasing Agent or revise same as appropriate.

~~F.~~E. The Purchasing Agent shall maintain a list of prequalified bidders who are eligible to bid upon public works construction projects for the City of Jackson. The Purchasing Agent shall maintain and update the list as deemed necessary and shall notify bidders of changes in qualification status. Prequalification will expire after five (5) years.

~~G.~~F. Bidding procedure - The Department Head will identify the required work classification or classifications of the prime bidder for the construction project. The work classification(s) will be included in the advertisement for the project.

13.0 RETAINAGE PROCEDURE

13.1 In all contracts involving progress payments, the provisions of Act 524 of 1980 as last amended shall be adhered to.

Upon receipt of a progress payment request from a contractor, the City department head supervising a project shall notify the City Accountant of the appropriate amount of retainage to be deposited in an escrow account for said project; said amounts to be disbursed by the Accountant to the contractor only after written certification by the supervising department head that disbursement is appropriate.

Progress payment retainage amounts to be deposited in such escrow accounts shall be based upon the following schedule:

A. Retention of up to ten percent (10%) of the payments claimed until all work is fifty percent (50%) complete;

B. After the work is fifty percent (50%) in place, there shall be no additional retainage beyond that provided for in (A) if the Contractor is making satisfactory progress and there is no specific cause for further withholding; provided, however, that if satisfactory progress is not being made, the City department head supervising a project may cause the City Accountant to place in the above referenced escrow accounts as retainage an additional amount of up to 10 percent (10%) of the dollar value of work more than 50% in place.

It is understood that the process described above shall not be applicable to contracts requiring three or less progress payments or a contract having a dollar value of less than $30,000.

14.0 EMERGENCY PURCHASES OF GOODS AND SERVICES

14.1 Under circumstances deemed to be an emergency by the City Manager, purchases of goods and services may be made by the City in a manner inconsistent with this manual; provided, however, that as soon as practicable thereafter, a full, written explanation reciting the rationale for such extraordinary action shall be provided to the City Council.

14.2 Whenever there exists an apparent threat to the public health, welfare or safety of the City or its residents, the Manager may authorize the Purchasing Agent to award a contract without competitive sealed bids by utilizing the quotation procedures as set forth in Section 6.2 or such other competition procedure as may be practical under the circumstances for the emergency purchase of supplies, services or construction items.

14.3 As soon as possible after the award the Manager shall file with the Council a full written report of the circumstances surrounding the emergency purchase.

~~15.0 PROFESSIONAL~~15.0 PROFESSIONAL OR GENERAL SERVICES

15.1 Where professional or general service providers are employed by the City as consultants to draw contracts and supervise and administer construction ~~projects, or~~projects or provide other general service related functions they may do so using contract documents of their choosing, provided, however, that all such documents shall be approved in advance of use by the City Attorney and Purchasing Agent and all relevant bid procedures of the City shall be adhered to by the Consultant.

All contracts involving consultants/professional, or general services must obtain the prior review and approval of the City Manager. Additionally, any contract for consultants/professional and general services involving an expenditure of funds in excess of $10,000 shall require proposals from at least three service providers or firms if they are available to submit. Provided, however, if the department wishing to engage in consultant/professional or general service provider is unable to obtain

at least two proposals, a written explanation of such inability must be submitted to the City Manager.

16.0 TIE BIDS

16.1 If two or more low bids are received for the same total amount or unit price, and the quality and service are equal, the contract shall be awarded to one of the tie bidders by evaluating the services based on factors addressing equity in ownership, employment, or community impact~~by drawing lots in public~~, unless one of the bidders is a taxpayer or resident of the City, in which case such taxpayer or resident shall be awarded the contract.

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17.0 CONTRACT MODIFICATIONS, AMENDMENTS AND CHANGE ORDERS

17.1 After a contract has been awarded it may become necessary to make modifications to reflect changes in circumstances and unforeseen needs. Change orders are permitted if the modification does not cause a fundamental change to the contract. If the City reasonably determines that a fundamental change in a contract is necessary, the City may terminate the existing contract, put the matter out for competitive bidding and award a new contract (possibly to a new party).

When a change order increases the dollar amount of a contract, said change must be requested by the Department Head who originally obtained authorization to solicit bids. If the dollar amount of the change order is less than $50,000, the change order must be authorized by the Department Head and the City Manager; if the change order is $50,000 or more, it must be authorized by City Council.

All signed change orders must be filed with the City Clerk to be attached to the original contract.

18.0 Contracting with DBEs, (MBE's, and WBE's)

~~18.0 Contracting with MBE's and WBE's~~

18.1 ~~———~~In accordance with 2 CFR Part 200.321 (a), (b) (1-6), all necessary affirmative steps will be taken to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible. Affirmative steps must include:

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A. ~~a)~~ Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

B. ~~b)~~ Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

C. ~~c)~~ Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

D. ~~d)~~ Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;

E. ~~e)~~ Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and,

F. ~~f)~~ Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (a) through (e) of this section.

~~The purchasing agent shall also be responsible to perform said duties as outlined in~~ The above paragraph sections A. through F. are supplementary to Section 3.0 of this policy in accordance with 2 CFR Part 200.318-326 General Procurement Standards when procuring competitive bids.

18~~18~~.2 ~~———~~The purchasing agent shall fully involve the Office of Diversity, Equity, and Inclusion (DEI) by:

A. ~~a)~~ Providing solicitation lists described in section 18.1(a) to the DEI; and,

B. ~~b)~~ Coordinating with the DEI and Community Engagement to provide classes to the public on both construction and goods and services bidding, informing potential bidders what the requirements are to qualify as a Micro Local Business Enterprise (MLBE) to achieve certification.

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18.1 In accordance with 2 CFR Part 200.321 (a), (b) (1-6), all necessary affirmative steps will be taken to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible. Affirmative steps must include:

a) Placing qualified small and minority businesses and women's business enterprises on solicitation lists and having those list available to the Office of Diversity, Equity, and Inclusion. ;

b) Assuring that small and minority businesses, and women's business enterprises are solicited by:

a. coordinating with the offices of DEI and Community Engagement to whenever they are potential sourcesprovide classes to the public on both construction and goods and services bidding informing potential bidders what the requirements were to qualify as a Micro LBEs (Micro Local Business Enterprise (MLBE) Certification). ;

c) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

d) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;

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e) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and,

f) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (a) through (e) of this section.

The purchasing agent shall be responsible to perform said duties as outlined in Section 3.0 of this policy in accordance with 2 CFR Part 200.318-326 when procuring competitive bids.

The purchasing agent shall be responsible to perform said duties as outlined in Section 3.0 of this policy in accordance with 2 CFR Part 200.318-326 when procuring competitive bids.

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EXHIBIT ~~B~~A

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SALE OF CITY OWNED PROPERTY

Purpose

Whenever any City property is no longer required for corporate or public purposes, the same may be offered for sale to the public. Personal property not exceeding $100 in value may be sold for cash by the Purchasing Agent for the best price obtainable. City owned Property valued in excess of $100 may be sold after per the Vacant City Property sales procedure or by advertising and receiving competitive bids.

Alternatively, at the discretion of the Purchasing Agent, property may be disposed of through direct sale to governmental, educational or nonprofit entities, or may be sold at public auction.

Section 2:

Bid procedures for City owned property in absence of public auction.

(1) A notice inviting offers for the purchase of City property shall be published in at least one applicable publication and on the City's website not less than seven days before the date set for receiving offers by the City. Such notice is to include a general description of the items to be sold, state where specifications may be secured, state where the property may be viewed, and the time and place for submitting and opening offers.

(2) Sealed offers shall be submitted to the City on or before the date and time specified for receipt of the offer in the notice. All offers shall be submitted to the City Purchasing Agent or his or her designee.

(3) Offers shall be publicly opened by the Purchasing Agent at the time, date and place specified in the notice. All persons interested shall be allowed to be present. The total amount of each offer shall be read aloud by the person or persons opening the offers.

(4) The offers shall be examined by the Purchasing Agent, and the highest responsible offer shall be selected.

The above procedures shall not apply to direct sales to governmental, educational or nonprofit entities.

Section 3:

Recovered stolen property or abandoned personal property in the possession of the City Police Department shall be disposed of pursuant to Chapter 21, Article IV of the City Code.

EXHIBIT ~~C~~B

THE SALE OF CITY OWNED VACANT PROPERTY

Purpose:

The City of Jackson acquires properties from the Jackson County Treasurer's Department through the Tax Foreclosure process annually. The vacant parcels that are no longer required for corporate or public purposes may be sold to adjacent property owners based on the below eligibility requirements.

Alternatively, at the discretion of the Purchasing Agent, property may be disposed of through direct sale to governmental, educational or nonprofit entities, or may be sold at public auction.

Section 1:

1) A formal offer must be submitted to the City Manager's office at Jackson City Hall for eligibility review. The offer must contain the name, address, phone number of the person requesting to purchase.
2) The offer must contain the address or parcel ID number of the vacant property. The City requests that the offers also contain information regarding what the requestor's purpose for acquiring the vacant property.
3) The offer must contain a proposed purchase price for the vacant property.
4) The requestors privately owned property must be immediately adjacent to the vacant parcel requested.
5) Requestors must be willing to sign a Property Transfer and Development Agreement with the City of Jackson.

Note All requests to purchase vacant property will be reviewed in the order that they are received. The City reserves all rights to keep or remit any property in its possession.

6) City staff will notify the requestor that their offer has been approved or denied either by phone or mail.

7) Requestors will have time to review the Property Transfer and Development Agreement. By signing the Agreement, the requestor acknowledges and agrees to all of the terms of the Agreement, including:

A. Combination of the property with their own privately held lot;
B. Payment of property taxes;
C. Maintenance of the property in accordance with the City Code.

CITY OF JACKSON
Founded 1829

Community Development Department

161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 788-4060 or (517) 788-4012 • Facsimile: (866) 971-2151

MEMO TO: Mayor Mahoney, City Manager Greene, and City Council

FROM: Chris Atkin, Planning Director and Zoning Administrator

DATE: April 18, 2023

SUBJECT: Zoning Map Amendment – 523 – 543 E. Washington Avenue (Parcel #6-01330) and E. Washington Avenue (Parcel #6-0137.A0)

At the regularly scheduled April 5, 2023 City of Jackson Planning Commission meeting, Commissioner Johnson motioned to recommend approval to City Council to rezone 523 – 543 E. Washington Avenue (Parcel #6-01330) and E. Washington Avenue (Parcel #6-0137.A0) from I-1, Light Industrial to I-2, General Industrial. Support from Commissioner Schlecte.

The motion passed with a 6-0 vote.

CITY OF JACKSON
Founded 1829

Community Development Department

161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 788-4060 or (517) 788-4012 • Facsimile: (866) 971-2151

RECEIVED FEB 16 2023

Application for Map Amendment (Rezone)

Requires a public hearing before the Planning Commission and City Council Approval.

$500.00 fee required with application submittal.

APPLICANT

Name: Nicholas Dyc
Address: 531 E. Washington Avenue
City: Jackson State: MI Zip: 49203
Phone: (313) 802-8322
Email: Nicholas Dyc <ndyc@icloud.com>

PROPERTY OWNER ☒ *Same as applicant*

Name: Nicholas Dyc
Address: 531 E. Washington Avenue
City: Jackson State: MI Zip: 49203
Phone: (313) 802-8322
Email: ndyc@icloud.com

PROPERTY SUBJECT TO REZONING REQUEST

Property Identification #: 6-013300000, ID-002641
Address: 529 E Washington Avenue / 523-541 E Washington
City: Jackson State: MI Zip: 49203
Nearest Intersection: Hupp Ave & E Washington

ADJACENT PROPERTY ZONING AND USE

NORTH – _____ Zoning _____ Use
SOUTH – _____ Zoning _____ Use
EAST – _____ Zoning _____ Use
WEST – _____ Zoning _____ Use

Current Zoning Designation: ☐R-1 ☐R-2 ☐R-3 ☐R-4 ☐R-5 ☐R-6 ☐C-1 ☐C-2 ☐C-3 ☐C-4 ☒I-1 ☐I-2

Current Use: ☐Residential ☐Commercial ☒Industrial ☐Mixed

Proposed Zoning Designation: ☐R-1 ☐R-2 ☐R-3 ☐R-4 ☐R-5 ☐R-6 ☐C-1 ☐C-2 ☐C-3 ☐C-4 ☐I-1 ☒I-2

Proposed Use: ☐Residential ☐Commercial ☒Industrial ☐Mixed

Reason for Request: The company is making a major investment in this facility of over $3 million dollars. It will also create 15-20 high paying jobs, starting at $25 / hr. Note: the mfg. process will be using machinery, and therefore needs the zoning change from I-1 to I-2.

I hereby attest that I/we have read and understand the application form, that the information submitted is true and accurate, and agree to all the terms, conditions, and other City of Jackson Code requirements. Furthermore, I/we understand all map amendment applications are subject to the procedures of zoning ordinance Section 28-183.

Signature of Applicant — Date: 1/31/23 — Signature of Owner *(If different from applicant)* — Date

If the owner cannot sign this form, the applicant shall submit a letter of consent from the property owner with this application.

OFFICE USE ONLY

CASE: PRZ23-0001 Application Accepted By: S Foster
Materials Submitted with Application: ☐Plans ☐Other
Total Pages Submitted: _____ Amount of Fee Paid: $500 ☐Cash ☒Check Check #: 0102

CITY OF JACKSON
Founded 1829

Community Development Department
161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 788-4060 or (517) 788-4012 • Facsimile: (866) 971-2151

March 23, 2023

Map Amendment Review (Rezone)
523 – 543 E. Washington Avenue (Parcel #6-01330)
E. Washington Avenue (Parcel #6-0137.A0)
City of Jackson, Michigan

GENERAL INFORMATION

Applicant: Nicholas Dyc
13821 Fawn Wood Ct.
Plymouth, MI 48170

Subject Location: 523 – 543 E. Washington Avenue (Parcel #6-01330)
E. Washington Avenue (Parcel #6-0137.A0)

Received Date: February 16, 2023

Current Zoning: I-1, Light Industrial

Proposed Zoning: I-2, General Industrial

Action Required: *Procedure following public hearing.* After the public hearing on such amendment, supplement or change, the city planning commission shall make its report. Such report shall be by resolution of the city planning commission carried by the affirmative votes of the majority of members in attendance. Such amendment, supplement or change, with report, shall then be certified in writing to the city council and to the county register of deeds.

SITE/PROPERTY DESCRIPTION

The applicant is requesting zoning reclassification of the developed 1.79 acre lot, addressed as 523 – 543 E. Washington Avenue (Parcel #6-01330), and the adjacent vacant 0.71 acre lot Parcel #6-0137.A0.

The structure at 523 – 543 E. Washington Avenue contains approximately six (6) spaces occupied by various permitted uses. The vacant lot, Parcel #6-0137.A0, provides access to the rear (southerly) side of the structure from E. Washington Avenue and Park Pl. The lots are under the same owner of record.

