

2025

# Strategic Plan



# THE VALUE OF STRATEGIC PLANNING

- **Provides a Roadmap and Direction to Success**
  - Keeps you Focused and Aligns Resources with Goals
- **POW!er Forward – you'll be Proactive – Not Reactive**
  - Makes you more Efficient and Effective
- **Defines your Competitive Advantage**
  - Identifies New Opportunities and Innovations



# STRATEGIC PLAN BEST PRACTICES

A good strategic plan starts with knowing your community's vision and your organization's role in helping to achieve it.

Next:

- Assess your strengths, weaknesses, opportunities, threats and key assets; as well as the four forces of value.
- Evaluate what's completed and still on the docket.
- **Prioritize – Prioritize – Prioritize**
- Establish metrics and timelines

A strategic plan is generally good for three (3) – five (5) years.

# YOUR MISSION

At its Strategic Planning Session on January 9, 2025, the Lake Orion DDA spent time streamlining its mission and vision statements, as well as establishing core values. While the current mission statement is sufficient, creating something that is succinct and memorable for Board members to articulate easier is needed, as well as defining the “why”.

***Current:*** To enhance the economic potential and preserve the historical character of the Lake Orion DDA District, the heart and hub of the Orion Community, through promotional activities and an organizational structure that focuses on community involvement with local businesses, residents, and other stakeholders.

**Who Is the DDA:** A Community of Innovators; stewards of economic growth

**What the DDA Does:** Celebrate, Preserve & Enhance; Drive the Direction

**Why the DDA Does It:** Prosperity for all; Sense of Community

**Who the DDA Does It For:** The community, local businesses, residents and stakeholders

# YOUR REVISED MISSION - OPTIONS

1

*To enhance the economic potential and preserve the historical character of the Lake Orion DDA District, the heart and hub of the Orion Community, **to foster prosperity and a strong sense of connection for all.***

2

***We are a community of innovative economic stewards dedicated to preserving, enhancing, and driving the growth of Lake Orion DDA District, the heart of our community, to foster prosperity and a strong sense of connection for all.***

3

**We are a community of innovative economic stewards focused on preserving and enhancing the Lake Orion DDA District to drive prosperity and a strong sense of connection for all.**

# YOUR FINAL REVISED MISSION (#3)

**We are a community of innovative economic stewards focused on preserving and enhancing the Lake Orion DDA District to drive prosperity and a strong sense of connection for all.**

# CORE VALUES

## THE IMPORTANCE OF CORE VALUES

- Defines Culture & Identity
- Sets Expectations
- Guides Behavior
- Helps Decision-Making
- Key in Developing the Vision

Use these core values to evaluate future needs, goals, deliverables and decision-making. Any action, project or program should have a minimum of one of these core values.

