



**CITY OF BERKLEY PUBLIC NOTICE
REGULAR CITY COUNCIL MEETING
TUESDAY, SEPTEMBER 8, 2026 - 7:00 PM
CITY HALL - 3338 COOLIDGE HIGHWAY
248-658-3300**

CALL 41ST COUNCIL TO ORDER

APPROVAL OF AGENDA

MAYOR-LED MOMENT OF REFLECTION

PLEDGE OF ALLEGIANCE

PUBLIC COMMENT(S)

Comments are invited on each Agenda item when that item comes up for consideration. Matters not listed on the Agenda may be addressed at this time. Please state your name and residential city. Each speaker's remarks are a matter of public record, and the Council will not engage in a back-and-forth discussion. Any person speaking at a City Council Meeting may be called to order by the Mayor or any Council Member for failure to be germane to the business of the City or for disruptive or disorderly behavior which prevents the Council from conducting its business. There is a three-minute limit per speaker.

ORDER OF BUSINESS

CONSENT AGENDA

- 1) Minutes of the 41st Regular City Council meeting on Monday, August 17, 2026, Work Session on Monday, July 20, 2026 and Special Meeting on Monday, August 10, 2026.
- 2) Off-cycle appointments to Boards and Commissions.
- 3) Tag Days Charitable Solicitation Permit.
- 4) Public Works Ford F-250 vehicle outfitting.
- 5) Five-Year Master Plan update by Carlisle Wortman Associates budgeted purchase.

REGULAR AGENDA

- 1) Recognitions or presentations from the Consent Agenda.
- 2) Consideration of Proposal from Berry Dunn for Strategic Plan Facilitation.

COMMUNICATIONS

ADJOURN

Note: The City Of Berkley Will Provide Necessary Reasonable Auxiliary Aids And Services, Such As Signers For The Hearing Impaired And Verbal Representations Of Printed Materials Being Considered At The Meeting, To Individuals With Disabilities At The Meeting Upon Four Working Days' Notice To The City. Individuals With Disabilities Requiring Auxiliary Aids Or Services Should Contact The City By Writing Or Calling: Victoria Mitchell, ADA Contact, Berkley City Hall, 3338 Coolidge Highway, Berkley, MI 48072 (1-248-658-3310).

Note: Official Minutes Of City Council Meetings And Supporting Documents For Council Packets Are Available For Public Review In The City Clerk'S Office During Normal Working Hours. Anyone Wishing To Submit Correspondence To The Council Before The Meeting May Send An Email To Comment@Berkleymt.Gov By Noon On The Day Of The Meeting. Emails Sent Prior To The Deadline Will Be A Part Of The Meeting Record But Will Not Be Read During The Council Meeting.

THE WORK SESSION MEETING OF THE FORTY-FIRST COUNCIL OF THE CITY OF BERKLEY, MICHIGAN WAS CALLED TO ORDER AT 5:30 PM ON MONDAY, JULY 20, 2026 BY MAYOR DEAN

PRESENT: Councilmember Steve Baker
Councilmember Clarence Black (arrived at 5:36)
Councilmember Gary Elrod
Mayor Pro Tem Ross Gavin
Councilmember Dennis Hennen
Councilmember Gregory Patterson
Mayor Bridget Dean

OTHER STAFF PRESENT:

City Manager Crystal VanVleck
City Attorney Lisa Hamameh
City Clerk Victoria Mitchell
Community Development Director Kristen Kapelanski

APPROVAL OF AGENDA

Mayor Pro Tem Gavin moved to approve the agenda
Seconded by Councilmember Patterson
Ayes: Elrod, Gavin, Hennen, Patterson, Baker and Dean
Nays: None
Absent: Black
Motion Approved.

PUBLIC COMMENT

None.

Regular Agenda

RECOGNITIONS/PRESENTATIONS

MSHDA Housing Tax Increment Financing Program.

City Manager Crystal VanVleck opened the work session.

Brad Hansen, Oakland County Senior Business Development Representative/Brownfield Coordinator, and Madalyn Eckel, Oakland County Senior Brownfield Specialist, were in attendance.

Community Development Director Kristen Kapelanski explained the purpose of the meeting is to discuss the TIF program. She began her presentation.

History and Background:

Public Act 381 of 1996 – Brownfield Redevelopment Financing Act.

- Created a system for communities to redevelop contaminated, blighted, obsolete, or underused properties by using TIF
- Authorized local jurisdictions to create Brownfield Redevelopment Authorities (BRAs), adopt brownfield plans, and capture the increase in property tax revenue generated by redevelopment to reimburse eligible cleanup and site-preparation costs

It was stated the City of Berkley does not have its own Brownfield Authority, it instead utilizes the County.

History and Background:

Public Act 90 of 2023 amended Public Act 381

- Expanded brownfield eligibility for housing projects
- Allowed more housing-related costs to be reimbursed through TIF
- Encouraged redevelopment of obsolete or blighted sites into housing
- Housing TIF regulated by MSHDA

Why did the state expand brownfield to housing?

- Initial Shortage – 2022
 - Housing deficit of about 190,000 units
- Progress Made – 2024
 - 50,000 units built or renovated, reducing the shortage of around 141,000 units
- Goals
 - Michigan increased its housing goal by 53 percent, aiming to build or renovate 115,000 units by 2027

It was stated the conversation matters for Berkley because one of the goals of the master plan is to diversify housing. The community listed this as a need. The construction costs and interest rates have risen so there is a large gap.

Director Kapelanski provided a refresher on what TIF is and its value.

Reimbursable Housing Development Activities:

- Reimbursement for qualified rehabilitation of rental units
- Costs of demolition and renovation of existing buildings or site preparation
- Reimbursement to fill a financing gap
- Infrastructure for public use and safety improvements necessary for housing project
 - Water/sewer
 - Sidewalks/driveways/parking areas
 - 'Green' site features

The site doesn't have to be contaminated. Housing has to be involved.

Fiscal Impact of Brownfield TIF:

- Captures increment, not existing revenue
 - No loss in tax revenue
- Can enable infrastructure improvements
 - Incorporate capital improvements
- Schools held harmless
 - School districts are made whole by the State

We would not see any loss in tax revenue.

The Financial Gap Problem Brownfield Solves:

- TIF recapture could close the financial gap.

TIF is not only for blight, the property doesn't have to be blighted. It could be used for work force housing, too.

Director Kapelanski said if we want more multi-family housing in the community, we need to close the financing gap.

Mr. Hansen said he has seen financing applications come in more regularly for infrastructure and site prep and demolition. With that being said, he has seen an application to address a financing gap.

Mr. Hansen said there is no cap on revenues. He said the local unit of government could put any cap on it they want.

Calculating the Financing Gap:

1. Establish the control rent
 - a. Determine baseline rent level using the HUD Fair Market Rent standard.
2. Determine potential rent loss
 - a. Calculate the difference between baseline control rent and anticipated project rent.
3. Determine PRL gap cap
 - a. Calculate the gap cap for each eligible unit type targeted at 120 percent AMI or less
4. Determine Total Housing Subsidy
 - a. Aggregate the individual gap caps across all bedroom types to find the total subsidy

Mr. Hansen was asked how long it usually takes for application approval. He said it takes about four months for approval. Possibly more. He said the MSHDA could help vet projects.

Mr. Hansen said every project is different, and adding housing has thrown them a lot of curveballs.

Key Risks and Misconceptions:

Common Misconceptions

- It raises taxes
- It's a giveaway to developers
- The community is paying upfront
- Schools lose funding
- Any project can use brownfield

Real Risks to Manage

- Underperformance risk
- Underestimation of eligible costs
- Local technical capacity
- Policy/Public perception risk
- Long-term capture considerations

Director Kapelanski said one point of today's work session is to get the general questions out of the way so when a project comes, we could focus on the project itself.

Director Kapelanski said IVY utilized the brownfield for 10 years, it was a traditional brownfield, not housing.

City Manager VanVleck said understanding the "why" behind this is an important first step.

MSHDA Data on Housing TIFS (through November 2024):

- Twenty-nine notices received from local BRAs
- Average years of tax capture approved – 22.9 years
- Average tax capture - \$6.9 million per project
- Average total project cost - \$22 million
- Average project size – 88 units
- Average number of units at or below 120 percent AMI – 51 percent

Mr. Hansen and Ms. Eckel discussed BRA from County's perspective.

Oakland County BRA (OCBRA) Process:

- The applicant shall seek approval from city council for the proposed Brownfield Plan in the form of a resolution.
- The project will be placed on an upcoming OCBRA meeting agenda.
- If the OCBRA approves the plan, the Brownfield Plan with resolutions (OCBRA and City) will be placed onto the OC Economic Development & Infrastructure Committee (ED&I) and Finance agendas for consideration.
- If both EDI and Finance committees approve the project, the County will schedule and publish a notice for the Public Hearing and forward the recommendation to the Board of Commissioners.
- Subsequent to holding the Public Hearing, the Board of Commissioners will review the project and approve or deny the Brownfield Plan.
- If the project is seeking State school tax capture the applicants must submit a 381 Work Plan (that meets the State approved format requirements) and includes the County approved Brownfield Plan and all related resolutions to the applicable State agencies (MSF, MSHDA, and EGLE as appropriate) for approval.

Mr. Hansen stated they try to facilitate the processes happening on parallel tracks. The final vote would happen at the Oakland County Board meeting.

Further discussion took place regarding the process.

Existing Oakland County Brownfield projects were discussed, including a Plan approved in 2025 for a five-story, 209 unit multi-family structure on the west side of South Troy St. between 7th and Lincoln avenues in Royal Oak.

Brownfield Work Plan Highlights – Lincoln Place in Royal Oak

- 209 units including 52 at 120% AMI or less with 20 year plan
- Approx \$800k for traditional EGLE cleanup costs
- Approx \$29 million for MSHDA eligible activities
 - Includes approx. \$20 mill towards financing gap

Rents were discussed for this project.

Further discussion took place regarding the rise in construction costs, site preparation use, rent, and other barriers preventing projects from moving forward.

It was stated this is a statewide and nationwide issue.

Next steps were discussed.

Director Kapelanski said there will be an economic development strategy presentation on August 17th and the TIFF will be a part of it.

Discussion regarding creating a strong communications plan was discussed.

ADJOURNMENT:

Councilmember Baker moved to adjourn the Work Session at 6:44 PM

Seconded by Councilmember Patterson

Ayes: Elrod, Gavin, Hennen, Patterson, Baker, Black and Dean

Nays: None

Motion Approved.

Bridget Dean, Mayor

ATTEST:

Victoria Mitchell, City Clerk

DRAFT

THE WORK SESSION MEETING OF THE FORTY-FIRST COUNCIL OF THE CITY OF BERKLEY, MICHIGAN WAS CALLED TO ORDER AT 5:30 PM ON MONDAY, AUGUST 10, 2026 BY MAYOR DEAN

PRESENT: Councilmember Steve Baker
Councilmember Clarence Black (arrived at 5:36)
Mayor Pro Tem Ross Gavin
Councilmember Dennis Hennen
Councilmember Gregory Patterson
Mayor Bridget Dean

ABSENT: Councilmember Gary Elrod

OTHER STAFF PRESENT:

City Manager Crystal VanVleck
Community Development Director Kristen Kapelanski
Parks and Recreation Superintendent Dan McMinn
Executive Assistant to the City Manager Lydia Brauher
Human Resources Director Jessica Stover
Deputy City Manager of Public Services Shawn Young
DDA Director Nate Mack

APPROVAL OF AGENDA

Councilmember Patterson moved to approve the agenda
Seconded by Councilmember Baker
Ayes: Gavin, Hennen, Patterson, Baker and Dean
Nays: None
Absent: Elrod
Motion Approved.

PUBLIC COMMENT

None.

Regular Agenda

DISCUSSION:

Matter of conducting interviews for Strategic Plan facilitation.

- Future iQ
- Berry, Dunn, McNeil & Parker, LLC
- Civic* Possible
- Double Haul Solutions

City Manager VanVleck introduced the agenda item and discussed how the evening would run.

City Manager VanVleck explained the rating sheets that were provided to council members.

Future iQ

- In attendance: David Beurle

- Interview questions were asked.

Berry, Dunn, McNeil & Parker

- In attendance: Charline Petit Hommen, Seth Hedstrom, Maddi Powers Spencer, and Evan Agnello
- Interview questions were asked.

Civic* Possible

- In attendance: Jason Schneider, Rachel Barra, and Hannah Lewis
- Interview questions were asked.

Double Haul Solutions

- In attendance: Nate Geinzer, Zack Szymanski, Will SaintAmour, and Stephanie Baron
- Interview questions were asked.

Council and staff in attendance provided their input regarding the interviews and candidates' responses.

ADJOURNMENT:

Councilmember Hennen moved to adjourn the Work Session at 9:05 PM

Seconded by Councilmember Baker

Ayes: Gavin, Hennen, Patterson, Baker, Black and Dean

Nays: None

Absent: Elrod

Motion Approved.

Bridget Dean, Mayor

ATTEST:

Lydia Brauher, Executive Assistant to the City Manager

**THE REGULAR MEETING OF THE FORTY-FIRST COUNCIL OF THE CITY OF BERKLEY, MICHIGAN
WAS CALLED TO ORDER AT 7:00 PM ON MONDAY, AUGUST 17, 2026 BY MAYOR DEAN**

PRESENT: Councilmember Steve Baker
Councilmember Clarence Black
Councilmember Gary Elrod
Mayor Pro Tem Ross Gavin
Councilmember Dennis Hennen
Councilmember Gregory Patterson
Mayor Bridget Dean

OTHER STAFF PRESENT:

City Manager Crystal VanVleck
City Attorney Lisa Hamameh
Deputy City Clerk Rachel Patterson
Community Development Director Kristen Kapelanski

APPROVAL OF AGENDA

Councilmember Baker moved to approve the agenda
Seconded by Mayor Pro Tem Gavin
Ayes: Black, Elrod, Gavin, Hennen, Patterson, Baker and Dean
Nays: None
Motion Approved.

PUBLIC COMMENT

Sophina Runde, Berkley, thanked the Council and the City for their support of the Berkley High School robotics team.

CONSENT AGENDA

Councilmember Hennen moved to approve the following Consent Agenda
Seconded by Councilmember Black

Minutes of the 41st Regular City Council meeting on Monday, July 20, 2026.

Warrant List No. 1425.

Proposal from Spalding DeDecker for design services as they relate to the Harvard Road Water Main and Road Reconstruction Project utilizing account number 443-901-975-000 with a not-to-exceed amount of \$177,410.

Spalding DeDecker proposal for engineering related services as the replacement to the EPA Community Grant for Lead Service Line Replacements.

Public Works North East Wall Replacement Phase 2 proposal from Allied Building Services in the amount of \$141,600 with an additional \$15,000 in contingency funds subject to a review of the contract by the City Attorney and approval and execution by the City Manager.

Second reading and adoption of an ordinance to amend Section 14.04.B Payment-In-Lieu Fees of Chapter 138 Zoning of the City of Berkley Code of Ordinances to modify regulations for payment-in-lieu of required parking spaces.

Second reading and adoption of an Ordinance of the City Council of the City of Berkley, Michigan to amend Article IX, Engineering Design Standards of Chapter 26, Buildings and Building Regulations of the City of Berkley Code of Ordinances to clarify that developments are subject to the provisions of the adopted Engineering Design Standards.

Update to the City's Cooperative Agreement with the Berkley School District for the School Resource Officer.

Declaring the attached items be declared as surplus to be sold or disposed of accordingly.

National Suicide Prevention Month proclamation.

Ayes: Elrod, Gavin, Hennen, Patterson, Baker, Black and Dean

Nays: None

Motion Approved.

Regular Agenda

RECOGNITIONS/PRESENTATIONS: Matter of receiving any recognitions or presentations from the Consent Agenda.

Presentation of the Quarter 2 Strategic Framework Report.

City Manager VanVleck presented the framework report updates:

- Priority Areas
 - Organizational Effectiveness- Collaboration and strategic planning serve as core drivers of equitable, efficient, and effective service delivery and policy development.
 - Economic Sustainability-A vibrant Berkley embraces creative and innovative economic strategies that welcome and encourage commercial and residential diversity.
 - Community Assets-Recognizing the cumulative human, financial, and community costs of capital disinvestment, Berkley will develop a sustainable long-term capital investment strategy that bolsters quality of life.
 - Open Communications-The City of Berkley prioritizes authentic, transparent, frequent, and consistent internal and external communication strategies that foster confidence, awareness, pride, and community connections.
 - Fiscal Stewardship -Berkley is attentive to its fiscal realities, yet prioritizes value over cost, seeks to balance the delivery of community services, unfunded capital, and financial liabilities through revenue diversity, operational efficiencies, and increasing private investment throughout the community.
- Priority Area 1: Organizational Effectiveness
 - Objective: Cultivate a strong organizational culture
 - Take Your Child to Work Day was a success! Activities were planned by Public Safety, the Library, the Clerk's Office, and Parks and Recreation.
 - Over 40 Parks and Recreation camp staff were trained as part of state licensing requirements.
 - Human Resources, the City Manager's Office, and Communications formed a team focused on promoting employee engagement and culture.
 - Members of our leadership team and City Council attended the annual North American Active Assailant Conference.
 - Objective: Optimize organizational structure, staffing, policies/procedures, and level of service
 - Updated Code Enforcement Policies and Procedures were adopted by City Council and implemented by the Community Development Department.
 - The Clerk and Deputy Clerk visited all Board and Commission meetings to review the Board and Commission Handbook and answer any questions.

- Community Development, the DDA, the City Manager's Office, and the Department of Public Works collaborated to release an RFP for the Coolidge Road project.
 - The Human Resources Director and City Manager met with our workers' compensation carrier to find ways to reduce risk of injury to employees and learn about current workplace safety trends and best practices.
 - The Clerk's Office continued to update its SOP manual, Election Manual, and Election Day Emergency Operations Manual with the help of Emergency Manager Jack Blanchard.
 - Year-to-date FOIA Requests:
 - Q2 2025 General FOIA Requests: 70 + 4 Appeals
 - Q2 2026 General FOIA Requests: 102 + 13 appeals
 - Approx. 480.75 hours of staff time
 - Objective: Foster stronger relationships with community and regional partners
 - Representatives from Community Development, the DDA, and the City Manager's Office attended meetings of the newly formed TriCommunity Commerce Partnership, a collaboration between the cities of Berkley, Huntington Woods, and Oak Park with the Chamber to increase efficiencies around business development and events.
 - The Clerk and Deputy Clerk visited the Ferndale Clerk's Office, where they discussed best practices, toured their election storage room, and went through their FOIA processes.
 - Human Resources attended the quarterly Public Sector HR Association (PSHRA) round table discussion, an opportunity for HR professionals from Oakland and Wayne Counties to share advice and resources
- Priority Area 2: Economic Sustainability
 - Objective: Identify, prioritize and deploy economic development tools
 - Community Development and the City Manager's Office met with brownfield representatives from Oakland County to begin exploring the use of a brownfield TIF for housing development.
 - The Planning Commission discussed the Payment in Lieu of Parking text amendment over several meetings, ultimately recommending approval.
 - Objective: Identify development opportunities and focus areas
 - The final draft of the Economic Development Strategy is close to completion.
 - Objective: Implement Master Plan updates and development process improvements
 - Community Development completed additional Zoning Ordinance clean-up amendments.
 - Objective: Improve City/DDA strategic alignment
 - Community Development has been working with the DDA on the Strategic Real Estate plan, the Coolidge RFP, and the Economic Development Strategy.
- Priority Area 3: Community Assets
 - Objective: Complete comprehensive asset needs inventory & management plan
 - Parks and Recreation and Communications worked together to create a plan to further examine residents' vision for the future of the Community Center campus.
 - A Water Asset Management Plan Update proposal has been put together and will be presented to City Council in Quarter 3.
 - The City provided Plante Moran Realpoint with our facilities assessment, utilization study, and appraisal for City Hall to review.
 - Objective: Improve facility/staff security & safety
 - Parks staff completed CPR/first aid training, basic water rescue training, and ALICE training as part of the pre-camp training sessions.
 - The Clerk worked with the Emergency Manager to update the Elections Security Plan to reflect the changes for the mid-term August Primary. She also reached out to the new facilities director at the School District to ensure compliance for August at all three precincts located in schools.
- Priority Area 4: Open Communications

- Objective: Identify community audiences and most effective City “voice(s)”
 - The Clerk's Office worked with the Communications Department to continue messaging heading into the midterm election season.
 - The Clerk and Deputy Clerk created new training manuals and classes to incorporate all of the mid-term changes in their election worker training sessions.
- Objective: Identify and implement priority communication strategies within human and financial resources
 - We gained nearly 70 new email subscribers over the past three months.
 - The Communications Department sent 23 email news blasts to subscribers.
 - The Communications Department shared social media outreach promoting:
 - Job openings
 - Curbside chipper/yard waste service and free compost for residents
 - Lids for Kids
 - The BOSS social district
 - Board & Commission recruitment
 - Water main breaks/road closures
 - Library and Parks & Recreation events/programs
 - City Council meeting/decision recaps
- A social media series was started to highlight the work done by each City Department. So far, posts have been shared to celebrate Municipal Clerks Week, National Police Week, and Public Works Week.
- Objective: Foster meaningful community engagement and genuine relationships
 - A Volunteer Appreciation Dinner was held to thank all of our board and commission members for the work they do to make Berkley a better place.
 - Public Safety hosted a Lids for Kids event. Estimated attendance throughout the day was 13,524.
 - The Clerk's Office hosted a program at the Library on how to make a voting plan.
 - The Summer Reading kickoff was a huge success. Attendance reached new heights with 266 kids, 29 teens, and 115 adults registering for the Summer Reading program.
- Priority Area 5: Fiscal Stewardship
 - Objective: Clearly define and articulate the City's long-term fiscal realities
 - Communications created a weekly "Budget Breakdown" social media series to share highlights of the adopted budget in 10 posts (two per week).
 - Objective: Identify additional funding strategies and partnerships
 - The Berkley Dads Club donated a new scoreboard for Community 1.
 - Senator Slotkin selected our “Harvard Road Infrastructure Resiliency” project for submission to the Interior and Environment Subcommittee for consideration for Congressionally Directed Spending (CDS).
 - Parks and Recreation was awarded a \$12,500 grant from the Ralph C. Wilson Jr. Foundation to support the expansion of the City's mobile recreation program.

Presentation by Better City of the City of Berkley's Economic Development Strategy.

Ms. VanVleck introduced Community Development Director Kristen Kapelanski and Jason Godfrey of Better City, who spearheaded the report. Mr. Godfrey presented the Economic Development Strategy:

- City Overview
 - Walkable, inner-ring community
 - Authentic downtown character
 - High-income resident base
 - Independent business identity
 - Corridors with redevelopment momentum
- What Makes Berkley Distinct
 - “Retro feel, metro appeal.”
 - Unpretentious
 - Family-friendly

- Walkable
 - Eclectic
 - Independent
 - Close to Detroit, but its own place
- Regional Positioning: Where Berkley Fits
 - Accessible.
 - Authentic.
 - Retail-balanced.
- Strategies
 - Priority development sites
 - Incentives and developer relationships
 - Local business support ecosystem
 - RRC readiness, City + DDA strategic alignment
- Strengthening Development Ecosystem
 - Clear vision for City
 - Predictable process
 - Defined incentive criteria
 - Early conversations
 - Coordinated City + DDA response
 - Public understanding of the “why”
- Strategic Recommendations
 - Parameters for Evaluating Incentives
 - Threshold criteria
 - Gap financing principles
 - Community benefit expectations
 - Council & DDA Training
 - Incentive rationale framework
 - Development supportive policies
 - Training on TIF + PILOTs
 - Formal incentive criteria
 - Business Resource Connection
 - Resource guide
 - City/DDA “front door”
 - Warm referrals
 - Business Retention & Expansion
 - Corridor check-ins
 - Pre-application meetings
 - Track business needs
 - Partner with local banks
 - Commercial Corridor Vitality
 - Evaluate CIA for Eleven Mile
 - Streetscape / signage / façade support
 - Public art + corridor identity
 - Light Entrepreneurial Hub Function
 - Workshops, coffee meetups, lender sessions
 - Startup resource events
- City Council Leadership
 - Developer Outreach
 - Meet-and-greet with developers
 - Introduce the Berkley team
 - Share the City's vision
 - Explain timelines and tools
 - Community Outreach
 - Proactive public communication
 - Plain-language incentive talking points
 - Open house after plan adoption

- Digital plan access / QR codes
- Priority Development Sites
 - 2555 W. Twelve Mile Road
 - 3142 Coolidge Highway
 - 3784, 3750 & 3708 Eleven Mile Road
 - 1716 Coolidge Highway & 2450 Eleven Mile Road
 - 4195–4105 Twelve Mile Road
 - 3490 & 3442 Twelve Mile Road
- Complexity Level: How the City Should Prioritize
 - Watch & Wait
 - Owner not ready
 - Maintain relationship
 - Prepare for future opportunity
 - Low Complexity
 - Fewer barriers
 - Clearer reuse path
 - Limited public role
 - Staff support / fast response
 - Moderate Complexity
 - Some coordination needed
 - Incentives may matter City/DDA partnership likely
 - High Complexity
 - Multiple owners or major site issues
 - Larger financing gap
 - Long-term catalytic potential
 - Prioritization is driven by owner responsiveness, not complexity level alone.
- Site 1: 2555 W. Twelve Mile Road
 - Project Details:
 - Property owner sells property to DDA at market value
 - DDA bonds against future property tax receipts to purchase the property and do demolition site work
 - DDA conveys property to developer / prior property owner
 - Development agreement stipulates development standards: 14,000 SF of retail 40 units of studio, 1BR, 2BR apartments
 - Financial Projections
 - Construction Costs: \$16.51M
 - Capital Stack: DDA TIF: \$2.26M (Site acquisition, demo, & site work)
 - Equity: \$4.02M
 - MEDC Grant: \$1.0M
 - Debt: (50% LTV, 6.5%): \$8.25M
 - C-PACE: \$0.97M
 - Annual Tax Impact:
 - Property Tax: \$366K (\$343K incremental)
 - Annual Cash Flow: \$60.6K
- Site 3: 3708 - 3750 & 3728 Eleven Mile Road
 - Option 1 | Artisan Incubator Reposition existing buildings
 - Create flexible maker / artisan / small-business space
 - Combine production space with shared retail / market opportunities
 - Create a maker-to-merchant pathway
 - Home-based business → market testing → permanent storefront
 - Property upgrade, seems like the appropriate incremental step
 - Strategic Enabler: Explore an Eleven Mile Corridor Improvement Authority (CIA)
 - Option 2 | Mixed-Use Redevelopment
 - Assemble the full site for comprehensive redevelopment
 - Introduce new housing and street-facing commercial activity
 - Strengthen Eleven Mile as a more active, walkable commercial corridor

- Potential to increase property value, tax base and customer activity
 - Requires property consolidation, demolition and significantly greater private investment
- Site 5: 4195–4105 Twelve Mile Road Project
 - Details: DDA purchases and consolidates the three parcels at market value
 - DDA bonds against future property tax receipts to purchase the property and do demolition site work
 - Reconfigure the parking in the rear in exchange for perpetual parking easements
 - DDA conveys property to developer / prior property owner
 - Development agreement stipulates development standards
 - 10,000SF ground floor retail 28 1BR & studio apartments
 - Pro forma:
 - Total Construction Costs: \$9,839,368
 - Capital Stack:
 - Capital Stack:
 - Equity: \$2.9M
 - C-PACE: \$1.0M
 - TIF: \$1.4M
 - Debt: \$4.4M
 - Annual Property Taxes: \$225K
 - Cash Flow: (\$45K)

Consideration of adoption of the 2026 Economic Development Strategy.