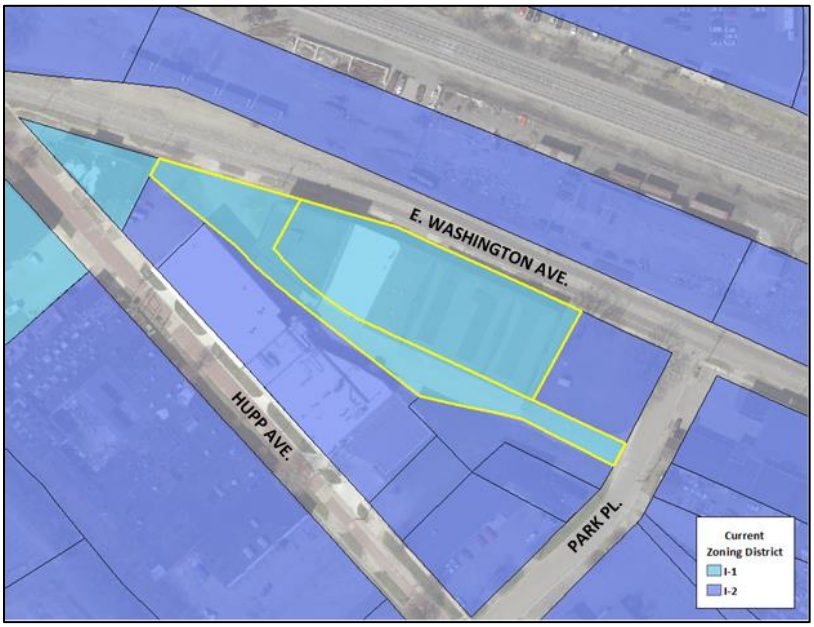
All uses, listed by the applicant or otherwise, are subject to review and approval by the City of Jackson. The process of rezoning does not grant any specific use; all new use is subject to the appropriate review process of the City of Jackson and will require a separate application.



NEIGHBORING ZONING AND LAND USE

The subject properties are currently zoned I-1, Light Industrial. The following table identifies surrounding zoning designations and current land uses.

	Northerly	Southerly	Easterly	Westerly
Zoning	I-2, General Industrial	I-2, General Industrial	I-2, General Industrial	I-1, Light Industrial I-2, General Industrial
Land Use	Industrial/Vacant	Industrial/Vacant	Industrial	Commercial



FUTURE LAND USE/MASTER PLAN

The Future Land Use map contained within the 2016 Master Plan demonstrates use designation of the subject properties “Industrial Commercial”.

The "Industrial Commercial" land use is described as:

> These areas include a hybrid of uses sharing the characteristics of both "light" industrial and "heavy" commercial uses. Businesses often include a retail component that desires visibility along busy city streets as a principal or accessory use. Common characteristics include outdoor storage or display areas and overhead doors. Representative uses include automobile repair and body shops, car dealerships, lumberyards, landscaping and lawn services, and contractor yards.

The proposed zoning classification is consistent with the 2016 Master Plan.

DEVELOPMENT POTENTIAL

Suggested uses in the "Industrial Commercial" designation include Industrial, commercial, related office and warehousing.

Per Section 28-47, any use allowed as a permitted or conditional use in the I-1 district, except those expressly listed in the C-4 district, shall be considered a valid permitted or conditional use in the I-2 district.

The Planning Commission should consider all permitted and conditional uses in the I-2, General Industrial zoning district. **NOTE:** Red "P" or "C" represent uses in I-1. The following is a list of those uses:

Use	I-2
Adult entertainment enterprises provided that such uses shall not be located within one thousand (1,000) feet of any other adult entertainment enterprise measured from property line to property line, and such uses shall not be located within seven hundred fifty (750) feet of a church, park, playground or school, or within seven hundred fifty (750) feet of any R-1, R-2, R-3, R-4, R-5, R-6, or PR-1 zoning district measured from property line to property line. Not more than one (1) adult entertainment enterprise shall be located in the same building, structure or portion thereof.	P
Auto washing stations	C/C
Automobile repair—Major	P/P
Automobile service station (See "Supplemental Regulations)	P/P
Automobile truck and trailer display and sales. Sales lots, which includes the entire outdoor display area and any associated structures, shall not be within fifty (50) feet of any R district	P
Automobile wrecking and salvage yard	C
Bag, carpet and rug cleaning, provided dust is effectively controlled	P
Bakery (wholesale)	P
Banks, loan and finance offices including drive through facilities	P/P
Billboards (subject to the provisions in section 28-253(b) and section 28-145(d)(13))	C
Boat display, hire, sales, and repair	C
Bottling or distribution of soft drinks and milk, provided a building used for such processing and distribution shall be at least one hundred (100) feet from any R district	P
Building materials sales yard and supply store	P/P
Building materials salvage yard	C
Candy, ice cream and other confectionery—Wholesale	P
Cleaning or dyeing plants, commercial laundries	P
Cold storage plants	P
Contractor yards for vehicles, equipment, materials, supplies but excluding asphalt and cement mixing	P/P
Contractor offices with the incidental storage of parts, equipment and vehicles	P/P
Watchman or caretaker residence, secondary to a primary use permitted in this district	P/P
Electrical equipment and motor assembly	P
Experimental laboratory	P
Factory and mill supplies	P
Feed and fertilizer, sales and storage	P
Gas station with or without a mini-mart	C/C

Incinerators, or reduction of garbage, refuse, bones, offal or dead animals		**C**
Junkyard		**C**
Landing field for aircraft (service buildings must be five hundred (500) feet from any R district)		**P**
Liquor and wine and malt beverage packaging and distribution		**P**
Lumberyard, retail, including only incidental mill work in an enclosed building		**P**
Machinery sales, farm or industrial, provided yards shall be enclosed		**P/P**
Manufacturing or processing, limited to the following products:		
Beverage bottling (nonalcoholic); coffee roasting; cosmetics; electrical/electronic equipment; engraving; fishing tackle; home/office furniture/furnishings; instruments (e.g. dental, drafting, musical, surgical); mattresses; paper products; pharmaceuticals; products from purchased plastic, shell, cellophane, glass, rubber and precious or semiprecious metals and stones; radar equip.; radios; surgical supports (e.g. braces, trusses, elastic hosiery); televisions; windows/doors		**P**
Manufacturing or processing of any of the following:		
a.	Abrasives, acid, alcohol, ammonia, asbestos, bone black, carbon black, lamp black, brick, clay, tile, charcoal and coke;	**P**
b.	Chemicals, cinder block, detergents, soaps and by-products;	**P**
c.	Fungicides and insecticides;	**P**
d.	Gases, glue, or gelatin;	**P**
e.	Grain milling and mixing;	**P**
f.	Graphite, insulation, metals, ingots, castings, sheets, bars or roads;	**P**
g.	Metal plating;	**P**
h.	Oils and fats, animal or vegetable;	**P**
i.	Paints, pigments, enamels, japans, lacquer, varnishes and wood fillers;	**P**
j.	Paper pulp and cellulose; paraffin, wax and wax products;	**P**
k.	Plastics, rubber and rubber products;	**P**
l.	Sauerkraut, vinegar and yeast;	**P**
m.	Viruses, toxins and serums	**P**
Manufacturing or processing of alkali, asphalt, cement, concrete, fertilizer, gravel, rock, gypsum and other forms of plaster base		**C**
Medical and adult use marihuana facilities:		
a.	Grower with or without a colocated processing facility in accordance with Sec. 28-140 of the Code.	**P/P**
b.	Registered primary caregiver in accordance with MMMA and Chapter 16.	**P/P**
c.	Retail or provisioning center facility in accordance with Sec. 28-140 of the Code.	**P/P**
d.	Secure transporter facility in accordance with Sec. 28-140 of the Code.	**P/P**
e.	Safety compliance facility in accordance with Sec. 28-140 of the Code.	**P/P**
f.	Microbusiness in accordance with Sec. 28-140 of the Code.	**P/P**
Metal working (excluding presses of over twenty (20) tons and machine-operated drop hammers)		**P**
Mobile home subdivision		**P**
Moving and storage companies		**P**
Office		
Designed to attract and serve customers on the premises;		**P**
Park and/or playground, public		**C/C**
Parking and storage yards for motor vehicles and/or transport equipment (must be at least two hundred (200) feet from any R district)		**P**
Plumbing, heating, and sheet metal shops (including punching or material of one-eighth inch or less in thickness)		**P**
Public utility material storage and service yard		**P**
Radio and television broadcasting studios		
a.	With transmitter	**P/P**
b.	Without transmitter	**P/P**
Recycling collection centers		**C/C**

Resale shops		
Restaurant, including eat-in and carry-out, and including bars and cocktail lounges		**P/P**
Social, fraternal clubs, union halls, lodges and similar uses		**P**
Special trades contractors		**P**
Stockyards, livestock auction yard		**C**
Storage		
a.	Bulk storage of explosives	**C**
b.	Flammable liquids three thousand (3,000) gallons or more, if stored aboveground, shall be at least one hundred (100) feet away from all boundary lines of the premises	**C**
c.	Liquid petroleum gas five hundred (500) gallons or more, if stored aboveground, shall be at least fifty (50) feet away from all boundary lines of the premises	**C**
d.	Self-service storage facilities (a building or group of buildings used exclusively as a storage facility for residential goods and available for rent with individual leases for portions of the facility)	**C/C**
Truck repair and service		**P/P**
Trucking freight terminal and yards		**P**
Welding shop		**P**
Wholesale and warehousing of any commodity permitted to be made or processed in the same district		**P/P**
Work release (halfway) house (see additional development requirements in section 28-140)		**P**
Accessory nonresidential uses and structures not otherwise prohibited, customarily accessory and incidental to any use by right		**C/C**
Legal nonconformities		**C/C**

ESSENTIAL FACILITIES AND SERVICES

The subject property are currently served, or have access to, essential city facilities and services.

TRAFFIC IMPACT AND SITE ACCESS

There will be no impact or change to the current traffic volume; off-street parking is available.

CONCLUSION/FINDINGS

For the planning commissions consideration, provided below is a summary of findings as they apply to the proposed rezoning of 523 – 543 E. Washington Avenue (Parcel #6-01330), and Parcel #6-0137.A0.

- The proposed zoning designation is consistent with the 2016 Master Plan;
- The proposed zoning designation is consistent with the surrounding zoning designations; and
- Any use allowed as a permitted or conditional use in the I-1 district is a valid permitted or conditional use in the I-2 district.

We believe recommending approval to City Council for the zoning map amendment request is appropriate.

Respectfully,

Christopher M. Atkin
Planning Director, City of Jackson

cc: Applicant

CITY OF JACKSON
PLANNING COMMISSION
NOTICE OF PUBLIC HEARING

NOTICE IS HEREBY GIVEN the City of Jackson Planning Commission will hold a public hearing to hear a request for zoning map amendments to the properties listed below and pursuant to Section 28-183 of the City of Jackson Zoning Ordinance.

Applicant:

Nicholas Dyc
13821 Fawn Wood Ct.
Plymouth, MI 48170

Subject property location:

529 E. Washington Avenue (Parcel #6-01330)
E. Washington Avenue (Parcel #6-0137.A0)

Requested actions:

The applicant is requesting the zoning map amendment for two (2) properties currently zoned I-1, Light Industrial to zoning designation I-2, General Industrial.

Effect of request:

Approval of the zoning map amendment for the subject properties will allow all currently permitted uses in the I-1 zoning district and I-2 zoning district.

YOU ARE FURTHER NOTIFIED that the City of Jackson will hear all oral and written objections and comments regarding the proposed zoning classification amendments and requests at:

6:00PM on April 5, 2023 in
City Hall Council Chambers, 2nd Floor
161 W. Michigan Avenue
Jackson, MI 49201

Reasonable accommodations for individuals with disabilities will be made if notification is received ten (10) days prior to the public hearing.

If you are interested in this request you may attend the public hearing or contact Chris Atkin at 517-768-6433 or catkin@cityofjackson.org with comments; written comments should be mailed to 161 W. Michigan Avenue, Jackson, MI. All comments and/or questions must be received no later than 5:00PM on April 5, 2023.

JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Telephone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jackson Brownfield Redevelopment Authority (JBRA)

DATE: April 18, 2023

SUBJECT: Brownfield Plan for 228 W. Michigan Avenue (Hayes Hotel) Parcel ID 1-008100000

At the regularly scheduled April 12, 2023 City of Jackson Brownfield Redevelopment Authority meeting reviewed and recommended adoption of the Brownfield Plan related to the development of a parcel of property located at 228 W. Michigan Avenue, Jackson, MI.

The project is the renovation of a vacant 122,709 square-foot former Hayes Hotel and associated parking. Project renovations include restaurant and retail use on the first floor, event space and office/commercial suites on the second floor, short term rentals on the third floor, and residential use on the fourth through tenth floors.

The estimated private investment is anticipated at $34,536,255; the total number of permanent, fulltime equivalent jobs to be added is approximately thirty-one (31).

This Plan will remain in effect for 30 years from the beginning date of the capture of tax increment revenues, or for the duration necessary to complete the reimbursement of eligible expenses for the Project, whichever is less. In no event shall the duration of the Plan exceed 35 years following the date of the resolution approving the Plan, nor shall the duration of the tax capture exceed the lesser of the period authorized under subsection (4) and (5) of Section 13 of Act 381 or 30 years.

Motion was made by Member Greene recommended to approval of a Brownfield Plan for 228 W. Michigan Avenue (Hayes Hotel) Parcel ID 1-008100000. Support Member Duke.

Vote – *Yeas: Mayor Mahoney, Councilmember Schlecte, City Manager Greene, JBRA Members Greer, Hones, Duke, Damich, and Wilkins (8). Nays: none. Motion carried.*

Recommendation:

Hold the public hearing and adopt the Brownfield Plan for 228 W. Michigan Avenue (Hayes Hotel) Parcel ID 1-008100000.

Your consideration and concurrence is appreciated.

Attachments: Resolution, Brownfield Plan, and Public Hearing Notices.

CITY OF JACKSON, JACKSON COUNTY

MICHIGAN

RESOLUTION IN SUPPORT OF A BROWNFIELD PLAN PURSUANT TO AND IN ACCORDANCE WITH THE PROVISIONS OF ACT 381 OF THE PUBLIC ACTS OF THE STATE OF MICHIGAN OF 1996, AS AMENDED

At a regular meeting of the City Council of Jackson, Michigan, held in the Council Chambers within the City Hall, 161 West Michigan Avenue, Jackson, Michigan, on_____, 2023 at 6:30 p.m.

PRESENT:

ABSENT:

MOTION BY:

SUPPORTED BY:

WHEREAS, the City Council of Jackson, pursuant to and in accordance with the provisions of the Brownfield Redevelopment Financing Act being Act 381 of the Public Acts of the State of Michigan of 1996, as amended (the "Act"), have formally resolved to participate in the Brownfield Redevelopment Authority (BRA) of the City of Jackson (the "Authority") and have designated that all related activities shall proceed through the BRA; and

WHEREAS, the Authority, pursuant to and in accordance with Section 13 of the Act, seeks approval by the City Council of Jackson, the Brownfield Plan (the "Plan") attached hereto, to be carried out within the City of Jackson, relating to the development of property located at 228 West Michigan Avenue in the City of Jackson, Jackson County, Michigan (the "Site"), as shown in Figures 1 and 2 of the Plan and more particularly described in the legal description of the property contained within the attached Plan; and

WHEREAS, the City Council of Jackson has reviewed the Plan, and was provided a reasonable opportunity to express their views and recommendations regarding the Plan and in accordance with Section 14(5) of the Act; and

WHEREAS, as a result of the review of the Plan the City Council of Jackson concurs with the approval of the individual Plan.