## LAKE ORION DDA CORE VALUES

*Ask yourself, “Is this project, program, action \_\_\_\_\_”*



COMMUNITY



COMMITMENT  
TO PRESERVING  
& NURTURING  
KEY ASSETS

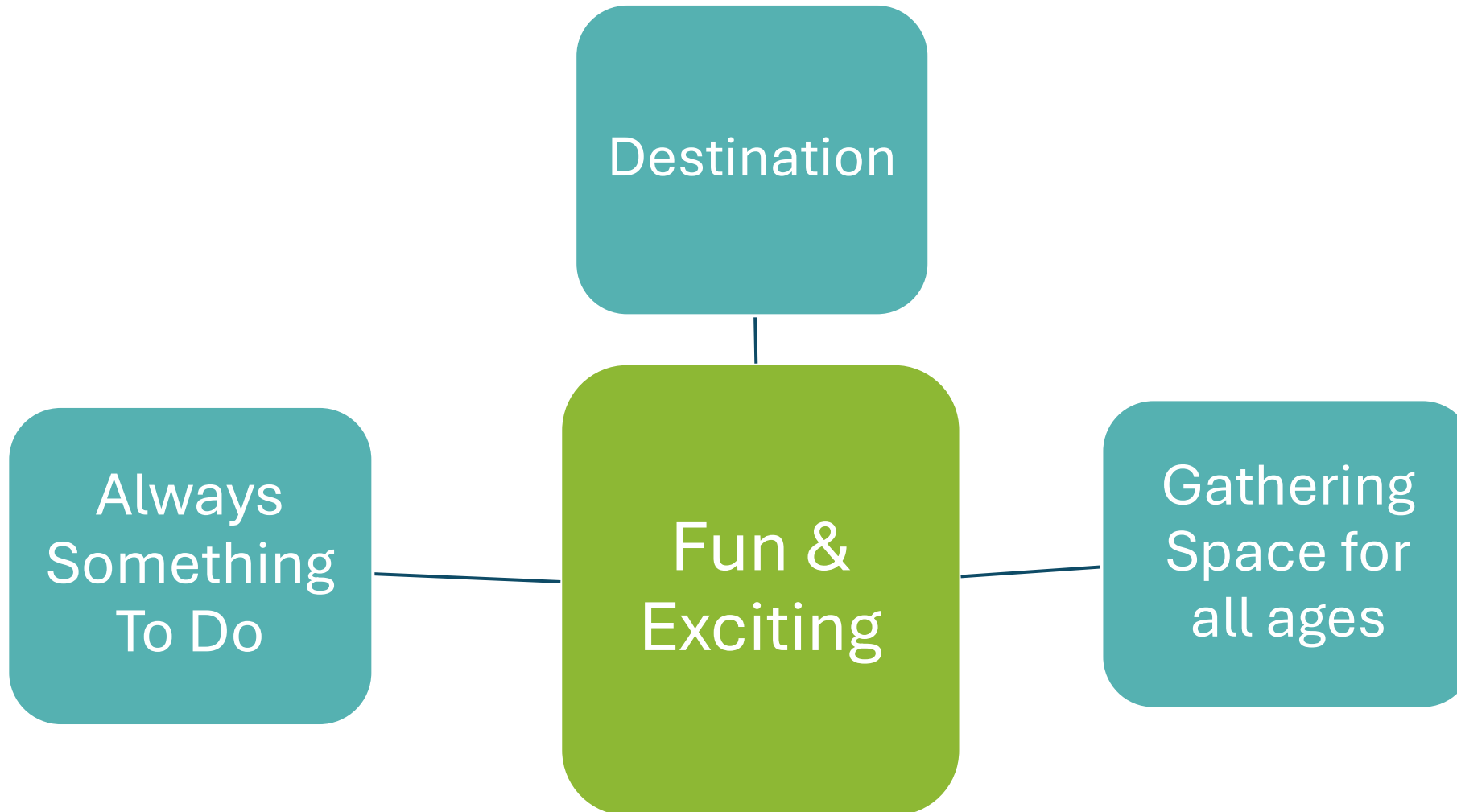


WELCOMING



INTEGRITY

# DOWNTOWN VISION PILLARS





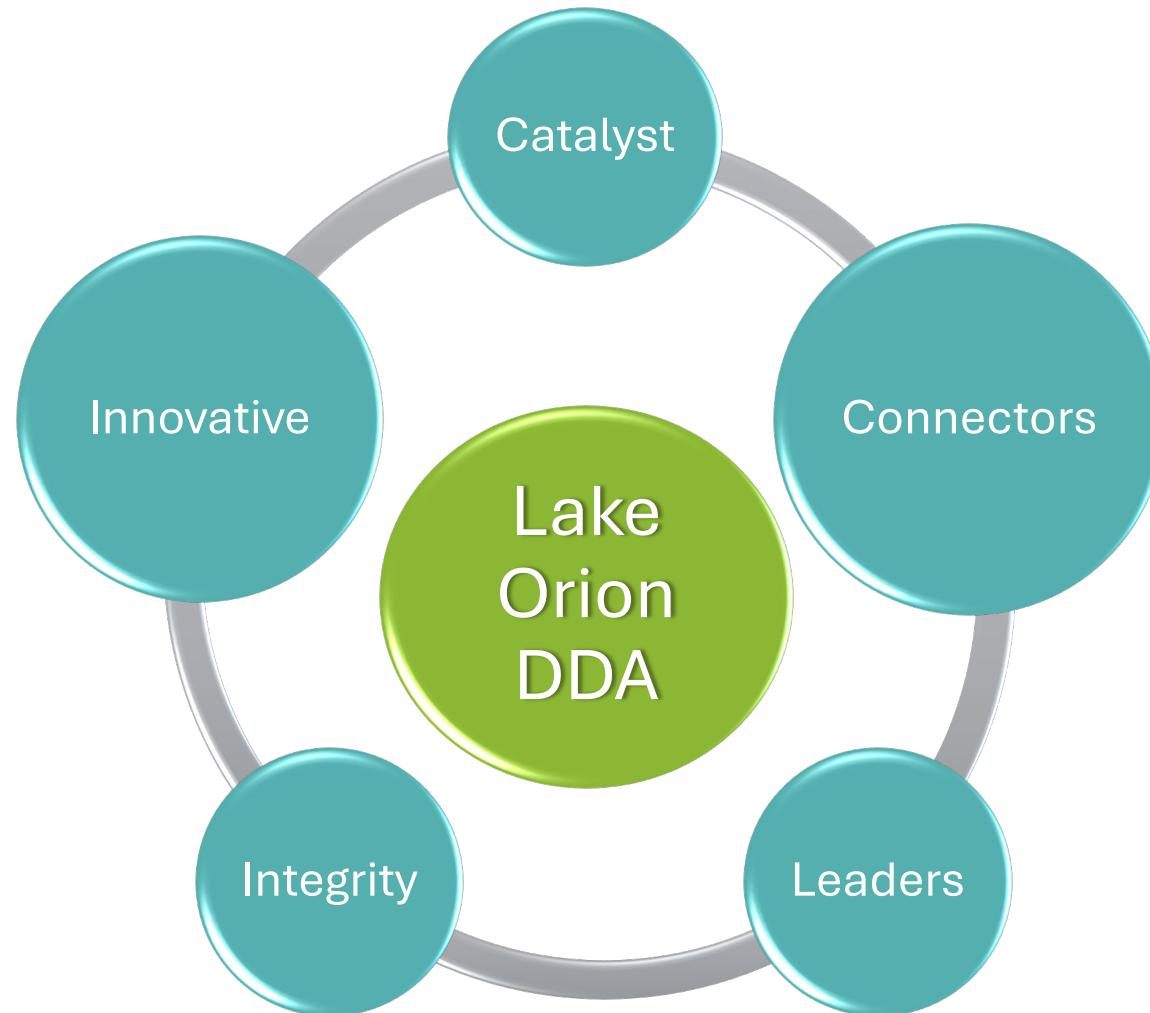
# VISION

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A lively lakeside downtown, where all ages come together for endless fun, connection, and unforgettable experiences in unique businesses, community spaces, and historic and natural treasures.



# ORGANIZATION VISION PILLARS



# DDA ROLE

- Improve the quality of life
- Create a sense of place
- Attract and retain residents, businesses and talent
- Spur private reinvestment
- Increase property value in and around the area

## The Work a DDA Does or Can Do

- Infrastructure improvements to streets, sidewalks, lighting, sewer and water
- Design of public gathering places and parks
- Revitalization of vacant and underutilized properties
- Rehabilitation of historic buildings, assets and facades
- Mixed-use and middle-housing infill developments
- Business recruitment and retention programs
- Safety, security and maintenance programs
- Marketing, special events and promotions

# SWOT ANALYSIS

Strengths	Weaknesses	Opportunities	Threats	Key Assets