Councilmember Baker moved to approve Motion No. M-92-26

Seconded by Councilmember Patterson

Ayes: Gavin, Hennen, Patterson, Baker, Black, Elrod and Dean

Nays: None

Motion Approved.

Matter of approving participation in the "Tie Michigan Teal" campaign to promote awareness of ovarian cancer and its symptoms.

Councilmember Patterson moved to approve Resolution No. R-22-26

Seconded by Councilmember Hennen

Ayes: Hennen, Patterson, Baker, Black, Elrod, Gavin and Dean

Nays: None

Motion Approved.

Second Reading and adoption of an Ordinance to amend Chapter 86 and Chapter 106 of the Berkley City Code of Ordinances to provide for the regulation of electric bicycles, electric skateboards/scooters, and bicycles. Councilmember Hennen moved to approve Ordinance No. O-11-26

Seconded by Councilmember Elrod

Ayes: Patterson, Baker, Black, Elrod, Gavin, Hennen and Dean

Nays: None

Motion Approved.

Cynthia Berry, Berkley, spoke regarding the ordinance.

Thomas Victare, Berkley, spoke regarding the ordinance.

Justin Simpson, Berkley, spoke regarding the ordinance.

Chris Copacia, Berkley, spoke regarding the ordinance.

Interlocal Agreement for Law Enforcement Services with Pleasant Ridge.

Mayor Pro Tem Gavin moved to approve Motion No. M-93-26

Seconded by Councilmember Baker

Ayes: Baker, Black, Elrod, Gavin, Hennen, Patterson and Dean
Nays: None
Motion Approved.

Interlocal Agreement for Law Enforcement Services with the Village of Beverly Hills as amended.
Councilmember Hennen moved to approve Motion No. M-94-26
Seconded by Councilmember Black
Ayes: Black, Elrod, Gavin, Hennen, Patterson, Baker and Dean
Nays: None
Motion Approved.

Letter of Understanding with the Berkley Police Service Aide Association/Michigan Association of Police (Dispatch Union).
Councilmember Patterson moved to approve Motion No. M-95-26
Seconded by Councilmember Black
Ayes: Elrod, Gavin, Hennen, Patterson, Baker, Black and Dean
Nays: None
Motion Approved.

City Council 2026-2027 Meeting Dates Amendment.
Councilmember Gavin moved to approve Motion No. M-96-26
Seconded by Councilmember Elrod
Ayes: Gavin, Hennen, Baker, Black, Elrod and Dean
Nays: Patterson
Motion Approved.

COMMUNICATIONS:

COUNCILMEMBER PATTERSON

- The Parks & Recreation Advisory Board did not meet due to quorum. The survey is still live. The open house is coming August 26th on Wednesday from 5:30 to 6:30 PM with pizza being provided.
- Thanks to CruiseFest and the Dream Cruise team. He said that it was a great event.

COUNCILMEMBER BLACK

- Thanked Councilmember Patterson for his great work with The Zoning Board of Appeals, which he will now be serving as Council Liaison to. He looks forward to meeting the board soon.

COUNCILMEMBER ELROD

- The Environmental Advisory Committee meets next tomorrow at 6:30 PM on Tuesday, August 18th at the Community Center. They look forward to discussing future initiatives which include rescheduling our e-recycling event that was canceled due to weather and a status update on the native garden planning out in front of the community center.
- The Beautification Advisory Committee meets next on Wednesday, August 26th at 6:30 PM in the second-floor conference room of the Public Safety building. Jenna Hatala is resigning as Chair; he said that it is with a heavy heart that they're losing her contributions and that she will be missed.

COUNCILMEMBER HENNEN

- The Planning Commission meets Tuesday, August 25th at 7 PM here in Council Chambers.
- The Tree Board is still on hiatus.

COUNCILMEMBER BAKER

- The Berkley Historical Committee did not meet, but the Museum is still open.
 - For more information, visit berkleyhistory.com.
- The Downtown Development Authority (DDA) met last Wednesday, August 12th.

- Congratulated the DDA on a successful Ladies' Night. The event was wild, very well attended and the businesses expressed their gratitude.
- The DDA also discussed the economic development strategy material presented tonight.
- They discussed purchasing additional bike racks.
- They are also going through a refresh of their strategic plan. They've received 14 bids and they're going through the process to narrow that down.
- For more information on upcoming events, you can always visit downtownberkeley.com.
- Berkley Days needs volunteers. Please contact Councilmember Baker or the Berkley Days group through social media.
- The Berkley Day's Committee is ramping up for the Fall Festival on Saturday, September 12th from noon until 4 PM at the community center. Volunteers are needed; a two-hour shift here or there could really make a difference. Please contact Councilmember Baker through email or the Berkley Day's group on their social media pages.
- BB King once said, "The beautiful thing about learning is that no one can take it away from you." Welcomed everyone back to school time. Best wishes to all of Berkley students, teachers, staff, and families for a year filled with learning, friendship, and new opportunities. He said that education is a community effort. Thanked the parents, caregivers, crossing guards, bus drivers, volunteers, and school employees who help our students succeed every day.
- Please stay safe and please hug somebody you love.

MAYOR PRO TEM GAVIN

- Thanked everyone involved in CruiseFest. He said that it was a fantastic event as always, and it's wonderful to see everybody come together as a community. The Berkley Area Chamber of Commerce will next meet on August 18th at 5:30 PM at the library.
- The next meeting of the Library Board will be Wednesday, September 16th at 7 PM at the library.

CITY MANAGER VANVLECK

- Thanked the departments that came together to put Dream Cruise and CruiseFest together: DPW, Parks and Recreation, department of public safety.
- Said that the clerk's office did a phenomenal job. Elections have gotten increasingly more difficult and more strenuous to organize and run.
 - Election by the numbers: the number of ballots, mail ballots returned for the August 4th Primary outpaced the total number of mail ballots submitted for the entire primary election in August of 2022.
 - There were 3,110 absentee ballots received.
 - We had a 46% voter turnout, 3,044 voters at the polls.
 - 221 of our Berkley residents voted at the EV center.

CITY ATTORNEY HAMAMEH

- No updates.

MAYOR DEAN

- Said that she attended the Michigan Association of Mayors summer workshop in Farmington this year. They began with an executive board meeting and then there was a welcome reception at the Kickstart Gallery followed by a tour of downtown. Thanked Mayor Joel Larusa for showing them a great time. Thanked the MML for the incredible sessions, the opportunities for learning, networking, and exchanging ideas with counterparts from across the state.
- Sent a special thank you to Jack and Barb Blanchard for coordinating all the food to feed the first responders prior to the Cruise Fest kicking off.
- Thanked the Department of Public Works for all the barricading, the road closures, the giant vehicles blocking off streets; Public Safety and Parks & Rec for ensuring that this was a safe and fun event for our community.
- Asked everyone to please take the Parks & Rec survey.
- The Mayor's Road Show has been on hiatus, but is coming back in September with her next Meet Your Mayor event at Heavenly Poundcake, date to be determined.

ADJOURNMENT:

Councilmember Patterson moved to adjourn the Regular Meeting at 8:49 PM

Seconded by Councilmember Hennen

Ayes: Baker, Black, Elrod, Gavin, Hennen, Patterson and Dean

Nays: None

Absent: None

Motion Approved.

Bridget Dean, Mayor

ATTEST:

Rachel Patterson, Deputy City Clerk

DRAFT



MEMORANDUM

To: Mayor Dean and City Council
From: Rachel Patterson, Victoria Mitchell
Date: September 8, 2026
Subject: Off-cycle appointments to Boards and Commissions.

Madam Mayor and Members of City Council,

Background

- Appointments to boards and commissions typically take place twice a year in February and July during a City Council special meeting.
- The City of Berkley Boards and Commissions Handbook establishes exceptions to this bi-annual schedule for Boards or Commissions needing members to meet quorum.
- This evening's agenda includes two off-cycle appointments to address immediate quorum deficiencies on the Board of Review and the Zoning Board of Appeals, ensuring these bodies can legally convene and proceed with municipal business.
- The candidates being considered have both been previously vetted and interviewed by City Council for other positions during prior appointment sessions.

Summary

- Two off-cycle board and commission appointments are before you this evening to ensure operating quorums.
- James Weidman is recommended for appointment to the Board of Review, and Curtis Rowe is recommended for appointment to the Zoning Board of Appeals.

Recommendation

Motion to (approve/deny/postpone) the appointment of:

1. James Weidman to a Board of Review term ending September 2030; and
2. Curtis Rowe to a Zoning Board of Appeals term ending September 2029.



City of Berkley Boards & Commissions Application

Please complete the form below to apply for appointment to a Berkley Board/Commission/Committee. You must complete a separate application for each committee you are applying for.

Full Name	Curtis Paul Rowe
Pronouns	he/him/his
Address	4053 Thomas Ave Berkley, MI 48072
Email Address	(b) (6)
Phone Number	(b) (6)
How many years have you lived in Berkley?	36
Indicate which Board/Commission committee this application is for:*	Zoning Board of Appeals
Are you reapplying for a board or commission?	No
Current Employer	(b) (6)
Current Occupation	Project Manager/Estimator - Electrical Discipline
Are you applying as a high school student?	No
Upload Resume	 CPR Rsm 5_15_26.pdf
Please outline your specific qualifications for this appointment:*	As a construction professional with over 30 years of experience in building construction and renovation projects, I would bring accrued knowledge and experience in preconstruction activities, including site development and logistics evaluations. This may relate to property zoning ordinance concerns, appeals requests, and variance requests. While my primary discipline is with electrical building systems, including site electrical and utilities, preconstruction coordination with site development and building construction is needed to avoid potential conflicts and be in compliance with local zoning ordinances. I enjoy working as a team in a collaborative setting, discussing concerns, requests, and collectively deciding a resolution that will be favorable to all parties concerned.

Statement of Purpose

The disclosure requirements and standards of conduct apply to City officers and employees, including the Mayor, Members of City Council, Department Directors, and other appointees such as board and commission members, and employees of the City of Berkley. The intent of this document is to be proactive in identifying potential conflicts of interest and any appearance of impropriety, to ensure that governmental decisions are made in the public's best interest, and to prohibit public servants from participating in matters that affect their personal or financial interests.

Use this form to describe any relationships, transactions, positions you hold, or any other circumstances that could contribute to an actual or perceived conflict of interest between the City of Berkley and your personal interest. (Use additional pages if necessary.)

1. To the best of your knowledge, do you or any members of your immediate family own any interest in real property located within the City of Berkley other than a single-family residence which you occupy? No

2. If you answered yes to question #1, please provide the following information related to real property you own, what is the nature of your interest in the real property? Provide the street address of unimproved property and state its location in relation to existing streets and the property's permanent real estate tax identification number:

3. Do you or members of your immediate family own five percent (5%) or more of any business entity located in the City of Berkley? No

5. Do you or any members of your immediate family have direct financial or ownership interest in, or business or employment relationships with any supplier, service provider or contractor of the City of Berkley from which you or they derive direct compensation or financial benefit that is not reported in the prior answers? No

6. Have you or any members of your immediate family given or received any gifts, loans, goods, or services from individuals (excluding immediate family members), the value of which exceeds \$100.00, within the last year, or since the effective date of this code, whichever time period is shorter, to or from any person or business or other legal entity doing business with the city, other than legal campaign contributions? No

Applicant Signature

(b) (6)



City of Berkley Boards & Commissions Application

Please complete the form below to apply for appointment to a Berkley Board/Commission/Committee. You must complete a separate application for each committee you are applying for.

Full Name	James R. Weidman
Pronouns	he/him/his
Address	3294 Royal Ave. Berkley MI 49072
Email Address	(b) (6)
Phone Number	(b) (6)
How many years have you lived in Berkley?	2
Indicate which Board/Commission committee this application is for:*	Board of Review
Are you reapplying for a board or commission?	No
Current Employer	Retired
Current Occupation	Retired
Are you applying as a high school student?	No
Please outline your specific qualifications for this appointment:*	1973-2000. 27 years local health insurance company. Various administrative positions. Administrative VP. Second career, 2001-2010 Computer teacher, Alternative School, High School, Community College.

Statement of Purpose

The disclosure requirements and standards of conduct apply to City officers and employees, including the Mayor, Members of City Council, Department Directors, and other appointees such as board and commission members, and employees of the City of Berkley. The intent of this document is to be proactive in identifying potential conflicts of interest and any appearance of impropriety, to ensure that governmental decisions are made in the public's best interest, and to prohibit public servants from participating in matters that affect their personal or financial interests.

Use this form to describe any relationships, transactions, positions you hold, or any other circumstances that could contribute to an actual or perceived conflict of interest between the City of Berkley and your personal interest. (Use additional pages if necessary.)

1. To the best of your knowledge, do you or any members of your immediate family own any interest in real property located within the City of Berkley other than a single-family residence which you occupy?

No

2. If you answered yes to question #1, please provide the following information related to real property you own, what is the nature of your interest in the real property? Provide the street address of unimproved property and state its location in relation to existing streets and the property's permanent real estate tax identification number:

3. Do you or members of your immediate family own five percent (5%) or more of any business entity located in the City of Berkley?

No

5. Do you or any members of your immediate family have direct financial or ownership interest in, or business or employment relationships with any supplier, service provider or contractor of the City of Berkley from which you or they derive direct compensation or financial benefit that is not reported in the prior answers?

No

6. Have you or any members of your immediate family given or received any gifts, loans, goods, or services from individuals (excluding immediate family members), the value of which exceeds \$100.00, within the last year, or since the effective date of this code, whichever time period is shorter, to or from any person or business or other legal entity doing business with the city, other than legal campaign contributions?

No

Applicant Signature

(b) (6)

MEMORANDUM

To: Mayor Dean and City Council
From: Rachel Patterson, Victoria Mitchell
Date: September 8, 2026
Subject: Tag Days Charitable Solicitation Permit.

Madam Mayor and Members of City Council,

Background

- The annual Berkley Band Boosters Tag Days is scheduled to take place Friday, October 9, 2026, and Saturday, October 10, 2026 outside approved storefronts during standard business hours.
- The necessary documentation was submitted to the Clerk's Office and reviewed by the appropriate City staff.
- No city resources are used for this event.

Summary

- The Berkley Band Boosters Tag Days Charitable Solicitation Permit Application is before you today for approval.
- The application and event plan received internal approval.

Recommendation

Motion to (approve/deny/postpone) the authorization of the Berkley Band Boosters, Berkley Orchestra Association, and Berkley Choir Boosters, 2325 Catalpa Drive, Berkley, Michigan, to conduct Berkley Tag Days 2026 in the City of Berkley on Friday, October 9, 2026, and Saturday, October 10, 2026, outside approved storefronts during standard business hours.



City Clerk's Office
3338 Coolidge Hwy.
Berkley, MI 48072
248-658-3300
Fax: 248-658-3301
www.berkleymich.org

CITY OF BERKLEY, MICHIGAN

CHARITABLE SOLICITATION

PERMIT APPLICATION DISPOSITION CHECKLIST

Event Name:

Tag Days

Event Date(s)

10/9 + 10/10/2026

Location(s)

store fronts throughout Berkley

Event Hours

Fri 4-10pm Business hours
Sat 7-10pm hours

ORGANIZATION:

Organization Name:

Berkley Band Boosters

Headquarters Street Address:

2325 Catalpa

City:

Berkley

State:

MI

Zip Code:

48072

Phone:

248.837.8100

Website:

bbs.berkleyschools.org

Tax Exempt Status (as defined by the US Internal Revenue Service):



Non-Profit



501(c)(3)



N/A



Other (specify) _____

The following documents have been submitted:

Completed application

☒ YES ☐ NO

Valid IRS tax exempt verification

☐ YES ☐ NO

Financial report for the preceding fiscal year

☒ YES ☐ NO

Proof of Commercial Liability Coverage

☒ YES ☐ NO

Estimated cost to execute the solicitation / event

☒ YES ☐ NO

Charitable Solicitation / Special Event Hold Harmless Agreement

☒ YES ☐ NO

Application reviewed by:

Public Safety

[Signature] 41

Public Works

[Signature]

Building Official

Comments:

Presented to City Council:

Date:

Approved:

☐ YES ☐ NO

Organization Notified

☐ YES ☐ NO



City Clerk's Office
3338 Coolidge Hwy.
Berkley, MI 48072
248-658-3300
Fax: 248-658-3301
www.berkleymich.org

CITY OF BERKLEY, MICHIGAN

CHARITABLE SOLICITATION PERMIT APPLICATION

Event Name: Tag Days

Event Date(s) 10/9 & 10/10/2020 Location(s) store fronts/multiple businesses Event Hours hours of business operation

ORGANIZATION INFORMATION

Name: <u>Berkley Band Boosters</u>			
Street Address: <u>2325 Catalpa Dr.</u>			
City: <u>Berkley</u>	State: <u>MI</u>	Zip Code: <u>48072</u>	Phone: <u>248.837.8100</u>
Website: <u>bhs.berkleyschools.org</u>			

Tax Exempt Status (as defined by the U.S. Internal Revenue Service):

☒ Non-Profit ☐ 501(c)(3) ☐ N/A ☐ Other (specify) _____

CONTACT PERSON (Authorized Representative)

Name Leigh Ann Phillips Title Secretary Phone (b) (6)
Email (b) (6)

AGENTS/OFFICERS OF ORGANIZATION

Name Orvella Bettis Title President Phone (b) (6)
Address (b) (6)

Name Kathie Blackburn Title President Phone (b) (6)
Address (b) (6)

Name Jenna Hance Title President Phone (b) (6)
Address (b) (6)

Describe the type and purpose of the solicitation and how collected funds be used.

Donations collected from students playing instruments or singing money is used to help music programs in High school + middle school.

The amount of wages, fees, commissions, expenses to be paid to any person in connection with the solicitation, together with the manner in which such wages, fees, expenses, commissions are to be paid:

None.
This is a fundraising event. All proceeds go to the Tag Days Committee which is Bentley High School: Band, Orchestra + Choir

Estimated cost of the solicitation

0

The following documents must be submitted with this application, pursuant to **Chapter 34 Charitable Solicitations, Article I** of the City of Berkley Code of Ordinance:

1. Internal Revenue Service tax exempt documentation for the organization
2. Organization's financial report for the preceding fiscal year
3. Proof of Commercial Liability Coverage on an "occurrence basis" with no less than \$500,000 per occurrence and/or combined single limit, Personal Injury, Bodily Injury, and Property Damage. The insured endorsement portion of the Certificate of Insurance must read EXACTLY as follows:
The City of Berkley, including all elected and appointed officials, all employees, and volunteers, all boards, commissions, and/or authorities and their board members, employees, and volunteers.
4. Charitable Solicitation Hold Harmless Agreement signed by an authorized representative of the organization.

If the above information cannot be furnished, please provide a detailed statement of the reason.

I hereby solemnly swear that no solicitor will be paid, either directly or indirectly, a salary, wage, commission or benefit for his/her service.

Leigh Ann Phillips Leigh Ann Phillips / Secretary 7/13/2026
Applicant Signature Print Name/Title Date

For City Use Only

Approved by

Title

Signature

Date



City Clerk's Office
3338 Coolidge Hwy.
Berkley, MI 48072
248-658-3300
Fax: 248-658-3301
www.berkleymich.org

CITY OF BERKLEY, MICHIGAN

CHARITABLE SOLICITATION HOLD HARMLESS AGREEMENT

This Hold Harmless Agreement is between Berkley Band Boosters, (the Organization) and the City of Berkley, Michigan, (City) for the date(s) specified below.

Organization Name Berkley Band Boosters
Address 2325 Catalpa Berkley MI 48072
City Berkley State MI Zip 48072 Phone 248.837.8100
Event Name Tag Days
Event Location(s) Store fronts throughout Berkley Event Date(s) 10/9 + 10/10/2024

To the fullest extent permitted by law, the Organization expressly agrees to indemnify and hold harmless the City of Berkley, its elected and appointed officials, its employees and volunteers and others working on behalf of the City, from and against all loss, cost, expense, damage, liability or claims (whether groundless or not) arising out of bodily injury, sickness or disease (including death resulting at any time there from) which may be sustained or claimed by any person or persons participating in the above named event.

This includes damage or destruction of any property (including loss of use) based on any act or omission (negligent or otherwise) of the Organization or anyone acting on its behalf in connection with or incidental to this agreement. The Organization shall, at its own cost and expense, defend any such claim and any suit, action, or proceeding which may be commenced hereunder. In the event of any suit, action or proceeding, the Organization shall pay:

- Any and all judgments which may be recovered.
- Any and all expenses, including, but not limited to, costs, attorneys' fees and settlement expenses which may be incurred.

The Organization shall not be responsible to the City on indemnity for damages caused by or resulting from the City's sole negligence.

Authorized Representative Leigh Ann Phillips Title Secretary
(Please print)
Signature Leigh Ann Phillips Date 7/13/2024

Berkely Band Boosters

Fiscal Year 2025/2026

Summary of Finance Activity

- Beginning Balance- \$13,420.52 as of July 2025
- Total Income- \$50,843.85
- Total Expenses- \$52,940
- Ending Balance- \$11,324.50



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

7/14/2026

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
Arthur J. Gallagher Risk Management Services, LLC
300 Ottawa NW
Suite 301
Grand Rapids MI 49503

CONTACT
NAME: Abby BoumisPHONE
(A/C, No, Ext): 616-233-0916FAX
(A/C, No):E-MAIL
ADDRESS: Abby_Boumis@ajg.com

INSURER(S) AFFORDING COVERAGE

NAIC #

INSURER A : Great American Insurance Company

16691

INSURER B : Arthur J Gallagher - Grand Rapids

INSURER C :

INSURER D :

INSURER E :

INSURER F :

INSURED
MAISL Joint Risk Management Trust
Berkley School District
14501 Talbot
Oak Park MI 48237

COVERAGES

CERTIFICATE NUMBER: 1645734079

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
B A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC OTHER:	Y		INSURER A & B MAC 3128240	7/1/2026 7/1/2026	7/1/2027 7/1/2027	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ Included GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMP/OP AGG \$ 1,000,000 Agg Applies per \$ Member
B A	☒ AUTOMOBILE LIABILITY ☒ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY			INSURER A & B MAC 3128240	7/1/2026 7/1/2026	7/1/2027 7/1/2027	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Physical Damage \$ Included
B A	☒ UMBRELLA LIAB ☒ EXCESS LIAB ☐ OCCUR ☐ CLAIMS-MADE DED RETENTION \$			INSURER A & B MAC 3128240	7/1/2026 7/1/2026	7/1/2027 7/1/2027	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$ PER STATUTE OTH-ER
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	School Board Legal Liability Professional & Errors & Omissions Auto Liability			MAC 3128240	7/1/2026	7/1/2027	Per Claim Limit \$1,000,000 Aggregate Limit \$1,000,000 Maintenance Ded. \$2,500

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

MAISL Joint Risk Management Trust is a qualified and approved self-insurance fund under the laws of the State of Michigan. SIR \$600,000
The City of Berkley, including all elected and appointed officials, all employees, and volunteers, all boards, commissions, and/or authorities and their board members, employees, and volunteers are included as Additional Insureds as respects to the General Liability, pursuant to and subject to the policy's terms, definitions, conditions and exclusions.
RE: Berkley Tag Days Orchestra and Band performing at a variety of businesses in Berkley on October 9 & 10, 2026.

CERTIFICATE HOLDER

City of Berkley
3388 Coolidge Highway
Berkley MI 48072
USA

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

Arthur J. Gallagher Risk Management Services, LLC

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Rachel Patterson <rpatterson@berkleymi.gov>

TAG Days

Emily Loomis <eloomis@berkleymi.gov>
To: Victoria Mitchell <vmitchell@berkleymi.gov>
Cc: Rachel Patterson <rpatterson@berkleymi.gov>

Mon, Aug 24, 2026 at 8:56 AM

No issues here; approved as presented.

Thank you!

[Quoted text hidden]

--

Emily Loomis (she, her, hers)
Building Official
Office: 248-658-3326
[City of Berkley, MI](#)
[3338 Coolidge Highway](#)
[Berkley, MI 48072](#)
www.berkleymi.gov





MEMORANDUM

To: Mayor Dean and City Council,
From: Adam Wozniak

Date: September 8, 2026
Subject: Public Works Ford F-250 vehicle outfitting.

Madam Mayor and Members of City Council,

Background

As part of the FY 2026-2027 budget, funds were allocated for the purchase of outfitting our recently purchased Ford F-250's. This is a part of our department's Capital Improvement Plan.

Summary

- Similar to previous purchases, this purchase would utilize the City of Rochester Hills RFP-RH-25-054 Cooperative Contract with Truck and Trailer Specialties, Inc. of Howell, Mi.
- The total purchase price for the two Ford F-250s outfitting is \$33,100.00, funded through two separate accounts. The first vehicle outfitting will be purchased using account number 592-536-985-000 (Water Sewer-Vehicle), which has an allocation of \$71,000.00 for the vehicle and outfitting. The second vehicle outfitting will be purchased using account number 101-441-982-000 (General Fund-Equipment), which also has an allocation of \$71,000.00 for the vehicle and outfitting. Each truck has a base cost of approximately \$16,550.00 for outfitting.
- Outfitting will include a full light package, Havis console, hydraulic lift tail gate, rear window cab rack for protection, along with many other additional safety and equipment add-ons.

Recommendation

Motion to (Approve/Deny/Postpone) the purchase outfitting for our recently purchased 2027 Ford F-250s utilizing City of Rochester Hills RFP-RH-25-054 Contract with Truck and Trailer Specialties, Inc. of Howell, Mi.