NOW, THEREFORE BE IT RESOLVED THAT:

1. **Plan Support**. Pursuant to the authority vested in the City Council of Jackson, by the Act, the Plan is hereby supported in the form attached to this Resolution.

2. **Severability**. Should any section, clause, or phrase of this Resolution be declared by the courts to be invalid, the same shall not affect the validity of this Resolution as a whole nor any part thereof other than the part so declared to be invalid.
3. **Repeals**. All resolutions of parts of resolutions in conflict with any of the provisions of this Resolution are hereby repealed.

AYES:

NAYES:

ABSTAINED:

RESOLUTION DECLARED ADOPTED.

STATE OF MICHIGAN)

)§

CITY OF JACKSON)

I, the undersigned, the fully qualified and acting Clerk of the City of Jackson, State of Michigan, do hereby certify that the foregoing is a true and complete copy of a resolution adopted by the City Council of Jackson at a regular meeting held on the_____day of_____, 2023, the original of which resolution is on file in my office.

IN WITNESS WHEREOF, I have hereunto set my official signature this_____day of _____, 2023.

Andrea Muray

City Clerk

Daniel Mahoney

Mayor

ACT 381 BROWNFIELD PLAN
For the
Former Hotel Hayes Project
228 W Michigan Ave, Jackson, Michigan 49201

City of Jackson
Brownfield Redevelopment Authority

March 20, 2023

Prepared by:
228 West Michigan Avenue LLC
225 E. Michigan Ave, Suite 300
Milwaukee, WI 53202
Contact: Brian Loftin
414.803.4612/bloftin@jjeffers.com

ASTI Environmental
10448 Citation Dr., Suite 100
Brighton, Michigan 48116
Contact: Tom Wackerman
810.599.5463/twacker@asti-env.com
ASTI File 3-11688

Approved by the Brownfield Redevelopment Authority on _____
Approved by the governing body of the local jurisdiction on _____

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TABLE

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ATTACHMENTS

Attachment A Brownfield Plan Resolution(s)
Attachment B Reimbursement Agreement
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ACT 381 BROWNFIELD PLAN

1.0 INTRODUCTION

In order to promote the revitalization of environmentally distressed and blighted areas within the boundaries of the City of Jackson ("the City"), the City established the City of Jackson Brownfield Redevelopment Authority (the "Authority") pursuant to Michigan Public Act 381 of 1996, as amended ("Act 381").

The primary purpose of this Brownfield Plan (the "Plan") is to promote the redevelopment of, and private investment in, certain "brownfield" properties within the City. Inclusion of property within this Plan will facilitate financing of environmental response and other eligible activities at eligible properties, and will also provide tax incentives to eligible taxpayers willing to invest in the revitalization of eligible sites, commonly referred to as "brownfields." By facilitating redevelopment of brownfield properties, this Plan is intended to promote economic growth for the benefit of the residents of the City and all taxing units located within, and benefited by, the Authority.

This Plan is intended to apply to the eligible property identified in this Plan and, if tax increment revenues are proposed to be captured from that eligible property, to identify and authorize the eligible activities to be funded by such tax increment revenues.

This Plan is intended to be a living document, which may be modified or amended in accordance with the requirements of Act 381, as necessary to achieve the purposes of Act 381. A subsequent change to the identification or designation of a developer after the approval of this Plan by the governing body (as defined by Act 381) shall not necessitate an amendment to this Plan, affect the application of this Plan to the eligible property, or impair the rights available to the Authority under this Plan.

This Plan describes the project to be completed and contains all the information required by Section 13(2) of Act 381. The applicable sections of Act 381 are noted throughout the Plan for reference purposes.

1.1 Description of Eligible Property (Section 13 (2)(h))

1.1.1 Proposed Redevelopment and Future Use for Each Eligible Property

The project is the renovation of a vacant 122,709 square foot, multi-story, former hotel and associated parking, as indicated in Figure 4 (the "Project"). This will include restaurant and retail on the first floor, event space and office/commercial suites on the second floor, short term rentals on the third floor, and residential on the fourth through tenth floors. The redevelopment of this iconic structure into a mixed-use commercial and residential development will provide an important investment to revitalize the City's primary business district, seat of county government and historic core, and to encourage spin-off investment to redevelop this portion of the downtown.

The project description provided herein is a summary of the proposed development at the time of the adoption of the Plan. The actual development may vary from the project description provided herein, without necessitating an amendment to this Plan, so long as such variations are not material and arise as a result of changes in market and/or financing conditions affecting the project and/or are related to the addition or immaterial removal of amenities to the project. All material changes to the project description, as determined by the Authority in its sole discretion, are subject to the approval of the Authority and shall be consistent with the overall nature of the proposed development, its proposed public purpose, and the purposes of Act 381.

The estimated private investment is anticipated at $34,536,255. The total number of permanent, fulltime equivalent jobs to be added as a result of the Project is estimated to be 31.5.

The Project is anticipated to begin in the fall of 2023 with Project completion in early 2025.

228 West Michigan Avenue LLC is the project developer (the "Developer").

1.1.2 Eligible Property Information

The property comprising the eligible property consists of one parcel containing the former hotel building (known as the Hotel Hayes) and adjacent surface parking, for a total of approximately 0.764 acres. The parcel is located on the northwest corner of W Michigan Ave and Hayes Ct (see Figure 1 titled "Site Location Map") in downtown Jackson, Michigan. The parcel and all tangible personal property located thereon will comprise the eligible property and are referred to herein as the "Subject Property". The boundaries of the Subject Property are shown in the Figure 2 titled "Eligible Property Map".

Parcel information is outlined below.

Address Parcel	228 W Michigan Ave
Parcel ID	1-008100000
Acreage	0.764
Owner	City of Jackson 161 W. Michigan Avenue Jackson, Michigan 49201
Legal Description	LOTS 7, 8, 9 EX E 22.5 FT OF LOTS 7 & 9, ALSO ALL OF VACATED ALLEY ADJOINING LOTS 8 & 9 TO THE WEST B1N R1W OF THE ORIGINAL PLAT OF THE VILLAGE OF JACKSONBURG

The Subject Property is located in the Downtown Development Association District, the Jackson Smart Energy District, and the Downtown Opportunity Zone.

1.1.3 Historical Use and Previous Ownership

The Subject Property was occupied by residential dwellings, the Jackson City Club, and an undertaker from at least 1886 until approximately 1926 when the current hotel building was built. A dry cleaner was a tenant from 1936 until 1941 other previous tenants include Christian Science Reading Room, Consumers Energy offices, Boy Scouts of America, and other commercial businesses.

1.1.4 Current Use of the Subject Property

The Subject Property has been vacant since 2003, but was most recently used for commercial purposes.

1.1.5 Site Conditions and Known Environmental Contamination

Phase I Environmental Site Assessment

The most recent Phase I Environmental Site Assessment (ESA) of the Subject Property is dated September 9, 2022. The following recognized environmental conditions (RECs) were identified based on historical uses of the Subject Property.

- A 2008 BEA conducted on the Subject Property concluded the presence of arsenic in soil at concentrations exceeding Part 201 GRCC is the basis for the conclusion that the Subject Property is a “Facility” as defined by Part 201.
- A former tenant space on the Subject Property was occupied by a dry cleaner from 1936 until 1941. Dry cleaner solvents pose significant environmental risk even when managed properly due to their ability to easily penetrate concrete and because they are toxic at relatively low concentrations. Previous investigations assessed the Subject Property for impact from the dry cleaner. No evidence of contamination was found. However, soil boring locations were placed approximately 100-feet northeast of the former drycleaner suite, only shallow soil samples were collected, and no groundwater samples were collected in the vicinity of the suite. Based on this information, previous sampling practices may not meet current regulatory standards, procedures, and criteria which are typically more restrictive. Use of the Subject Property as a dry cleaner is considered a REC.
- The eastern adjoining property located at 212-222 W. Michigan Avenue historically operated as a millinery (i.e., hat shop), Consumers Energy headquarters, and a park. It has been identified as a "Facility," as defined by Part 201. Additionally, EPA conducted mercury assessments on the site. Based on the likely presence of historic mercury contamination on the site and the presence of a known release, migration of a release onto the Subject Property is likely.

In addition, there are two significant data gaps:

- Around 1941 There was an unknown fuel source for the Subject Property prior to natural gas service installation in 1952. Past use of fuel oil has been documented for the north adjoining property. A geophysical survey of the

Subject Property was completed August 7, 2000. The results of the geophysical subsurface survey adjacent to the parked automobiles and the existing building were inconclusive. The electro-magnetic interference associated with the vehicles made it difficult to interpret the collected data in the areas where the vehicles were parked. The remainder of the surveyed area did not indicate subsurface anomalies consistent with USTs or other large, metallic objects. Based on the survey and interference from the vehicles, it is a possibility that a UST(s) may be present on the Subject Property. Although no evidence (i.e., fill ports, vent pipes, or pressure gages, etc.) was found during the assessment, there is a potential that heating oil was used as a fuel source prior to natural gas. If a buried heating oil fuel tank is found during any redevelopment activities, the tank should be properly decommissioned with verification sampling conducted.

- The Subject Property was identified as a US Brownfield site in the Standard Government Environmental Record Sources. According to Chris Atkins, the Planning Director and Zoning Administrator for the City of Jackson, he has no knowledge of a Brownfield Plan for the property. No records were found by the EPA. The EDR report indicated a Phase II ESA was completed August 12, 2008. It is unknown if cleanup was required. Soils were affected. The inability to review the EPA records does not allow ASTI to form an adequate opinion of whether the assessment results would be considered a REC for the Subject Property. The EPA records could disclosure information about a release including contaminant concentrations, extent, and source of the release.

Soil and Groundwater Sampling

On August 10, 2000, SME conducted three soil borings (SP19, SP20, and SP21) on the Subject Property regarding the identified RECs. Two soil samples from SP19, one soil sample from SP20 and SP21, and one groundwater sample each from SP19 and SP29 were submitted for analysis of volatile organic compounds (VOCs), polynuclear aromatic hydrocarbons (PNAs), and the 10 Michigan Metals (arsenic, barium, cadmium, chromium, copper, lead, mercury, selenium, silver, and zinc). Arsenic was detected in the soil sample at SP19 (8'-10') at 8,300 µg/kg, which exceeds the current EGLE Part 201 GRCC for Direct Contact of 7,600 µg/kg and the Drinking Water Protection (DWP) and Groundwater Surface Water Interface Protection (GSIP) of 4,600 µg/kg.

With regard to the unknown fuel source for the Property prior to natural gas service installation in 1952, SME Inc. conducted a geophysical subsurface survey of the Property, report dated September 8, 2000. SME concluded the survey did not indicate subsurface anomalies consistent with USTs or other large, metallic objects, other than anomalies identified near vehicles in the parking lot. The electro-magnetic interference associated with the vehicles made it difficult for SME to interpret the collected data in the areas where the vehicles were parked. Based on the survey, it is unlikely that a UST(s) were used to fuel the building prior to conversion to natural gas.

On July 18, 2008, ASTI conducted four soil borings (HH-SS-01 through HH-SS-04) on the Subject Property with regard to the identified RECs. One soil sample was collected from

each of the borings. Groundwater was encountered in borings HH-MW-01 and HH-MW-02 and one groundwater sample was collected. The soil samples from HH-SS-01 and HH-SS-02 were submitted to Brighton Analytical of Brighton, Michigan for analysis of volatile organic compounds (VOCs). The soil samples from HH-SS-03 and HH-SS-04 were submitted for analysis of arsenic. The groundwater samples from HH-1-MW-01 and HH-MW-02 were submitted to Brighton Analytical for analysis of lead, polynuclear aromatic hydrocarbons (PNAs), and VOCs. Arsenic was detected in the soil samples HH-SS-03 (8-10') at a concentration of 29,000 µg/kg which exceeds the GRCC for DWP, GSIP, and DC. Arsenic was also detected in the soil sample HH-SS-04 at 6,600 µg/kg, which exceeds the GRCC for DWP and GSIP.

On October 24, 2022, ASTI supervised the completion of three soil borings (SB-1, SB-2, SB- 3) at the Subject Property. The soil borings were advanced to depths of 5 or 12 feet below ground surface (bgs). Groundwater was encountered in soil borings SB-1 and SB-2 and temporary monitoring wells were installed at each of these boring locations for collection of groundwater samples. The soil sample was analyzed for the following: volatile organic compounds (VOCs) and mercury. Groundwater was encountered in soil borings SB-1 and SB-2 and temporary monitoring wells were installed. Neither VOCs nor mercury were detected above the laboratory reporting limits in soil or groundwater.

Hazardous Materials Survey

In 2022, the Developer conducted a hazardous materials survey that included an evaluation of asbestos containing materials and an inventory of other hazardous materials, such as mercury switches and light ballasts. The survey identified approximately 40,000 square feet of asbestos containing building materials and almost 1,000 individual sources of hazardous materials in various locations as summarized below, that will need to be removed prior to renovation.

Asbestos Containing Building Materials

- Pipe insulation joint and wrap
- Roof flashing
- Glue Pods
- Brick glue
- Window caulk
- Floor tile
- Sink undercoating
- Paint
- Ceiling materials
- Boiler gaskets and insulation
- Vibration dampeners
- Fire door insulation
- Possible roofing system

Hazardous Materials

- Fluorescent light tubes and ballasts
- Sodium lamps
- Halogen lamps

- Mercury containing thermostats
- HVAC and motor parts
- Ceiling heaters
- Elevator chemicals
- Lead acid batteries
- CRT monitors

2.0 Information Required by Section 13(2) of the Statute

2.1 Basis for Eligibility (Section 13 (2)(h) and Section 2 (p))

The Subject Property is considered "eligible property" as defined by Act 381, Section 2 because (a) the Subject Property was previously utilized for a commercial purpose; (b) it is located within the City of Jackson, a qualified local governmental unit under Act 381; and (c) the Subject Property is a facility, as that term is defined in Part 201 of Michigan's Natural Resources and Environmental Protection Act (1994 PA 451), based on investigations in 2008 and 2022.

2.2 Summary of Eligible Activities and Costs (Section 13 (2)(a),(b))

The "eligible activities" that are intended to be carried out at the Subject Property are considered "eligible activities" as defined by Section 2 of Act 381, because they include baseline environmental assessment activities, due care activities, additional response activities, asbestos and hazardous materials abatement, lead based paint abatement, waste disposal, demolition, public infrastructure improvements, site preparation, interest, and preparation and implementation of a Brownfield Plan and 381 Work Plan

A summary of the eligible activities and the estimated cost of each eligible activity intended to be paid for with tax increment revenues from the Subject Property are shown in Table 1 titled "Eligible Activity Cost Estimates". The eligible activities described in the table are not exhaustive. Subject to the approval of the Authority in writing, additional eligible activities may be carried out at the Subject Property, without requiring an amendment to this Plan, so long as such eligible activities are permitted by Act 381 and the cost of such eligible activities does not exceed the total costs stated below.