Staff	Connection to Lake	Lumberyard Project	People without Knowledge of Happenings	Lakes/Trails/Greenspace
Beautiful Downtown	Lack of Volunteers/Committee Depth	Retail Product Gap Fill	Members of Council Wanting to Shrink or Dismantle DDA	Lumberyard
Lakes/Trails/Natural Features	Quantity & Variety of Retail & Small Food Places	Greenspace	Lack of Village Mgt. Support	Businesses & Restaurants - Unique Shops
	Village Relationship	Increase Pedestrian Traffic	Higher Sq. Ft. Rent/Price	

Listed above is the primary SWOT analysis voted by the DDA Board. For a full list, please refer to the notes in attachments.

# NEEDS ASSESSMENT

Physical	Economic	Social	Organizational
Façade Improvements	Small Business Support Tools/Growth	Family Activities	Decision on Outsource Vs. Village Contracts
Lumberyard Improvements	Coordinated Marketing	Activities for All Businesses	Volunteers & Revised Structure
Cross Highway Access	Money to Improve M-24	Unique/Bigger Events (don't just do it to do it)	Community Involvement/Vision
Dumpster Enclosures ( and litter control)	More Retail	Business Incentive Promotion	Less Battles
Greenspace Expansion	Grants	Placemaking for All Ages	Increase Communication/Transparency
More Gathering Spaces	Promote Tourism		

Listed above is the primary needs assessment voted by the DDA Board. For a full list, please refer to the notes in attachments.