TRUCK & TRAILER *Specialties, Inc.*

900 Grand Oaks Drive | Howell, MI 48843 | www.ttspec.com | ph: (517) 552-3855 | fx: (517) 552-3666

July 28, 2026

City of Berkley
3238 Bacon Avenue, Berkley, MI 48072
Attn: Matt Wells, ph: (248) 250-2166
HQO006190

Equipment Quotation

The following pricing is based on City of Rochester Hills RFP-RH-25-054 contract awarded April 2026

Truck# 4

Chassis information:

2027 Ford F250, 56" CA, 8' bed, SuperCab, 4x4, vinyl floor, factory camera, upfitter switches & plow prep

Install ProTech Aluminum Mesh Cab Rack 24" to mount antenna & mini lightbar brackets (mo. 57LP-6840-24)

Install Custom Lighting & Electrical including the following:

Chassis switches for warning & work lighting including:

Grille Flashers, Rear Flashers, Side Work Lights & Rear Work Lights

Four (4) SoundOff mPower (mo. EMPS20V38-P) amber/green flashers flush-mounted:

Two (2) in chassis grille

Two (2) at rear near license plate

One (1) SoundOff Pinnacle (mo. EPL7PDPC) amber/green mini lightbar on cab rack

Two (2) SoundOff Intersector (mo. ENT2B3P) amber/green flashers under side mirrors

One (1) Whelen Traffic Advisor (mo. TACF-85) and in-cab control mounted on cab rack

Five (5) Maxxima (mo. MWL-47) work lights, 2 side-facing & 2 rear-facing on cab rack, 1 rear-facing on toolbox

Backup alarm

Install Havis Console including the following:

C-B70: bracket

C-AS-840-11: angled console

C-FP-3: 3" filler plate

C-EB25-WTA-1P: Whelen plate, install controller

C-EB25-MXP-1P: Motorola plate, install radio

Install One (1) Weather Guard Super Hi-Side Toolbox including the following:

Aluminum diamond-plate, Clear

15.2 cubic feet capacity, 90-¼" L x 16-¼" W x 18" H (mo. 391-0-02)

Mounted on streetside bed rail

Install Thieman TopLifter Hydraulic Liftgate including the following:

Model TT 15 EST AL 56 x 26+6 2pc Galvanized

Platform dimensions are 56" wide x 26" plus a 6" tapered ramp

Extruded aluminum two-piece, fold-down platform

Dual cylinder series

Lifting capacity of 1,500#

Split-style non-towing bumper

Power-up & power-down functioning

12 VDC electric-over-hydraulic

Standard toggle control switch at gate for up & down

TRUCK & TRAILER *Specialties, Inc.*

900 Grand Oaks Drive | Howell, MI 48843 | www.ttspec.com | ph: (517) 552-3855 | fx: (517) 552-3666

Keyed power to liftgate

No interference with EOM installed receiver-type trailer hitch

Remount factory back-up camera in mounting hardware kit

Galvanized undercarriage in lieu of painted

Install Luverne Grip-Step running boards for SuperCab (mos. 415078 & 401723)

Above equipment, installed pricing: \$16,550.00 ea.

Minimum full 1-year warranty on parts and labor on all equipment.

Payment Terms: Net 30 days. Pricing effective for 30 days.

FOB: City of Berkley

Delivery: 10 weeks on Havis, allow 2-3 weeks for installation following

Thank you for the opportunity to quote.

Respectfully submitted by,
Jon Luea/Brian Bouwman

TRUCK & TRAILER *Specialties, Inc.*

900 Grand Oaks Drive | Howell, MI 48843 | www.ttspec.com | ph: (517) 552-3855 | fx: (517) 552-3666

July 28, 2026

City of Berkley
3238 Bacon Avenue, Berkley, MI 48072
Attn: Matt Wells, ph: (248) 250-2166
HQ0005264

Equipment Quotation

The following pricing is based on City of Rochester Hills RFP-RH-25-054 contract awarded April 2026

Truck# 78

Chassis information:

2027 Ford F250, 56" CA, 8' bed, SuperCab, 4x4, vinyl floor, factory camera, upfitter switches & plow prep

Install ProTech Aluminum Mesh Cab Rack 24" to mount antenna & mini lightbar brackets (mo. 57LP-6840-24)

Install Custom Lighting & Electrical including the following:

Chassis switches for warning & work lighting including:

Grille Flashers, Rear Flashers, Side Work Lights & Rear Work Lights

Four (4) SoundOff mPower (mo. EMPS20V38-P) amber/green flashers flush-mounted:

Two (2) in chassis grille

Two (2) at rear near license plate

One (1) SoundOff Pinnacle (mo. EPL7PDPC) amber/green mini lightbar on cab rack

Two (2) SoundOff Intersector (mo. ENT2B3P) amber/green flashers under side mirrors

One (1) Whelen Traffic Advisor (mo. TACF-85) and in-cab control mounted on cab rack

Five (5) Maxxima (mo. MWL-47) work lights, 2 side-facing & 2 rear-facing on cab rack, 1 rear-facing on toolbox

Backup alarm

Install Havis Console including the following:

C-B70: bracket

C-AS-840-11: angled console

C-FP-3: 3" filler plate

C-EB25-WTA-1P: Whelen plate, install controller

C-EB25-MXP-1P: Motorola plate, install radio

Install One (1) Weather Guard Super Hi-Side Toolbox including the following:

Aluminum diamond-plate, Clear

15.2 cubic feet capacity, 90-¼" L x 16-¼" W x 18" H (mo. 391-0-02)

Mounted on streetside bed rail

Install Luverne Grip-Step running boards for SuperCab (mos. 415078 & 401723)

Install New Thieman TopLifter Hydraulic Liftgate including the following:

Model TT 15 EST AL 56 x 26+6 2pc Galvanized

Platform dimensions are 56" wide x 26" plus a 6" tapered ramp

Extruded aluminum two-piece, fold-down platform

Dual cylinder series

Lifting capacity of 1,500#

Split-style non-towing bumper

Power-up & power-down functioning

12 VDC electric-over-hydraulic

TRUCK & TRAILER *Specialties, Inc.*

900 Grand Oaks Drive | Howell, MI 48843 | www.ttspec.com | ph: (517) 552-3855 | fx: (517) 552-3666

Standard toggle control switch at gate for up & down
Keyed power to liftgate
No interference with EOM installed receiver-type trailer hitch
Remount factory back-up camera in mounting hardware kit
Galvanized undercarriage in lieu of painted

Above equipment, installed pricing: \$16,550.00 ea.

Minimum full 1-year warranty on parts and labor on all equipment.

Payment Terms: Net 30 days. Pricing effective for 30 days.

FOB: City of Berkley

Delivery: 10 weeks on Havis, allow 2-3 weeks for installation following

Thank you for the opportunity to quote.

Respectfully submitted by,
Jon Luea/Brian Bouwman

MEMORANDUM

To: Madam Mayor and Members of City Council
From: Kristen Kapelanski
Date: September 8, 2026
Subject: Five-Year Master Plan update by Carlisle Wortman Associates budgeted purchase.

Madam Mayor and Members of City Council,

Background

- The Michigan Planning Enabling Act (MPEA) requires all communities in the State of Michigan to update their Master Plan every five years. The City of Berkley went through a full Master Plan rewrite five years ago.
- In 2024, the MPEA was amended to mandate that all master plans include an assessment of the community's existing and forecasted housing demands, along with strategies and policies to address those demands. While the previous Master Plan did include some of these elements, it did not include the aforementioned assessment with specific implementation strategies.
- Under the City's existing Professional Services Contract for planning consultation services with Carlisle Wortman Associates, staff is proposing the required five-year Master Plan update focusing on the state-mandated housing components.

Summary

- The Community Development Department seeks approval to authorize the City Manager to enter into a contract to update the Master Plan with Carlisle Wortman Associates, pending City Attorney review.
- The total cost of the contract is a not to exceed amount of \$27,345 with additional optional costs.
- This project was planned and budgeted for as part of the 2026-2027 budget process.

Recommendation

Motion to (approve/deny/postpone) the Master Plan update contract with Carlisle Wortman Associates subject to City Attorney review and execution by the City Manager.



Carlisle | Wortman
ASSOCIATES, INC.

117 NORTH FIRST STREET SUITE 70 ANN ARBOR, MI 48104 734.662.2200 734.662.1935 FAX

**AGREEMENT FOR MASTER PLAN UPDATE ASSISTANCE SERVICES
ZONING ORDINANCE IMPLEMENTATION POLICIES**

THIS AGREEMENT, Entered into this _____ day of _____, 2026 by the **City of Berkley** hereinafter referred to as the “Client” and **Carlisle/Wortman Associates, Inc.** hereinafter referred to as the “Consultant.”

WHEREAS, The Client desires to engage the Consultant to provide Master Plan Update Assistance services.

NOW, THEREFORE, In consideration of the foregoing, and of the mutual agreement hereinafter set forth, the parties hereto legally intending to be bound hereby do agree for themselves and their respective successors and assigns as follows:

SECTION 1.0

SCOPE OF WORK

The Consultant for its part agrees to provide **Master Plan Update Assistance Services** in accordance with a Scope of Work described in **Exhibit A** attached hereto.

SECTION 2.0

COLLECTION OF DATA

It is understood that the Consultant will have the cooperation of the Client in the collection of basic data and other information for the above work. This shall include the transmittal of base maps in GIS or AutoCAD files, if available.

SECTION 3.0

SCOPE AND PAYMENT FOR SERVICES

- 3.1 Planning Consultation Services** – At the request of the Client, the Consultant shall perform consultation services relative to **Master Plan Update** as described in **Exhibit A**. The Consultant shall be paid in accordance with the not-to-exceed project costs and the hourly rates depicted in **Exhibit B** attached hereto.
- 3.2 Terms of Payment** - The Consultant shall present the Client with an itemized invoice each month based on work performed in the previous month. Invoices shall be paid within thirty (30) days after receipt by the Client.

Benjamin R. Carlisle, *President* John L. Enos, *Vice President*
Paul Montagno, *Principal* Megan Masson-Minock, *Principal* Laura Kreps, *Principal* Brent Strong, *Principal*
David Scurto, *Principal* Sally M. Elmiger, *Principal* Craig Strong, *Principal* Douglas J. Lewan, *Principal*
Richard K. Carlisle, *Past President/Senior Principal* R. Donald Wortman, *Past Principal*

SECTION 4.0**REPRESENTATION**

It is understood and agreed that **Benjamin Carlisle** will represent the Consultant and **Kristen Kapelanski** will represent the Client in all matters pertaining to this Agreement. **Megan Masson-Minock, Michelle Marin, Matteo Passalaqua, and Brady Heath** will serve as the Planning Consultants. From time to time, the Consultant may use additional personnel within the firm or sub-consultants to assist in the execution of matters pertaining to this contract.

SECTION 5.0**OWNERSHIP OF MATERIALS**

- 5.1** Any work product, materials, and documents produced by CWA pursuant to this Agreement shall be and remain property of Client and shall not be made subject to any copyright unless authorized by Client. CWA hereby assigns to Client the copyright to all works prepared, developed, or created pursuant to the services outlined in this Agreement, including the rights to: (1) reproduce the work; (2) prepare derivative works; (3) distribute copies to the public by sale, rental, lease, or lending; (4) perform the works publicly; and (5) to display the work publicly. CWA waives its right to claim authorship of the works, to prevent its name from being used in connection with the works, and to prevent distortion of the works.
- 5.2** Other materials, methodology and proprietary work used or provided by CWA to Client not specifically created and delivered pursuant to the Services outlined in this Agreement may be protected by a copyright held by CWA and CWA reserves all rights granted to it by any copyright. Client shall not reproduce, sell, or otherwise make copies of any copyrighted material, subject to the following exceptions: (1) for exclusive use internally by Client staff and/or employees; or (2) pursuant to a request under the Michigan Freedom of Information Act, MCL 15,231, *et seq.*, or any other state or federal open records act, to the extent that such statutes apply; or (3) pursuant to law, regulations, or court order. CWA waives any right to prevent its name from being used in connection with the services.
- 5.3** CWA will be provided with a copy of the Client's Freedom of Information Act ("FOIA") policy. Client is responsible for responses to FOIA requests, and CWA shall not directly respond to any third parties regarding any received FOIA requests. Upon receipt of a FOIA request, CWA shall immediately give that request to the Client Clerk. CWA shall provide specific information requested by Client for response to the FOIA request by the date and time requested by the Client Clerk or in a specific format if so requested by the Client Clerk.
- 5.4** If CWA receives a claim for damages, a summons or complaint, a subpoena or other document concerning a request for money damages, a threat of a lawsuit, or any court action proceeding, CWA shall immediately hand deliver these documents to the Client Clerk.
- 5.5** In the event of litigation, Client acknowledges that CWA can only produce information or materials requested at any point in the litigation process with authorization from the Client Attorney or designated Legal Counsel. Client agrees to defend CWA against any and all claims when CWA is operating under the direction of the Client Attorney, or other designated Legal Counsel, regarding such matters.

SECTION 6.0**INSURANCE AND LIMITATION OF LIABILITY**

- 6.1** During the term of this agreement, the Consultant agrees to procure and maintain in effect insurance policies in the amounts and with the types of coverage shown below:
- a) Professional liability insurance protecting the Consultant and its employees in an amount not less than \$2,000,000.
 - b) Workers Compensation Insurance in the form and amount required by Michigan law.
 - c) Commercial General Liability Insurance on an "Occurrence Basis" with limits of liability not less than \$2,000,000 per occurrence and/or aggregate combined single limit, Personal Injury, Bodily Injury and Property Damage.
- 6.2** The Client and the Consultant shall have no liability to each other for any claim relating to this agreement in excess of the fees and expenses paid to the Consultant except pursuant to indemnification obligations concerning third party claims under Section 7.0. In no event shall the Client and the Consultant be liable to each other for indirect, special, incidental, or consequential damages, even if the Client and the Consultant have been advised of the possibility of such damages. Except as otherwise specifically provided in this agreement, neither party's liability to the other party under this Agreement shall exceed the total amounts paid or payable by the Client under this agreement.

SECTION 7.0**INDEMNIFICATION**

CWA agrees, to the fullest extent permitted by law, to indemnify and hold Client harmless from damages and losses arising from the negligent acts, errors or omissions of CWA in the performance of professional services under this Agreement, to the extent that CWA is responsible for such damages and losses on a comparative basis of fault and responsibility between CWA and Client. CWA is not obligated to indemnify Client for Client's own negligence.

SECTION 8.0**GENERAL PROVISIONS**

- 8.1** The Exhibits attached to and referenced in this Agreement are incorporated into this Agreement by reference and expressly made an integral and component part of this Agreement for all purposes and shall be binding upon the Parties. References to any Exhibit in this Agreement shall be deemed to include this reference and incorporation.
- 8.2** Any notice under this Agreement shall be addressed and directed to the representatives of the Parties identified in Section 4.0.
- 8.3** The headings contained in this Agreement are for convenience in reference and are not intended to define or limit the scope of any provision of this Agreement.

- 8.4** This Agreement is intended solely for the mutual benefit of the Parties hereto, and there is no intention, expressed or otherwise, to create any rights or interest for any party or person other than the Parties.
- 8.5** CWA shall perform the services under this Agreement as an independent contractor and shall not be deemed by virtue of this Agreement to have entered into any partnership, joint venture, employer/employee or other relationship with Client other than as a contracting party and independent contractor. Employees of CWA shall not be deemed to be employees of Client for purposes of compensation, fringe benefits, workers' compensation, unemployment compensation, minimum wage laws, income tax withholding, social security, or any other purpose.
- 8.6** CWA will not discriminate against any employee or applicant for employment because of race, color, religion, sex or national origin. CWA will take affirmative action to ensure applicants are employed, and employees are treated during employment without regard to their race, color, religion, sex or national origin. Such action shall include, but not be limited to the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.
- 8.7** Nothing in this Agreement shall be construed to waive, limit, or otherwise modify any governmental immunity that may be available by law to Client, its officials, employees, contractors, agents, volunteers, or any other person acting on behalf of Client and, in particular, governmental immunity afforded or available pursuant to the Michigan Governmental Immunity Act, MCL 691.1401, *et. seq.*
- 8.8** This Agreement constitutes the entire agreement between the Parties, and all prior discussion, agreements and understandings, whether verbal or in writing, are merged into this Agreement.
- 8.9** If any section, subsection, clause, phrase or portion of this Agreement is for any reason held invalid, unlawful, or unconstitutional by any court of competent jurisdiction, that portion shall be considered a separate, distinct and independent portion of this Agreement, and the remaining portions of this Agreement shall remain in full force and effect.

SECTION 9.0

TERMS OF AGREEMENT

The term of this Agreement shall be for a period **from the date first entered into through completion of the Scope of Work, estimated to by no later than September 30, 2027 or until the project scope of work has been completed**, unless mutually extended.

This Agreement may be terminated by either the Client or Consultant individually or jointly upon sixty (60) days written notice. Compensation during the notice period would be paid by the Client to the Consultant if services are faithfully rendered to the Client.

IN WITNESS WHEREOF, The Consultant and the Client execute this Agreement as of the date first set forth in this Agreement.

WITNESS

CLIENT

Crystal VanVleck
City Manager
City of Berkley

Kristen Kapelanski
Community Development Director
City of Berkley

WITNESS

CONSULTANT

Ben Carlisle, AICP
President
Carlisle Wortman Associates, Inc.

EXHIBIT A

SCOPE OF WORK

All Planning work will be performed in accordance with the rate schedule shown in **Exhibit B** attached hereto. Such work shall include but is not limited to the following:

A. Project Initiation and Plan-to-Plan Meeting

CWA will initiate the project and facilitate a joint working session with the Planning Commission and City Council to define priorities for the update.

- Meet with City staff to confirm the project schedule, responsibilities, available data, communication procedures, and expectations.
- Review the current Master Plan, recent planning and zoning initiatives, relevant development trends, and available demographic information.
- Prepare for and facilitate one joint Plan-to-Plan meeting, including a facilitator script, presentation materials, invitations, agenda and packet preparation, meeting logistics, facilitation, and a written summary.

B. Housing Analysis and Community Forum

Housing will be the principal substantive focus of the Master Plan update.

- Analyze recent residential building permit activity, demographic and household data, and information from the Michigan Housing Data Portal and other appropriate sources.
- Assess existing and forecasted housing demand, housing supply and types, tenure, cost and affordability, age and condition, accessibility, aging in place, and the needs of households at different income levels and life stages.
- Review how existing land-use and zoning policies affect housing preservation and production and identify opportunities to accommodate an appropriate range of housing options while respecting established neighborhood character.
- Prepare for and facilitate one community housing forum, including meeting materials, presentation and facilitation, GIS or graphic support, meeting logistics, and a summary of public input.
- Prepare updated housing goals, policies, and implementation strategies responsive to the analysis, community input, and applicable statutory requirements.

C. Demographics and Existing Land Use

CWA will update the factual foundation of the Master Plan.

- Update population, household, age, income, tenure, and other demographic information relevant to the Master Plan and housing analysis.
- Review and update the existing land-use information and map using available City and GIS data.

D. Draft Master Plan Update

CWA will prepare a focused update of applicable Master Plan text, maps, goals, policies, and implementation recommendations.

- Update the housing chapter as the principal substantive component of the project.

- Update other portions of the Plan where information is outdated, inconsistent, or no longer reflective of City policy.
- Review and revise the Future Land Use Map and related recommendations where necessary.
- Update the implementation program to identify practical actions, anticipated timeframes, and responsible parties.
- Prepare one consolidated staff review draft and incorporate one coordinated round of City staff comments.

E. Review and Adoption

CWA will assist the City through the statutory review and adoption process.

- Present the draft to the Planning Commission and revise the document based on consolidated direction.
- Assist the City with notice, distribution, and public review procedures required by the Michigan Planning Enabling Act.
- Prepare for and attend the required public hearing and adoption meetings.
- Complete final revisions and provide the final adopted Master Plan in editable and PDF electronic formats.

F. Project Management

CWA will provide regular coordination with City staff, internal team management, schedule and budget tracking, and routine project communications throughout the assignment.

G. City Responsibilities

The City will:

- Designate a primary project contact and provide timely, consolidated comments and direction.
- Provide available GIS files, building permit records, prior plans and studies, and other relevant City data.
- Arrange meeting dates and locations and provide required public notices and legal publications.
- Provide access to meeting facilities and technology and cover direct costs for food, printing, postage, publication, room rental, or similar third-party expenses unless otherwise agreed.
- Coordinate review by City departments, boards, commissions, and legal counsel.

H. Assumptions and Additional Services

The scope is based on the meetings, and one coordinated round of staff review expressly identified above. Additional meetings, workshops, focus groups, rounds of revision, detailed corridor or subarea plans, market or fiscal impact studies, engineering or environmental analyses, zoning ordinance amendments, printing, mailing, publication, translation, or other services not expressly included are additional services and require written authorization.

EXHIBIT B RATES & FEES

The estimated fee is based on the scope and assumptions in work plan above and CWA's 2026-2027 contractual hourly rates with the City of Berkeley. This is a "not to exceed" estimate, meaning actual costs may be lower depending on the final scope and needs—for example, in areas such as supplies, printing, or reduced mapping detail.

Task	Scope Component	Hours	Estimated Fee
A	Project Initiation and Plan-to-Plan Meeting	40	\$5,560
B	Housing Analysis and Community Housing Forum	77	\$10,870
C	Demographics and Existing Land Use	14	\$2,020
D	Draft Master Plan Update and Adoption Process	101	\$14,455
TOTAL ESTIMATED FEE		232	\$27,345

Optional Services

Optional Service	Estimated Fee
Online community survey	\$8,790

Any additional in-person meetings or work not listed in the above scope of work will be charged hourly at the following rates:

Project Team	Hourly Rate
Principal	\$165
Senior Associate	\$145
Associate	\$135
Community Planner	\$125
Graphics (GIS) Technician	\$110
Support Staff	\$95

Any expenses beyond those specified above will be charged at the following rates:

Expense	Rate
AutoCAD/GIS Operation	\$35/hr
Mileage	70¢/mi.
Supplies, Prints, Mailing	cost + 20%

MEMORANDUM

To: Madam Mayor and City Council
From: Crystal VanVleck
Date: September 8, 2026
Subject: Consideration of Proposal from Berry Dunn for Strategic Plan Facilitation.

Madam Mayor and Members of City Council,

Background

The City of Berkley currently operates under the guidance of the 2025-2027 Strategic Framework. This plan defined priority areas and addressed some foundational needs of the municipality. As we approach the end of this framework, it's time for the City to embark on the comprehensive planning process to establish the next generation of priorities.

Summary

- To achieve this, the City released a Request for Proposals in May 2026 to seek a qualified firm to lead us through this process.
- The primary objective is to assess the City's current position, engage the community, and draft a visionary and strategic plan to lead the City of Berkley.
- The City received many proposals from qualified firms, and embarked on a robust evaluation process to choose the firm that we believe is most equipped to achieve our scope of work, including a meaningful engagement process, and a plan that is both inspiring and actionable.
- Berry Dunn is a highly qualified firm who has aided many local governments in similar processes. Their proposal meets all the requirements we outlined in our scope, including a statistically valid survey through the ETC Institute, and also includes a digital engagement tool.
- The proposal is for \$86,800. The City budgeted \$70,000 for this initiative based on an early estimate of the work. I am recommending a budget amendment of \$16,800 to 101-101-817-000.

Recommendation

Motion to (approve/postpone/deny) the proposal from Berry Dunn and authorize the City

Manager to enter into a contract upon review and approval from the City Attorney and a budget amendment of \$16,800 to 101-101-817-000.

PROPOSAL

PROPOSAL FOR:

City of Berkley

REQUEST FOR PROPOSALS FOR A:

Strategic Plan

SUBMITTED BY:

Berry, Dunn, McNeil & Parker, LLC
2211 Congress Street, Portland, ME 04102

Seth Hedstrom, PMP®, LSSGB

Project Principal

Berry, Dunn, McNeil & Parker, LLC
shedstrom@berrydunn.com

Maddison Powers Spencer, MPA

Project Manager and Facilitator

Berry, Dunn, McNeil & Parker, LLC
maddi.powers@berrydunn.com

June 26, 2026, before 5 p.m. EDT

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1. Cover Letter

June 26, 2026

City of Berkley
Attn: Crystal VanVleck, City Manager
3338 Coolidge Hwy, Berkley, MI 48072

Dear Crystal VanVleck,

On behalf of Berry, Dunn, McNeil & Parker, LLC (“BerryDunn,” “we,” “our”), I am pleased to submit this proposal in response to the City of Berkley’s (the City’s) request for proposals (RFP) for a Strategic Plan. We have read the City’s request and reviewed its terms, conditions, and the contents presented. Our proposal is a firm and irrevocable offer valid for 90 days from the submission deadline of June 26, 2026.

As the City will learn more about in the following pages, our firm is a nationally recognized professional services firm headquartered in Portland, Maine, with nine office locations. We are focused on **inspiring organizations to transform and innovate** and have lived our core values and preserved our reputation for excellence throughout our 52-year history. Our firm’s culture is centered on a deep understanding of our clients’ commitment to serving the public. We proudly tailor each of our projects to recognize the work our clients do every day. **We care about what we do, and we care about the people impacted by our work—including those at the City and in the Berkley community.**

As further described in key sections of our proposal, we possess several attributes that other proposers would be troubled to match:



Insights from **50+ strategic plans** in the last five years, bringing proven practices to **Upper Midwest** communities



Technology-enabled engagement and **statistically valid surveying** to capture diverse stakeholder perspectives



Experienced local government advisors with **three decades** of strategic planning and implementation expertise



Facilitation methodology **proven to build consensus** and translate priorities into **actionable plans**

We are confident that our approach will provide the City with a practical, actionable strategic plan that supports its goals and long-term priorities. We appreciate the opportunity to propose, and the time and consideration taken by the City to review our submission.

As a principal and leader in our Local Government Practice Group, I can attest to the accuracy of our materials, and I am legally authorized to bind, negotiate, make presentations on behalf of, and commit our firm and our resources. **If you have questions regarding our proposal or updates on the evaluation process, please consider me your primary point of contact and feel free to contact me directly.**

Sincerely,



Seth Hedstrom, PMP®, LSSGB, Project Principal

Berry, Dunn, McNeil & Parker, LLC

t: 207.541.2212 | e: shedstrom@berrydunn.com

2. Firm Background and Qualifications

Introducing BerryDunn

BerryDunn was formed in 1974 and has 76 principals, 35 owners, and nine office locations. We have experienced sustained growth throughout our **52-year history**.

We employ more than 990 staff members—including more than 400 in our Consulting Services Team. From extensive project experience for more than 900 state, local, and quasi-governmental agencies, our team brings valuable perspectives to every engagement. Additionally, our team has experience serving state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents the City serves.

Our firm provides a full range of professional services—including organizational development, technology planning, business process improvement, cost of service and financial analysis, community services planning, and more—supporting our ability to complete the requested tasks.

With organizational development as a core tenet of our work, we are pleased to offer the following services to benefit the City:

- **Strategic planning**
- Community/stakeholder engagement
- Leadership development
- Executive coaching
- Organizational change management
- Organizational assessment
- Business process improvement
- Performance measurement

Below, we illustrate the overall organization of BerryDunn's Local Government Practice Group. We provide unparalleled expertise and unique insights across these practices, supporting our clients in solving some of their biggest challenges, addressing opportunities to improve and plan, and carefully considering how our projects impact the organization at the enterprise and departmental levels.

Figure 1: Overview of BerryDunn's Local Government Practice Group



Specialized Expertise of the Enterprise Organizational Development Practice

BerryDunn's dedicated Enterprise Organizational Development Practice offers both an intimate project experience and a national perspective to support our clients' desire to transform and innovate. We recognize how important it is that the City establishes a partnership with a firm that understands that work at this level of impact requires a guided hand and a tailored approach to meet them where they are and lead them to where they want to go.

Work of this nature touches all aspects of an organization, including the City's elected officials, staff, stakeholders, community members, and visitors. As such, this initiative requires a layered approach that offers the attention, guidance, and follow-through that will support positive, sustainable, and long-term change.

Our efforts are centered on sound partnership with our clients. We guide projects at various stages and take the time to properly gauge availability and resources to help ensure our clients receive consistent, reliable, and quality service. We support a variety of organizational development initiatives, providing services that include project management, stakeholder and community engagement and analysis, strategic plan development, implementation planning, and progress monitoring, among others.

Partnership with ETC Institute

We are pleased to partner with ETC Institute to conduct the City's statistically valid community survey.