The costs listed in the Plan are estimated costs and may increase or decrease depending on the nature and extent of environmental contamination and other unknown conditions encountered on the Subject Property. As long as the total costs are not exceeded, line item costs of eligible activities may be adjusted after the date this Plan is approved by the governing body, to the extent the adjustments do not violate the terms of the Plan, and provided that the total cost of eligible activities subject to payment or reimbursement shall not exceed the estimated costs set forth in the Plan.

The Developer desires to be reimbursed for the costs of eligible activities. Tax increment revenues generated by the Subject Property will be captured by the Authority and used

to reimburse the cost of the eligible activities completed on the Subject Property. The actual cost of those eligible activities encompassed by this Plan that will qualify for reimbursement from tax increment revenues from the Subject Property shall be governed by the terms of a Reimbursement Agreement and Act 381.

The following eligible activities will be completed for this Project and are the subject of this Plan. A list of eligible activities included in this Plan, and the associated estimated costs, is provided in Table 1.

EGLE Eligible Activities

The following activities will be reimbursed from local and school tax capture. Some of these activities were completed prior to this Plan as permitted by Act 381 Plan and those activities do not include contingency.

Pre-Approved Activities

Baseline Environmental Assessment Activities
This includes the completion of environmental due diligence activities that include preparation of Phase I and II Environmental Site Assessments (ESAs); Baseline Environmental Assessments (BEA); investigations to document and support the due care activities; additional delineation required to define impacts or design remedies, preparation of a Due Care Plan; and data interpretation and reporting, oversight and project management as required to support the Project.

Hazardous Materials Survey and Lead Based Paint Survey
This includes the Hazardous Materials Survey and the Lead Based Paint Survey, as well as preparation of bid specifications for pre-demolition asbestos abatement.

Other Activities

Develop/Prepare Brownfield Plan
This includes the reasonable costs of preparing the Brownfield Plan. This activity also includes professional costs related to oversight and project management of these activities as needed.

Implement Brownfield Plan
This includes costs for implementation of the Brownfield Plan. This activity also includes professional costs related to oversight and project management of these activities as needed.

Interest
Interest costs are included in this Work Plan, calculated on the outstanding balance of unreimbursed Eligible Activities at the rate of the lesser of 1% over prime rate or five percent (5%) per year.

MSF Eligible Activities

The following activities will be reimbursed from local and school tax capture.

Lead and Asbestos Abatement
Based on the results of the Hazardous Materials Survey, this includes abatement of asbestos containing materials, hazardous materials, and lead based paint prior to demolition. This activity also includes professional costs related to engineering, design, and oversight and project management of these activities as needed.

Demolition
This includes interior and exterior demolition to prepare the existing buildings for renovation, site demolition, and infrastructure removal as necessary to prepare the Subject Property for redevelopment. This activity also includes professional costs related to engineering, design, and oversight and project management of these activities as needed.

Public Infrastructure Improvements
This includes replacement and upgrading of sidewalks, curbs and gutters in the public right-of-way (see Figure 3). This activity also includes professional costs related to engineering, design, and oversight and project management of these activities as needed.

Other Activities

Some of these activities were completed prior to this Plan as permitted by Act 381 Plan and those activities do not include contingency.

Develop/Prepare Brownfield Plan
This includes the reasonable costs of preparing the Brownfield Plan and 381 Work Plan. This activity also includes professional costs related to oversight and project management of these activities as needed.

Implement Brownfield Plan
This includes costs for implementation of the Brownfield Plan and 381 Work Plan. This activity also includes professional costs related to oversight and project management of these activities as needed.

Interest
Interest costs are included in this Work Plan, calculated on the outstanding balance of unreimbursed Eligible Activities at the rate of the lesser of 1% over prime rate or five percent (5%) per year.

2.3 Estimate of Captured Taxable Value and Tax Increment Revenues (Section 13(2)(c))

This Plan anticipates the capture of tax increment revenues to reimburse the Developer for the costs of Eligible Activities under this Plan in accordance with the Reimbursement Agreement. The initial taxable value will be the taxable value of the eligible property at the time of plan approval, as shown by the assessment roll. For illustration purposes this Plan uses an initial taxable value of $1 because the current taxable value is $0, and a projected future taxable value of $3,830,000 which is the estimated taxable value of the Subject Property at the time of the next assessment roll after project completion. The captured taxable value will be the difference between the initial taxable value at the time this Plan is approved and the actual taxable value for each year for which this Plan is in effect.

A table of the total estimated tax increment revenues to be captured for the Project is attached to this Plan as Table 2. Tax capture for reimbursement of Eligible Activities as described in this Plan is estimated to require 20 years, assuming reimbursement from local and state taxes, as illustrated in Table 3. Conservative assumptions were included in the captured taxable value and tax rates. These assumptions are used for illustrative purposes only and are not intended to limit reimbursement of the actual annual tax capture amount. The following assumptions were used to develop the attached tables.

1. The Plan assumes reimbursement for all eligible costs in the amount of $2,484,629.
2. The Developer is requesting an Obsolete Property Rehabilitation Act (OPRA) tax abatement, and therefore local tax capture is assumed to be limited during the first 12 years, and state tax capture is assumed to be limited during the first 6 years.
3. Administrative expense capture for the Authority is 6% per year, except when the local tax capture is less than that amount during the proposed OPRA tax abatement, during which the administrative capture is equal to the total local capture.
4. Local and state tax capture are included in calculating capture.
5. Annual appreciation in taxable value of 1%.
6. The Plan assumes that an intergovernmental agreement will be prepared with the Downtown Development Authority to permit capture of the DDA milage.

Tax increments are projected to be captured and applied: (i) to reimbursement of Eligible Activity costs; (ii) for payment of the City of Jackson Brownfield Redevelopment Authority administrative expenses; (ii) to make deposits into the State of Michigan Brownfield Redevelopment Fund (BRF); and (iii) to make deposits into the Local Brownfield Redevelopment Fund (LBRF) as follows:

Eligible Activity Reimbursement	$	2,484,629
Administrative Fees	$	149,217
State Brownfield Redevelopment Fund	$	218,116
Local Brownfield Revolving Fund	$	880,321
Total Brownfield Plan Capture	$	3,732,283

2.4 Method of Financing and Description of Advances Made by the Municipality

The Eligible Activities are to be financed solely by the Developer. No advances have been made by the Authority or City for the costs of eligible activities under this Plan.

2.5 Maximum Amount of Note or Bonded Indebtedness

The Authority will not incur any note or bonded indebtedness to finance the purposes of this Plan.

2.6 Duration of Brownfield Plan (Section (13)(2)(f)

This Plan will remain in effect for 30 years from the beginning date of the capture of tax increment revenues, or for the duration necessary to complete the reimbursement of eligible expenses for the Project, whichever is less. In no event shall the duration of the Plan exceed 35 years following the date of the resolution approving the Plan, nor shall the duration of the tax capture exceed the lesser of the period authorized under subsection (4) and (5) of Section 13 of Act 381 or 30 years.

The beginning date of capture of tax increment revenues for the eligible property is anticipated to occur in accordance with the TIF table included as Table 3. However, in no event shall the beginning date of the capture of tax increment revenues be later than five years after the date of the resolution approving the Plan.

The Subject Property will become a part of this Plan on the date this Plan is approved by the governing body and the Reimbursement Agreement is approved by the Authority.

2.7 Estimated Impact of Tax Increment Financing on Revenues of Taxing Jurisdictions (Section 13(2)(g))

The following is the estimated impact of this Plan on the taxing jurisdictions.

		Tax Capture for This Plan (24 Year Plan)				
School Capture	Millage Rate	**Total Capture**	**Reimburse**	**Brownfield Authority**	**State BRF**	**LBRF**
School Operating Tax	18.0000	$ 1,343,637	$ 1,249,699	$ -		$ 93,938
State Education Tax (SET)	6.0000	$ 442,056	$ 208,283	$ -	$ 218,116	$ 15,656
School Total	**24.0000**	*$ 1,785,693*	*$ 1,457,982*	*$ -*	*$ 218,116*	*$ 109,595*
Local Capture	Millage Rate					
MED CARE	0.2476	$ 13,709	$ 7,230	$ 1,051		$ 5,428
SENIOR SERVICES	0.5966	$ 33,033	$ 17,422	$ 2,532		$ 13,079
LIFEWAYS	0.4947	$ 27,391	$ 14,446	$ 2,100		$ 10,845
COUNTY PARKS	0.4954	$ 27,430	$ 14,467	$ 2,103		$ 10,860
ANIMAL CONTROL	0.2476	$ 13,709	$ 7,230	$ 1,051		$ 5,428
LIBRARY	1.7411	$ 96,402	$ 50,843	$ 7,390		$ 38,169
JACKSON ISD OPER	0.1700	$ 9,413	$ 4,964	$ 722		$ 3,727
JACKSON ISD VOC	1.0643	$ 58,929	$ 31,079	$ 4,517		$ 23,332
JACKSON ISD SPEC	2.3492	$ 130,072	$ 68,601	$ 9,971		$ 51,500
JACKSON ISD SP12	0.7704	$ 42,656	$ 22,497	$ 3,270		$ 16,889
JTA	0.9946	$ 55,069	$ 29,044	$ 4,221		$ 21,804
CITY OPER	6.6828	$ 370,017	$ 195,150	$ 28,364		$ 146,503
CITY PUB IMP	1.9092	$ 105,710	$ 55,752	$ 8,103		$ 41,854
CITY POL/FIRE	8.7000	$ 481,706	$ 254,056	$ 36,925		$ 190,725
JACKSON COLLEGE	1.1327	$ 62,716	$ 33,077	$ 4,808		$ 24,832
JPS OPER PUB REC	0.4952	$ 27,418	$ 14,461	$ 2,102		$ 10,856
COUNTY OPER	5.0660	$ 280,497	$ 147,936	$ 21,502		$ 111,059
CITY DDA	1.9996	$ 110,715	$ 58,392	$ 8,487		$ 43,836
Local Total	**35.1570**	*$ 1,946,590*	*$ 1,026,647*	*$ 149,217*	*$ -*	*$ 770,726*
Total Captured Above	**59.1570**	$ 3,732,283	$ 2,484,629	$ 149,217	$ 218,116	$ 880,321

In addition, the following taxes are projected to be generated but shall not be captured during the life of the Plan.

Millages Not Captured	Millage Rate	**Increment Not Captured (24 Year Plan)**
CITY HALL DEBT	0.9500	$ 98,143
JPS DEBT 2004, 2009, 2011	6.2000	$ 640,512
Total Above	**7.1500**	$ 738,655

2.8 Estimates of Residents and Displacement of Individuals/Families (Section 13(2)(i-l))

There are currently no residential dwellings or residences that occupy the Subject Property and no occupied residences will be acquired or cleared, therefore there will be no displacement or relocation of persons under this Plan.

2.9 Plan of Financing (Section 13(2)(d)) and Maximum Amount of Indebtedness (Section 13(2)(e))

The Eligible Activities are to be financed solely by the Developer. The Authority will reimburse the Developer for the actual cost of approved Eligible Activities, but only from actual tax increment revenues generated from the Subject Property.

All reimbursements authorized under this Plan shall be governed by the Reimbursement Agreement. Reimbursements under the Reimbursement Agreement shall not exceed the cost of eligible activities permitted under this Plan.

Unless otherwise agreed upon by the Developer, the Authority, and the State of Michigan, the Authority shall not incur any note or bonded indebtedness to finance the purposes of this Plan.

2.10 Local Brownfield Revolving Fund ("LBRF") (Section 8; Section 13(2)(m))

The Authority has established a Local Brownfield Revolving Fund (LBRF) consisting of all tax increment revenues authorized to be captured and deposited in the LBRF, as specified in Section 13(5) of Act 381, under this Plan and any other plan of the Authority. It may also include funds appropriated or otherwise made available from public or private sources.

The amount of tax increment revenue authorized for capture and deposit in the LBRF is estimated at $880,321. All funds, if any, deposited in the LBRF shall be used in accordance with Section 8 of Act 381.

2.11 Brownfield Redevelopment Fund (Section 8a; Section 13(2)(m))

The Authority shall pay to the Department of Treasury at least once annually an amount equal to 50% of the taxes levied under the state education tax, 1993 PA 331, MCL 211.901 to 211.906, that are captured under this Plan for up to the first twenty-five (25) years or the duration of capture of tax increment revenues for each eligible property included in this Plan. If the Authority pays an amount equal to 50% of the taxes levied under the state education tax, 1993 PA 331, MCL 211.901 to 211.906, on a parcel of eligible property to the Department of Treasury under Section 13b(14) of Act 381, the percentage of local taxes levied on that parcel and used to reimburse eligible activities for the Project under this Plan shall not exceed the percentage of local taxes levied on that parcel that would have been used to reimburse eligible activities for the Project under this Plan if the 50% of the taxes levied under the state education tax, 1993 PA 331, MCL 211.901 to 211.906, on that parcel were not paid to the Department of Treasury under Section 13b(14) of Act 381.

2.12 Other Material that the Authority or Governing Body Considers Pertinent

The Developer and its affiliates shall comply with all applicable laws, ordinances,

executive orders, or other regulations imposed by the City or any other properly constituted governmental authority with respect to the Subject Property and shall use the Subject Property in accordance with this Plan.