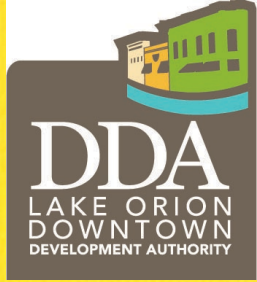
# MOVING FORWARD & TIF PLAN PROJECTS

Moving Forward	TIF Plan Priorities	Timeline
Lumberyard	Gateway Project	2025-28
Better Working Relationship with Village Council & Mgt.	Managing Infrastructure Account (ADDED AFTER SESSION)	2025
More Boutique Variety	Façade Improvement	2025
Communication & Brand/Mantra	Branding & Communication (be specific about next steps)	2025
Being the Resource to Businesses	Business Recruitment & Marketing (be specific about next steps)	2025
Focus on Future	Admin Support & Services (be specific about next steps)	2025-28
	Safe Lake Access	2025-27
	Dumpsters	2026





# METRICS OF SUCCESS



- Broad-based Community Support/Buy-in
- Large Volunteer Force
- Financial Strength & Support to Meet Goals, Projects & Deliver on Program Needs
- Target Market Grows
- A Community for All Ages
- Diversity & Retention of Businesses
- Strong DDA/Village Relationship
- GAMSA Winner/National Recognition

# KEY STRATEGIES



**LAKESHORE  
ECONOMY**



**COMMUNITY  
BUILDING**





# LAKESHORE ECONOMY



**Grow Local  
Community &  
Tourism  
Business**

**Enhance  
Downtown  
Connections**

**Create Great  
First  
Impressions**



# LAKESHORE ECONOMY



## **Enhance Downtown Connections**

Gateway Project – Lumberyard

Trail Access & Amenities

Walkable Lake Access

Community Gathering & Green Spaces for All  
Ages (Public & Private)



# GATEWAYS - LUMBERYARD

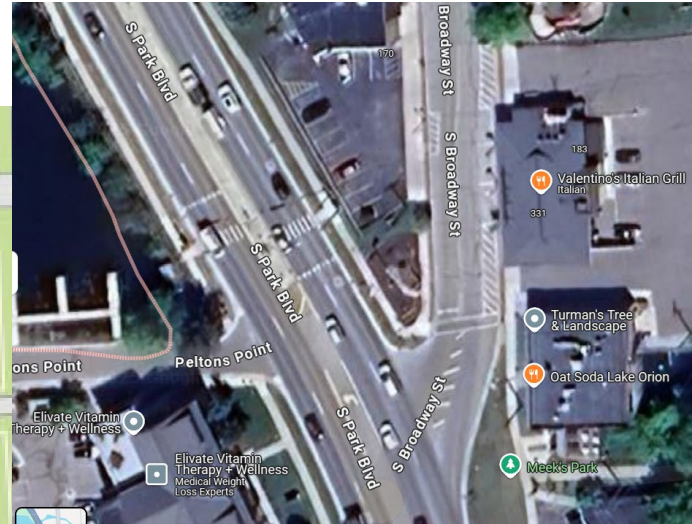
## VISION

- Visualize Your Activation Plan
  - Public gathering/event space - preserve and rehabilitate main barn – develop an activation plan
  - Retail activation - open storefront to Paint Creek Trail; create a market village incorporating existing sheds
  - Preserve sightlines to trail & add amenities to connect
- Develop & Communicate an Action Plan Timeline
- Share Storytelling/History
- Develop a Funding Campaign
- Devise a Business Plan





# WALKABLE LAKE ACCESS / TRAIL AMENITIES



TRAFFIC LIGHT  
WARRANTED?