ETC Institute is a market research firm that specializes in the design and administration of market research for governmental organizations. Their major areas of emphasis include resident satisfaction surveys, community planning surveys, business surveys, parks and recreation surveys, transportation surveys, employee surveys, voter opinion surveys, focus groups, and stakeholder interviews. Since 1982, ETC Institute has completed research projects for organizations in all 50 states. ETC Institute has designed and administered more than 4,000 statistically valid surveys, and its team of professional researchers has moderated more than 1,000 focus groups and 2,000 stakeholder meetings.

ETC has a long-standing track record of success in the local government sector, providing robust data and meaningful analysis that help agencies prioritize investments, evaluate programs, and plan for future growth. Their use of advanced, multi-modal survey methodologies—including mail, online, and telephone outreach—helps ensure high levels of representation and statistical reliability, particularly among traditionally underrepresented populations.

ETC is well-positioned to support the City. Their familiarity with regional trends and challenges, combined with their proven methodology, allows them to deliver nuanced and actionable findings that reflect the City's unique community values. ETC's collaborative approach and clear communication make them a trusted partner for local governments seeking to align services with resident expectations and elevate the overall quality of life.

With ETC as a partner, the City will gain access to meaningful data and insights that strengthen the foundation of its strategic plan, helping to ensure that future investments are responsive to community needs and backed by sound evidence.

3. Relevant Experience

Commitment to the State of Michigan

With BerryDunn, the City will be served by a firm and project team members who have **demonstrated their commitment to the State of Michigan (the State)** through similar and other types of consulting engagements. Below, we share our clients in the State.

- Bloomfield Township
- City of Ann Arbor
- City of Detroit
- City of Mt. Pleasant
- City of Saline
- City of Traverse City
- Detroit Wayne Integrated Health Network
- Grand Rapids Community College
- Kalamazoo County Finance Department
- Macomb Community College
- Marquette County
- Michigan Department of Education
- Michigan Department of Health and Human Services
- Oakland University
- Ottawa County
- Saginaw County
- Schoolcraft Memorial Hospital
- Township of Canton
- Washtenaw County
- Wayne State University

We also take pride in our local presence, as we have one dozen employees who reside in the State and/or have worked in State's local government landscape. We will leverage their insights, expertise, and locality when and where it will most benefit the City.

Strategic Planning

Strategic Planning

BerryDunn has been offering strategic planning services for over 30 years and has worked with a long list of local government clients. Through this experience, we have assisted a wide range of clients with various services related to those requested by the City.

Below, we provide a representative list of clients for whom our project team members have performed similar services in recent years. An asterisk indicates that we have been selected to conduct the work; however, work has not yet begun.

- Bloomfield Township, Michigan
- City of Apopka, Florida
- City of Beaverton, Oregon
- City of Blue Springs, Missouri
- City of Capitola, California
- City of Maryland Heights, Missouri
- City of Menifee, California
- City of Milton, Georgia
- City of New Braunfels, Texas
- City of Peoria, Illinois
- City of Port Arthur, Texas
- Lane County, Oregon
- Laramie County, Wyoming
- Marquette County, Michigan
- Milwaukee County, Wisconsin
- Onslow County, North Carolina



Did You Know?

BerryDunn has developed more than 50 strategic plans in just the past five years alone using a **boutique, relationship-driven approach**.

Your proposed project team works together frequently, particularly on similar initiatives in the Midwest.

- City of Colorado Springs, Colorado
- City of Columbia, Missouri
- City of Cooper City, Florida
- City of Coppell, Texas
- City of Creswell, Oregon
- City of Edgewater, Colorado
- City of Ennis, Texas
- City of Evans, Colorado
- City of Foley, Alabama
- City of Fort Bend, Texas*
- City of Fort Pierce, Florida*
- City of Gresham, Oregon
- City of Groveland, Florida
- City of Homestead, Florida
- City of Indio, California
- City of Janesville, Wisconsin
- City of Lauderdale, Florida
- City of Lawrenceville, Georgia
- City of Margate, Florida
- City of Redlands, California
- City of Santa Monica, California
- City of Smithville, Missouri
- City of St. Charles, Illinois
- City of Washougal, Washington
- City of Waukesha, Wisconsin
- City of Wausau, Wisconsin
- City of Westminster, Colorado
- Cumberland County, Pennsylvania
- DuPage County, Illinois
- Erie Housing Authority, Pennsylvania
- Jefferson County, Washington
- Johnson County, Iowa
- Lake County, Illinois
- Lancaster County, Nebraska
- Orange County, North Carolina
- Pitt County, North Carolina
- Santa Clara County, California
- Sarpy County, Nebraska
- St. Johns County, Florida
- Tompkins County, New York
- Town of Chelmsford, Massachusetts
- Town of Holliston, Massachusetts
- Town of Zebulon, North Carolina
- Vallejo Flood and Wastewater District, California
- Vancouver Housing Authority, Washington
- Village of Northbrook, Illinois
- Washington County, Minnesota
- Weld County, Colorado

We include detailed descriptions for three relevant projects—including project dates, scope, and a current contact—in **Section 8. Required Forms**. We would be happy to provide additional information upon request.

Work Samples

In **Appendix B. Work Samples**, we invite the City to view the strategic plans our team developed for Bloomfield Township, Michigan, and the City of Janesville, Wisconsin.

As an example of ETC's deliverables, we invite the City to review the 2025 City of Sterling Heights Residential Survey developed for the City of Sterling Heights, Michigan.

4. Project Approach and Methodology

A Strategic Plan Designed Uniquely for Berkley

The City of Berkley has built a reputation as a community that successfully balances small-town character with the opportunities and amenities of the Detroit metropolitan region. Home to around 15,000 residents, the City is known for its walkable neighborhoods, vibrant downtown, strong schools, and welcoming atmosphere, attracting new residents and investment while remaining rooted in the values that have defined it for generations. This balance is reflected in Berkley's mission to enhance economic vitality, preserve neighborhoods, and foster progress, as well as its vision to be a thriving 21st-century municipality supported by strong neighborhoods, walkable design, and a caring community.

Against this background, the City seeks a robust strategic planning process that provides a meaningful overview of the City's priorities and establishes a clear path forward for the organization and community. Through 2024 and 2025, City Council and department leadership established the City's first Strategic Framework, creating a strong foundation for this next phase of planning. Building upon this framework, as well as the City's 2021 Master Plan, 2026 - 2030 Parks and Recreation Master Plan, and Economic Development Strategy, this initiative presents an opportunity to assess Berkley's current position, engage stakeholders in shaping future priorities, and develop a strategic plan that reflects the community's values. Equally important is capturing perspectives from residents, businesses, elected officials, staff, and community partners through meaningful engagement, including a statistically valid community survey.

We also recognize that the City's ultimate goal is an actionable strategic plan that serves as a management tool. The City has emphasized the need for implementation guidance, accountability, performance measurement, and progress tracking to help ensure strategic priorities translate into measurable results. By aligning community aspirations with organizational priorities, establishing ownership for initiatives, and defining clear metrics for success, the updated strategic plan will help Berkley make informed decisions, strengthen accountability, and continue delivering on its promise as a **"Small City – Big Impact!"** community.

Figure 2: Annual Events Such as Berkley CruiseFest Showcase the City's Community Spirit.



Approach and Guiding Methodologies

Our project team will engage the City's various stakeholders in ways that will maximize creativity and innovation and inspire collaboration for achieving its vision, including:

- City Council
- The City Manager and Executive Leadership Team
- Department heads and other key staff
- Residents and other key community stakeholders

It is our goal to help the City develop a strategic plan that can be reasonably implemented with support and commitment from these stakeholders and others. A strategic plan is a living document that remains applicable, helps navigate in times of organizational changes, and defines the organization's reason for being. It establishes a clear and compelling vision; sets measurable objectives and performance measures; lays out the desired impact on and value added to communities; and helps clarify direction and focus, assisting in aligning resources to accomplish strategic objectives.

Having a clear, concrete strategic direction will help keep the City on track and focused on what is important when challenges, changes, and unanticipated events occur. It also helps ensure decisions, policies, plans, programs, and processes are designed through the lenses of stewardship of resources, accessibility, and collective impact.



The North Star Vision

An organization's North Star Vision serves as a unifying focal point for long-term achievement. It must be clear enough for stakeholders to know what they are working toward and how to get there. Stakeholders must see their role in this vision and believe in the organization's dream, as they will play a vital role in executing on it.

Partnering with Your Leaders

A critical component of our project management approach is building intentional partnerships with organizational leaders. To help ensure project success, we orient organization and project leaders to our process, build a foundation of shared understandings, and work together toward the common goal of developing an achievable and impactful strategic plan. We serve as trusted advisors, using our extensive experience to guide the process in collaboration with the unique desires and needs of the City's leaders.

Planning in Context—A Proven Approach, Tailored to Your Needs

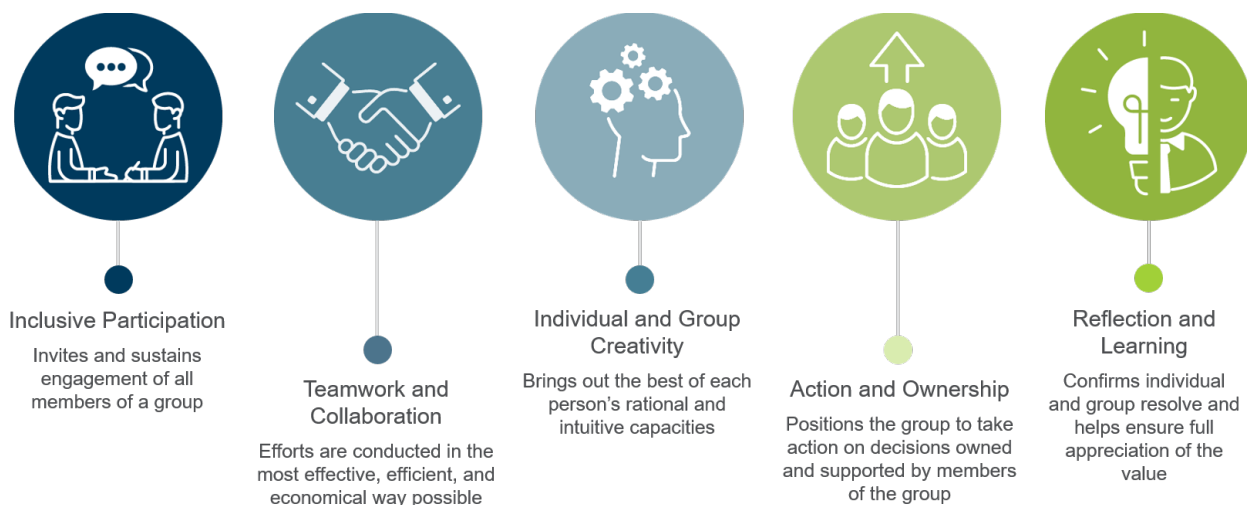
Our specialized knowledge, sound methodology, and extensive experience with a wide variety of local government clients allow us to provide a proven strategic planning process, as well as the dexterity to tailor that process to the unique needs and circumstances of each client. This includes customization based on the City's size, resources, previous experience with strategic planning, unique organizational and stakeholder needs, and more. With BerryDunn, the City can expect localized, "white glove" service from a firm with both regional and national perspectives.

Achieving Consensus and Quickly Moving Groups to Action

We will design and conduct a well-facilitated strategic planning process using data and personal knowledge to assess the City's environment. Our project team will use the ICA ToP® facilitation methodology to help ensure the City's strategic planning sessions are highly collaborative and inclusive.

The ToP® methodology emphasizes structured participation that pulls information into the group's thinking process and creates a clear intention, helping members of the group align with one another and reach consensus. Structured participation encourages the values shown in Figure 3 below.

Figure 3: Values Encouraged by Structured Participation as Defined by the ICA ToP® Facilitation Methodology



Applying Effective Tools

Another key to success is aligning the organization's financial resources with strategic priorities. When groups have difficulty agreeing on priorities or selecting just a few to focus on, we use a cost-benefit scoring sheet that helps the group score the impacts, risks, level of difficulty, and effort for each strategy or objective to determine the ones to prioritize. We can customize this tool for use with the City if the group is having difficulty achieving consensus.

Effectively Engaging Stakeholders

We will utilize several strategies to effectively engage and collect data and information from the City's Council, leadership, staff, and community. This includes developing a communications strategy, conducting a community survey, facilitating focus groups, interviews, and community meetings, and creating an interactive project landing page and engagement website via Social Point.

Interviews and Focus Groups

In various professional roles, our team has gained extensive facilitation experience by interviewing and presenting to a wide variety of community stakeholders.

Our proposed project team includes experienced facilitators trained in the ICA ToP® facilitation methodology. They have the skills and knowledge necessary to establish credibility, build trust, ask the right questions, and elicit information from a wide range of groups and participants.



Did You Know?

Our engagement approach reflects decades of experience working with local governments—including those serving communities with **fewer than 15,000 residents**.

We avoid one-size-fits-all outreach, **tailoring engagement methods to the community** and adapting in real time to meet people where they are.

Statistically Valid Surveys

Survey Design – Prior to administering a survey, we will review any previous surveys administered by the City and their associated results. BerryDunn and our proposed project partner, ETC Institute, has conducted many surveys for a variety of projects. We understand the importance of asking the right questions to target relevant insights. We keep the survey short and simple, using terminology familiar to all participants, and we conduct a pilot with departmental leadership and project team members to help identify unclear items and refine questions.

Survey Sample and Distribution – BerryDunn and ETC Institute will work with the City and its in-scope department(s) to determine the appropriate audience and distribution method for the survey based on project goals. To increase response rates and help ensure survey success, the survey format, introduction, and distribution will be designed to make the activity accessible and compelling for the designated audience.

Survey Questionnaire – Depending on the project and the target audience, BerryDunn and ETC Institute often include demographic questions such as gender, race, age, income, housing, and education to look for potential variation in the experience of historically marginalized people in disaggregated data. The demographic fields are voluntary to limit fears that participants might have about anonymity. This honors and supports a methodology that removes bias from the process.

Measuring Survey Effectiveness – We measure effectiveness in a variety of ways, including response rate, time spent completing the survey, and outcomes related to each survey question. The City may elect to target either 300 or 400 completed surveys based on its desired level of precision. A sample of 300 completed surveys will provide a margin of error of $\pm 5.7\%$ at the 95% confidence level, while a sample of 400 completed surveys will improve the margin of error to $\pm 4.9\%$ at the 95% confidence level. ETC Institute will also monitor demographic and geographic representation throughout the survey period and apply weighting methodologies as needed to help ensure the results accurately reflect the City's population.

Community Forums

BerryDunn facilitates open houses and community forums that are aimed at our target audiences, and we make our interactions fun, engaging, and welcoming, helping to meet people where they are and build rapport. We utilize these forums to gather input, engage in discussion, share information, and promote buy-in and consensus for strategic initiatives and future plans. We are innovative, creative thinkers and facilitators, making our community outreach interesting and something participants want to take part in.

Virtual Engagement

Social Point is a customizable community engagement platform that is used to inform stakeholders of project goals, objectives, and progress, and provide opportunities to interact and gather information. This tool has several features that we use frequently and as needed throughout strategic planning projects, such as forums, mapping, an ideas wall, and surveys. **Social Point is mobile-friendly and can be translated into 15 common languages, making it easy for the City stakeholders and residents to participate.**

With this tool, we will easily be able to set up a landing page and sub-pages for the City to capture the culture of the stakeholders it serves—providing opportunities for participants to contribute to the City's mission, values, vision, and strategic priorities.

We will also be able to track analytics and progress in real-time, promote participation, and set up email notifications to help ensure that, even in a remote environment, effective strategic planning and community engagement activities can take place.

We invite the City to view a recent Social Point site developed for Bloomfield Township, Michigan, below.

Bloomfield Township, Michigan

<https://berrydunn.mysocialpinpoint.com/bloomfield-township-strategic-plan/home>



Connecting Objectives to Outcomes and Resources

Our goal is to produce a strategic planning document that the City can actively use to track progress and report outcomes to internal and external audiences. Implementation planning is a crucial part of our proposed approach, where our team will work with the City to develop an Implementation Plan that maps out how the organization will execute its strategic priorities.

Performance tracking is an essential component in meeting an organization's goals and objectives. In developing performance measurements, we consider those factors that others may not—such as forecasting, environmental trends, and effective engagement—that help ensure performance measurement focuses not only on the activities associated with achievement, but also on the outcomes. As such, we will work with the City to establish the means to best track its progress and create a clear and achievable path toward its vision. We approach performance measurement using the angles of performance metrics (outcome-based and quantifiable) and outcome measures (focusing on the benefit to and impact on the community).

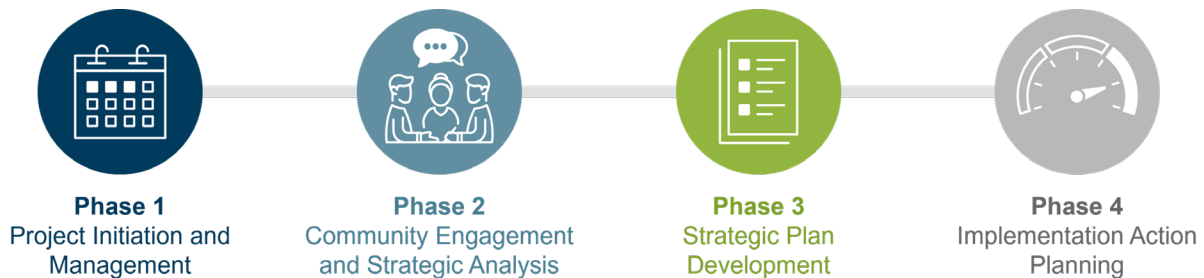
5. Proposed Work Plan and Timeline

Work Plan

BerryDunn strives to be flexible when it comes to development and execution of an effective work plan. We understand that no two projects are exactly alike and believe that **one of the primary reasons we have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs.**

Figure 4 presents an overview of our work plan intended to achieve the City's goals and objectives for this important initiative.

Figure 4: Work Plan Overview



Our proposed work plan is described in full detail below and on the following pages.



Phase 1: Project Initiation and Management

1.1 Conduct initial virtual project planning meeting. Upon conducting background research to familiarize ourselves with the City, we will conduct an initial virtual project planning meeting with the City Manager and project team to confirm project goals, milestones, roles, and expectations for stakeholder engagement. During this meeting, we will introduce key team members; identify known constraints; refine tasks, dates, and deliverables, as needed; and confirm approaches to communication, scope, risk, and resource management. We will also review potential formats for the Final City of Berkley Strategic Plan. Outcomes from this meeting will be used to refine the proposed Project Work Plan and Schedule.

1.2 Request and compile documents and data. We will request and compile documentation and data to help us better understand the current environment and inform engagement activities. Examples include:

- The City's current guiding Strategic Framework, Master Plan, Parks and Recreation Master Plan, and Economic Development Strategy
- Key performance metrics and program data
- Prior internal and external assessments
- Existing policies, organizational charts, staffing, and budget information
- Data from prior surveys and community and stakeholder engagement efforts
- Demographic, economic, and community data and forecasted trends from the U.S. Census Bureau, the U.S. Bureau of Labor Statistics, American Community Survey, U.S. Department of Education, Centers for Disease Control and Prevention, the Opportunity Index, and other state and local data sources

1.3 Develop the Project Work Plan Schedule. Building on the initial planning meeting and document review, we will develop a detailed Project Work Plan and Schedule outlining tasks, timelines, roles, and deliverables. This will also define agreed-upon project control procedures, including quality assurance and deliverable review and acceptance. After sharing draft materials in advance, we will facilitate a videoconference with the City's project team to review the drafts and gather input. We will incorporate feedback and finalize the documentation.

➔ **Deliverable 1: Project Work Plan and Schedule**

1.4 Identify key stakeholders and develop an associated communications strategy. We will work with the City to identify key stakeholder groups and develop a tailored engagement and communications strategy. This will include recommended engagement methods, messaging to build awareness and participation, and approaches for keeping the Board, staff, and community informed throughout the process. The strategy will also include kickoff and orientation presentations for the City's project team, City Council, and other leadership. All materials will be reviewed with the City's project team prior to finalization and distribution.

1.5 Develop interview guides and community survey questions. We will develop interview guides and draft statistically valid survey questions tailored to each engagement audience, focused on assessing the City's current conditions, strategic readiness, and barriers to success. Draft questions will be reviewed with the City, and feedback will be incorporated prior to finalizing the community surveys for administration.

1.6 Conduct Biweekly Project Status Meetings. Our project manager and lead facilitator, Maddison Powers Spencer, will conduct biweekly status meetings with the City's project manager throughout the engagement. These meetings will address completed and upcoming activities, risks and issues, anticipated challenges, and work products contributing to deliverable development.

➔ **Deliverable 2: Biweekly Project Status Meetings**



Phase 2: Community Engagement and Strategic Analysis

2.1 Coordinate stakeholder engagement logistics. We will coordinate with the City to schedule and handle logistics for community engagement activities, including interviews, focus groups, meeting-in-a-box packages, and community meetings. All logistics will be managed to help ensure we create accessible involvement, promote participation, and build trust with participants in our activities.

2.2 Design the statistically valid survey and prepare the sampling Plan. This task will include the following services:

- ETC Institute will meet by phone/videoconference with Consulting Staff and the City to discuss the goals and objectives for the project. To facilitate the survey design process, ETC Institute will provide sample surveys created for similar projects. It is anticipated that three to four drafts of the survey will be prepared before the survey is approved by the City. The survey will be up to six pages in length.
- ETC Institute will participate in meetings by phone/videoconference to develop the survey.

- ETC Institute will conduct a pilot test of the survey to help ensure the questions are understood. Based on the results of the pilot test, ETC Institute will recommend changes, if needed, to the survey.
- ETC Institute will select a random sample of residents to be contacted for the survey. The sample will be address-based. The sample may also include all residential households in the community.

➞ **Deliverable 3. Approved Survey Instrument**

2.3 Develop the City's Social Point site. We will customize the Social Point virtual engagement platform to support broad community participation and idea-sharing. We will work in collaboration with the City to help ensure its landing page is built thoughtfully and speaks to its culture. Within this landing page, City stakeholders will have access to an idea wall, forum, quick polls, and other engagement tools that will help gather information related to the City's current environment and the community's desired vision for the City's future.

2.4 Review and analyze City provided documents and data. We will review and analyze the documents and data requested in Task 1.2. This will be used to help us produce a Draft Environmental Scan and Strategic Analysis that will inform engagement activities.

2.5 Conduct employee engagement activities. We will conduct on-site or virtual interviews and focus groups with City Councilmembers, City leadership, staff, community partners, local businesses, and other stakeholders identified by the City, guided by previously developed protocols. We will also administer an employee survey, guided by protocols developed in Task 1.5. These activities will support an environmental scan and strategic analysis, helping us assess community needs, organizational priorities, service alignment, and opportunities for the future. Working with this broad range of stakeholders, we will gather diverse perspectives, build consensus around strategic priorities, and promote engagement, buy-in, and participation throughout the planning process.

2.6 Synthesize information in a Draft Environmental Scan and Strategic Analysis. We will synthesize findings from quantitative and qualitative research, document and data review, Social Point, and leadership and stakeholder interviews to develop a Draft Environmental Scan and Strategic Analysis. The draft will be a highly visual slide deck used to inform upcoming community forums and strategic planning sessions and will summarize the City's current economic, social, and environmental conditions; a SWOT Analysis; and key discovery outcomes. We will present the draft to the City's project team to solicit input and build consensus.

➞ **Deliverable 4: Draft Environmental Scan and Strategic Analysis**

2.7 Administer the statistically valid survey. This task will include the following services:

- ETC Institute will administer the survey by a combination of mail and online.
- ETC Institute will mail the survey and a cover letter (on City letterhead) to a sample of households in the City. Only one survey per household will be sent. Postage-paid envelopes will be provided by ETC Institute for each respondent. The City will provide a cover letter for the mailed survey. The cover letter will contain a link to an online version of the survey. Residents who receive the survey will have the option of returning the printed survey by mail or completing it online.
- ETC Institute will follow-up with residents who receive the mailed survey by sending texts, postcards, and a second mailing (if needed) to maximize participation in the survey. ETC Institute's fees include printing and mailing up to 3,000 surveys and 3,000 postcards. The goal will be to obtain completed surveys from 300 residents. A sample of 300 completed surveys will provide results that have a margin of error of +/-5.7% at the 95% level of confidence at the Study Area level. A sample of 400

completed surveys will provide results that have a margin of error of +/-4.9% at the 95% level of confidence at the Study Area level.

- ETC Institute will promote awareness of the survey using social media ads on Facebook and Instagram to encourage participation.
- ETC Institute will send the initial ads created for social media to BerryDunn for approval before any social media ads are published.
- All respondents who complete the survey online will be required to provide their home address when they finish the survey. ETC Institute will match addresses from respondents who complete the survey online to the addresses that were selected for the random sample to help ensure the participant is part of the random sample. If a respondent does not provide an address or the address is not part of the random sample, it will not be included.
- ETC Institute will monitor the distribution of the sample to help ensure that the sample reasonably reflects the demographic composition of the City with regard to geographic dispersion, age, gender, race/ethnicity and other factors. ETC Institute will weight the data as needed if one or more demographic groups is overrepresented or underrepresented relative to recent census estimates for the City's population.

➞ Deliverable 5. Initial Survey Results

2.8 Analyze results and compile Final Report. ETC Institute will submit a final report to the City. At a minimum, this report will include the following items:

- Formal report that includes an executive summary of the survey methodology and a description of major findings.
- Charts and graphs that show the overall results of each question on the survey.
- Benchmarking analysis showing how the City compares to other communities – if applicable.
- Priorities-Investment Rating or Importance-Satisfaction analysis that will identify the items that should receive the highest priority for investment from the City.
- Tabular data that shows the results for each question on the survey, including open ended questions.
- A copy of the survey instrument.

ETC Institute will submit the survey findings report in an electronic format. ETC Institute will also provide the raw data in an Excel database, or other format as requested by the City.

➞ Deliverable 6. Final Survey Report

Optional 2.9 Present Final Survey Report. Following completion of the survey and final report, ETC Institute will present survey findings and recommendations to City leadership and other stakeholders. Presentations may be conducted on-site or via webinar, depending on the City's preference.

2.10 Design, prepare for, and conduct community forums. Using information gathered to date and the ICA ToP® facilitation methodology, we will design a community forum format that is structured to educate, inform, and engage all participants in developing a vision for the City. We will make creative use of digital applications to help ensure forums are engaging and effective. Once prepared, we will facilitate a total of three community forums that can be conducted virtually or in person to gather perspectives and ideas from the community. We will also use this time to conduct pop-up events or small events throughout the community. We will use the Draft Environmental Scan and Strategic Analysis to educate the community about the current environment of the City.

2.11 Finalize the Environmental Scan and Strategic Analysis. We will incorporate community forum outcomes and City feedback to finalize the Environmental Scan and Strategic Analysis. The updated document will guide strategic planning sessions, as well as generate excitement for the process among stakeholders, encourage new ideas, and foster a sense of cohesion and optimism for the future. The Final Environmental Scan and Strategic Analysis will also include a SWOC Analysis that will assist in the development of the Final City of Berkley Strategic Plan.