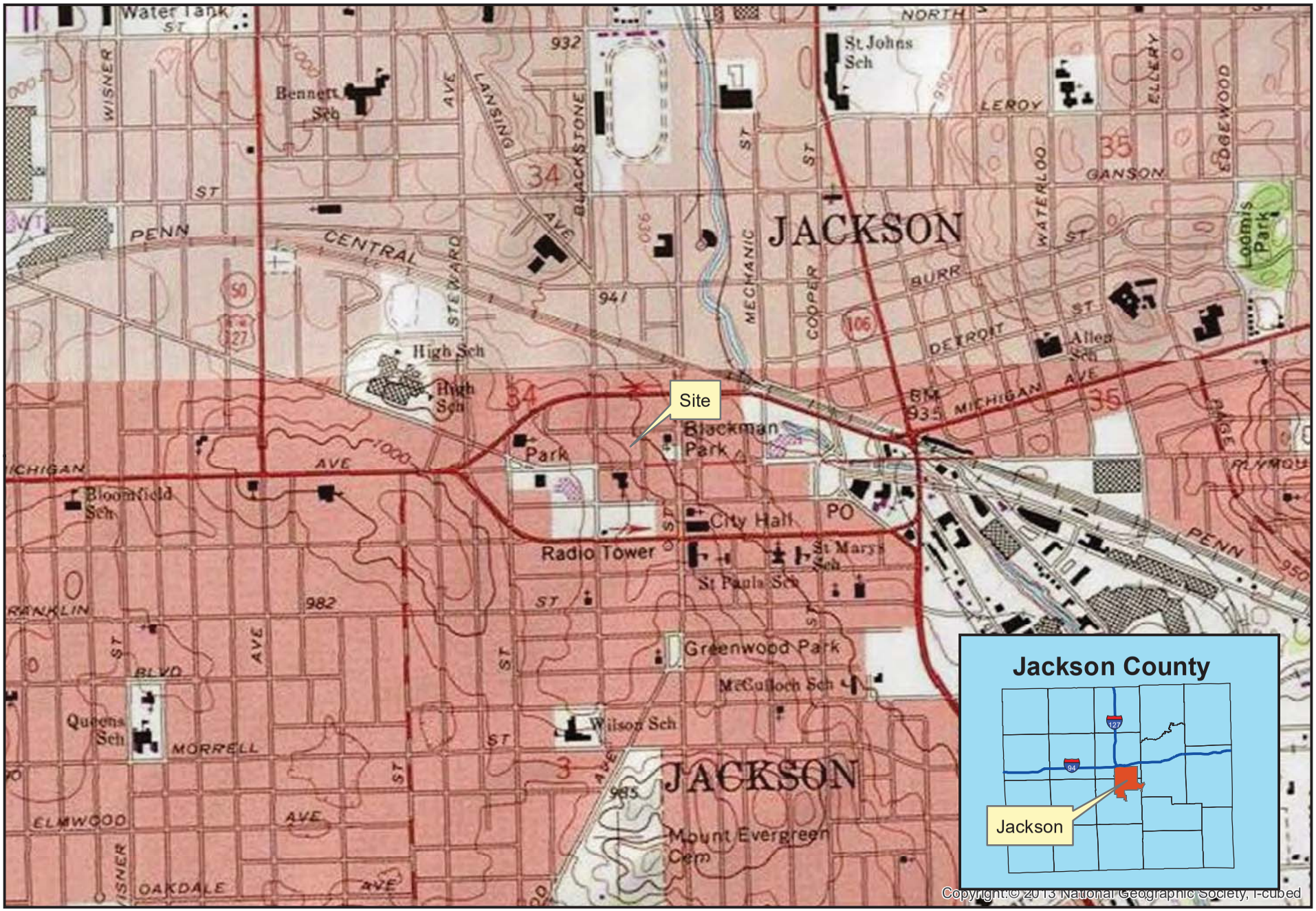
The Developer represents and warrants that a Phase I Environmental Site Assessment ("ESA"), and if appropriate, a Phase II ESA, baseline environmental assessment, and due care plan, pursuant to Part 201 of Michigan's Natural Resources and Environmental Protection Act (MCL 324.20101 et seq.), have been performed on the Subject Property ("Environmental Documents").

Because of the challenges of renovation of this historic building, the Developer is also seeking an Obsolete Property Rehabilitation Act tax abatement, a Community Revitalization loan or grant, a Revitalization and Placemaking Program grant, and historic tax credits. Although that OPRA abatement has not yet been approved, the tax capture and reimbursement tables provided as Tables 2 and 3, respectively, include assumptions for that tax abatement. Tax capture during the tax abatement period is limited to the difference between the abated tax and the tax on the base taxable value.

III. EXHIBITS

FIGURES

Site Maps



Former Hayes Hotel

228 W. Michigan Avenue, Jackson, MI

1,000 500 0 1,000 Feet

Created for: Hayes Hotel Development, LLC
Created by: RMH, July 11, 2022, ASTI Project 1-6757

Site Location Map



228 W Michigan Ave

Jackson, MI

ASTI Environmental

Created for: J. Jeffers & Co.
Created by: TJW (4-6757) February 7, 2023

Figure 2: Eligible Property Map



228 W Michigan Ave

Jackson, MI

ASTI Environmental

Created for: J. Jeffers & Co.
Created by: TJW (4-6757) February 7, 2023

Figure 3: Public Infrastructure Improvements



J. JEFFERS & CO.

The Hayes

Development Summary / January 24, 2023 / **Confidential**

The Hayes is an opportunity to restore an iconic building to its former landmark status and foster community viability & vibrancy through **historic rehabilitation.**

Development Summary

- 228 West Michigan Avenue / Jackson, MI
- **10-story / Mixed-use / Historic Rehabilitation**
- Market Rate Apartments with Tenant Amenities
- Restaurant & Retail
- Office / Commercial Suites
- Event & Hospitality Space
- Parking & Site Improvements



Image is a basic architectural rendering of proposed rehabilitation. "Hotel Hayes" was originally constructed in 1926.


Floorplans

Rehabilitation Highlights

- **Floor One**
  - Restaurant
  - Commercial/Retail
  - Private Residence Entrance
- **Floor Two**
  - Grand Ballroom & Events
  - Office/Commercial
- **Floor Three**
  - Office/Commercial
- **Floors 4-10**
  - 84 Market Rate Apartments





Hotel Hayes / Current Condition



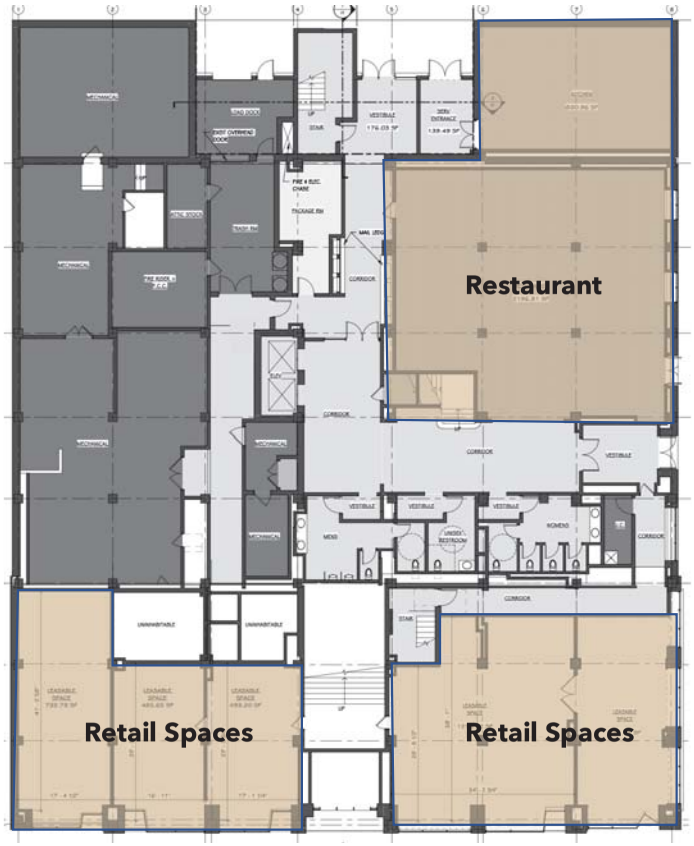
The Hayes / Rehabilitation Rendering

First Floor

- Restaurant (3,035 SF)
- Retail/Commercial spaces (3,545 SF)
- Restored historic Entrance & Grand Staircase
- Private Residence Entry (rear of building)

Common corridors & bathrooms, building infrastructure & core mechanicals are also located on this floor.

First floor storefront windows will be returned to their original architectural height and scale.



Second Floor

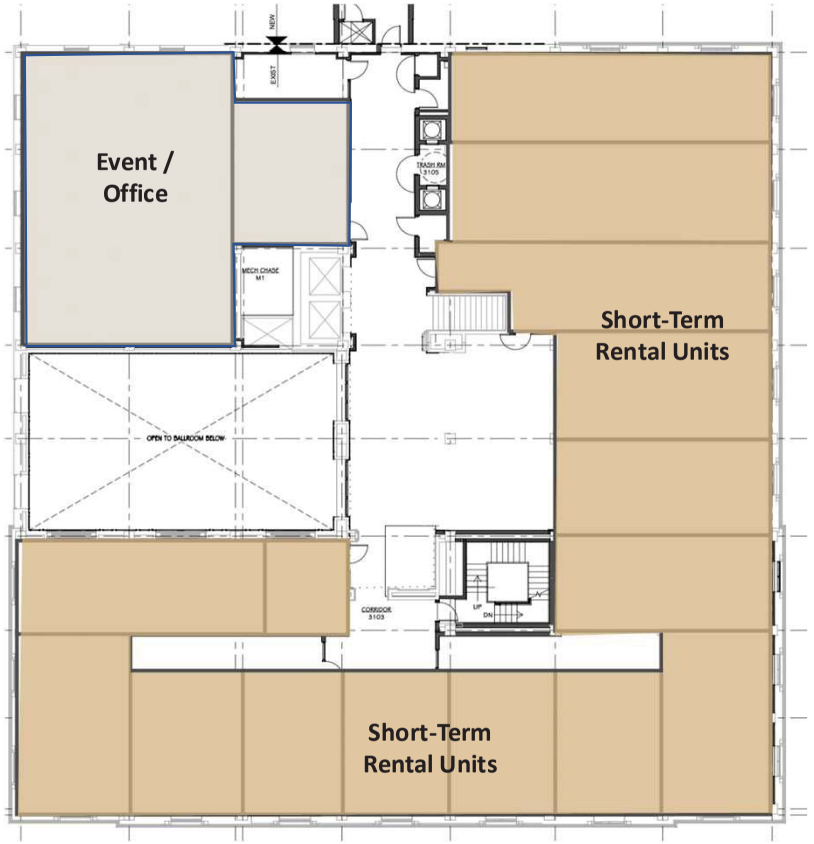
- Grand Ballroom & Event spaces (4,615 SF)
- Office/Commercial Suites (3,070 SF)
- Onsite Property Management
- Restored Historic Staircase (interior)
- Restored Grand Lobby



Third Floor

- 14 Short-term Rental Units (Avg. 560 SF)
- Event/Office Space (1,995 SF)
- Amenity Restrooms
- Restored interior stairs
- Views into Grand Ballroom

Event/Office space will be used exclusively by the Hospitality Group and Rental Unit management company.



Residential Floors (4-10)

- **Sample layout & unit configuration**
- Studios, 1 and 2-bedrooms
- Open living floor plans
- Modern kitchens & bathrooms
- Historic details & character
- In-unit washer/dryer
- Stainless appliances



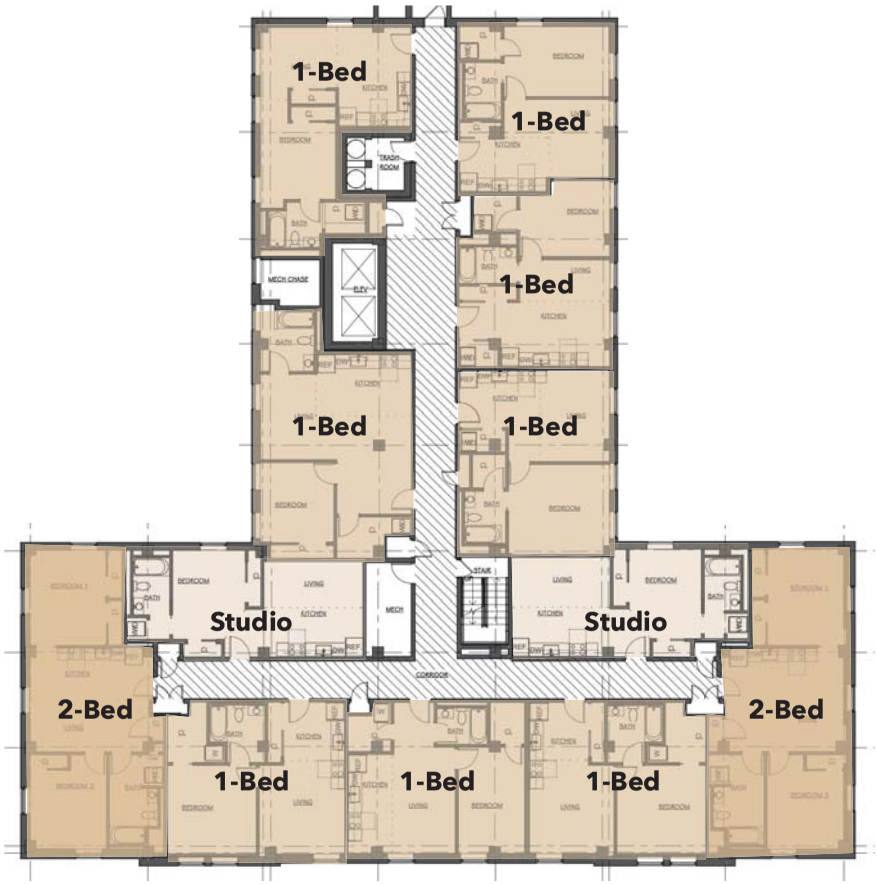
Floorplans 5-10

- **12 Units per floor**
- 2 / Two bedroom (820 SF)
- 8 / One bedroom (535 – 630 SF)
- 2 / Studio (510 SF)

Fourth Floor layout varies from floorplans 5-10. Floors 5-10 stack and repeat.

Floorplans include two (new) mechanical chases, (new) internal trash & recycling chutes, and restored historical stairwell.

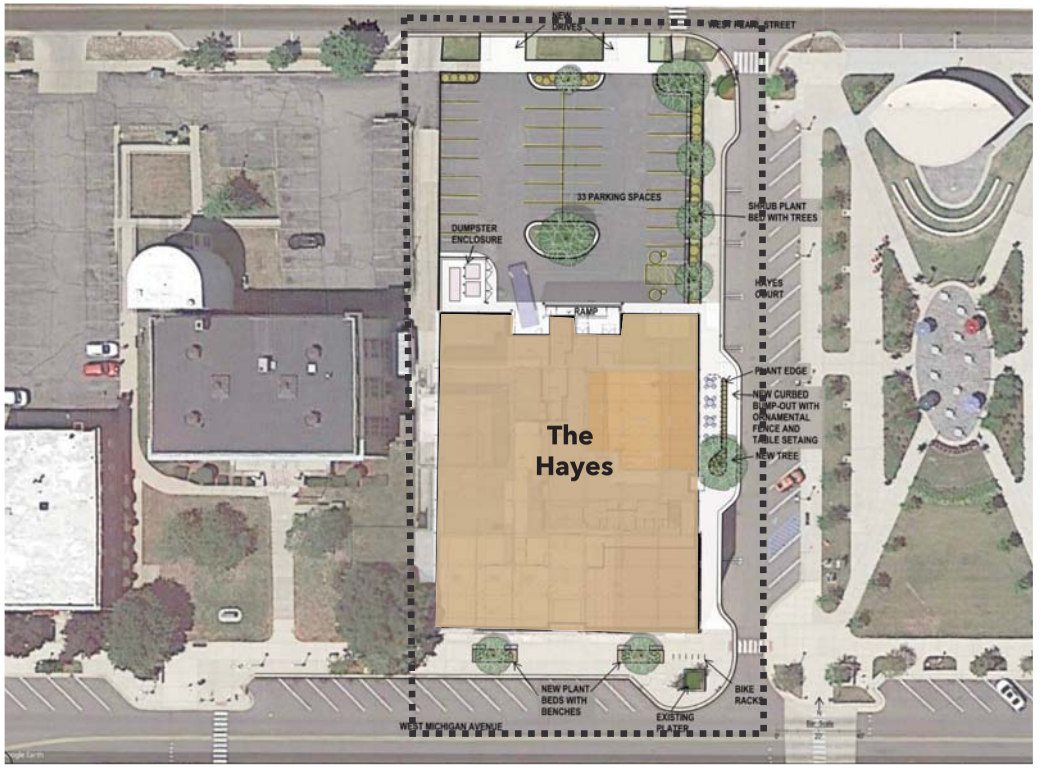
Building rehabilitation will include elevator upgrades and a (new) rear of building stairwell.