MORE VISUAL  
CROSSWALKS

## TRAIL AMENITIES/DOWNTOWN CONNECTIONS

- Restrooms & doggie stations
- Drinking fountains for people & pups
- Bike racks, repair stations
- Public art directional signage/QR code self-guided tours
- Signage to things downtowns and interpretive signage
- Shaded rest areas, benches and tables
- Lighting
- Destination Activities in Greens Park





# EXPANDING GATHERING SPACES

## Plant Seeds

- Identify Locations/Opportunities
- Don't Forget Private Businesses/Sites
- Visualize what's needed with Conceptual Designs
- Take Advantage of Design Assistance from MSOC



From  
Small  
to  
Large  
Spaces







# LQC

## *Lighter, Quicker, Cheaper*

- Project for Public Spaces <https://www.pps.org/article/lighter-quicker-cheaper>
- <https://www.patronicity.com/lqc-grant>



A selection of interventions and projects from around the world. Refer to our [great LQC Intervention site](#) for case studies.



# LHF

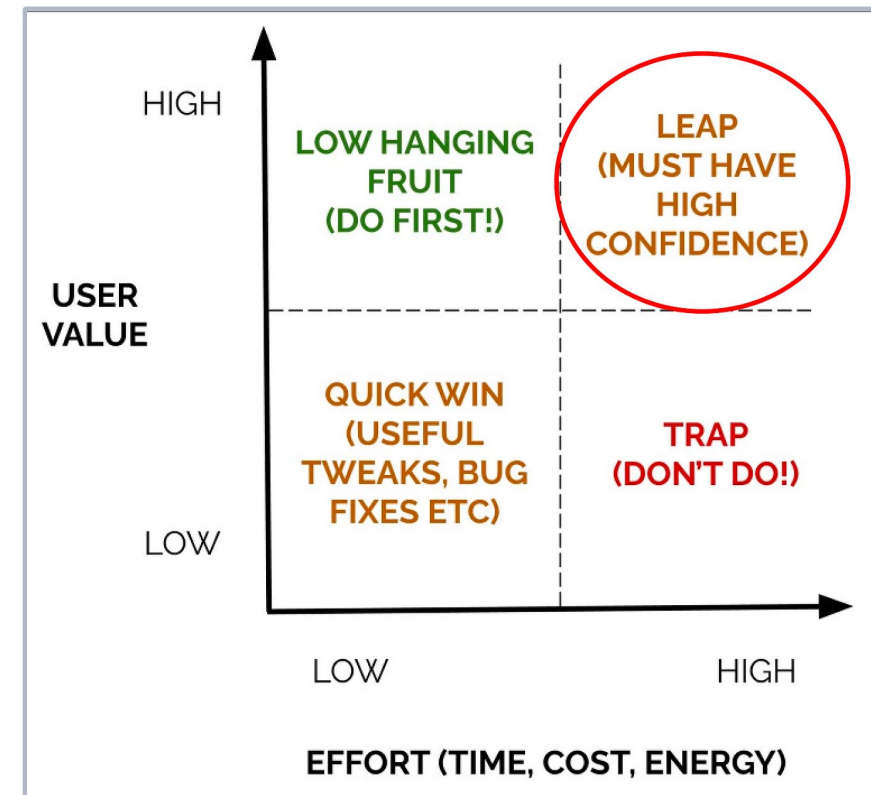
## *Low Hanging Fruit*

### The Strategy

- Integrate Low Hanging Fruit Projects with harder tasks, but don't solely rely on them.
- Plan for the hard stuff, while implementing something easy.

### The Benefits

- Sense of Accomplishment
- Activates/Rewards/Sustains Volunteerism
- Minimal Effort
- High Impact - Immediate Results & Awareness
- Cost-Effective & “Budgetable”





# LAKESHORE ECONOMY



## Grow Local Tourism Business

**Recruitment** - Business Mix Analysis and Recruitment Strategy

**Retention** - Small Business Support Tools/Growth

**Lakeshore-centric and Trail-based Events & Promotions** - Signature Events, Recreational Activities for Families & All Ages

**Tourism Marketing** – Co-op & Coordinated Business Opportunities





# WHY DOWNTOWN LAKE ORION?

## *Defining What Local Tourism Means to LO*



### **#1 Reason Why People (Residents & Consumers) Choose Lake Orion – Access to Lakes, Nature, Recreation**

- #1 Reason Why Businesses Locate to Lake Orion – Access to the People Who Choose Lake Orion

### **What is Tourism for LO?**

- An Emotional Connection to a Place
- Offers Natural, Cultural & Man-made Attractions/Businesses
- Lake Orion offers its residents and customers a mix of tourism niches - Experiential, Heritage, Eco, Sustainable, Event, Cultural Heritage, Nature & Adventure