➔ **Deliverable 7: Final Environmental Scan and Strategic Analysis**



Phase 3: Strategic Plan Development

3.1 Develop agendas for strategic planning sessions.

We will design agendas and meeting materials for two in-person strategic planning sessions. Each session's agenda will guide strategic planning progress and will include a presentation of the Final Environmental Scan and Strategic Analysis to provide participants with a shared understanding of the current environment, the trends that are affecting it, opportunities for the future, and key takeaways from engagement activities. Each session will focus on building consensus and refining the strategic priorities identified, as well as the City's vision and key results. We will review the meeting designs and agendas for each session with the City's project team before updating them to final.



Did You Know?

Using the ICA ToP® methodology, we create a structured process to help participants align around shared goals and priorities.

While stakeholders focus on providing insight and direction, the BerryDunn team translates that consensus into a well-written strategic plan.

3.2 Facilitate on-site strategic planning session 1 with the City Council. We will facilitate an on-site session with the City Council focused on establishing the City's vision, mission, core values, strategic goals, and strategic priorities. This session will be guided by the previously developed meeting design and agenda, as well as the Final Environmental Scan and Strategic Analysis. We will use the ICA ToP® facilitation methodology, designed to produce group consensus, to address and resolve any conflicting values or visions. We will document the outcomes of this session to review with the City's project team and plan for next steps.

3.3 Facilitate on-site strategic planning session 2 with City leadership and staff. We will facilitate a second on-site session with City leadership and staff to refine City Councils' work and develop objectives and performance measures. It will be guided by the previously developed meeting design and agenda, outcomes of strategic planning session 1, and the Final Environmental Scan and Strategic Analysis. We will document outcomes of this session and review with the City's project team.

3.4 Conduct on-site performance measures workshop. We will work with the City's project team to finalize objectives and performance measures. The measures will be quantified in terms of actual progress made toward meeting the objectives and appropriate as it relates to the City's size, operations, management, and systems. We will document outcomes, as well as a process and schedule for progress reporting and performance evaluation to help ensure effective tracking and monitoring.

3.5 Develop and present the Initial City of Berkley Strategic Plan Draft. We will prepare an Initial Strategic Plan Draft in an agreed-upon format, including an executive summary and detailed articulation

of vision, priorities, goals, objectives, and performance measures. We will also apply the Government Finance Officers Association (GFOA) Strategic Planning Best Practices checklist to help ensure the City's plan meets GFOA requirements. The draft will be reviewed with the City's project team and presented to the City Council in a work session, serving as an opportunity for City leadership to provide feedback and make changes.

➔ **Deliverable 8: Initial City of Berkley Strategic Plan Draft**

3.6 Develop the Final City of Berkley Strategic Plan. After reviewing the Initial City of Berkley Strategic Plan Draft with City leadership, we will finalize a graphically designed City of Berkley Strategic Plan for adoption. In addition to the content described in Task 3.5, the final document will include a description of the strategic plan development process, the plan for progress monitoring and reporting, as well as the development of a one-page "Plan at a Glance" document that can serve as a standalone, high-level summary of the Strategic Plan.

3.7 Present Final City of Berkley Strategic Plan. We will prepare a slide deck and virtual presentation for the Board during one of its regular meetings. This is an opportunity for the Board to have full visibility into the strategic planning process, outcomes, and plans moving forward. At the conclusion of the meeting, the final plan will be approved for adoption, at which point the City can begin implementation planning efforts.

3.8 Facilitate Implementation Planning Orientation and Develop Implementation Framework. We will facilitate an implementation planning orientation session with City leadership and key staff to introduce the implementation approach, clarify roles and responsibilities, and establish expectations for long-term plan management. Following the orientation, we will review and finalize an Implementation Plan template customized to the City's needs that defines initiatives and actions; responsible departments, teams, or individuals; resources and partners; timelines and interdependencies; and performance-tracking measures. The template will be designed to support accountability, implementation, progress monitoring, and long-term maintenance of the Strategic Plan.

➔ **Deliverable 9: Final City of Berkley Strategic Plan**



Phase 4: Implementation Action Planning

4.1 Develop Final Implementation Plan. Building on the adopted strategic priorities, we will develop an Implementation Plan that translates the Strategic Plan into an actionable roadmap for execution. Working with City leadership and staff, we will establish implementation timelines, identify responsible individuals and departments for key initiatives, and define the resources, partnerships, and communication activities necessary to support successful implementation. We will also develop a framework for tracking and reporting progress, recommend processes for periodic review and plan updates, and establish performance metrics and evaluation measures to monitor results. Following City review and feedback, we will finalize the Implementation Plan to provide a practical tool for accountability, decision-making, and ongoing strategic management.

4.2 Conduct project closeout activities. Once the strategic planning effort is complete, we will perform closeout activities, including providing the City with documentation developed and collected during the process, and conducting lessons learned and knowledge-sharing activities. Conducting this task will

equip the City with the tools needed to continue to progress toward its vision and to successfully implement its plan, even after the project is complete.

Optional 4.3 Facilitate development of department-level work plans. Using the Implementation Plan template, we will facilitate implementation planning sessions with City department staff to develop aligned, department-level work plans for each City department or division. These work plans will define operational tasks, responsible staff, milestones and target dates, performance measures, and reporting procedures, helping ensure clear alignment between departmental activities, Citywide strategic objectives, and expected outcomes.

➔ **Deliverable 10: Implementation Plan, Reporting, and Progress Monitoring**

Anticipated Schedule

Below, we highlight our proposed project schedule for the City's requested work effort. We are happy to adjust this schedule to best accommodate the City's needs, as appropriate.

Table 1: Proposed Project Schedule

Phase	Months								
	1	2	3	4	5	6	7	8	9
1									
2									
3									
4									

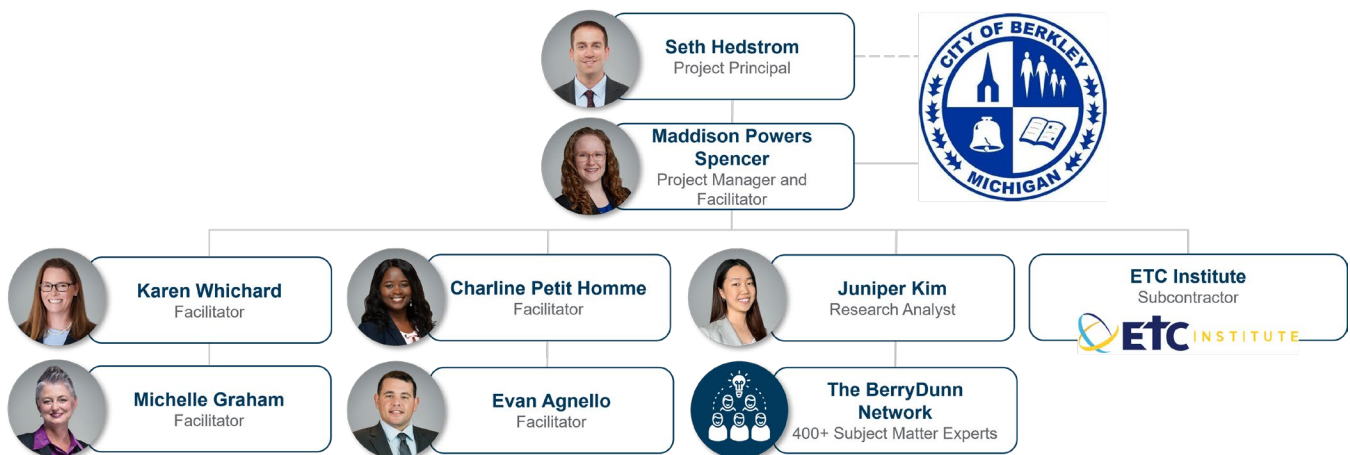
6. Team Members and Roles

Organizational Structure

At BerryDunn, we believe in the synergy that accompanies a team approach. That said, we have carefully assembled a project team with unique and specialized qualifications that coincide with the needs and desired outcomes of the City. **These project team members will remain committed, available, and assigned to perform the City’s requested work effort.**

Figure 5 describes the organizational structure of our project team, followed by a listing of project staff.

Figure 5: Project Team Organizational Structure



Roles, Responsibilities, and Qualifications

On the following pages, we list our project team members’ experience, qualifications, and expertise as they relate to projects of this nature and work with comparable local government clients. Our project team members’ full resumes can be found in **Appendix A** for further review.



Seth Hedstrom, PMP®, LSSGB

Project Principal

Seth is a principal and the leader of our Local Government Practice Group. He brings extensive experience in project management. He has served as project principal on nearly all BerryDunn’s organizational development projects and has managed more than 75 enterprise process and technology planning projects over the course of 16 years with BerryDunn. Seth has led our clients through many of the complex decision points and issue-resolution processes typical of large-scale planning and improvement projects and facilitated effective change. His experience includes providing oversight of strategic planning projects, assessing and documenting current environments, benchmarking with similar organizations, introducing industry best practices, developing recommendations, conducting organizational and operational assessments, and implementing and operationalizing plans and outcomes. **Seth has overseen the majority of our strategic planning work in the State and across the Midwest region.**

As the **project principal**, Seth will maintain overall responsibility for the services provided to the City, help ensure the commitment of our firm and appropriate resource allocation, and review and approve all deliverables in accordance with our quality assurance processes.



Maddison Powers Spencer, MPA

Project Manager and Facilitator

Maddison is a senior consultant in our Local Government Practice Group. She leverages her firsthand public-sector experience as an assistant to the city manager to support clients and drive successful projects. Certified in the ICA ToP® facilitation methodology, she is adept at leading community and employee engagement efforts and synthesizing outcomes to enhance client results. Maddison's strong communication, leadership, and project management skills complement her ability to conduct current environment assessments, analyze data, and organize and facilitate groups.

Maddison has assisted with the development of almost 40 local government strategic plans, including numerous in the State and region. She served in a similar role for Cities of Blue Springs, Columbia, Smithville, and Maryland Heights, Missouri; and Cities of Indio and Capitola, California. She has helped with the development of several regionally relevant strategic plans including the Cities of Janesville, and Wakesha, Wisconsin; DuPage and Lake Counties, Illinois; the Cities of St. Charles, Illinois.

As the **project manager and facilitator**, Maddison will serve as the City's primary point of contact, leading day-to-day project management, staff oversight, and the development of the Project Work Plan and Schedule. She will guide the analysis and development of deliverables, design and support strategic planning sessions and interviews, provide subject matter expertise, and present findings and the final City of Berkley Strategic Plan.



Karen Whichard, MPA, Prosci® CCP

Facilitator

Karen is a manager in our Local Government Practice Group and a seasoned public-sector leader with 19 years of experience in both small and large local governments. Her time with local government organizations ranges from working with a town of 15,000 residents to playing a key role for the City of Charlotte, which is home to nearly 900,000 residents. She boasts a significant track record of successfully building consensus, solving complex problems, and navigating diverse political environments to implement the policy vision of elected bodies. At BerryDunn, **Karen has led and supported strategic planning efforts for clients throughout the United States and Midwest**, including DuPage and Lake Counties, Illinois; as well as smaller communities with fewer than 15,000 residents, such as the Town of Zebulon, North Carolina.



Michelle Graham, MBTI®, CPM, LSSGB

Facilitator

Michelle is a senior consultant in the Local Government Practice Group. She has experience managing and executing various types of projects and initiatives while maintaining a constant focus on organizational development and human capital management. Prior to joining BerryDunn, Michelle held various leadership roles for the City of Pearland,

Texas, for more than 20 years. Her experience includes six years of as director of human resources and more than 15 years of parks and recreation leadership. She has a proven track record in employee retention and has earned multiple departmental and individual awards for her initiatives. **She utilizes her professional skills, abilities, ethics, experience, and education to focus on the client's needs and provide for meaningful work.** Michelle has worked on an organizational assessment for Sheboygan County, Wisconsin, and strategic plans for the Village of Northbrook, and City of Peoria, Illinois; City of Maryland Heights, Missouri.



Charline Petit Homme, MPA, PMP®, Prosci® CCP

Facilitator

Charline is a manager in our Local Government Practice Group. She has 13 years of experience working in the public sector and consulting, and she is particularly skilled in leading clients through complex transformational initiatives, including strategic planning projects. She is a strong facilitator and is certified in the ICA ToP® facilitation methodology. Her experience also includes organizing and leading groups through the adoption of new ideas and concepts, and promoting buy-in. She brings in-depth knowledge and involvement with strategic planning, change management, and relationship building through her strong communication, leadership, and project management skills. She is especially skilled at facilitating stakeholder engagement efforts and synthesizing outcomes to optimize results for her clients. Prior to joining BerryDunn, Charline spent multiple years serving the public sector, supporting and conducting field research, data collection, organizational reporting, gap analysis, and recommendations development.

Charline leverages her experience to provide firsthand insights and lessons learned on similar organizational development engagements. This includes regionally relevant strategic plans developed for Marquette County, Michigan; the Cities of Janesville, Wausau, and Waupaca, Wisconsin; and the City of Peoria, Illinois.



Evan Agnello, MS

Facilitator

Evan is a senior consultant in BerryDunn's Local Government Practice Group. He is an experienced leader with a demonstrated history of working with both internal and external stakeholders to understand organizational needs and support successful outcomes. His background includes leading complex projects, facilitating discussions with diverse groups, evaluating business needs, and helping organizations navigate strategic decision-making processes. Prior to joining BerryDunn, Evan held leadership positions with CentralSquare Technologies and Tyler Technologies/New World Systems, where he worked closely with public-sector clients to understand priorities, build consensus, and implement solutions that improved service delivery and customer experience. Evan brings strong communication, relationship-building, and facilitation skills to every engagement. **His ability to synthesize stakeholder input and identify common themes helps organizations move from ideas to actionable solutions. Evan is also a proud resident of the State.**



Juniper Kim

Research Analyst

Juniper is a consultant in our Local Government Practice Group, where she supports strategic planning, community engagement, and organizational change initiatives. With

a background in psychology and global affairs and three years of experience in research and analysis, she brings a people-centered approach grounded in strong research and policy analysis skills. Juniper has helped municipalities across the country translate data and stakeholder input into actionable strategies. Leveraging her multilingual communication skills, she strengthens accessible engagement efforts, and her technical skills in analysis tools enable her to deliver meaningful, data-driven insights that support informed decision-making. Juniper is currently working alongside our proposed team members on strategic plans for the Village of Northbrook, Illinois; the City of Apopka, Florida; the City of Evans, Colorado; and Pitt County, North Carolina.

As the **research analyst**, Juniper will document engagement and strategic planning outcomes, assess the City's current environment, analyze existing data, and research best practices and industry standards.

Additional Resources

As mentioned, the subject matter experts (SMEs) introduced on the following page are only representative of our broader pool of more than 400 consulting resources. This pool is composed of highly specialized and skilled public-sector consulting professionals whose expertise can be leveraged and support can be drawn upon as needed during the City's strategic planning project.



Jason Genck, MPA, CPRP

Parks, Recreation, Libraries, and Community Services SME

Jason is a manager in our Local Government Practice Group and has more than 26 years of experience in the community services industry—including the areas of parks, recreation, and libraries. He is an expert in the field and regularly speaks at conferences such as those hosted by the National Recreation and Park Association and the Colorado, Illinois, and Oregon Park associations. Prior to joining BerryDunn, Jason served as the executive director for the City of Westminster, Colorado's three-time national Gold Medal Parks, Recreation & Library Department. During and prior to this time, he oversaw the development of numerous strategic plans and led strategic planning efforts for counties, non-profits, and special districts.



Andrea Brinkley, MPA, PMP®

Public Works and Facilities SME

Andrea is a senior consultant in BerryDunn's Local Government Practice Group. She has 24 years of municipal government experience that includes leadership roles in capital improvement program execution, public works, and public utilities. She has extensive experience in operational and capital improvement budgets, training, project management, analysis of service delivery, operational assessment, engagement with local government communities, and leading a wide-ranging staff with a collaborative and participatory approach.



Sam Eisenbeiser, MCP, AICP

Economic Development SME

Sam is a senior consultant in BerryDunn's Local Government Practice Group. An American Institute of Certified Planners (AICP)-certified planner with over 20 years of experience, he is a strong believer in the power of community planning to build strong local economies and vibrant places. He specializes in economic development, market analysis, and project management, with expertise in advanced public engagement techniques and decision-support tools. Both highly

analytical and creative, he is skilled at helping divergent stakeholder groups find common ground and explaining technical concepts to diverse audiences. He is well versed in market, fiscal, and real estate analysis, community outreach, land use planning, and public opinion survey administration and interpretation.



Keri Ouellette, MCRP, AICP

Planning Services SME

Keri is a manager in our Local Government Practice Group and an expert in community development operations. She joined BerryDunn after working for the City of Portland, Maine, as a permitting manager, where she gained a broad understanding of the complex issues that face the City and region and the challenges that municipalities face in addressing growth and managing enforcement. In addition, Keri's previous work with New York City's Department of Housing Preservation and Development and the Town of Eastchester, New York allowed her to develop a keen understanding of local government policy development in both a small town and a large city agency. She helps clients take the steps to evaluate processes and develop standard operating procedures to improve efficiency.



Khara Dodds, MCRP, AICP

Community Development SME

Khara is a manager in BerryDunn's Local Government Practice Group. She is an AICP-certified planner with more than 13 years of leadership experience and 20 years of planning and community engagement experience. She believes in the potential of community development to empower communities and positively impact quality of life. Khara leverages her experience in city and regional planning to assist clients as they assess existing policies and processes, collect and evaluate stakeholder input, and identify and implement recommendations for improvement. Khara has a demonstrated commitment to leading DEI efforts. She is a member of BerryDunn's CEO Council on Diversity, Equity, Inclusion, Belonging, and Access (DEIBA)'s systemic barriers subcommittee and is certified in Equitable Community Change through eCornell University.



Jesse Myott, MA

Finance SME

Jesse is a manager in our Local Government Practice Group. He has nearly a decade of public-sector experience, focusing on supporting municipalities with operating and capital improvement budget development and management; special fund accounting, revenue and expenditure forecasting; customer valuation; and cost of revenue analyses for municipal programs and services. Jesse has led multiple cost of service and cost allocation projects for local governments from California to Massachusetts.



Jason Andrews

Public Safety SME

Jason is a senior consultant in BerryDunn's Local Government Practice Group and brings more than 25 years of executive public safety experience, with deep expertise in policy development, operational improvement, and organizational leadership. He is an accomplished leader with an emphasis on staff development through both inspirational and aspirational leadership.

7. Cost Proposal

Our proposed fixed-fee services cost to complete the City's desired project is broken down by phase in Table 2. Our costs are based on our experience conducting projects of similar size and scope, and the assumption that satisfying a deliverable is based on the City's signed acceptance. That said, the City will not incur any additional costs associated with the process of reaching deliverable acceptance.

We will utilize our hybrid methodologies through collaborative planning with the City to limit travel expenses to the City as appropriate.

Table 2: Cost by Project Phase

Phase	Fixed-Fee Services Cost
Phase 1: Project Initiation and Management	\$14,500
Phase 2: Community Engagement and Strategic Analysis Includes administration of a statistically valid community survey and analysis of up to 300 completed survey responses	\$37,500
Phase 3: Strategic Plan Development	\$19,800
Phase 4: Implementation Action Planning	\$7,500
Total Fixed-Fee Services Cost	\$79,300
Travel expense estimated allocation*	\$7,500

**This travel expense allocation represents our best estimate to provide a hybrid approach to service delivery. We would be happy to further discuss and refine this estimate with the City. While our services are proposed as a fixed fee, we propose to only invoice the City for actual travel expenses incurred.*

Optional Survey and Implementation Services

To provide flexibility and allow the City to tailor the engagement to its needs and budget, we have identified the following optional services for consideration.

Table 3: Optional, Add-On Services

Optional Service	Fee
Increase survey sample from 300 to 400 completed responses Improves margin of error from $\pm 5.7\%$ to $\pm 4.9\%$	\$5,000
On-site presentation of survey results	\$2,750
Webinar presentation of survey results	\$1,750
Department-level implementation work plans	\$14,900

8. Required Forms

On the following pages, we provide copies of the City's required forms.

- a) Non-Discrimination Affidavit
- b) Vendor References
- c) Non-Collusive Affidavit
- d) Conflict of Interest Disclosure Form
- e) Hold Harmless and Indemnity Form
- f) Iran Business Relationship Affidavit



CITY OF BERKLEY
OFFICE OF THE CITY CLERK
 3338 COOLIDGE HWY, BERKLEY, MICHIGAN 48072

CITY OF BERKLEY BID OPPORTUNITY NON-DISCRIMINATION AFFIDAVIT

BID OPPORTUNITY: Strategic Plan

**THIS AFFIDAVIT SHALL BE SUBMITTED AND MADE A PART OF EACH AND EVERY BID PROPOSAL
TO THE CITY OF BERKLEY, MICHIGAN**

STATE OF MAINE
 COUNTY OF CUMBERLAND

Seth Hedstrom, BEING DULY SWORN
 deposes and says that:

1. In compliance with the City of Berkley Non-Discrimination Policy, the Contractor shall not discriminate against an employee or an applicant for employment in hiring, any terms and conditions of employment or matters related to employment regardless of race, color, religion, sex, sexual orientation, gender identity or expression, national origin, age, genetic information, height, weight, disability, veteran status, familial status, marital status or any other reason, that is unrelated to the person's ability to perform the duties of a particular job or position, in accordance with applicable federal and state laws.
2. The undersigned is duly authorized to execute this affidavit on behalf of the bidder.

Subscribed and sworn to before me this
26th day of June, 2026
 a notary public in and for said County,

Kathleen Fickett
 Notary Public

KATHLEEN J FICKETT
 NOTARY PUBLIC
 State of Maine
 My Commission Expires
 December 5, 2030

My Commission expires: _____

Seth Hedstrom
 Authorized Signature

Seth Hedstrom, Principal
 Printed Name of Signatory

Berry, Dunn, McNeil & Parker, LLC
 Company Name

2211 Congress Street
 Address

Portland, Maine 04102
 City, State, Zip Code

(207) 541-2212
 Area Code & Phone Number

PLEASE NOTE: City of Berkley employees cannot notarize this document.

CITY OF BERKLEY BID OPPORTUNITY CONTRACTOR REFERENCES

BID OPPORTUNITY:	Strategic Plan
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REFERENCE 1:

COMPANY NAME	Bloomfield Township, Michigan
ADDRESS	4200 Telegraph Road Bloomfield Hills, MI 48302
TELEPHONE	248.433.7725
CONTACT PERSON	Susan Bowlin, Executive Assistant to Township Supervisor
CONTRACT DATES	04/2024 to Present
DESCRIPTION OF WORK	Bloomfield Township (pop. 45,000) engaged BerryDunn to help update its Strategic Plan. The Township sought an inclusive planning process that involved a wide range of stakeholders. Our work included conducting interviews, leading visioning workshops, and analyzing demographic, economic, and community data. Additionally, we developed a customized Social Point site. For additional detail regarding the scope and outcomes, we provide full project descriptions on the following page.

REFERENCE 2:

COMPANY NAME	City of Capitola, California
ADDRESS	420 Capitola Avenue Capitola, CA 95010
TELEPHONE	831.475.7300
CONTACT PERSON	Chloe Woodmansee, Assistant City Manager
CONTRACT DATES	01/2024 to 03/2025
DESCRIPTION OF WORK	BerryDunn completed the development of a five-year strategic plan for the City of Capitola (pop. 9,000), engaging leadership, staff, and community members through one-on-one and group interviews and workshops, an interactive project website, virtual surveys, and social media. We leveraged existing plans and outreach, such as likely-voter surveys; Capitola General Plan; Vision Capitola; and policies, plans, and budgets. For additional detail regarding the scope and outcomes, we provide full project descriptions on the following page.

REFERENCE 3:

COMPANY NAME	City of Janesville, Wisconsin
ADDRESS	18 North Jackson Street Janesville, WI 53548
TELEPHONE	608. 755.3103
CONTACT PERSON	Nicholas Faust, Assistant to the City Manager
CONTRACT DATES	04/2024 to 11/2024
DESCRIPTION OF WORK	The City of Janesville (pop. 66,000) selected BerryDunn to lead the development of a new Five-Year Strategic Plan. With a rich regional history as a commercial and industrial hub, the City sought to align its policy priorities and budget allocations with the evolving needs of its residents and businesses. For additional detail regarding the scope and outcomes, we provide full project descriptions on the following page.

Bloomfield Township, Michigan

CLIENT

CONTACT:

Susan Bowlin, Executive Assistant to Township Supervisor
4200 Telegraph Road
Bloomfield Hills, MI 48302
248.433.7725 | sbowlin@bloomfieldtwpmi.gov

CONTRACT

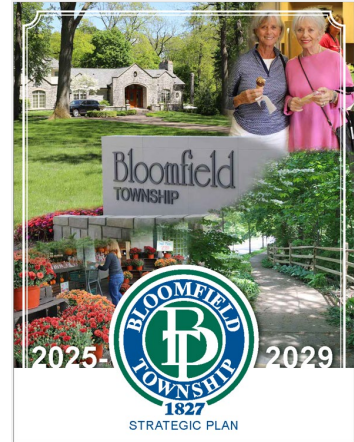
DATES:

04/2024 to Present

SCOPE: Bloomfield Township (pop. 45,000) engaged BerryDunn in April 2024 to help update its Strategic Plan. The Township sought a thorough and inclusive planning process that involved a wide range of stakeholders, such as Township leadership, residents, and business owners. Our work included conducting interviews, leading visioning workshops, and analyzing demographic, economic, and community data. Additionally, we developed a customized Social Point site to facilitate community engagement.

The Final Strategic Plan was adopted in October 2024. It defines a shared vision for the future and focuses the Township's resources, goals, and objectives on five priorities: Vibrant Lifestyle, Welcoming Community, Enhance Community Character, Reliable Infrastructure, and Best-in-Class Government. Each priority is linked to corresponding goals, objectives, outcomes, and performance measures.

The plan is currently being implemented by department staff with guidance and direction from the Township Board. Residents, businesses and stakeholder organizations can track the Township's progress and understand the impact of the strategic goals and objectives in their daily lives.



City of Capitola, California

CLIENT

CONTACT:

Chloe Woodmansee, Assistant City Manager
420 Capitola Avenue
Capitola, CA 95010
831.475.7300 | cwoodmansee@ci.capitola.ca.us

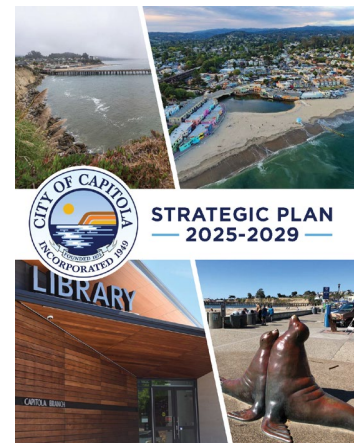
CONTRACT

DATES:

01/2024 to 03/2025

SCOPE: BerryDunn completed the development of a Five-Year Strategic Plan for the City of Capitola (pop. 9,000) in 2025. Over the course of the project, we engaged City leadership, staff, and community members through one-on-one and group interviews and workshops, an interactive project website, virtual surveys, and social media. We leveraged concurrent and existing plans and outreach, such as the City's likely-voter surveys; Capitola General Plan; Vision Capitola; and policies, plans, and budgets.

Through collaborative strategic planning sessions, we helped the City define its mission, vision, values, strategic priorities, and performance measures and metrics. Together, we identified six strategic priorities and established objectives and performance measures for each. The final plan was presented to the City Council and adopted in March 2025.