Proposed Site Plan

- Comprehensive landscaping
- Improved street and pedestrian appeal
- New bike racks, planters, and greenery
- Updated parking lot and lighting
- Curb/Dinning Bump-out (facing park)
- Concealed trash corral

Plan shown for conceptual direction only – appropriate approvals and permitting required.





Brian Loftin / SVP Development

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TABLES

Table 1
Eligible Activity Cost Estimates

Assessment and Due Care		Estimated Costs
Pre-Approved Activities		
	Phase I	$2,800
	Phase II Investigation	$11,800
	BEA	$2,900
	Due Care Plan	$2,200
	Subtotal Pre-Approved Activities	**$19,700**
Lead, Mold, and Asbestos Abatement		
	Asbestos Survey	$11,300
	Asbestos and Haz Sub Inspection/Bid Specs	$2,000
	Asbestos Abatement and Monitoring	$381,000
	Lead Survey	$11,300
	Lead Abatement	$889,000
	Subtotal Abatement Activities	**$1,294,600**
Brownfield Contractor Costs		
	Brownfield Plan	$10,000
	381 Work Plan	$10,000
	Implementation of Brownfield Plan and 381 Work Plan	$5,000
	Subtotal Plan Activities	**$25,000**

Site Preparation		
	Staking related to Rough Grade, Roadway and Utilities	$15,000
	Geotechnical Engineering	$10,000
	Temporary Erosion Control	$25,000
	Temporary Site Control (i.e., security, fencing, lighting)	$40,000
	Subtotal Site Preparation Activities	**$90,000**

Infrastructure		
Public		
	Sidewalk	$25,000
	Curbs and Gutters	$15,000
	Subtotal Public Infrastructure	**$40,000**

Subtotal Above	$1,469,300
*Contingency at 15%**	$213,690
Total Activity Costs with Contingency	$1,682,990

*Contingency does not include Pre-Approved Activities, Brownfield Plan, or 381 Work Plan

Other Eligible Costs		
	Interest	$801,639

Total Costs Above	$2,484,629

FINANCIAL ANALYSIS *Former Hotel Hayes*

Table 2 - Total Brownfield Tax Capture March 15, 2023

0

1.00% Estimated Taxable Value (TV) Increase Rate

Plan Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Calendar Year	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041
Base Taxable Value	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1
Estimated New TV	$ 3,830,000	$ 3,868,300	$ 3,906,983	$ 3,946,053	$ 3,985,513	$ 4,025,369	$ 4,065,622	$ 4,106,278	$ 4,147,341	$ 4,188,815	$ 4,230,703	$ 4,273,010	$ 4,315,740	$ 4,358,897	$ 4,402,486	$ 4,446,511
Incremental Difference (New TV - Base TV)	**$ 3,829,999**	**$ 3,868,299**	**$ 3,906,982**	**$ 3,946,052**	**$ 3,985,512**	**$ 4,025,368**	**$ 4,065,621**	**$ 4,106,277**	**$ 4,147,340**	**$ 4,188,814**	**$ 4,230,702**	**$ 4,273,009**	**$ 4,315,739**	**$ 4,358,896**	**$ 4,402,485**	**$ 4,446,510**
School Capture	Millage Rate	Tax Abatement Period														
School Operating Tax	18.0000	$ 34,920	$ 35,269	$ 35,622	$ 35,978	$ 36,338	$ 36,701	$ 73,181	$ 73,913	$ 74,652	$ 75,399	$ 76,153	$ 76,914	$ 77,683	$ 78,460	$ 79,245	$ 80,037
State Education Tax (SET)	6.0000	$ 11,640	$ 11,756	$ 11,874	$ 11,993	$ 12,113	$ 12,234	$ 24,394	$ 24,638	$ 24,884	$ 25,133	$ 25,384	$ 25,638	$ 25,894	$ 26,153	$ 26,415	$ 26,679
School Total	**24.0000**																
Local Capture	Millage Rate	**Tax Abatement Period**															
MED CARE	0.2476	$ 12	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 14	$ 14	$ 14	$ 1,069	$ 1,079	$ 1,090	$ 1,101
SENIOR SERVICES	0.5966	$ 30	$ 30	$ 30	$ 31	$ 31	$ 31	$ 32	$ 32	$ 32	$ 33	$ 33	$ 33	$ 2,575	$ 2,601	$ 2,627	$ 2,653
LIFEWAYS	0.4947	$ 25	$ 25	$ 25	$ 25	$ 26	$ 26	$ 26	$ 27	$ 27	$ 27	$ 27	$ 28	$ 2,135	$ 2,156	$ 2,178	$ 2,200
COUNTY PARKS	0.4954	$ 25	$ 25	$ 25	$ 26	$ 26	$ 26	$ 26	$ 27	$ 27	$ 27	$ 27	$ 28	$ 2,138	$ 2,159	$ 2,181	$ 2,203
ANIMAL CONTROL	0.2476	$ 12	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 13	$ 14	$ 14	$ 14	$ 1,069	$ 1,079	$ 1,090	$ 1,101
LIBRARY	1.7411	$ 87	$ 88	$ 89	$ 90	$ 91	$ 91	$ 92	$ 93	$ 94	$ 95	$ 96	$ 97	$ 7,514	$ 7,589	$ 7,665	$ 7,742
JACKSON ISD OPER	0.1700	$ 8	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 9	$ 734	$ 741	$ 748	$ 756
JACKSON ISD VOC	1.0643	$ 53	$ 54	$ 54	$ 55	$ 55	$ 56	$ 56	$ 57	$ 58	$ 58	$ 59	$ 59	$ 4,593	$ 4,639	$ 4,686	$ 4,732
JACKSON ISD SPEC	2.3492	$ 117	$ 119	$ 120	$ 121	$ 122	$ 123	$ 125	$ 126	$ 127	$ 128	$ 130	$ 131	$ 10,139	$ 10,240	$ 10,342	$ 10,446
JACKSON ISD SP12	0.7704	$ 39	$ 39	$ 39	$ 40	$ 40	$ 40	$ 41	$ 41	$ 42	$ 42	$ 43	$ 43	$ 3,325	$ 3,358	$ 3,392	$ 3,426
JTA	0.9946	$ 50	$ 50	$ 51	$ 51	$ 52	$ 52	$ 53	$ 53	$ 54	$ 54	$ 55	$ 55	$ 4,292	$ 4,335	$ 4,379	$ 4,422
CITY OPER	6.6828	$ 334	$ 337	$ 341	$ 344	$ 348	$ 351	$ 355	$ 358	$ 362	$ 365	$ 369	$ 373	$ 28,841	$ 29,130	$ 29,421	$ 29,715
CITY PUB IMP	1.9092	$ 95	$ 96	$ 97	$ 98	$ 99	$ 100	$ 101	$ 102	$ 103	$ 104	$ 105	$ 106	$ 8,240	$ 8,322	$ 8,405	$ 8,489
CITY POL/FIRE	8.7000	$ 435	$ 439	$ 444	$ 448	$ 453	$ 457	$ 462	$ 466	$ 471	$ 476	$ 481	$ 485	$ 37,547	$ 37,922	$ 38,302	$ 38,685
JACKSON COLLEGE	1.1327	$ 57	$ 57	$ 58	$ 58	$ 59	$ 60	$ 60	$ 61	$ 61	$ 62	$ 63	$ 63	$ 4,888	$ 4,937	$ 4,987	$ 5,037
JPS OPER PUB REC	0.4952	$ 25	$ 25	$ 25	$ 26	$ 26	$ 26	$ 26	$ 27	$ 27	$ 27	$ 27	$ 28	$ 2,137	$ 2,159	$ 2,180	$ 2,202
COUNTY OPER	5.0660	$ 253	$ 256	$ 258	$ 261	$ 264	$ 266	$ 269	$ 272	$ 274	$ 277	$ 280	$ 283	$ 21,864	$ 22,082	$ 22,303	$ 22,526
CITY DDA	1.9996	$ 100	$ 101	$ 102	$ 103	$ 104	$ 105	$ 106	$ 107	$ 108	$ 109	$ 110	$ 112	$ 8,630	$ 8,716	$ 8,803	$ 8,891
Local Total	**35.1570**																
Non-Capturable Millages	Millage Rate																
CITY HALL DEBT	0.9500	$ 47	$ 48	$ 48	$ 49	$ 49	$ 50	$ 50	$ 51	$ 51	$ 52	$ 52	$ 53	$ 4,100	$ 4,141	$ 4,182	$ 4,224
JPS DEBT 2004, 2009, 20118	6.2000	$ 310	$ 313	$ 316	$ 319	$ 323	$ 326	$ 329	$ 332	$ 336	$ 339	$ 342	$ 346	$ 26,758	$ 27,025	$ 27,295	$ 27,568
Total Non-Capturable Taxes	**7.1500**																
Total Tax Increment Revenue (TIR) Available for Capture		$ 48,318	$ 48,801	$ 49,289	$ 49,782	$ 50,280	$ 50,782	$ 99,441	$ 100,435	$ 101,440	$ 102,454	$ 103,479	$ 104,513	$ 255,306	$ 257,859	$ 260,438	$ 263,042
Total Tax Increment Revenue (TIR) Not Available		$ 357	$ 361	$ 365	$ 368	$ 372	$ 376	$ 379	$ 383	$ 387	$ 391	$ 395	$ 399	$ 30,858	$ 31,166	$ 31,478	$ 31,793

Footnotes: Amounts provided are estimates based on the assumptions used as of the date of this table. Actual tax payments and reimbursement amounts will vary based on assessed value, tax rates and other factors. This table is provided for illustration purposes only.

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Plan Year	17	18	19	20	21	22	23	24	25	26	27	28	29	30	TOTAL
Calendar Year	2042	2043	2044	2045	2046	2047	2048	2049	2050	2051	2052	2053	2054	2055	
Base Taxable Value	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	$ 1	
Estimated New TV	$ 4,490,976	$ 4,535,886	$ 4,581,245	$ 4,627,057	$ 4,673,328	$ 4,720,061	$ 4,767,262	$ 4,814,934	$ 4,863,084	$ 4,911,715	$ 4,960,832	$ 5,010,440	$ 5,060,544	$ 5,111,150	
Incremental Difference (New TV - Base TV)	**$ 4,490,975**	**$ 4,535,885**	**$ 4,581,244**	**$ 4,627,056**	**$ 4,673,327**	**$ 4,720,060**	**$ 4,767,261**	**$ 4,814,933**	**$ 4,863,083**	**$ 4,911,714**	**$ 4,960,831**	**$ 5,010,439**	**$ 5,060,543**	**$ 5,111,149**	
School Capture	Millage Rate														
School Operating Tax	18.0000	$ 80,838	$ 81,646	$ 82,462	$ 83,287	$ 84,120	$ 84,961	$ 85,811	$ 86,669	$ 87,535	$ 88,411	$ 89,295	$ 90,188	$ 91,090	$ 92,001	$ 2,188,778
State Education Tax (SET)	6.0000	$ 26,946	$ 27,215	$ 27,487	$ 27,762	$ 28,040	$ 28,320	$ 28,604	$ 28,890	$ 29,178	$ 29,470	$ 29,765	$ 30,063	$ 30,363	$ 30,667	$ 729,593
School Total	**24.0000**															$ 2,918,371
Local Capture	Millage Rate														
MED CARE	0.2476	$ 1,112	$ 1,123	$ 1,134	$ 1,146	$ 1,157	$ 1,169	$ 1,180	$ 1,192	$ 1,204	$ 1,216	$ 1,228	$ 1,241	$ 1,253	$ 1,266	$ 21,117
SENIOR SERVICES	0.5966	$ 2,679	$ 2,706	$ 2,733	$ 2,761	$ 2,788	$ 2,816	$ 2,844	$ 2,873	$ 2,901	$ 2,930	$ 2,960	$ 2,989	$ 3,019	$ 3,049	$ 50,882
LIFEWAYS	0.4947	$ 2,222	$ 2,244	$ 2,266	$ 2,289	$ 2,312	$ 2,335	$ 2,358	$ 2,382	$ 2,406	$ 2,430	$ 2,454	$ 2,479	$ 2,503	$ 2,528	$ 42,191
COUNTY PARKS	0.4954	$ 2,225	$ 2,247	$ 2,270	$ 2,292	$ 2,315	$ 2,338	$ 2,362	$ 2,385	$ 2,409	$ 2,433	$ 2,458	$ 2,482	$ 2,507	$ 2,532	$ 42,251
ANIMAL CONTROL	0.2476	$ 1,112	$ 1,123	$ 1,134	$ 1,146	$ 1,157	$ 1,169	$ 1,180	$ 1,192	$ 1,204	$ 1,216	$ 1,228	$ 1,241	$ 1,253	$ 1,266	$ 21,117
LIBRARY	1.7411	$ 7,819	$ 7,897	$ 7,976	$ 8,056	$ 8,137	$ 8,218	$ 8,300	$ 8,383	$ 8,467	$ 8,552	$ 8,637	$ 8,724	$ 8,811	$ 8,899	$ 148,492
JACKSON ISD OPER	0.1700	$ 763	$ 771	$ 779	$ 787	$ 794	$ 802	$ 810	$ 819	$ 827	$ 835	$ 843	$ 852	$ 860	$ 869	$ 14,499
JACKSON ISD VOC	1.0643	$ 4,780	$ 4,828	$ 4,876	$ 4,925	$ 4,974	$ 5,024	$ 5,074	$ 5,125	$ 5,176	$ 5,228	$ 5,280	$ 5,333	$ 5,386	$ 5,440	$ 90,770
JACKSON ISD SPEC	2.3492	$ 10,550	$ 10,656	$ 10,762	$ 10,870	$ 10,979	$ 11,088	$ 11,199	$ 11,311	$ 11,424	$ 11,539	$ 11,654	$ 11,771	$ 11,888	$ 12,007	$ 200,354
JACKSON ISD SP12	0.7704	$ 3,460	$ 3,494	$ 3,529	$ 3,565	$ 3,600	$ 3,636	$ 3,673	$ 3,709	$ 3,747	$ 3,784	$ 3,822	$ 3,860	$ 3,899	$ 3,938	$ 65,705
JTA	0.9946	$ 4,467	$ 4,511	$ 4,557	$ 4,602	$ 4,648	$ 4,695	$ 4,742	$ 4,789	$ 4,837	$ 4,885	$ 4,934	$ 4,983	$ 5,033	$ 5,084	$ 84,826
CITY OPER	6.6828	$ 30,012	$ 30,312	$ 30,616	$ 30,922	$ 31,231	$ 31,543	$ 31,859	$ 32,177	$ 32,499	$ 32,824	$ 33,152	$ 33,484	$ 33,819	$ 34,157	$ 569,951
CITY PUB IMP	1.9092	$ 8,574	$ 8,660	$ 8,747	$ 8,834	$ 8,922	$ 9,012	$ 9,102	$ 9,193	$ 9,285	$ 9,377	$ 9,471	$ 9,566	$ 9,662	$ 9,758	$ 162,828
CITY POL/FIRE	8.7000	$ 39,071	$ 39,462	$ 39,857	$ 40,255	$ 40,658	$ 41,065	$ 41,475	$ 41,890	$ 42,309	$ 42,732	$ 43,159	$ 43,591	$ 44,027	$ 44,467	$ 741,990
JACKSON COLLEGE	1.1327	$ 5,087	$ 5,138	$ 5,189	$ 5,241	$ 5,293	$ 5,346	$ 5,400	$ 5,454	$ 5,508	$ 5,563	$ 5,619	$ 5,675	$ 5,732	$ 5,789	$ 96,604
JPS OPER PUB REC	0.4952	$ 2,224	$ 2,246	$ 2,269	$ 2,291	$ 2,314	$ 2,337	$ 2,361	$ 2,384	$ 2,408	$ 2,432	$ 2,457	$ 2,481	$ 2,506	$ 2,531	$ 42,234
COUNTY OPER	5.0660	$ 22,751	$ 22,979	$ 23,209	$ 23,441	$ 23,675	$ 23,912	$ 24,151	$ 24,392	$ 24,636	$ 24,883	$ 25,132	$ 25,383	$ 25,637	$ 25,893	$ 432,060
CITY DDA	1.9996	$ 8,980	$ 9,070	$ 9,161	$ 9,252	$ 9,345	$ 9,438	$ 9,533	$ 9,628	$ 9,724	$ 9,821	$ 9,920	$ 10,019	$ 10,119	$ 10,220	$ 170,538
Local Total	**35.1570**															$ 2,998,409
Non-Capturable Millages	Millage Rate														
CITY HALL DEBT	0.9500	$ 4,266	$ 4,309	$ 4,352	$ 4,396	$ 4,440	$ 4,484	$ 4,529	$ 4,574	$ 4,620	$ 4,666	$ 4,713	$ 4,760	$ 4,808	$ 4,856	$ 81,022
JPS DEBT 2004, 2009, 20118	6.2000	$ 27,844	$ 28,122	$ 28,404	$ 28,688	$ 28,975	$ 29,264	$ 29,557	$ 29,853	$ 30,151	$ 30,453	$ 30,757	$ 31,065	$ 31,375	$ 31,689	$ 528,775
Total Non-Capturable Taxes	**7.1500**															$ 609,797
Total Tax Increment Revenue (TIR) Available for Capture		$ 265,673	$ 268,329	$ 271,013	$ 273,723	$ 276,460	$ 279,225	$ 282,017	$ 284,837	$ 287,685	$ 290,562	$ 293,468	$ 296,403	$ 299,367	$ 302,360	$ 5,916,780
Total Tax Increment Revenue (TIR) Not Available		$ 32,110	$ 32,432	$ 32,756	$ 33,083	$ 33,414	$ 33,748	$ 34,086	$ 34,427	$ 34,771	$ 35,119	$ 35,470	$ 35,825	$ 36,183	$ 36,545	$ 609,797