### **BE A TOURIST IN YOUR OWN BACKYARD!**

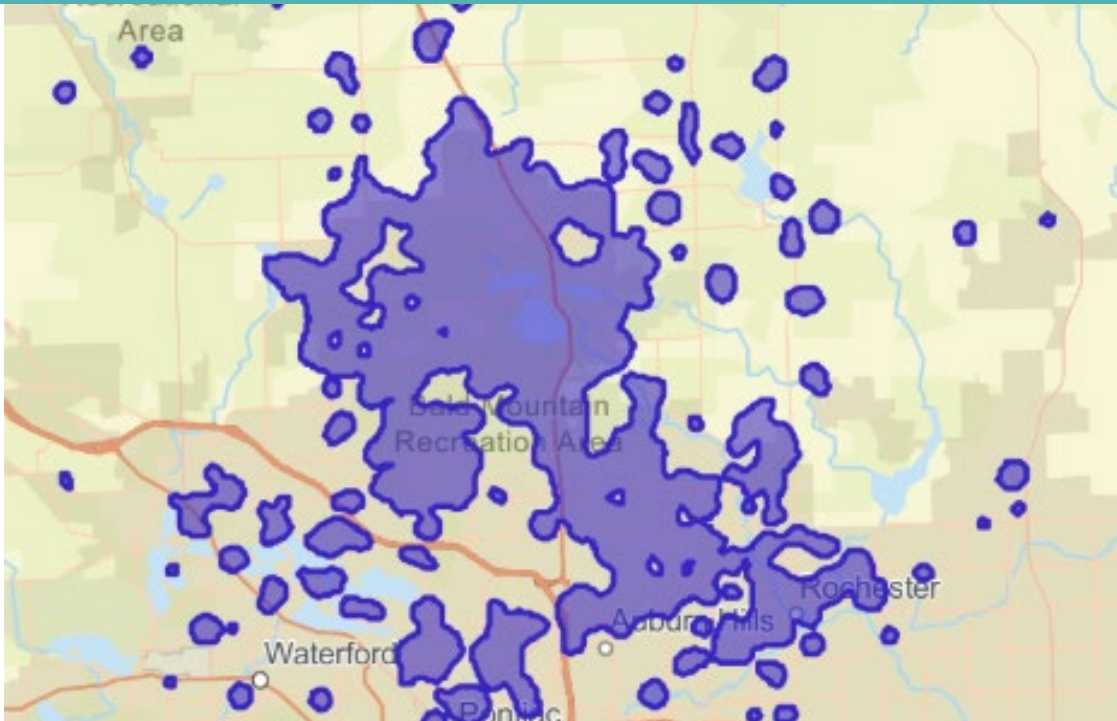
Local tourism is about connecting with communities, supporting local businesses, and experiencing authentic culture.



# LAKE ORION DDA TARGET MARKET AREA



## PRIMARY AUDIENCE



### 70% of Visitors

Lake Orion/Orion Twp  
Oxford  
Auburn Hills  
Rochester  
Rochester Hills  
Pontiac  
Waterford  
Independence Twp

### Demographics

\$94.6k Median HH Income  
39.5 Median Age  
\$77.8k Disposable Income

### Consumer Trends

485.9k Unique Visitors  
2.6m Visits  
5.37 Visit Frequency  
105 min. Avg. Stay

## Targeted Marketing:

- Grow Visitor Duration & Frequency from Existing Consumer Base
- Target towards Recreationalists via Social Media Ads/Messaging about Assets/Recreation
- Co-op Marketing Goes A Long Way!
- Geo-Fencing/Push Notifications – Leverage Other Media Partners