City of Janesville, Wisconsin

CLIENT

CONTACT:

Nicholas Faust, Assistant to the City Manager
18 North Jackson Street
Janesville, WI 53548
608.755.3103 | faustn@ci.janesville.wi.us

CONTRACT

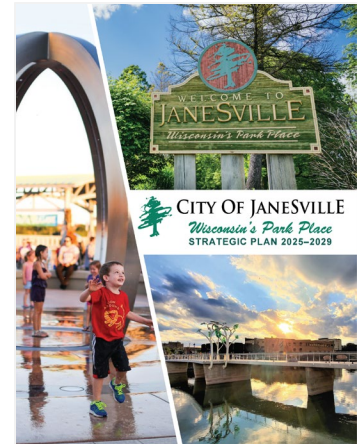
DATES:

04/2024 – 11/2024

SCOPE: The City of Janesville (pop. 66,000) selected BerryDunn in April 2024 to lead the development of a new Five-Year Strategic Plan. With a rich regional history as a commercial and industrial hub, the City sought to align its policy priorities and budget allocations with the evolving needs of its residents and businesses.

To support this, we conducted interviews with the City Manager, department heads, and City Council members and facilitated stakeholder focus groups. We also developed a customized Social Point site to engage the community in shaping Janesville's future. Through a collaborative process, we performed an environmental scan and SWOT analysis and led strategic planning workshops focused on identifying short- and long-term goals.

The resulting Strategic Plan emphasizes seven strategic goals, including diversity, equity, inclusion, and belonging; financial sustainability; housing; economic development; infrastructure; and performance culture. The plan was approved unanimously by City Council in December 2024.





CITY OF BERKLEY
OFFICE OF THE CITY CLERK
 3338 COOLIDGE HWY, BERKLEY, MICHIGAN 48072

CITY OF BERKLEY BID OPPORTUNITY NON-COLLUSIVE AFFIDAVIT

BID OPPORTUNITY:	Strategic Plan
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**THIS AFFIDAVIT SHALL BE SUBMITTED AND MADE A PART OF EACH AND EVERY BID PROPOSAL
TO THE CITY OF BERKLEY, MICHIGAN**

STATE OF MAINE
 COUNTY OF CUMBERLAND

Seth Hedstrom, BEING DULY SWORN
 deposes and says that:

1. The bid has been arrived at by the bidder independently and has been submitted without collusion with, and without any agreement, understanding, or planned common course of action with any other vender of materials, supplies, equipment, or services described in the invitation to bid, designed to limit independent bidding or competition; and
2. The contents of the bid have not been communicated by the bidder or its employees or agents to any person not an employee or agent of the bidder or its surety on any bond furnished with the bid and will not be communicated to any such person prior to the official opening of the bid.
3. The undersigned is duly authorized to execute this affidavit on behalf of the bidder.

Subscribed and sworn to before me this
26th day of June, 2026
 a notary public in and for said County,

Kathleen Fickett
 Notary Public

My Commission expires: **KATHLEEN J FICKETT**
NOTARY PUBLIC
State of Maine
My Commission Expires
December 5, 2030

[Signature]
 Authorized Signature

Seth Hedstrom, Principal
 Printed Name of Signatory

Berry, Dunn, McNeil & Parker, LLC
 Company Name

2211 Congress Street
 Address

Portland, Maine 04102
 City, State, Zip Code

(207) 541-2212
 Area Code & Phone Number

PLEASE NOTE: City of Berkley employees cannot notarize this document.



CITY OF BERKLEY
OFFICE OF THE CITY CLERK
3338 COOLIDGE HWY, BERKLEY, MICHIGAN 48072

CITY OF BERKLEY BID OPPORTUNITY CONFLICT OF INTEREST DISCLOSURE FORM

BID OPPORTUNITY:	Strategic Plan
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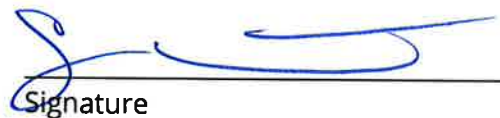
Name:	Seth Hedstrom	Company:	Berry, Dunn, McNeil & Parker, LLC
Title:	Principal	Address:	2211 Congress Street Portland, Maine 04102

Please describe any relationships, transactions, positions you hold (as owner, director or volunteer of a for-profit or nonprofit organization) or other circumstances you believe could contribute to an actual or perceived conflict of interest between the City of Berkley and your personal interest. (Use additional paper if necessary.)

I have the following conflict of interest to report.

I have the following potential conflict of interest to report.

☒ I have no circumstances that I believe could contribute to an actual or perceived conflict of interest.
--


Signature

June 26, 2026
Date



CITY OF BERKLEY
OFFICE OF THE CITY CLERK
3338 COOLIDGE HWY, BERKLEY, MICHIGAN 48072

CITY OF BERKLEY BID OPPORTUNITY HOLD HARMLESS & INDEMNITY FORM

BID OPPORTUNITY:	Strategic Plan
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PURPOSE:

To the fullest extent permitted by law, the CONTRACTOR expressly agrees to indemnify and hold harmless the City of Berkley (City), its elected and appointed officials, its employees and volunteers and others working on behalf of the City, from and against all loss, cost, expense, damage, liability or claims (whether groundless or not) arising out of bodily injury, sickness or disease (including death resulting at anytime there from) which may be sustained or claimed by any person or persons.

This includes damage or destruction of any property (including loss of use) based on any act or omission (negligent or otherwise) of the CONTRACTOR or anyone acting on its behalf in connection with or incident to this agreement.

The CONTRACTOR shall, at its own cost and expense, defend any such claim and any suit, action, or proceeding which may be commenced hereunder. In the event of any suit, action or proceeding, the CONTRACTOR shall pay:

- Any and all judgments which may be recovered.
- Any and all expenses including, but not limited to, costs, attorneys' fees and settlement expenses which may be incurred.

The CONTRACTOR shall not be responsible to the City on indemnity for damages caused by or resulting from the City's sole negligence.

PLEASE PRINT:

Berry, Dunn, McNeil & Parker, LLC

Contractor Name

2211 Congress Street

Contractor Street Address

Portland, Maine 04102

City, State, Zip Code

(207) 541-2212

Telephone

Seth Hedstrom, Principal

Authorized Representative


Signature

June 26, 2026

Date



Witness



CITY OF BERKLEY
OFFICE OF THE CITY CLERK
3338 COOLIDGE HWY, BERKLEY, MICHIGAN 48072

CITY OF BERKLEY BID OPPORTUNITY IRAN BUSINESS RELATIONSHIP AFFIDAVIT

BID OPPORTUNITY:	Strategic Plan
-------------------------	----------------

**THIS AFFIDAVIT SHALL BE SUBMITTED AND MADE A PART OF EACH AND EVERY BID PROPOSAL
TO THE CITY OF BERKLEY, MICHIGAN**

STATE OF MAINE
COUNTY OF CUMBERLAND

Seth Hedstrom, BEING DULY SWORN
deposes and says that:

- 1. Pursuant to the Michigan Iran Economic Sanctions Act, 2012 P.A. 517, by submitting a bid, proposal or response, the respondent certifies, under civil penalty for false certification, that it is not an "Iran linked business," as that term is defined in the Act.*
2. The undersigned is duly authorized to execute this affidavit on behalf of the bidder.

Subscribed and sworn to before me this
26th day of June, 2026
a notary public in and for said County,

Kathleen Fickett
Notary Public

My Commission expires: KATHLEEN J FICKETT
NOTARY PUBLIC
State of Maine
My Commission Expires
December 5, 2030

[Signature]
Authorized Signature

Seth Hedstrom, Principal
Printed Name of Signatory

Berry, Dunn, McNeil & Parker, LLC
Company Name

2211 Congress Street
Address

Portland, Maine 04102
City, State, Zip Code

(207) 541-2212
Area Code & Phone Number

PLEASE NOTE: City of Berkley employees cannot notarize this document.

Appendix A: Resumes

Seth Hedstrom, PMP®, LSSGB

Principal | Berry, Dunn, McNeil & Parker, LLC



Seth is a principal and leads BerryDunn’s Local Government Practice Group. He has more than 15 years of experience assisting public-sector clients. His experience includes technology planning, organizational needs assessments, system planning and procurement, and the implementation of enterprise-wide information systems. Seth often serves in a leadership role on strategic planning projects and manages and oversees project progress and issue escalation and resolution with executive project sponsors.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Business Management, Babson College
- Project Management Professional® (PMP®), Project Management Institute® (PMI®)
- Lean Six Sigma Green Belt (LSSGB) Certified
- Diversity and Inclusion Certificate, Cornell University
- Associate Member, Government Finance Officers Association
- Affiliate Member, International City/County Management Association (ICMA)

EXPERIENCE

Strategic Planning: Seth has served as a project principal on dozens of BerryDunn’s strategic planning projects across the country. He has overseen the project management, community engagement, strategic planning, and implementation phases of the strategic planning life cycle for a variety of organizations of different sizes, scopes, and complexities.

Project Management: Seth has served in leadership on most of BerryDunn’s local government strategic planning projects. He also has managed system selection and IT strategic planning projects for some of BerryDunn’s largest local government clients. He helps ensure projects are conducted in a high-quality manner, as well as stay on time and on budget.

Business Process Improvement: Seth has provided business process improvement services for many BerryDunn clients, either as a standalone engagement or as part of an enterprise system selection. His experience includes documenting as-is business processes, benchmarking processes with similar organizations, introducing industry best practices, and developing to-be business process recommendations.

Operational and Organizational Assessments: Seth has been involved in numerous operational and organizational assessment projects, which involve current environment analysis, future state planning, and the development of an implementation plan for incremental improvements over a multiyear planning horizon to align with client resources.

SELECT CLIENT LIST

- | | | |
|---------------------------|------------------------|-----------------------------|
| ▪ City of Capitola, CA | ▪ City of Wausau, WI | ▪ Marquette County, MI |
| ▪ City of Bloomington, MN | ▪ DuPage County, IL | ▪ Ottawa County, MI |
| ▪ City of St. Charles, IL | ▪ Lake County, IL | ▪ Saginaw County, MI |
| ▪ City of Waukesha, WI | ▪ Lancaster County, NE | ▪ Village of Northbrook, IL |
| | | ▪ Village of Oak Park, IL |

Maddison Powers Spencer, MPA

Senior Consultant | Berry, Dunn, McNeil & Parker, LLC



Maddison is a senior consultant in our Local Government Practice Group. She leverages her firsthand public-sector experience as an assistant to the city manager to support clients and drive successful projects. Focusing on strategic initiatives, organizational change and development, she is adept at leading community and employee engagement efforts and synthesizing outcomes to enhance client results. Maddison's strong communication, leadership, and project management skills complement her ability to conduct current environment assessments, analyze data, and organize and facilitate groups. She has worked on change management efforts, strategic plans, organizational assessments, and implementation of strategic initiatives with over 40 clients.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MPA, Local Government, University of North Carolina at Chapel Hill, School of Government
- BS, Political Science, Northern Arizona University
- Institute of Cultural Affairs (ICA) Technology of Participation® (ToP®) Certified
- ICA Approaches to Environmental Scanning (AESO) Certified
- ICMA, Emerging Leaders Development Program, Class of 2023
- International Association for Public Participation (IAP2), Foundations in Public Participation Certified

EXPERIENCE

Project Management: Maddison is well-organized and detail-oriented, supporting her in her ability to effectively manage projects and provide support to her colleagues and the clients she serves. She is well versed in documenting outcomes, researching and analyzing documents and data, and managing various priorities to promote success and productivity. In addition, she has experience with scheduling, reporting, and seeking opportunities for business process improvement.

Local Government: Maddison is the former assistant to the city manager for the City of Covington, Georgia. In that role, she worked across city departments in an effort to manage priorities, develop recommendations, conduct research, support community needs, and develop reports for the city mayor and city council. In addition, Maddison served as a senior fellow through the International City/County Management Association (ICMA) fellowship. In this role she managed the recruitment and hiring for two assistant city managers, led a leadership development initiative to develop more women leaders in the organization, and managed an annexation study to understand the impact of service delivery for various city groups.

Facilitation and Engagement: Maddison is skilled in developing stakeholder and community engagement messaging for employees, residents, businesses, key groups, leadership, and governing bodies. She focuses on collaborating on a communications strategy to help ensure clear and consistent messaging reach a broad range of people. Her experience as a facilitator and program manager supports her coordination of logistics for various engagement activities, such as interviews, focus groups, roundtables, and community events. She works as a facilitator for internal and external initiatives for clients. Maddison's focus is on creating a multifaceted outreach strategy that promotes an inclusive participation process.

SELECT CLIENT LIST

- | | | |
|----------------------------|--------------------------------|-------------------------|
| ▪ Bloomfield Township, MI | ▪ City of Janesville, WI | ▪ DuPage County, IL |
| ▪ City of Blue Springs, MO | ▪ City of Maryland Heights, MO | ▪ Lake County, IL |
| ▪ City of Capitola, CA | ▪ City of St. Charles, IL | ▪ Marquette County, MI |
| ▪ City of Columbia, MO | ▪ City of Smithville, MO | ▪ Milwaukee County, WI |
| ▪ City of Indio, CA | ▪ City of Waukesha, WI | ▪ Washington County, MN |

Karen Whichard, MPA, Prosci® CCP

Manager | Berry, Dunn, McNeil & Parker, LLC



Karen Whichard is a manager in BerryDunn's Local Government Practice Group. She is a seasoned public-sector leader with 19 years of experience in both small and large local governments. Her time with local government organizations ranges from working with a town of 15,000 residents to playing a key role for the City of Charlotte, North Carolina, which is home to nearly 900,000 residents. She boasts a significant track record of successfully building consensus, solving complex problems, and navigating diverse political environments to implement the policy vision of elected bodies.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MPA, University of North Carolina Charlotte
- BA, Journalism and Mass Communication, University of North Carolina at Chapel Hill
- Prosci® Certified Change Practitioner (CCP)
- ICA ToP® Facilitation Methodology

EXPERIENCE

Strategic Planning: For Karen, a successful plan reflects community goals, staff expertise, and elected official policy direction. Each of these components is critical to a plan that is able to be implemented successfully. In addition to the right inputs, Karen's background in city budget development allows her to guide her clients as they integrate plan objectives with budget priorities. During Karen's time with the Town of Davidson, North Carolina, she directed the creation and adoption of the 2020-2021 two-year strategic plan including managing the biennial town board retreat. With the City of Charlotte, Karen served as the lead budget analyst for the Strategy and Budget Department and contributed to its Environmental Focus Area Plan and the Strategic Energy Action Plan.

Organizational Development: Karen brings a deep understanding of the challenges of local government service delivery, having served both in operating departments and executive management roles. Her ability to connect to staff at all levels as a project manager helps ensure the final recommendations are actionable and relevant to the organization. As assistant county manager for Gaston County, North Carolina, Karen was a member of the executive leadership team. In this role, she helped rebuild the relationship with a key community profit active in child welfare and foster care after years of challenges. She also implemented a change management program to improve workplace culture in the Division of Social Services – Child Welfare Division. Karen reformed the Health & Human Services Division to increase collaboration, promote efficiency, and improve client outcomes.

Financial Management: As a member of the City of Charlotte Strategy and Budget Department, Karen provided operating and capital budget oversight of operating and capital budgets for functions including housing and neighborhoods, code enforcement, solid waste collections and the City's water/sewer utility. This work included analyzing budgets and personnel requests for appropriate staffing levels, evaluating capital needs, benchmarking city services, and ensuring rates and fees were set to meet cost recovery targets. As assistant town manager for the Town of Davidson, she managed the Town's \$14 million public facilities project as well as \$17 million in general obligation bond projects for parks, greenways and transportation. Part of this work led to the Town of Davidson's first AAA bond rating.

SELECT CLIENT LIST

- | | | |
|-----------------------------|---|------------------------|
| ▪ City of Foley, AL | ▪ DuPage County, IL | ▪ Orange County, NC |
| ▪ City of New Braunfels, TX | ▪ Lake County, IL | ▪ Onslow County, NC |
| ▪ City of Sarasota, FL | ▪ Metro Nashville and Davidson County, TN | ▪ Pitt County, NC |
| | | ▪ St. Johns County, FL |

Michelle Graham, MBTI®, CPM, LSSGB

Senior Consultant | Berry, Dunn, McNeil & Parker, LLC



Michelle Graham is a senior consultant in the Local Government Practice Group. She has experience managing and executing various types of projects and initiatives while maintaining a constant focus on organizational development and human capital management. Prior to joining BerryDunn, Michelle held various leadership roles for the City of Pearland, Texas for more than 20 years. Her experience includes six years of as director of human resources and more than 15 years of parks and recreation leadership. She has a proven track record in employee retention and has earned multiple departmental and individual awards for her initiatives. She utilizes her professional skills, abilities, ethics, experience, and education to focus on the client's needs and provide for meaningful work.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MS, Recreation and Leisure Studies, Southern Connecticut State University
- BA, Speech Communication, Sam Houston State University
- Certified MBTI® Practitioner and Trainer
- Certified Public Manager (CPM)
- Lean Six Sigma Green Belt (LSSGB) Certified
- Member, Public Sector Human Resources Association (PSHRA)
- Member, Society of Human Resources Management (SHRM)

EXPERIENCE

Strategic Planning: Michelle has engaged staff, citizens, and elected officials through a variety of planning efforts. She has led and facilitated multiple teams through visioning processes at the department level as well as organization wide. She has engaged stakeholders in many planning efforts, initiated affinity groups and training to engage employees in process improvement, and educated elected officials and others in fun and creative ways. Her efforts contributed to her city being recognized as one of the Houston Chronicle's Top Workplaces in 2019. Michelle has also presented on Emerging Leaders to the National Black Forum of City Administrators.

Human Capital Management: During her tenure with BerryDunn, Michelle has provided project management services for numerous public-sector clients, including system selection and implementation projects for both financial and HCM software systems. Prior to joining BerryDunn, in her role in the City of Pearland, Texas, Michelle initiated employee engagement efforts over three years, resulting in her employer being recognized as a Top Workplace in 2019. Additionally, she kickstarted multiple successful development programs to grow staff through low-cost professional development opportunities. With an eye for growth and career advancement, Michelle has mentored and coached many employees resulting in their growth and career advancement while serving as director of human resources. In addition, she initiated and created multiple engagement opportunities for staff at various levels, including a women's affinity group; a Lean process improvement team; and an employee recognition team. Over the course of two years, she increased the retention rate of seasonal employees from 8.7% to 30.4%.

SELECT CLIENT LIST

- | | | |
|-------------------------|-------------------------|-----------------------------|
| ▪ City of Beaverton, OR | ▪ Cumberland County, PA | ▪ Sheboygan County, WI |
| ▪ City of Peoria, IL | ▪ Lancaster County, NE | ▪ Village of Northbrook, IL |
| ▪ City of Sarasota, FL | ▪ Marion County, OR | |

Charline Petit Homme, MPA, Prosci® CCP, PMP®

Manager | Berry, Dunn, McNeil & Parker, LLC



Charline Petit Homme is a manager in our Local Government Practice Group and is particularly skilled in leading clients through complex transformational initiatives, including strategic planning projects. She is a strong facilitator and is certified in the ICA ToP® facilitation methodology. Her experience also includes organizing and leading groups through the adoption of new ideas and concepts, and promoting buy-in. She brings in-depth knowledge and involvement with strategic planning, change management, and relationship building through her strong communication, leadership, and project management skills. She is especially skilled at facilitating stakeholder engagement efforts and synthesizing outcomes to optimize results for her clients. Prior to joining BerryDunn, Charline spent multiple years serving the public sector, supporting and conducting field research, data collection, organizational reporting, gap analysis, and recommendations development.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MPA, Clark University
- BA, Political Science, Clark University
- Prosci® Certified Change Practitioner (CCP)
- Project Management Professional® (PMP®), Project Management Institute® (PMI®)
- ICA ToP® Facilitation Methodology Certified

EXPERIENCE

Strategic Planning: Charline regularly leads and facilitates strategic planning efforts with BerryDunn's municipal and county government clients. She leverages her ICA ToP® certification to help groups achieve consensus even when there are competing priorities and challenging constraints. She utilizes her project management training to keep large strategic planning efforts on schedule and on budget. She has served as project manager on recent or ongoing strategic planning initiatives, including those for the Attleboro Redevelopment Authority and the Towns of Chelmsford and Holliston, Massachusetts.

Community Outreach and Engagement: Charline is heavily involved with community outreach and engagement on strategic planning projects. She helps facilitate stakeholder interviews, serves as producer on community forums, and creates Social Point sites in collaboration with clients to help ensure a thorough and inclusive process.

Organizational Change Management: Charline helps her clients embrace change and prepare for a future environment through effective communication. Charline has assisted clients in developing timely and consistent communication to promote buy-in and project success. Her approach integrates the Prosci® methodology, emphasizing stakeholder engagement, readiness assessments, and tailored facilitation plans. She is adept at leading cross functional teams through the adoption of new systems and processes, helping ensure sustainable change and operational efficiency.

SELECT CLIENT LIST

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|--------------------------|------------------------|--------------------------|
| ▪ City of Creswell, OR | ▪ City of Milton, GA | ▪ City of Wausau, WI |
| ▪ City of Groveland, FL | ▪ City of Peoria, IL | ▪ Marquette County, MI |
| ▪ City of Janesville, WI | ▪ City of Waukesha, WI | ▪ Town of Chelmsford, MA |
| | | ▪ Town of Holliston, MA |

Evan Agnello, MS

Senior Consultant | Berry, Dunn, McNeil & Parker, LLC



Evan Agnello is a senior consultant in BerryDunn’s Local Government Practice Group. Evan utilizes his extensive experience in system selection and project management to develop a thorough understanding of a client’s needs, helping ensure effective adoption of the right product solutions. He served as a project manager for the City of Tampa, Florida as it implemented a customer service solution, and prior to joining BerryDunn, Evan served as senior customer success manager for CentralSquare Technologies, as well as in multiple leadership roles at Tyler Technologies/New World Systems. In these roles, he was a product owner for a community development product that customers used to make payments and schedule inspections. Evan is an experienced leader with a demonstrated history of working with both internal and external customers.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MS, Information Systems, Central Michigan University
- BS, Business Administration, Central Michigan University

EXPERIENCE

Familiarity with Public-Facing Technologies: Evan’s extensive experience with system selection projects provides him with valuable knowledge and familiarity with public-facing technologies. He brings experience as a product owner for a community development product that customers use to make payments and schedule inspections and served as a senior customer success manager at CentralSquare Technologies and technical services manager at Tyler Technologies, where he managed the implementation and user acceptance testing of more than 100 customer upgrades annually.

System Assessment and Selection: Evan has many years of experience working on highly visible and impactful system selection projects, developing a deep understanding of client needs. He has experience facilitating peer-to-peer networking opportunities, managing high-priority customer escalations to successful resolution, conducting market research, and building key client relationships.

Experience with CRM Technologies: Evan served as a project manager for the City of Tampa, Florida in its implementation of Salesforce, which is used to provide customer service to its citizens and encapsulates a customer portal. The process to replace the City’s aging legacy system touched more than 20 departments and included both improved business processes and flows and customer outreach and responsiveness. He is currently serving as project manager for the City of Sunnyvale, California as it assesses its CRM system, and assisting the City of San José, California in assessing the current state of its CRM solution and building a transformation plan for its future state.

SELECT CLIENT LIST

- | | | |
|-------------------------|-------------------------|--|
| ▪ City of Cleveland, OH | ▪ City of Plano, TX | ▪ City of Tampa, FL |
| ▪ City of Detroit, MI | ▪ City of San José, CA | ▪ Louisville/Jefferson County Metro Government, KY |
| ▪ City of Lawrence, KS | ▪ City of Sunnyvale, CA | |

Jaeyoun “Juniper” Kim

Consultant | Berry, Dunn, McNeil & Parker, LLC



Juniper is a consultant in BerryDunn’s Local Government Practice Group. Her background in psychology and global affairs informs her strong commitment to ethical, people-centered policy solutions and community-based change. Drawing on a strong research foundation developed in academic and professional roles, she delivers data-informed insights that help ensure each client engagement reflects both rigorous analysis and the values of the communities served.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, Psychology and Global Affairs, University of Notre Dame

EXPERIENCE

Strategic Planning and Community Engagement: Juniper has supported multiple strategic planning engagements with municipalities nationwide. Her work includes conducting environmental scans, developing SWOT analyses, preparing visioning worksheets and community facing-materials, and synthesizing findings from stakeholder discussions. She also assists in the development of strategic plan implementation guides, converting long-term priorities into actionable steps. Fluent in Korean and proficient in Spanish, Juniper brings valuable language skills to support inclusive, community-centered planning efforts.

Policy and Research: With experience conducting research on domestic and global policy topics in both professional and academic settings, Juniper supports local government clients by analyzing census data, interpreting community survey results, and synthesizing stakeholder input. As a project partner with the Student Policy Network, she conducted research on human rights violations and contributed to a formal submission to the International Criminal Court, in addition to developing a policy brief on labor trafficking for nonprofit leadership.

Organizational Change Management: At BerryDunn, Juniper contributed to the development of a formal report documenting the firm’s approach to organizational change management using the Prosci® methodology. Her work included compiling internal knowledge, articulating change management strategies, and identifying opportunities to better support local government clients through transitions. She gained experience presenting change-related recommendations to leadership and supporting staff through education and communication strategies.

Data Analysis and Reporting: Juniper is proficient in data analysis and modeling tools, such as Excel, Python, Geographic Information Systems (GIS), and NetLogo, and has used these tools to clean, organize, and synthesize data into actionable deliverables. She has also helped create visual mediums, like infographics and presentation, to support communication with client staff, leadership, and community members.

SELECT CLIENT LIST

- | | | |
|-------------------------|-----------------------------|-----------------------------|
| ▪ City of Apopka, FL | ▪ City of New Braunfels, TX | ▪ Lancaster County, NE |
| ▪ City of Coppell, TX | ▪ City of Sanford, ME | ▪ Milwaukee County, WI |
| ▪ City of Eugene, OR | ▪ Cumberland County, PA | ▪ Pitt County, NC |
| ▪ City of Evans, CO | ▪ Hamilton County, OH | ▪ Village of Northbrook, IL |
| ▪ City of Homestead, FL | | |

Appendix B: Work Samples

BerryDunn

- **Bloomfield Township, Michigan** | 2025-2029 Strategic Plan
- **City of Janesville, Wisconsin** | 2025-2029 Strategic Plan

ETC Institute

- **City of Sterling Heights, Michigan** | 2025 Residential Survey



**STRATEGIC PLAN
2025 – 2029**

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Dear Bloomfield Township Community,

Bloomfield Township continues to be a premiere destination where people want to be — to live, visit, or operate a business. Our continued growth and success will come from embracing the strengths of our community and engaging in purposeful planning.

Over the last year, your Township government has been immersed in the strategic planning process to set the vision for the next five years. The Township engaged BerryDunn, a recognized leader in public sector strategic planning, as our consultants. Together with the Township's Strategic Planning Committee, BerryDunn reached out to the community through stakeholder panel interviews, public forums, an interactive website with collaborative idea wall, as well as both an open response survey and a professionally administered, statistically relevant survey. We received participation and feedback from approximately 3,000 residents, business owners, community leaders and other stakeholders, along with Township staff and Board Members. Many common themes and goals arose from these community outreach initiatives which formed the basis of our planning. After months of internal analysis and deliberation, the project culminated with the Board of Trustees voting on October 28, 2024, to adopt the attached Bloomfield Township 2025-2029 Strategic Plan.