FINANCIAL ANALYSIS *Former Hotel Hayes*
Table 3 - Brownfield Plan Reimbursement March 15, 2023

	Developer Maximum Reimburse-ment	Proportionality	Actual School & Local Taxes Capture	Actual Local-Only Taxes	Total Actual Capture
State		**37%**	**$ 1,457,982**		$ 1,457,982
Local		**63%**	**$ 1,026,647**	$ -	$ 1,026,647
TOTAL					
EGLE		**3%**	$ 85,907	$ -	$ 85,907
MSF		**97%**	$ 2,398,722	$ -	$ 2,398,722

Estimated Total Years of Plan: 24

0

Estimated Developer Reimbursement	$ 2,484,629
Administrative Fees	$ 149,217
State Brownfield Redevelopment Fund	$ 218,116
Local Brownfield Revolving Fund	$ 880,321

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
		2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
Total State Incremental Revenue		$ 46,560	$ 47,026	$ 47,496	$ 47,971	$ 48,450	$ 48,935	$ 97,575	$ 98,551	$ 99,536	$ 100,532	$ 101,537	$ 102,552	$ 103,578	$ 104,614	$ 105,660	$ 106,716	$ 107,783
State Brownfield Redevelopment Fund (3 mils of SET)		$ 5,820	$ 5,878	$ 5,937	$ 5,996	$ 6,056	$ 6,117	$ 12,197	$ 12,319	$ 12,442	$ 12,566	$ 12,692	$ 12,819	$ 12,947	$ 13,077	$ 13,207	$ 13,340	$ 13,473
State TIR Available for Reimbursement		**$ 40,740**	**$ 41,147**	**$ 41,559**	**$ 41,974**	**$ 42,394**	**$ 42,818**	**$ 85,378**	**$ 86,232**	**$ 87,094**	**$ 87,965**	**$ 88,845**	**$ 89,733**	**$ 90,631**	**$ 91,537**	**$ 92,452**	**$ 93,377**	**$ 94,310**
Total Local Incremental Revenue		$ 1,758	$ 1,775	$ 1,793	$ 1,811	$ 1,829	$ 1,847	$ 1,866	$ 1,885	$ 1,903	$ 1,923	$ 1,942	$ 1,961	$ 151,728	$ 153,246	$ 154,778	$ 156,326	$ 157,889
BRA Administrative Fee	6.0%	$ 1,758	$ 1,775	$ 1,793	$ 1,811	$ 1,829	$ 1,847	$ 1,866	$ 1,885	$ 1,903	$ 1,923	$ 1,942	$ 1,961	$ 15,318	$ 15,472	$ 15,626	$ 15,783	$ 15,940
Local TIR Available for Reimbursement		**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ -**	**$ 136,410**	**$ 137,774**	**$ 139,152**	**$ 140,543**	**$ 141,949**
Total State & Local TIR Available		**$ 40,740**	**$ 41,147**	**$ 41,559**	**$ 41,974**	**$ 42,394**	**$ 42,818**	**$ 85,378**	**$ 86,232**	**$ 87,094**	**$ 87,965**	**$ 88,845**	**$ 89,733**	**$ 227,041**	**$ 229,311**	**$ 231,604**	**$ 233,920**	**$ 236,259**
DEVELOPER	Beginning Balance																	
DEVELOPER Reimbursement Balance	***$ 2,484,629***	***$ 2,443,889***	***$ 2,402,742***	***$ 2,361,183***	***$ 2,319,209***	***$ 2,276,814***	***$ 2,233,996***	***$ 2,148,618***	***$ 2,062,386***	***$ 1,975,292***	***$ 1,887,327***	***$ 1,798,483***	***$ 1,708,749***	***$ 1,481,709***	***$ 1,252,398***	***$ 1,020,794***	***$ 786,874***	***$ 550,614***
MSF Non-Environmental Costs	$ 1,624,800	$ 39,331	$ 39,725	$ 40,122	$ 40,523	$ 40,928	$ 41,338	$ 82,426	$ 83,250	$ 84,083	$ 84,924	$ 85,773	$ 86,631	$ 219,191	$ 221,382	$ 223,596	$ 211,577	$ -
State Tax Reimbursement		$ 39,331	$ 39,725	$ 40,122	$ 40,523	$ 40,928	$ 41,338	$ 82,426	$ 83,250	$ 84,083	$ 84,924	$ 85,773	$ 86,631	$ 87,497	$ 88,372	$ 89,256	$ 84,458	$ -
Local Tax Reimbursement		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 131,694	$ 133,011	$ 134,341	$ 127,119	$ -
Total MSF Reimbursement Balance		*$ 1,585,469*	*$ 1,545,744*	*$ 1,505,622*	*$ 1,465,099*	*$ 1,424,170*	*$ 1,382,833*	*$ 1,300,407*	*$ 1,217,156*	*$ 1,133,074*	*$ 1,048,150*	*$ 962,377*	*$ 875,746*	*$ 656,556*	*$ 435,173*	*$ 211,577*	*$ -*	*$ -*
EGLE Environmental Costs	$ 58,190	*$ 1,409*	*$ 1,423*	*$ 1,437*	*$ 1,451*	*$ 1,466*	*$ 1,480*	*$ 2,952*	*$ 2,981*	*$ 3,011*	*$ 3,041*	*$ 3,072*	*$ 3,103*	*$ 7,850*	*$ 7,929*	*$ 8,008*	*$ 7,577*	*$ -*
State Tax Reimbursement		$ 1,409	$ 1,423	$ 1,437	$ 1,451	$ 1,466	$ 1,480	$ 2,952	$ 2,981	$ 3,011	$ 3,041	$ 3,072	$ 3,103	$ 3,134	$ 3,165	$ 3,197	$ 3,025	$ -
Local Tax Reimbursement		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 4,716	$ 4,764	$ 4,811	$ 4,553	$ -
Total EGLE Reimbursement Balance		*$ 56,781*	*$ 55,359*	*$ 53,922*	*$ 52,471*	*$ 51,005*	*$ 49,524*	*$ 46,572*	*$ 43,591*	*$ 40,579*	*$ 37,538*	*$ 34,466*	*$ 31,364*	*$ 23,514*	*$ 15,585*	*$ 7,577*	*$ -*	*$ -*
Local Only Costs	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Local Tax Reimbursement		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Total Local Only Reimbursement Balance		*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Interest Costs	$ 801,639	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 0	$ (0)	$ 0	$ 14,766	$ 236,259
State Tax Reimbursement		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 5,894	$ 94,310
Local Tax Reimbursement		$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 0	$ (0)	$ 0	$ 8,872	$ 141,949
Total Interest Reimbursement Balance		*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 801,639*	*$ 786,874*	*$ 550,614*
Total Annual Developer Reimbursement		*$ 40,740*	*$ 41,147*	*$ 41,559*	*$ 41,974*	*$ 42,394*	*$ 42,818*	*$ 85,378*	*$ 86,232*	*$ 87,094*	*$ 87,965*	*$ 88,845*	*$ 89,733*	*$ 227,041*	*$ 229,311*	*$ 231,604*	*$ 233,920*	*$ 236,259*

LOCAL BROWNFIELD REVOLVING FUND

LBRF Deposits *	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -								
State Tax Capture	*$ -*	*$ (0)*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Local Tax Capture	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Total LBRF Capture	*$ -*	*$ (0)*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*

* Up to five years of capture for LBRF Deposits after eligible activities are reimbursed. May be taken from DEQ & Local TIR only.

Footnotes:
Amounts provided are estimates based on the assumptions used as of the date of this table. Actual tax payments and reimbursement amounts will vary based on assessed value, tax rates and other factors. This table is provided for illustration purposes only.

0

			18	19	20	21	22	23	24	25	26	27	28	29	30	
			2043	2044	2045	2046	2047	2048	2049	2050	2051	2052	2053	2054	2055	TOTAL
Total State Incremental Revenue			$ 108,861	$ 109,950	$ 111,049	$ 112,160	$ 113,281	$ 114,414	$ 115,558	$ 116,714	$ 117,881	$ 119,060	$ 120,251	$ 121,453	$ 122,668	$ 2,918,371
State Brownfield Redevelopment Fund (3 mils of SET)			$ 13,608	$ 13,744	$ 13,881	$ -	$ -	$ -	$ -	$ -						$ 218,116
State TIR Available for Reimbursement			**$ 95,254**	**$ 96,206**	**$ 97,168**	**$ 112,160**	**$ 113,281**	**$ 114,414**	**$ 115,558**	**$ 116,714**	**$ 117,881**	**$ 119,060**	**$ 120,251**	**$ 121,453**	**$ 122,668**	**$ 2,700,255**
Total Local Incremental Revenue			$ 159,468	$ 161,063	$ 162,673	$ 164,300	$ 165,943	$ 167,603	$ 169,279	$ 170,971	$ 172,681	$ 174,408	$ 176,152	$ 177,914	$ 179,693	$ 2,998,409
BRA Administrative Fee	6.0%		$ 16,100	$ 16,261	$ 16,423	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 149,217
Local TIR Available for Reimbursement			**$ 143,368**	**$ 144,802**	**$ 146,250**	**$ 164,300**	**$ 165,943**	**$ 167,603**	**$ 169,279**	**$ 170,971**	**$ 172,681**	**$ 174,408**	**$ 176,152**	**$ 177,914**	**$ 179,693**	**$ 2,849,192**
Total State & Local TIR Available			**$ 238,622**	**$ 241,008**	**$ 243,418**	**$ 276,460**	**$ 279,225**	**$ 282,017**	**$ 284,837**	**$ 287,685**	**$ 290,562**	**$ 293,468**	**$ 296,403**	**$ 299,367**	**$ 302,360**	**$ 5,549,447**
DEVELOPER	Beginning Balance															
DEVELOPER Reimbursement Balance	***$ 2,484,629***		***$ 311,992***	***$ 70,984***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	
MSF Non-Environmental Costs	*$ 1,624,800*		*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ 1,624,800*
State Tax Reimbursement			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 1,098,636
Local Tax Reimbursement			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 526,164
Total MSF Reimbursement Balance			*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
EGLE Environmental Costs	*$ 58,190*		*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ 58,190*
State Tax Reimbursement			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 39,346
Local Tax Reimbursement			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 18,844
Total EGLE Reimbursement Balance			*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Local Only Costs	*$ -*		*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Local Tax Reimbursement			$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -
Total Local Only Reimbursement Balance			*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Interest Costs	*$ 801,639*		*$ 238,622*	*$ 241,008*	*$ 70,984*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ 801,639*
State Tax Reimbursement			$ 95,254	$ 96,206	$ 28,336	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 320,000
Local Tax Reimbursement			$ 143,368	$ 144,802	$ 42,649	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ -	$ 481,639
Total Interest Reimbursement Balance			*$ 311,992*	*$ 70,984*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*
Total Annual Developer Reimbursement			***$ 238,622***	***$ 241,008***	***$ 70,984***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ 2,484,629***
LOCAL BROWNFIELD REVOLVING FUND																
LBRF Deposits *																
State Tax Capture			*$ -*	*$ -*	*$ 68,833*	*$ 40,762*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	***$ 109,595***
Local Tax Capture			*$ -*	*$ -*	*$ 103,602*	*$ 164,300*	*$ 165,943*	*$ 167,603*	*$ 169,279*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	*$ -*	***$ 770,726***
Total LBRF Capture			***$ -***	***$ -***	***$ 172,434***	***$ 205,062***	***$ 165,943***	***$ 167,603***	***$ 169,279***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ -***	***$ 880,321***

ATTACHMENT A

Brownfield Plan Resolution(s)

ATTACHMENT B

Reimbursement Agreement

ATTACHMENT C

Letters of Support

Spring Arbor
UNIVERSITY

Office of the President

May 20, 2022

Grant Review Committee
Revitalization and Placemaking Program (RAP)
Michigan Economic Development Corporation
300 N. Washington Square
Lansing, MI 48913

Dear Grant Review Committee,

Please accept the enclosed as an indication of Spring Arbor University's enthusiastic support for J. Jeffers & Co.'s proposed redevelopment of the iconic 1926 Hotel Hayes building Downtown Jackson.

A priority site for investment identified by the City of Jackson and Jackson Anchor Initiative in MEDC's Redevelopment Ready Communities Program, the long-vacant property is uniquely positioned to support stakeholders' key revitalization goals. Among those goals are attracting new residents and new spending power to the community's traditional commercial core, which has been successfully reimagined as an Innovation & Smart Energy District.