# BUSINESS OPPORTUNITIES

## Advantage Leakage

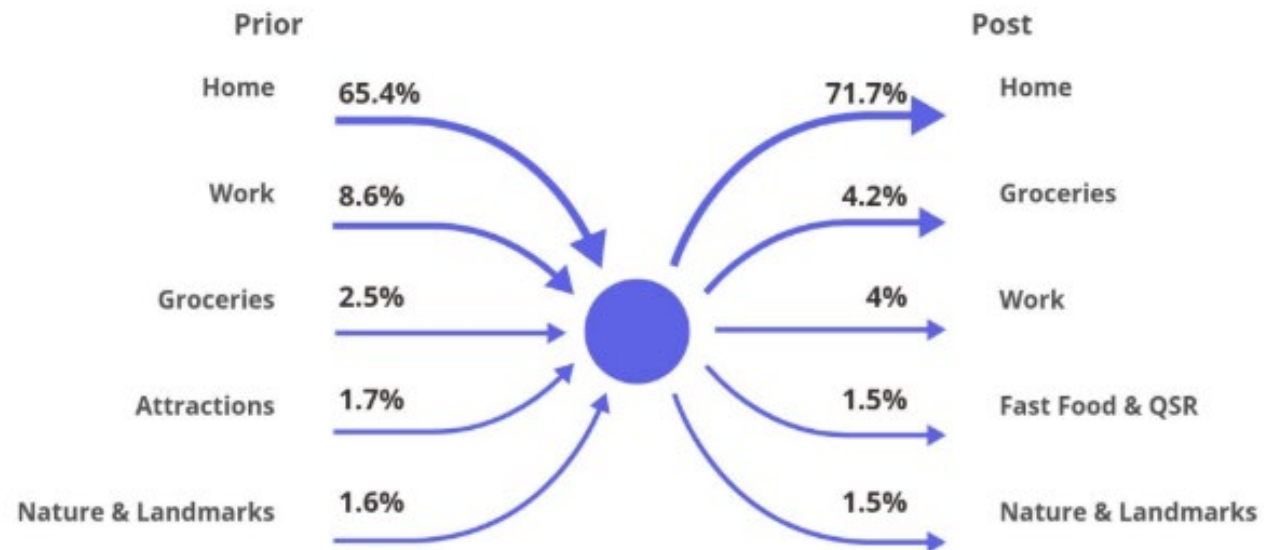
- Nature & Landmarks

## Sales Leakage

- Grocery
- QSR Foods

## Competition

- Great Lakes Mall
- Auburn Mile
- Baldwin Commons
- Hampton Village Centre
- Village of Rochester Hills
- Somerset
- Adams Marketplace



## Retail Needs:

- Recreation/Outdoor
- Grocery
- Home
- Travel-Related

## Service Needs:

- Quick-Serve Food



# BUSINESS RECRUITMENT



## ➤ Retail

- Children's Clothing Stores
- More Boutiques & Clothing, Shoes, Accessories
- Bookstore
- Home Décor
- Outdoor Gear, Clothing & Rentals

## ➤ Fitness Focused Services

## ➤ Food/Restaurant

- Bakery
- Quick Serve Deli / Soup
- Boating/Biking Grab-n-Go – Mini-Market (healthy snacks, meals and group shareables)

## ➤ Experiential Businesses (arts, creative businesses)

## ➤ Lodging

## Lean Into Businesses that Grow the Lakeshore Economy

- Create Incentives Geared at this Sector
- Unique Selling Proposition is the Lake & Trails Connections



# SAMPLE MARKET PROFILE







# GROW LOCAL TOURISM

## Enhance listings and searchability:


- Add downtown and assets to other listings & Google page

**AllTrails**  [Explore](#) [Saved](#) [Shop](#) [Log in](#)

[Back to Explore](#) [Hiking](#) / [United States](#) / [Michigan](#) / [Lake Orion](#)

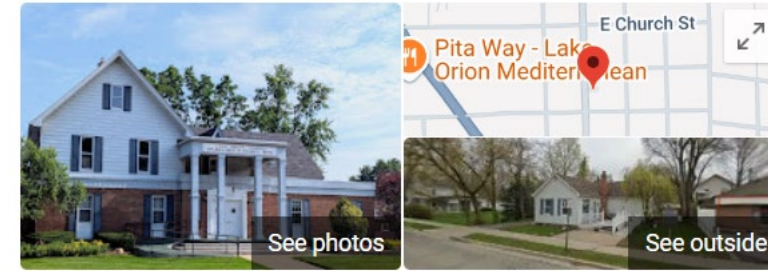
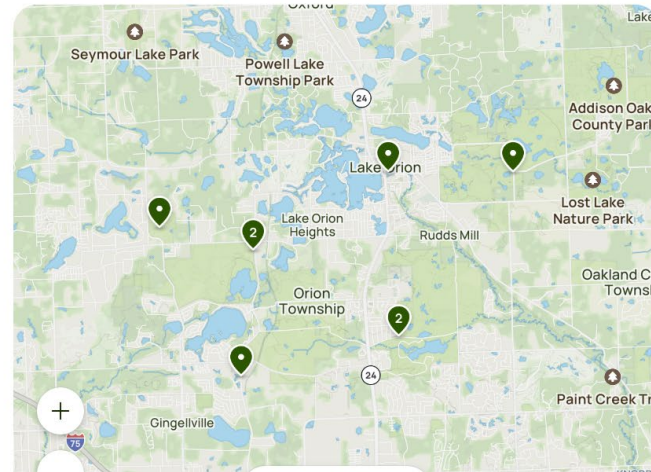
### Best trails in Lake Orion