We are proud to present the Bloomfield Township Strategic Plan for 2025-2029, a blueprint for our community's future. It outlines our vision, sets clear priorities, and defines the actions that will help us achieve them. As we move along this path, it is essential to have a framework that ensures we remain focused on serving you effectively. This is the purpose of the Bloomfield Township Strategic Plan: to act as a compass to ensure we uphold our commitments and maintain accountability.

The Strategic Planning Committee extends our heartfelt thanks to everyone who contributed their insights, making this a truly comprehensive process. We believe our new Strategic Plan is a dynamic, evolving guide that provides clear direction while maintaining the flexibility needed to adapt to our Township's needs in a responsive and responsible manner. We are excited to put this plan into motion, driving growth, prosperity, and improving the quality of life for all in Bloomfield Township.

Respectfully Submitted,

The Strategic Planning Committee



Dani Walsh



Michael Schostak



Amy McKaig



Susan Bowlin



Patti Voelker

Introduction



The Township's strategic plan is a living document that creates a framework and the steps needed to meet and exceed our community's needs over the next several years. The process for completing the strategic plan was overseen by a Strategic Planning Committee, and the content of the plan was determined through broad input from the Bloomfield Township community, Board of Trustees, department leaders and staff. The plan will be implemented by department staff with guidance and direction from the Township Board. The Board will receive regular reports from staff on their progress implementing the plan and the Board will report progress to the Township community so residents, businesses and stakeholder organizations can track the Township's performance and understand the impact of the strategic goals and objectives in their daily lives.

Regular meetings of the Board of Trustees are held the second and fourth Monday of each month at 7:00 P.M. in the Town Hall Auditorium, 4200 Telegraph Rd, Bloomfield Township, MI, 48302.



Dani Walsh, Supervisor
Michael Schostak, Treasurer
Martin Brook, Clerk
Neal Barnett, Trustee
Stephanie Fakih, Trustee
Christopher Kolinski, Trustee
Valerie Murray, Trustee



Who We Are



OUR MISSION



Bloomfield Township delivers best-in-class services in a fiscally responsible manner, fostering a premiere community where all can thrive, while protecting our natural resources.

OUR VISION



Bloomfield Township is a safe, inviting, and vibrant community where residents' quality of life is enhanced with outdoor recreation opportunities, well-maintained infrastructure and natural spaces, leading-edge technology, and an exemplary Township government.

Values



Stewardship

We are committed to careful management of public funds and resources to ensure long-term financial viability.

Excellence

We strive for best-in-class service and continuous improvement through visionary leadership that places the needs of the community first.

Integrity

We uphold honesty and transparency in all our interactions by fostering trust and respect within our organization and throughout the community.

Innovation

We embrace forward-thinking, aspirational solutions and positive change to continually enhance our services and community impact.

Collaboration

We work together with approachability and friendliness to build strong partnerships and effectively address community needs.

Why a Strategic Plan?



What does it do?



We know our community has big dreams for Bloomfield Township and want to see them come true. Our strategic plan charts a course for the future that identifies the results we want to achieve.

The strategic plan defines a shared vision for the future and focuses the Township's resources on five clearly defined priorities – *Vibrant Lifestyle*, *Welcoming Community*, *Enhance Community Character*, *Reliable Infrastructure*, and *Best-in-Class Government* – along with goals, objectives and clear measures for tracking progress and accountability.

At its core, the strategic plan maximizes our chances of realizing the Township's vision by balancing the short-term, immediate reality with long-term goals that help us prepare for and navigate a changing environment. It provides a "*north star*" direction that keeps us on track and working together to keep our commitment to the Township's mission and reach our desired destination.



Strategic Priorities



Vibrant Lifestyle

Our Goal...

Support outdoor recreational and cultural activities for all ages and abilities while encouraging a thriving retail and hospitality presence.

Objectives

- A. Explore opportunities that will enhance and promote community and cultural events by partnering with other cities, villages, townships (CVTs), and community organizations to develop or expand programming to the community.
- B. Build relationships with the local restaurant and business communities to foster business start-up, retention, and expansion that creates a bustling restaurant scene.
- C. Develop a recreational strategy that is fiscally sustainable to offer green space settings, park amenities, outdoor activities, performance space, and recreational programs for all ages.
- D. Develop an action plan to create outdoor spaces for more recreational opportunities.
- E. Create a Vibrant Lifestyle community board to collaborate and support community events.

Outcomes

- Board of Trustees approval of an actionable plan to develop new parks and recreation opportunities.
- The Township is more bike-friendly.
- Community events are created and supported by the Township in partnership with other organizations.
- The Township has the information it needs to seek funding for the creation of parks and green spaces.



Performance Measures

- Create a list of potential partners with community, recreation, and gathering spaces by June 2025.
- Number of Township initiated events.
- Number of ribbon cuttings.
- Develop one community event at Bowers Farm by December 2026.
- Engage in one co-sponsored community event with CVTs by December 2026.
- Cost of community events in comparison to attendance.
- Maintain/increase resident satisfaction with community engagement (measured by annual community survey).
- Complete an inventory of potential green spaces and conduct a feasibility study of their viability within 18 months of inventory completion.
- Maintain/increase resident satisfaction with the recreational opportunities in the Township measured by a community survey within three years.
- Percentage increase in funding available for parks and green spaces.
- Increased participation in recreational programs and opportunities (measured through program registration and counting program attendance with a clicker).
- Complete a needs analysis for multi-use space.



Welcoming Community

Our Goal...

Build and enhance avenues of communication among residents, the Township, businesses, and other stakeholders in support of a safe, vibrant, and welcoming community.

Objectives

- A. Recreate an ambassador program to welcome new residents and introduce them to Township services, amenities, and attractions.
- B. Explore and develop partnerships to expand and promote community events that appeal to a broad range of interests.
- C. Produce a calendar of events to be distributed throughout the Township so residents are aware of activities and opportunities for enjoying life in their community.
- D. Develop a brand identity for Bloomfield Township that highlights its unique characteristics and differentiates the community from surrounding towns and cities.
- E. Promote the brand identity with specific messaging focused on safety, diversity, and the Township's natural beauty through all available channels.



Welcoming Community



Outcomes

- Residents feel welcomed and knowledgeable about Township services, amenities, and businesses.
- The Township has a distinct and recognizable identity.

Performance Measures

- Number of people attending events.
- Number of events per year.
- Maintain/increase resident satisfaction with Township communication and community engagement efforts (measured by annual or biennial community survey).
- Number of welcome packets delivered.
- Increase in community participation in available communication channels and activities measured year-over-year.
 - Website clicks
 - Newsletter participation
 - Social media platforms
 - Podcast meetings



Enhance Community Character

Our Goal...

Preserve the Township's history and natural resources to maintain our unique community character and neighborhood design elements for current and future residents.

Objectives

- A. Create a multimedia campaign to inform Township residents about code enforcement and building code resources to ensure the safety of residents and assist them with enhancing and improving their properties.
- B. Encourage use of safety paths by informing the community through multi-faceted channels to ensure a sense of safe and connected neighborhoods.
- C. Revisit the Township's tree preservation and protection policies and amend current zoning ordinances to further define levels of required preservation and enforcement so that green spaces and tranquil settings are maintained.
- D. Collaborate with HOAs to inform residents about Township residential lot regulations and to protect and maintain wetland areas.
- E. Engage with Preservation Bloomfield, Bloomfield Historical Society, and the Bloomfield Hills School District to promote their educational opportunities regarding the Township's rich history.
- F. Update the Township's master plan to allow the evolution of the Township in a way that is consistent with community character and neighborhood designs.



Enhance Community Character



Outcomes

- Trees and greenspaces that provide a tranquil setting are preserved.
- Large lots and density requirements are protected.
- The Township Master Plan is updated by December 2027.

Performance Measures

- Number of enforcement actions, wetland violations, and HOA lot splits.
- Reduction in number of zoning and building violations.
- Number of informational campaigns that were developed and attended.
- Number of tree preservation applications.



Reliable Infrastructure

Our Goal...

Continue to invest in reliable and modern infrastructure and systems that meet the Township's expected levels of service, while evolving with the changing needs and potential growth of the community.

Objectives

- A. Invest in technology to analyze, improve, and provide resilient infrastructure that meets needed service levels of the community.
- B. Continue the execution of the Township's Capital Improvement Program through proactive and solid fiscal planning, while including options for clean technologies where possible.
- C. Continue to advocate for more improvements in the utility providers electric, internet and cellular communications infrastructure.



Reliable Infrastructure



Outcomes

- The Township public safety facilities are updated/renovated.
- The Township's Capital Improvement program is funded and implemented through the Five-Year Asset Management Plan.
- Infrastructure solutions and needs are met through partnerships.

Performance Measures

- Number of Capital Improvement projects completed.
- Maintain/increase resident satisfaction with public utilities by hosting an annual Town Hall with utility providers.
- Completed comprehensive, organization-wide technology assessment to identify needs of the Township by April 2028.
- Number of cellular tower applications received.



Best-in-Class Government

Our Goal...

Deliver best-in-class government services to the community by developing and maintaining an exemplary workforce, while continuing to be an innovative leader in local government.

Objectives

- A. Establish an employee retention plan that includes competitive total compensation, professional development and training plans focused on leadership, emotional intelligence, and employee wellness to maintain a positive and thriving workforce culture.
- B. Establish an employee recruitment plan that streamlines the hiring process and develops a talent pipeline to attract top talent and be a sought-after employer of choice.
- C. Create community outreach programs and partnerships with community stakeholders to develop a talent pipeline to attract top talent and to become a sought-after employer of choice.
- D. Continue our strong and efficient financial management practices that prioritize the use of all resources to maintain high levels of service to the community.
- E. Maintain involvement with community stakeholders, community outreach programs, and professional organizations to continue to learn and develop resources and best practice policies.



Best-in-Class Government



Outcomes

- Maintain regional leader status in public service delivery.
- Partnerships are developed with other service providers and the community participates and is informed.
- A Human Resources and Performance Management Program is established.

Performance Measures

- Increase in grant funding.
- Reduction in staff vacancy rate.
- Number of training hours completed annually.
- Number of Employee Assistance Program (EAP) contacts.
- Change in rate of staff turnover.
- Percentage increase in employee satisfaction with total compensation (measured by annual employee engagement survey).
- Maintain/increase employee engagement (measured through an employee engagement survey annually).
- Maintain/increase resident satisfaction with the quality and value of Township services (measured by annual or biennial community survey).



How Did We Arrive at this Plan?



The strategic planning process is as important as the final document itself. Input was incorporated from across the community and the Township organization, including the Township Board, employees, leadership, residents, businesses, educators, youth, seniors, community-based organizations, and other community stakeholders. This helps ensure that we are being responsive to community priorities and needs and that Township resources are aligned with those needs as well as with the government's organizational needs.



What's Next?



We understand our community's high standards and aspirations. Our shared goal is to maintain the high quality of life we enjoy today and ensure Bloomfield remains an exceptional place to live. The Strategic Plan's five-year timeline allows us to thoughtfully sequence initiatives that support this goal.

With the Strategic Plan in place, we're developing an implementation framework that translates our priorities, goals, and objectives into actionable steps, with clear responsibilities and timelines. This approach fosters collaboration among Township departments as we work toward our desired future. Regular monitoring and evaluation systems will support continuous improvement and ensure alignment with the Township's vision and strategic priorities.

We are committed to focusing resources on the priorities that best serve our community, aligning the Strategic Plan with the Township's annual budget process to ensure efficient resource use and support for our key goals. As needs and opportunities shift over the plan's lifetime, we'll address necessary adjustments as part of our budget review. Guided by the Strategic Plan, other Township initiatives will also align, keeping all efforts moving in a common direction. The values expressed in this plan will shape decision-making, service delivery, and the daily work of Township employees.

Keeping Track of Progress

The Township will monitor progress toward strategic plan goals and objectives and report on performance measures. Tracking keeps us transparent and holds us accountable.

We will provide the community with an annual report and year-end presentation to the Board of Trustees. Community members can expect to understand what we are working on and the benefits that will result for our residents, businesses, and the community overall.

Monthly –

Township staff will discuss and evaluate progress on strategic goals and objectives.

Quarterly –

Township leadership will provide the Township Supervisor with progress updates for each strategic plan priority.

Twice a Year –

The Township Supervisor will prepare an update to the Board for each strategic priority, including progress updates, successes and wins, and challenges.

Annually –

The Township Supervisor will prepare a year-end update detailing progress on each strategic priority, goal, and objective. The report will be presented to the Board of Trustees and shared with the community on the Township's website bloomfieldtwp.org.

Engagement Summary



2,243

Online Interactions with Social Pinpoint
Virtual Engagement Platform



162

Ideas Wall
Comments



110

Attendance at 3
Community Forums



80

Interviews and
Focus Group Participation



424

Statistically Valid Community
Survey Responses



4

Plan Development
Workshops

Statistical Validity indicates how much one can rely on the conclusion derived from a survey sample. The combinations of proper sampling methods, adequate sample sizes and unbiased data collection improve the reliability of survey results. To achieve a level of confidence of the survey results, the goal for the random sample was to reach 400 completed surveys from residents of Bloomfield Township. The 424 responses ensures that the survey results are statistically significant based on the population so that the results of the survey have a 95% level of confidence, within +/- 3.57%.

Acknowledgements



This strategic plan results from the combined efforts of our Township's elected officials, employees, and community members. Bloomfield Township would like to extend sincere thanks to everyone who saw the importance of this plan and dedicated their knowledge, guidance, and time over the past several months to bring it to life.

Your contributions are the bricks that build the foundation for our future.



Strategic Planning Committee

Dani Walsh, *Township Supervisor*

Michael Schostak, *Township Treasurer*

Patti Voelker, *Director of Planning, Building and Ordinance*

Amy McKaig, *Digital Content Coordinator*

Susan Bowlin, *Administrative Assistant to the Township Supervisor*



Work Session Committee

Corey Almas, *Director of Engineering and Environmental Services*

Wil Babinchak, *Director of Information Technology*

James Gallagher, *Police Chief*

Mary Jevahirian, *Deputy Treasurer*

Darrin Kraatz, *Director of Assessing*

John LeRoy, *Fire Chief*

Carrie LeZotte, *Director of Cable and Community Relations*

Noah Mehalski, *Director of Department of Public Works*

Deana Mondock, *Deputy Clerk*

Jason Theis, *Director of Accounting*

Christine Tvaroha, *Director of Senior Services*

Patti Voelker, *Director Planning, Building and Ordinance*



Stakeholder Panelists

Imam Shaykh Abdullah Al-Mahmudi, *Muslim Unity Center*

Lynn Alexander, *Senior Advocate for Oakland County*

Corey Almas, *Engineering and Environmental Services Department Director*

Wil Babinchak, *Information Technology Department Director*

Duane Barbat, *Barbat Organization President*

Neal Barnett, *Bloomfield Township Trustee*

Joe Bauman, *Birmingham Bloomfield Chamber of Commerce President*

Matt Beatty, *Bloomfield Christian School Head of School*

Derk Beckerleg, *Secrest, Wardle, et al. Bloomfield Township Attorney*

Scott Bednas, *Boy Scouts of America Troop 1022 Scoutmaster*

Dean Begley, *Township DPW Foreman & Supervisor Union President*

Jason Beidelman, *Penske Corporation Vice President Manufacturer Relations*

Acknowledgements



Stakeholder Panelists Continued

Jeffrey Bellefleur, *The Rotary Club of Bloomfield Board Secretary*
Jim Bellinson, *Riverstone Growth Partners, Mex, and Beau's Grillery Owner*
Martin Brook, *Bloomfield Township Clerk*
Pam Carmichael, *Bloomfield Historical Society and Preservation Bloomfield Board Member*
James Clark, *Robertson Brothers Chief Executive Officer*
John Clark, *Giarmarco, Mullins, Horton PC, Township Labor Attorney*
Vincent D'Angelo, *D'Angelo Brothers Incorporated Owner*
Michael J. Dul, *Michael J. Dul and Associates Owner and Preservation Bloomfield President*
Jason Dungjen, *Detroit Skate Club Director and Coach*
Patrick Dunn, *48th District Court Administrator*
Rana Emmons, *Township Financial Sustainability Commission Board Member*
Stephanie Fakih, *Bloomfield Township Trustee*
Natalie Finerty, *Bloomfield Youth Association Board Member*
Katie Fotherby, *Township General Employee Labor Council Union President*
James Gallagher, *Police Department Chief*
Yuliya Gaydayenko, *Jewish Family Services Chief Program Officer of Older Adult Services*
Dani Gillman, *Bloomfield Township Library Board President*
Jocelyn Giangrande, *Township Zoning Board of Appeals Vice Chair*
Ned Greenberg, *Island Lake Board Riparian*
Tom Haji, *Chaldean Chamber of Commerce and Chaldean Cultural Center*
Paulina Hakopian, *Bloomfield Hills School District PTOC President*
Brian Henry, *Zoning Board of Appeals Chair*
Carlos Hesano, *DRYmedic Restoration President & Wabeek Country Club Owner*
Robert Higgins, *Schwartz and Company Investment Advisors*
Geoff Hockman, *Bloomfield Sports Shop Owner & Bloomfield Village Fire Department Chief*
Alan Jaros, *Bowers School Farm Director & E.L. Johnson Nature Center Director*
Shanna Johnson, *Henry Ford West Bloomfield Hospital President*
Scott Jorgensen, *Foxcroft Home Owners Association Board Member*
Jerry Keller, *Department of Public Works Union President*
Christopher Kolinski, *Bloomfield Township Trustee*
Darrin Kraatz, *Assessing Department Director*
Angel Lau, *Friends of Bowers Farm Board President*
John LeRoy, *Fire Department Chief*
Carrie LeZotte, *Cable and Community Relations Department Director*
Gordon Light II, *American Quality Cleaning Owner*
Carol Mastroianni, *Birmingham Bloomfield Community Coalition Executive Director*
Steve Mazur, *Bloomfield Tennis Club and Fitness Owner*
Keith McDonald, *Bloomfield Hills School District Superintendent of Human Resources*
Joe McGrail, *Township Fire Union President*
Tim McGrane, *M1 Concourse Chief Executive Officer*

Acknowledgements



Stakeholder Panelists Continued

Noah Mehalski, *Department of Public Works Director & Director and Deputy Union President*

Tera Moon, *Bloomfield Township Library Director*

Valerie Murray, *Bloomfield Township Trustee*

Ed Okuniewski, *Brother Rice High School Principal*

Chris Pero, *Max Broock Realtors Real Estate Agent*

Rishiv Ramesh, *International Academy High School Student*

Tom Riney, *Township Police Union President*

Dr. Embekka Roberson, *Superintendent of Birmingham Public School District*

Laura Rubin, *Meadow Lake Board Riparian*

Jeremy Salomon, *International Academy High School Student*

Jeff Salz, *Planning Commission Chair*

Jay Sawmiller, *HUB International*

Pastor Niklaus Schillack, *Beautiful Savior Lutheran Church*

Michael Schostak, *Bloomfield Township Treasurer*

Addy Shattuck, *Pet Supplies Plus Bloomfield Owner*

Shane Spradlin, *Penske Corporation Executive Vice President & General Counsel*

Effie Steele, *Forest Lake Board Riparian*

Karyn Stickel, *Hubbell Roth and Clark Senior Associate*

Bob Taylor, *Township Board of Review Member*

Jason Theis, *Accounting Department Director*

Christine Tvaroha, *Senior Services Department Director*

Rebecca Van Loon, *Brooklyn Bagel Deli Owner*

Patti Voelker, *Planning, Building and Ordinance Department Director*

Dani Walsh, *Bloomfield Township Supervisor*

Dale Watchowski, *President & CEO of Redico and American House*

Erin Watson, *Friends of Johnson Nature Center Board President*

Cathy Weissenborn, *Bloomfield Village Manager*

Cathy White, *Bloomfield Area Cable Board Member*

And to the *thousands* of residents who engaged and participated in the multiple surveys, the online idea wall and/or the many in-person community forums,

we thank you!



We would also like to thank the BerryDunn Consulting team for their facilitation of the process.

Seth Hedstrom, *Principal*

Michelle Kennedy, *Project Manager and Facilitator*

Jen Ferguson and Keith Linton, *Facilitators*

Maddi Powers Spencer, *Facilitator and Research Analyst*



**STRATEGIC PLAN
2025 – 2029**



CITY OF JANESVILLE

Wisconsin's Park Place

STRATEGIC PLAN 2025–2029



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Letter from the City Manager



Dear Janesville Community,

Over the past several months the residents and stakeholders of Janesville came together to have a spirited and interesting discussion on the City's future. The results of those discussion is the City's new 2025-2029 Strategic Plan. It serves as a framework to guide our priorities and actions over the next five years, ensuring we stay aligned with the goals and values expressed by you — our community members.

The plan encompasses our Mission, Vision, Guiding Principles, and Strategic Priorities. These were carefully chosen to address and enhance critical areas in our community. Our priorities will shape our operational strategies, budget allocations, and program implementations, ensuring that we meet the diverse needs of our city.

The Strategic Plan is only valuable if it is put to work. Now that the document is complete, it is time for our city leaders to work together to accomplish the aspirational goals and objectives it outlines. To this end, we will be incorporating this plan into the way we operate for years to come and reporting back regularly on our progress.

Your input has been invaluable in shaping this plan. Through online engagement, community forums, and direct conversations, we have gathered insights that are crucial to our collective vision for Janesville. This document is not merely a guideline for city operations; it is a testament to our commitment to work transparently and collaboratively with you all.

I encourage you to read through the Strategic Plan and consider how you might get involved in its implementation. Your engagement is essential as we move forward. Together, we will continue to be a great place for people to live and visit. Thank you for your continued support and collaboration.

Sincerely,

Kevin Lahner,
City Manager, City of Janesville

Why a Strategic Plan?



CITY OF JANESVILLE
Wisconsin's Park Place
STRATEGIC PLAN 2025–2029

What does it do?

We know our community has big dreams for Janesville and want to see them come true. Our strategic plan charts a course for the future that identifies the results we want to achieve.

The strategic plan defines a shared vision for the future and focuses the City's resources on seven clearly defined priorities – community engagement, economic development, financial sustainability, housing for all, infrastructure, organizational excellence, and vibrant community – along with goals, objectives and clear measures for tracking progress and accountability.

At its core, the strategic plan maximizes our chances of realizing the City's vision by balancing the short-term, immediate reality with long-term goals that help us prepare for and navigate a changing environment. It provides a “north star” direction that keeps us on track and working together to keep our commitment to the City's mission and reach our desired destination. Track the progress of the City's strategic goals by visiting our Park Place Performs! dashboard at www.janesvillewi.gov/strategicplan.



Who we are



Mission Statement



An adaptive and welcoming community enriching lives.

Vision Statement



A vibrant and diverse community to discover life's opportunities.

Guiding Principles



Adaptability

We are creative and flexible in response to our community.

Respect and Diversity

We embrace diversity, empathy, and collaboration through a foundation of mutual respect.

Service

We serve with kindness, integrity, and professionalism. We are accountable for making ethical and innovative decisions that reflect community-driven goals.

Communication

We value honest and clear communication.

Equity, Inclusion, and Belonging

Through inclusive and equitable practices, we create spaces that reflect the diverse perspectives of our community and foster a culture of belonging.



Plan at a glance

The City of Janesville 2025-2029 Strategic Plan serves as the road map over the next five years to guide our community's vision. The City's strategic plan is a living document that creates a framework and the steps needed to meet and exceed our community's needs over the next several years. The mission tells us *"what"* we are to be doing. It keeps our elected and appointed officials and staff focused on the tasks to be done. The vision tells us *"where"* we are going. It keeps us focused on the destination and the future we are trying to create. The guiding principles tell us *"how"* to do what we are doing. They remind us of the way we intend to serve the people and community of Janesville.



Community Engagement



Our Goal



Strengthen our community by fostering an open and engaging environment, increasing participation in local initiatives, and collaborating with local partners to build a more connected, vibrant city.

Objectives

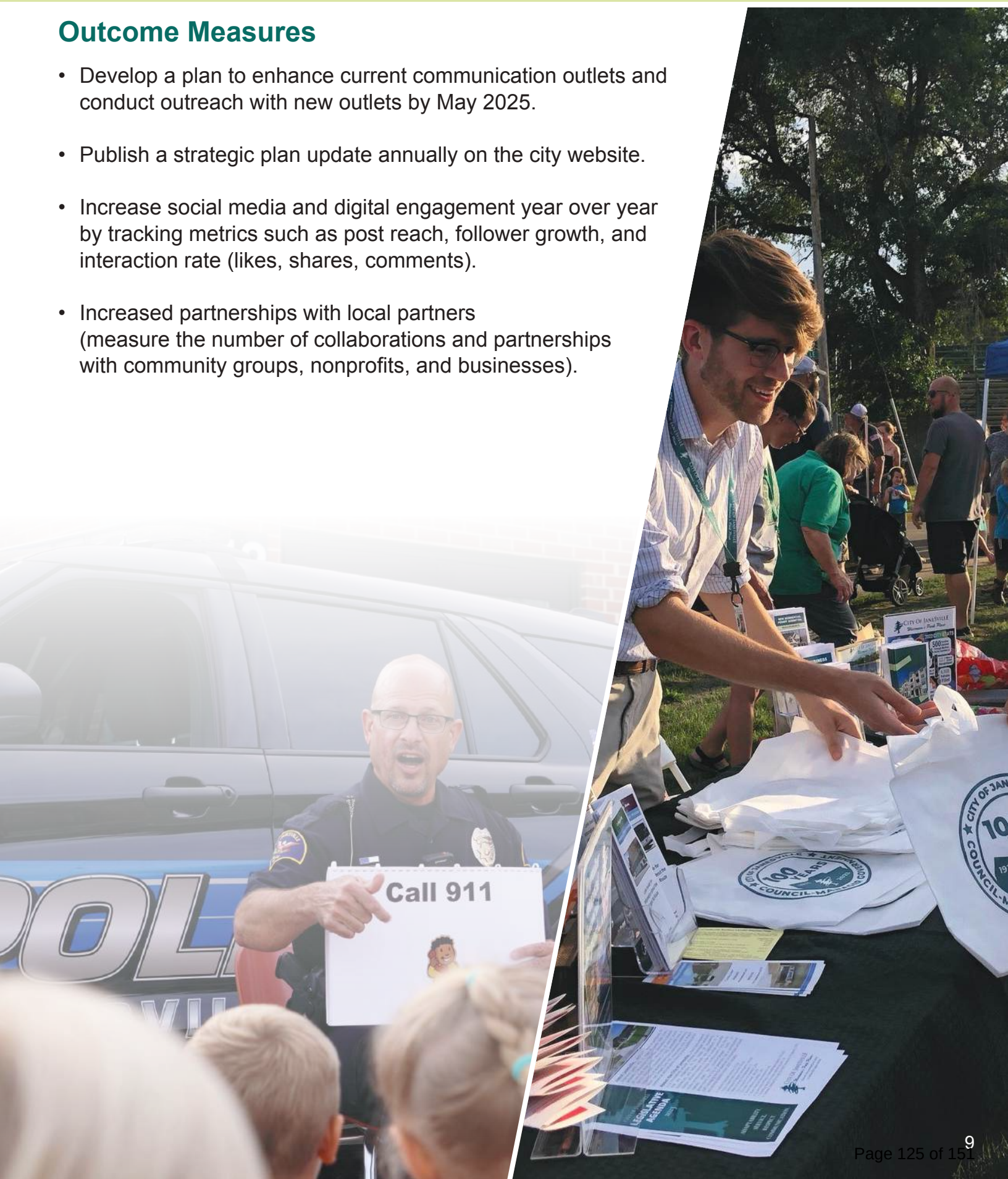
1. Promote a consistent, positive image of the city to attract and retain residents and businesses.
2. Utilize a variety of media outlets to encourage two-way dialogue with community members.
3. Foster stronger public confidence in the city through active communication and engagement.
4. Continue to promote city interests to county, state, and federal elected officials.
5. Continue to share the city's strategic goals to communicate progress and instill public trust.