J. Jeffers & Co.'s proposed historic rehabilitation of the Hotel Hayes building – estimated at $27 million – will reactivate more than 110,000 square feet of space in a high-quality, mixed-use scenario. Initial plans call for 91 apartment units along with accommodation for premier event space and ground-floor boutique retail/hospitality uses. Centered in community impact as outlined across our community's primary planning documents, a project of this scope will bolster local efforts to build long-term economic, social and environmental resilience. This includes mitigating the varied detrimental impacts of the ongoing Covid-19 pandemic.

Spring Arbor University continues be actively engaged in initiatives to provide for a vibrant community. Our students, faculty, and staff value Jackson by serving in a variety of ways. These individuals participate in the community with over 77,000 hours of volunteerism, thus supporting one of the pillars of the University's Concept Statement ".....critical participation in the contemporary world."

Spring Arbor University salutes the City of Jackson and Jackson Anchor Initiative for effectively marketing this cherished Downtown anchor and welcomes opportunities to collaborate with J. Jeffers &

Co., a company that is mission driven in its community practice to approach real estate development both holistically and inclusively.

MEDC's consideration of the Hayes Hotel project for RAP grant funding is appreciated and applauded. Please feel free to contact me at president@arbor.edu or my office phone, 517-750-6308 with any questions regarding Spring Arbor University's support of J. Jeffers & Co.'s catalytic investment.

Sincerely,

Dr. Brent D. Ellis
President

CITY OF JACKSON
Founded 1829

City Manager's Office

161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (866) 384-1772

May 31, 2022

Grant Review Committee
Revitalization and Placemaking Program (RAP)
Michigan Economic Development Corporation
300 N. Washington Square
Lansing, MI 48913

Dear Grant Review Committee,

Please accept this letter as an indication of the City of Jackson's enthusiastic support for J. Jeffers & Co.'s proposed redevelopment of the iconic 1926 Hotel Hayes building Downtown Jackson. In-kind and direct financial support that the City intends to provide to the project include:

- Brownfield TIF. Net Present Value of the project is estimated at $3,000,000.
- Obsolete Property Rehabilitation Act (OPRA) financing. Net Present Value of the project is estimated at $1,350,000.
- Reduced Property Acquisition Cost, valued at $2,975,000.
- Predevelopment Grant financing, valued at $100,000.

The Hotel Hayes property is a priority site for investment identified by the City of Jackson's Redevelopment Ready Communities Program. The long-vacant property is uniquely positioned to support stakeholders' key revitalization goals. Among those goals are attracting new residents and new spending power to the community's traditional commercial core, which has been successfully reimagined as an Innovation & Smart Energy District.

J. Jeffers & Co.'s proposed historic rehabilitation of the Hotel Hayes building – estimated at $31.6 million – will reactivate more than 110,000 square feet of space in a high-quality, mixed-use scenario. Initial plans call for 115 apartment units along with accommodation for premier event space and ground-floor boutique retail/hospitality uses. Centered on community impact as outlined across our community's primary planning documents, a project of this scope will bolster local efforts to build long-term economic, social, and environmental resilience. This includes mitigating the varied detrimental impacts of the ongoing Covid-19 pandemic.

The City of Jackson is pleased to support this building redevelopment. We value the tools, resources, and incentives that the MEDC brings to this project to help the City enhance its economic vitality.

Respectfully,

Jonathan Greene
City Manager

Jackson ANCHOR INITIATIVE

Live.
Invest.
Innovate.
Locally.

May 12, 2022

Grant Review Committee
Revitalization and Placemaking Program (RAP)
Michigan Economic Development Corporation
300 N. Washington Square
Lansing, MI 48913

Dear Grant Review Committee,

Please accept this letter as an indication of Jackson Anchor Initiative's enthusiastic support for J. Jeffers & Co.'s proposed redevelopment of the iconic 1926 Hotel Hayes building in Downtown Jackson.

The Hotel Hayes property has been identified as a priority investment site by the City of Jackson and Jackson Anchor Initiative in MEDC's Redevelopment Ready Communities program. The long-vacant property is uniquely positioned to support stakeholders' key revitalization goals. Among those goals are attracting new residents and adding new spending power to the community's traditional commercial core, which has been successfully reimagined as an Innovation & Smart Energy District.

J. Jeffers & Co.'s proposed historic rehabilitation of the Hotel Hayes building – estimated at $27 million – will reactivate more than 110,000 square feet of space in a high-quality, mixed-use scenario. Initial plans call for 91 apartment units along with accommodation for premier event space and ground-floor boutique retail/hospitality uses. Centered in community impact as outlined across our community's primary planning documents, a project of this scope will bolster local efforts to build long-term economic, social and environmental resilience. This includes mitigating the varied detrimental impacts of the ongoing COVID-19 pandemic.

The Jackson Anchor Initiative is pleased to partner with the City of Jackson and J. Jeffers & Co. in marketing this cherished downtown anchor. We welcome opportunities to collaborate with J. Jeffers & Co., a company that is mission driven in its community practice to approach real estate development both holistically and inclusively. MEDC's consideration of the Hotel Hayes project for RAP grant funding is appreciated and applauded. Please feel free to contact me at Scott@JaxAnchor.org / 734-765-8124 with any questions regarding the Jackson Anchor Initiative's support of J. Jeffers & Co.'s catalytic investment.

Sincerely,

Scott Fleming

Scott Fleming, CEcD
President/ CEO, Jackson Anchor Initiative

May 13, 2022

Grant Review Committee
Revitalization and Placemaking Program (RAP)
Michigan Economic Development Corporation
300 N. Washington Square
Lansing, MI 48913

Dear Grant Review Committee,

Consumers Energy is supportive of J. Jeffers & Co.'s proposed redevelopment of the iconic 1926 Hotel Hayes building Downtown Jackson.

A priority site for investment identified by the City of Jackson and Jackson Anchor Initiative in MEDC's Redevelopment Ready Communities Program, the long-vacant property is uniquely positioned to support stakeholders' key revitalization goals. Among those goals are attracting new residents and new spending power to the community's traditional commercial core, which has been successfully reimagined as an Innovation & Smart Energy District.

J. Jeffers & Co.'s proposed historic rehabilitation of the Hotel Hayes building – estimated at $27 million – will reactivate more than 110,000 square feet of space in a high-quality, mixed-use scenario. Initial plans call for 91 apartment units along with accommodation for event space and ground-floor retail space. Centered in an impactful location as outlined across our community's primary planning documents, a project of this scope will bolster local efforts to build long-term economic, social, and environmental resilience.

Consumers Energy is excited and supportive of the proposed redevelopment of the Hotel Hayes building because of the ways it will support new growth in our hometown. We are prepared to support the project through our Smart Energy District and provide clean and affordable energy solutions.

MEDC's consideration of the Hayes Hotel project for RAP grant funding is appreciated. Please feel free to contact me at 517-788-7194 with any questions regarding Consumers Energy's support of J. Jeffers & Co.'s investment.

Sincerely,



Consumers Energy
One Energy Plaza
Jackson, MI 49201
consumersenergy.com

Garrick J. Rochow
President and Chief Executive Officer

CITY OF JACKSON
Founded 1829

Brownfield Redevelopment Authority
161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 788-4028 • Facsimile: (866) 384-1772

Public Hearing on Brownfield Plan set for April 25, 2023

Jackson City Council will hold a Public Hearing on April 25, 2023 at approximately 6:30 p.m., in Council Chambers within the City Hall, 161 West Michigan Avenue, Jackson, Michigan, to receive public comment on a Brownfield Plan Development and Reimbursement Agreement to include therein the property located at 228 West Michigan Avenue in Jackson, Michigan. The following legal parcels are included as the "eligible property":

- PIN 1-008100000

On April 12, 2023, the Authority Board reviewed and recommended adoption of the Brownfield Plan Development and Reimbursement Agreement related to the development of a parcel of property located at 228 West Michigan Avenue in the City of Jackson, Michigan. The project is the renovation of a vacant 122,709 square foot, multi-story, former hotel and associated parking. Project renovations include restaurant and retail on the first floor, event space and office/commercial suites on the second floor, short term rentals on the third floor, and residential on the fourth through tenth floors. The redevelopment of this iconic structure into a mixed-use commercial and residential development will provide an important investment to revitalize the City's primary business district, seat of county government and historic core, and to encourage spin-off investment to redevelop this portion of the downtown.

The building has been deemed functionally obsolete based on outdated and inadequate mechanical, electrical, and telecommunications/IT systems. Thus, the parcel included in this development is "eligible property" as defined in the Brownfield Redevelopment Financing Act (1996 PA 381).

The Brownfield Plan, which includes a site map and legal description of the property, is available for public inspection at City Hall, Community Development Department, located on the 3rd floor at 161 West Michigan Avenue, Jackson, Michigan 49201. All aspects of the plan are open for discussion at the public hearing.

FURTHER INFORMATION may be obtained from the Brownfield Redevelopment Authority of the City of Jackson at (517) 768-6433.

THIS NOTICE is given by order of the City Council of Jackson, Michigan.

Posted on: April 14, 2023

JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Telephone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: **Resolution to Apply for a Transportation Economic Development Fund Category F Grant for Repaving Wisner Street from Ganson Street to North Street.**

Recommendation:

> **Approve a resolution for application to the Michigan Department of Transportation (MDOT) for a Transportation Economic Development Fund (TEDF) Category F Grant, authorization for the Mayor and City Clerk to execute the resolution, and authorization for the City Engineer to file an application for repaving Wisner Street from Ganson Street to North Street.**

Attached is a memo from Jon H. Dowling, City Engineer, regarding a resolution to apply for a funding grant as outlined above.

I recommend approval. Your consideration and concurrence is appreciated.

JG

Attachments

DEPARTMENTAL REPORT

MEMO TO: Jonathan Greene, City Manager

FROM: Jon H. Dowling, P.E., City Engineer

DATE: April 25, 2023

RECOMMENDATION: Approve a resolution for application to the Michigan Department of Transportation (MDOT) for a Transportation Economic Development Fund (TEDF) Category F Grant, authorization for the Mayor and City Clerk to execute the resolution, and authorization for the City Engineer to file an application for repaving Wisner Street from Ganson Street to North Street.

SUMMARY

The Michigan Department of Transportation (MDOT) is soliciting applications for candidate projects for Transportation Economic Development Fund (TEDF) Category F Grant Funding. Engineering has determined Wisner Street from Ganson Street to North Street needs improvements.

BUDGETARY CONSIDERATIONS

The total construction cost is estimated at $620,707 with the TEDF Program paying $375,000 of the construction cost with federal funding. The City is responsible for the remaining cost along with 100% of the engineering costs. The total estimated cost for the City is $338,813. This cost would be paid from the Major Street Fund.

HISTORY, BACKGROUND and DISCUSSION

Engineering records show that Wisner Street from Ganson Street to North Street was originally constructed in 1962. The roadway was overlaid in 1994, crack sealed in 1997 and sealcoated in 1998. The current PASER rating is 3.

DISCUSSION OF THE ISSUE

Engineering proposes, if the City receives the TEDF Category F Grant, to remove the pavement full depth and repave with 6” hot mix asphalt, replace damaged curb and gutter and fill in missing sidewalk.

POSITIONS

I am requesting the attached resolution to apply for Transportation Economic Development Fund (TEDF) Category F Grant Funding through MDOT for improvements to Wisner Street from Ganson Street to North Street be approved, the Mayor and City Clerk be authorized to execute the resolution and the City Engineer by authorized to file an application.

JHD/ss

Att.

RESOLUTION

BY THE CITY COUNCIL:

WHEREAS, Engineering has determined that Wisner Street from Ganson Street to North Street is in need of pavement replacement; and

WHEREAS, The Michigan Department of Transportation has called for Transportation Economic Development Fund (TEDF) Category F projects for fiscal year 2024-2025; and

WHEREAS, the maximum amount of each grant is $375,000; and

WHEREAS, based upon engineering conceptual estimates, the projected construction cost is $620,707, with the Category F amount of $375,000; and

WHEREAS, the balance of the conceptual construction cost is $245,707, and estimated engineering costs are $93,106, for a total estimated City cost of $338,813; and

WHEREAS, the City cost will be paid out of the Major Street Fund;

NOW, THEREFORE, BE IT RESOLVED, that the City Council of the City of Jackson hereby certifies its support of the filing by the City Engineer on behalf of the City of Jackson an application for Wisner Street from Ganson Street to North Street pavement replacement under the Michigan Department of Transportation TEDF Program.

* * * * * *

State of Michigan)
County of Jackson)ss
City of Jackson)

I, Andrea Muray, City Clerk, in and for the City of Jackson, County and State aforesaid, do hereby certify that the foregoing is a true and complete copy of a resolution adopted by the Jackson City Council on the 25th day of April, 2023.

IN WITNESS WHEREOF, I have hereto affixed my signature and the Seal of the City of Jackson, Michigan, on this 26th day of April, 2023.

Daniel Mahoney, Mayor

Andrea Muray, City Clerk

CITY OF JACKSON
Founded 1829

City Manager's Office
161 W. Michigan Ave. - Jackson, MI 49201
Phone: (517) 788-4035 • Facsimile: (517) 768-5820

MEMO TO: Mayor and City Councilmembers

FROM: Jonathan Greene, City Manager

DATE: April 25, 2023

SUBJECT: Approval of American Rescue Plan Act – State and Local Fiscal Recovery Funds for the provisioning of governmental services in the General Fund

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Recommendation:

Approval of American Rescue Plan Act – State and Local Fiscal Recovery Funds for the provisioning of governmental services in the General Fund in the amount of $4,514,997.74.

Your consideration and concurrence is appreciated.

DEPARTMENTAL REPORT

CITY OF JACKSON
Founded 1829

Finance Department

161 W. Michigan Ave. • Jackson, MI 49201
Phone: (517) 788-4030 • Facsimile: (866) 763-7956

MEMO TO: Jonathan Greene, City Manager

FROM: Heather Ehnis, Finance Director

DATE: April 25, 2023

RECOMMENDATION: Approval of American Rescue Plan Act – State and Local Fiscal Recovery Funds for the provisioning of governmental services

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SUMMARY

The City has remaining funds to allocate from the American Rescue Plan Act – State and Local Fiscal Recovery Funds (SLFRF) awarded by Treasury in March 2021. To date, this amount is $4,514,997.74. The consultant retained by the City to assist with this grant award, recently learned a bill was brought before the US House of Representatives to "unobligated" any SLFRF not already approved for projects by grantees. Should this bill pass, the City may be responsible to return the remaining balance of $4,514,997.74 to Treasury.

BUDGETARY CONSIDERATIONS

Additional funds in the amount of $4,514,997.74 will be made available in the General Fund for the provisioning of general governmental services to be fully expended by December 31, 2026. The timeline and total allocated to the Revenue Replacement category will meet the requirements of the SLFRF grant.

HISTORY, BACKGROUND and DISCUSSION

A local government my expend SLFRF on a broad range of government services under the Revenue Replacement category. Spending funds in the Revenue Replacement category allows a local government to undertake a wide array of potential expenditures, including the salaries and fringe benefits of local government employees; park improvement projects; purchasing equipment and supplies for local government operations; renovating public buildings and facilities; and many more. The City of Jackson may elect to allocate up to $10 million under this category as outlined in Treasury's Final Rule.

POSITIONS

Recommend City Council to approve the allocation of ARPA SLFRF for use in the General Fund for general governmental services in the amount of $4,514,997.74.