Outcome Measures

- Develop a plan to enhance current communication outlets and conduct outreach with new outlets by May 2025.
- Publish a strategic plan update annually on the city website.
- Increase social media and digital engagement year over year by tracking metrics such as post reach, follower growth, and interaction rate (likes, shares, comments).
- Increased partnerships with local partners (measure the number of collaborations and partnerships with community groups, nonprofits, and businesses).



Economic Development



Our Goal



Promote businesses and growth throughout the city to maintain a positive business environment.

Objectives

1. Attract, retain, and expand businesses to diversify industries and jobs for better wages and community prosperity.
2. Support and develop entrepreneurs through existing community partnerships.
3. Sustain growth and development of downtown to boost the local economy.
4. Develop a new redevelopment plan for the former GM/JATCO Site.
5. Market and promote the business community to developers, brokers, and investors to foster relationships.
6. Advocate for development that positions the city as a desirable place to conduct business.
7. Continue to work with our partners to foster a regional business community that promotes the Rock County business environment.
8. Rewrite zoning code to maintain flexible zoning codes for evolving residential, commercial, and industrial developments.



Outcome Measures

- Increase in taxable value
(metrics: building permits, capital investment).
- New and existing employers adding new jobs.
- Complete a new zoning code update by December 31, 2025.
- Increase in median income.
- Number of new businesses created in the city.
- Continue implementation of the Arise plan.
 - Identified sites in Arise are developed and no longer vacant
 - Increase in residential units
- Increase in Tax Incremental District (TID) tax increment year over year.



Financial Sustainability



Our Goal



Maintain long-term financial responsibility through prudent management, varied revenue streams, and cost optimization.

Objectives

1. Maintain fiscal policies that will result in an AA or higher bond rating.
2. Maintain procurement practices that result in the best product or service at the lowest cost.
3. Maximize equipment/product life cycles to minimize overall costs.
4. Collaborate with the community and leverage public-private partnerships (P3s) to be good stewards of limited city resources.
5. Explore and maximize revenue diversification opportunities to decrease the burden on property taxpayers.
6. Continue to advocate for a more equitable calculation and distribution of state-shared revenue rules.



Outcome Measures

- Achieve an AA or higher rating.
- Evaluate fiscal policies on an annual basis.
- Increase city revenue diversification (percentage of total revenue coming from sources other than property taxes).
- Continue to annually review and adjust fee schedules.



Housing for All



Our Goal



Promote and encourage the development and redevelopment of housing to increase accessibility and availability of housing across the economic spectrum.

Objectives

1. Leverage P3s to incentivize the creation of housing options that meet the needs of all residents throughout the city.
2. Revise zoning codes to better enable the production of diverse housing types and lot sizes at various price points.
3. Partner with county, state, and federal programs intended to boost housing repair and maintenance.
4. Continue to find and market residential development opportunities to investment partners.
5. Promote infill projects and revitalization efforts to encourage the utilization of vacant or underused land.



Outcome Measures

- Increase the total units added by occupancy type.
- Preservation of existing housing stock
(# of homeowner rehabilitation loans provided).
- Establish new partnerships and maintain current relationships
to increase the number of housing units.
- Development of infill lots (building permit issuance).



Infrastructure



Our Goal



Utilize best practices for routine maintenance, rehabilitation, and updates for city infrastructure, facilities, and assets.

Objectives

1. Maximize the life cycle of the City's assets (i.e., public infrastructure, streets, roadways, facilities, fleet, and equipment) through routine preventative maintenance and capital improvement programs (CIP).
2. Develop and maintain an efficient, safe, and varied transportation system based upon adopted long range plans, standards, and best practices.
3. Recognize the critical nature of information technology (IT) in public services and allocate resources accordingly to maintain and upgrade the City's IT hardware and software infrastructure.
4. Leverage technology in all work areas to improve efficiency and customer service.
5. Maintain resilient water, wastewater, and stormwater systems through active upkeep and Capital Improvement Plan that meet or exceed state and federal standards to maximize system redundancy and reliability.
6. Continue growing, sustaining, and ensuring the health of the landfill to achieve self-sufficiency.



Outcome Measures

- Decrease the number of water main breaks per year.
- Increase miles of water main replaced annually.
- Annual capital improvement investment in city building facilities based on Capital Improvement Plan (CIP).
- Increase the average street Pavement Surface Evaluation and Rating (PASER).
- Increase miles of street rehabilitated or reconstructed annually.
- Increase hardware and software replaced or upgraded annually.
- Track the number of help desk tickets resolved annually to establish a baseline of average time to resolve tickets.



Organizational Excellence



Our Goal



Continually strive for organizational excellence by valuing diversity, continuously improving and empowering our teams to deliver high-quality outcomes.

Objectives

1. Recruit, onboard, and retain a more diverse workforce that reflects the diversity of the community.
2. Enhance staff training opportunities to foster a more inclusive, equitable, and engaging work environment and promote a culture of continuous advancement.
3. Continue advancing the Diversity, Equity, Inclusion, and Belonging (DEIB) committee's work to promote the City's DEIB efforts and initiatives.
4. Implement and act on feedback from the City's cultural assessment.
5. Review and update City personnel policies to promote equity, inclusion, and workplace efficiency.
6. Continue to conduct after-action reviews (AARs) following significant city events to improve future planning, promote continuous improvement, and enhance emergency preparedness.
7. Empower employees to pursue innovative solutions and create an engaging workforce.





Outcome Measures

- City staff demographics.
- Decrease staff turnover rates.
- Increase staff training hours.
- Increase City investment on staff training and conference opportunities.
- Establish an annual review cycle of city policies.
- Conduct an After-Action Review (AAR) within 30 days following a significant city event.



Vibrant Community



Our Goal



Promote a safe and healthy community with amenities and activities to attract and retain a multi-generational community.

Objectives

1. Provide quality public safety services aligned with best practices and safety standards.
2. Train employees to help ensure emergency management preparedness.
3. Promote partnerships that enhance public safety, seek community involvement, foster a sense of ownership, and strengthen neighborhoods.
4. Provide various cultural and recreational opportunities that promote a sense of belonging and quality lifestyles.



Vibrant Community

Outcome Measures

- Decrease response times.
- Tracking emergency preparedness training attendance via sign-in sheets.
- Increase positive survey responses related to public safety year over year.
- Increase community event participation.
- Increase public safety events/hours.



How Did We Create This Plan?



The strategic planning process is as important as the final document itself. Input was incorporated from across the community and the City organization, including the City Council, employees, and leadership, residents, businesses, educators, youth, seniors, community-based organizations, and other community stakeholders. This helps ensure that we are being responsive to community priorities and needs and that City resources are aligned with those needs as well as with the government's organizational needs.



How Did We Create This Plan?



1,908

Online Interactions with Social Pinpoint
Virtual Engagement Platform



108

Ideas Wall
Comments



154

Survey Responses



3

Community Forums



37

Attendance at 3
Community Forums



35

Interviews and
Focus Group Participation



Plan Development Workshops

2



Direct emails to

3,244



Social Media with Post Reach of

13,140

What's Next?



We know our community has high standards and aspirations for the City of Janesville. We enjoy a high quality of life here and want to remain an excellent place to be. The plan's five-year timeline allows for thoughtful sequencing of initiatives that will make our continued high quality of life possible.

With the strategic plan in place, the City is building an implementation plan to translate the priorities, goals, and objectives into action steps with assigned responsibilities and established timelines. This will allow City departments to work together to achieve our desired future. Regular monitoring and evaluation systems will be put in place to help ensure continuous improvement and ongoing alignment with the City's vision and strategic priorities.

We are committed to focusing resources on the priorities that best serve the needs of the community as captured in this plan, so we will align the strategic plan with the City's annual budget process so we can ensure that resources are utilized efficiently and directed toward the most important priorities. As needs or opportunities shift during the life of the plan, the City expects to address any needed changes as part of the annual budget process. And, with the strategic plan as a guide, other City plans and initiatives can be built to align so that everything is flowing in a common direction. The values expressed in this plan will drive how the City makes decisions and delivers services, and employees will apply these principles in their day-to-day work.

Keeping Track of Progress

The City will monitor progress toward strategic plan goals and objectives and report on performance measures. Tracking keeps us transparent and holds us accountable. We will provide the community with an annual report and year-end presentation to the City Council. Community members can expect to understand what we are working on and the benefits that will result for our residents, businesses, and the community overall.

Monthly –

City staff will discuss and evaluate progress on strategic goals and objectives.

Quarterly –

City leadership will provide the City Council with progress updates for each strategic plan priority.

Twice a Year –

The City Manager will prepare an update to the City Council for each strategic priority, including progress updates, successes and wins, and challenges.

Annually –

The City Manager will prepare a year-end update detailing progress on each strategic priority, goal, and objective. The report will be presented to City Council and shared with the community on the City's website www.janesvillewi.gov.

Acknowledgements

This strategic plan results from the combined efforts of our City's elected officials, employees, and community members. The City of Janesville would like to extend sincere thanks to everyone who saw the importance of this plan and dedicated their knowledge, guidance, and time over the past several months to bring it to life. Your contributions are the bricks that build the foundation for our future.



City Council

City of Janesville Staff

Community Leaders

Forward Janesville, Inc

Residents of Janesville

We would also like to thank the BerryDunn Consulting team for their facilitation of the process.



Principal: Seth Hedstrom

PM and Facilitator: Charline Kirongozi

Facilitator: Jen Ferguson

Research Analyst: Maddison Powers Spencer



CITY OF JANESVILLE

Wisconsin's Park Place

STRATEGIC PLAN 2025–2029





CITY OF
Sterling Heights
InnovatingLiving

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City Hall
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Sterling Heights, MI | 48311-8009

City Council

Mayor	Michael C. Taylor
Mayor Pro Tem	Liz Sierawski
Councilwoman	Deanna Koski
Councilman	Michael V. Radtke Jr.
Councilwoman	Maria G. Schmidt
Councilman	Henry Yanez
Councilwoman	Barbara A. Ziarko

City Manager Mark D. Vanderpool

TEL 586.446.CITY (2489) FAX 586.276.4077

cityhall@sterling-heights.net | www.sterling-heights.net

facebook.com/cityofsterlingheights | twitter.com/sterlingheights

July 2025

Dear Sterling Heights Resident:

We're reaching out to ask for your input on an important community survey. Your household was randomly selected to participate, and your feedback will help shape the future of our city.

We want to know how satisfied you are with the services the City provides and how we can better meet the needs of our residents. Your perspective is invaluable and will help ensure that the City's priorities reflect what matters most to our community.

We understand your time is valuable, and we truly appreciate you taking a few moments to complete the survey. Every response plays an important role in guiding decisions about City services, programs, and planning efforts. Your input will also help the City Council evaluate how well we're delivering on the community's shared vision for Sterling Heights.

Please complete the survey online at sterlingheightssurvey.org or return the paper version in the enclosed postage-paid envelope. We kindly ask that you submit your responses within the next week. ETC Institute is conducting the survey on our behalf, and all responses will remain confidential. Results will be shared with the City in September.

If you have any questions, feel free to contact Community Relations at (586) 446-2471 or email cityhall@sterlingheights.gov.

Thank you for taking the time to share your thoughts and help us continue building a stronger Sterling Heights.

Sincerely,

Michael C. Taylor, Mayor
City of Sterling Heights

Scan to complete
survey online.



Si tiene preguntas acerca de la encuesta y no habla Ingles, por favor llame al 1-844-811-0411. Gracias

هاتفك ورقم اسمك وترك 1-844-247-8190 بالرقم الاتصال يرجى العربية، باللغة الاستطلاع في للمشاركة



2025 City of Sterling Heights Residential Survey

Please complete this important survey if you are an adult (age 18 or older) in the household. City leaders will use your input to determine how well the community's needs are being met. The survey will take approximately 10 minutes to complete. When you are finished, please return it in the postage-paid envelope provided. Your responses will remain confidential. If you have questions about this survey, please contact Community Relations at the city of Sterling Heights at (586) 446-2470 or by e-mail at cityhall@sterlingheights.gov. Thank you!

- Overall Perception.** Some items that may influence your perception of the City of Sterling Heights are listed below. Please rate each item on a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied."

How satisfied are you with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. Overall image of the City	5	4	3	2	1	9
2. Overall value that you receive for your City tax dollars and fees	5	4	3	2	1	9
3. Overall quality of City services	5	4	3	2	1	9
4. The City as a place to live	5	4	3	2	1	9
5. The City as a place to raise children	5	4	3	2	1	9
6. The City as a place to retire	5	4	3	2	1	9
7. Overall quality of life in the City	5	4	3	2	1	9
8. Overall direction of the City	5	4	3	2	1	9

- Public Safety.** For each of the following, please rate your satisfaction on a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied."

How satisfied are you with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
01. Overall quality of local police protection	5	4	3	2	1	9
02. The visibility of police in neighborhoods	5	4	3	2	1	9
03. The visibility of police in retail areas	5	4	3	2	1	9
04. The visibility of police in public parks	5	4	3	2	1	9
05. The City's efforts to prevent crime	5	4	3	2	1	9
06. How quickly police respond to emergencies	5	4	3	2	1	9
07. Enforcement of local traffic laws	5	4	3	2	1	9
08. Overall quality of public interaction with the police department	5	4	3	2	1	9
09. Quality of animal control	5	4	3	2	1	9
10. Overall quality of local fire protection	5	4	3	2	1	9
11. How quickly fire department personnel respond to emergencies	5	4	3	2	1	9
12. Overall quality of emergency medical services	5	4	3	2	1	9
13. How quickly emergency medical personnel respond to emergencies	5	4	3	2	1	9

- Which THREE of the public safety items do you think should receive the MOST EMPHASIS from City leaders over the next two years?** [Write in your answers below using the numbers from the list in Question 2.]

1st: _____ 2nd: _____ 3rd: _____

4. **Perceptions of Safety.** Using a scale of 1 to 5, where 5 is "Very Safe" and 1 is "Very Unsafe," please rate how safe you feel in the following situations.

How safe do you feel...	Very Safe	Safe	Neutral	Unsafe	Very Unsafe	Don't Know
1. In your neighborhood during the day	5	4	3	2	1	9
2. In your neighborhood at night	5	4	3	2	1	9
3. In City parks and recreation facilities	5	4	3	2	1	9
4. In commercial and retail areas of the City during the day	5	4	3	2	1	9
5. In commercial and retail areas of the City at night	5	4	3	2	1	9

5. **Parks and Recreation and City Events.** For each of the following, please rate your satisfaction on a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied."

How satisfied are you with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
01. Maintenance and mowing of City parks	5	4	3	2	1	9
02. The number of City parks	5	4	3	2	1	9
03. Bike/Hike trail system	5	4	3	2	1	9
04. Park amenities (picnic tables, shelters, playgrounds, sports fields/courts, etc.)	5	4	3	2	1	9
05. Nature Center services and programs	5	4	3	2	1	9
06. Senior Center	5	4	3	2	1	9
07. Music in the Park Concert Series	5	4	3	2	1	9
08. Youth recreation programs offered	5	4	3	2	1	9
09. Teen recreation programs offered	5	4	3	2	1	9
10. Adult recreation programs offered	5	4	3	2	1	9
11. Senior recreation programs offered	5	4	3	2	1	9
12. Special recreation programs	5	4	3	2	1	9
13. Special events (A Sterling Christmas, Sterling Frights, Cultural Exchange, Memorial Day Parade)	5	4	3	2	1	9
14. Sterlingfest Art & Music Fair	5	4	3	2	1	9
15. Fees charged for recreational programs	5	4	3	2	1	9

6. **Which THREE of the parks and recreation and events items listed above do you think should receive the MOST EMPHASIS from City leaders over the next two years?** *[Write in your answers below using the numbers from the list in Question 5.]*

1st: _____ 2nd: _____ 3rd: _____

7. **Public Library Services.** For each of the following, please rate your satisfaction on a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied."

How satisfied are you with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. Print collections	5	4	3	2	1	9
2. Audio/video collections	5	4	3	2	1	9
3. Digital collections	5	4	3	2	1	9
4. Reference services	5	4	3	2	1	9
5. Homebound/home delivery services	5	4	3	2	1	9
6. Programs for children	5	4	3	2	1	9
7. Programs for teens	5	4	3	2	1	9
8. Programs for adults	5	4	3	2	1	9

8. Which TWO of the Library items listed above do you think should receive the MOST EMPHASIS from City leaders over the next two years? *[Write in your answers below using the numbers from the list in Question 7.]*

1st: ____ 2nd: ____

9. **Code Enforcement.** For each of the following, please rate your satisfaction on a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied."

How satisfied are you with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. Enforcing the clean-up of litter and debris on residential property	5	4	3	2	1	9
2. Enforcing the mowing and trimming of grass and weeds on residential property	5	4	3	2	1	9
3. Enforcing the mowing and trimming of grass and weeds on commercial property	5	4	3	2	1	9
4. Enforcing the exterior maintenance of residential property in your neighborhood	5	4	3	2	1	9
5. Enforcing the exterior maintenance of commercial property in your neighborhood	5	4	3	2	1	9
6. Enforcing the exterior maintenance of rental properties in your neighborhood	5	4	3	2	1	9
7. Enforcing sign regulations	5	4	3	2	1	9

10. Which TWO of the code enforcement items do you think should receive the MOST EMPHASIS from City leaders over the next two years? *[Write in your answers below using the numbers from the list in Question 9.]*

1st: ____ 2nd: ____

11. **City Maintenance.** For each of the following, please rate your satisfaction on a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied."

How satisfied are you with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
01. Maintenance of major City streets	5	4	3	2	1	9
02. Maintenance of neighborhood streets	5	4	3	2	1	9
03. Maintenance of curbs and sidewalks	5	4	3	2	1	9
04. Maintenance of traffic signals/signs	5	4	3	2	1	9
05. Adequacy of City street lighting	5	4	3	2	1	9
06. Maintenance of City buildings, such as City Hall	5	4	3	2	1	9
07. Snow removal on major City streets	5	4	3	2	1	9
08. Snow removal on residential streets	5	4	3	2	1	9
09. Mowing and trimming along City streets and other public areas	5	4	3	2	1	9
10. Overall cleanliness of City streets and other public areas	5	4	3	2	1	9
11. Overall flow of traffic and congestion management in Sterling Heights	5	4	3	2	1	9
12. Maintenance of stormwater drainage system	5	4	3	2	1	9
13. Refuse, recycling and yard waste removal	5	4	3	2	1	9

12. **Which THREE of the city maintenance items do you think should receive the MOST EMPHASIS from City leaders over the next two years?** *[Write in your answers below using the numbers from the list in Question 11.]*

1st: _____ 2nd: _____ 3rd: _____

13. **City Leadership and Communication.** For each of the following, please rate your satisfaction on a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied."

How satisfied are you with...	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1. Overall quality of leadership provided	5	4	3	2	1	9
2. Overall accessibility of City leaders	5	4	3	2	1	9
3. Overall responsiveness of City leaders	5	4	3	2	1	9
4. The availability of information about City programs and services	5	4	3	2	1	9
5. The City's efforts to keep you informed about local issues	5	4	3	2	1	9
6. The level of public involvement in local decision making	5	4	3	2	1	9
7. The quality of the City's website	5	4	3	2	1	9

14. **In the past year, which methods have you used most often to get City-related information from the City of Sterling Heights?** *[Check all that apply.]*

____ (1) Traditional U.S. Mail ____ (6) Social Media (Facebook, X, YouTube, Instagram)
 ____ (2) City Magazine ____ (7) Local Media Coverage
 ____ (3) City Website ____ (8) Text Alerts
 ____ (4) Email ____ (9) Other: _____
 ____ (5) SHTV (Channel 5 & 99)

15. **What communication channels should we be using that we currently are not?** *[Check all that apply.]*

____ (1) Snapchat ____ (2) TikTok ____ (3) Other: _____

- 16. Have you called, e-mailed, or submitted a ticket through See Click Fix, or visited the City with a question, problem, or complaint during the past year?**

____(1) Yes [Answer Question 16a-b.] ____ (2) No [Go to Question 17.]

- 16a. How easy was it to contact the person you needed to reach?**

____(4) Very easy ____ (2) Difficult ____ (9) Don't know
____(3) Easy ____ (1) Very difficult

- 16b. For each item below, please rate how often the employees you have contacted during the past year have displayed the customer service described on a scale of 1 to 5, where 5 means "Always," and 1 means "Never."**

Behavior of Employees		Always	Usually	Sometimes	Seldom	Never	Don't Know
1.	They were courteous and polite	5	4	3	2	1	9
2.	They gave prompt, accurate, and complete answers to questions	5	4	3	2	1	9
3.	They did what they said they would do in a timely manner	5	4	3	2	1	9
4.	They helped you resolve an issue to your satisfaction	5	4	3	2	1	9

- 17. What do you like most about living in Sterling Heights? [Check all that apply.]**

____(01) Grew up in region ____ (06) Close to family/friends
____(02) Close to work ____ (07) Affordable cost of living
____(03) Employment opportunities ____ (08) Shopping and entertainment options
____(04) Quality of life amenities ____ (09) A diverse population
____(05) Educational systems ____ (10) Other: _____

- 18. Please indicate up to THREE things that would make you consider leaving Sterling Heights. [Check up to 3 choices.]**

____(01) Congestion/Traffic ____ (06) Changing demographics
____(02) Affordability ____ (07) Lack of housing options
____(03) Cost of living ____ (08) Shopping and entertainment options
____(04) Driving distance to work ____ (09) Desire for more land
____(05) Employment opportunities ____ (10) Other: _____

- 19. Why would you recommend Sterling Heights as a place to live to your friends or family? [Check all that apply.]**

____(01) Grew up in region ____ (06) Close to family/friends
____(02) Close to work ____ (07) Affordable cost of living
____(03) Employment opportunities ____ (08) Shopping and entertainment options
____(04) Quality of life amenities ____ (09) A diverse population
____(05) Educational systems ____ (10) Other: _____

20. Please rate your satisfaction with the following aspects of your neighborhood on a scale of 1 to 5, where 5 is "Very Satisfied" and 1 is "Very Dissatisfied."

How satisfied are you with...		Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied	Don't Know
1.	Housing stock (type, quality, and price of available housing in your neighborhood)	5	4	3	2	1	9
2.	Parks (size, accessibility and amenities, of the parks in your neighborhood)	5	4	3	2	1	9
3.	Proximity to retail, entertainment (convenience of the stores, entertainment venues you utilize)	5	4	3	2	1	9
4.	Proximity to service providers like schools, hospitals, doctors, dentists, salons (convenience of the service providers you utilize)	5	4	3	2	1	9

21. The City's Visioning 2040 Plan includes creating spaces that provide relaxation, leisure, and the development of social connections, which can reduce feelings of loneliness and isolation. These spaces also contribute to a sense of belonging and can be crucial for building and maintaining social capital within a community. Please rate your level of agreement with the following statement:

"I feel Sterling Heights is a community that provides vibrant and attractive areas with unique offerings and focal points as well a robust system of pathways and trails that connect residents to these areas."

____(4) Strongly agree ____ (2) Disagree ____ (9) Don't know
 ____ (3) Agree ____ (1) Strongly disagree

22. The City is committed to making sure we are a community that is exceptionally maintained, sustainable and environmentally responsible. Please rate your level of agreement with the following statement:

"I feel Sterling Heights is a community that values sustainability."

____(4) Strongly agree ____ (2) Disagree ____ (9) Don't know
 ____ (3) Agree ____ (1) Strongly disagree

23. The City is committed to being an inclusive community where all residents feel welcome, accepted, respected and safe in Sterling Heights. Please rate your level of agreement with the following statement:

"From my perception, I feel Sterling Heights is an inclusive community."

____(4) Strongly agree ____ (2) Disagree ____ (9) Don't know
 ____ (3) Agree ____ (1) Strongly disagree

24. Since you've lived in Sterling Heights, do you feel race relations in the City have improved, stayed the same or worsened?

____ (3) Improved ____ (2) Stayed the same ____ (1) Worsened ____ (9) Don't know

25. Is there anything else the City of Sterling Heights should be doing, or anything not addressed in this survey you would like city leaders to know?

26. Approximately how many years have you lived in the City of Sterling Heights?

____ (1) Less than 1-year ____ (2) 1-5 years ____ (3) 6-10 years ____ (4) More than 10 years

27. **Do you own or rent your current residence?** ____ (1) Own ____ (2) Rent
28. **In what type of residence do you live?**
 ____ (1) Single family home ____ (3) Duplex ____ (5) Condominium
 ____ (2) Manufactured/mobile home ____ (4) Apartment ____ (6) Other: _____
29. **What is your age?** ____ years
30. **What is the highest level of education completed by a member of your household?**
 ____ (1) Less than high school graduate ____ (5) Associate's Degree
 ____ (2) High school diploma or GED ____ (6) Bachelor's Degree
 ____ (3) Some college ____ (7) Graduate/Professional Degree
 ____ (4) Vocational/technical
31. **Please estimate your total annual household income:**
 ____ (1) Less than \$25,000 ____ (3) \$35,000 - \$49,999 ____ (5) \$75,000 - \$99,999
 ____ (2) \$25,000 - \$34,999 ____ (4) \$50,000 - \$74,999 ____ (6) \$100,000 or more
32. **What is your gender?**
 ____ (1) Male ____ (3) Non-binary
 ____ (2) Female ____ (4) Prefer to self-describe: _____
33. **Is English the primary language spoken in your home?** ____ (1) Yes ____ (2) No
34. **What is your ethnic origin? [Check all that apply.]**
 ____ (01) Asian or Asian Indian ____ (05) Native Hawaiian or other Pacific Islander
 ____ (02) Black or African American ____ (06) Hispanic or Latino
 ____ (03) American Indian or Alaska Native ____ (07) Arab or Middle Eastern
 ____ (04) White ____ (99) Other: _____
35. **Are you registered to vote in Sterling Heights?** ____ (1) Yes ____ (2) No
36. **Are you currently employed?** ____ (1) Yes ____ (2) No
37. **Do you currently have access to broadband data (or hi-speed internet access)?**
 ____ (1) Yes ____ (2) No

This concludes the survey. Thank you for your time!

Please return your completed survey in the enclosed postage paid envelope addressed to:
 ETC Institute, 725 W. Frontier Circle, Olathe, KS 66061

Your responses will remain completely confidential. The information printed to the right will ONLY be used to help identify the level of satisfaction with City services in your area. If your address is not correct, please provide the correct information. Thank you.

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