★ 4.4 (4,046 reviews)



[All photos](#)

Looking for the best hiking trails in Lake Orion? Whether you're getting ready to hike,



## Lake Orion Downtown Development Authority

4.1 ★★★★★ 9 Google reviews

City government office in Lake Orion, Michigan



### Find A Trail - Bike paths near me

We're A Non-Profit All About Helping You Enjoy The Outdoors. Register Now! Find Georgia **Trail** Descriptions, **Trail** Maps...

#### Bike Trails

We Help You Find Long-Distance Comprehensive Bike Trails.

#### Find Trail Near Me

Find a nearby trail Exercise outdoors today

#### Trail Itineraries

Detailed Multi-Day Itineraries. Self-Guided Trail Tours.





# GROW LOCAL TOURISM

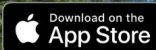


## Leverage Partnerships with other Tourism & Recreation-based Organizations/Businesses



Detroit Brew Trail

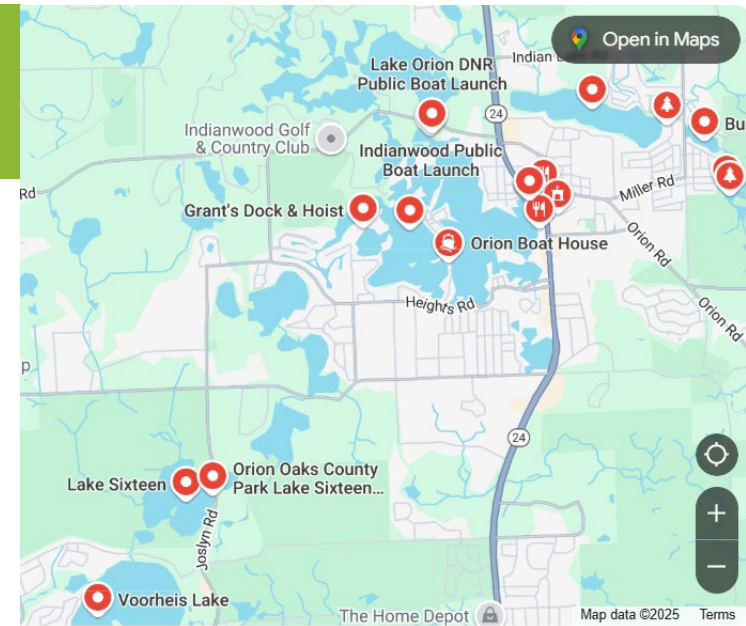
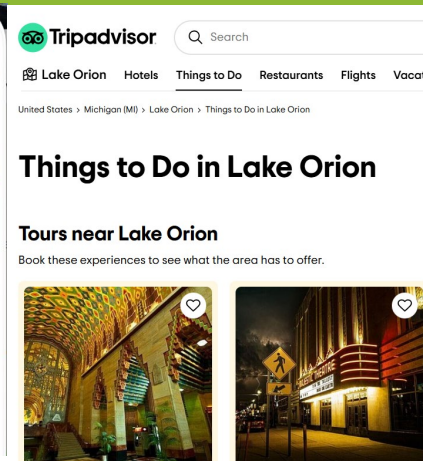
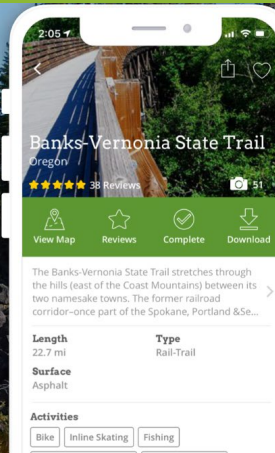
### Get the Free TrailLink App



Scan the QR code to get TrailLink on your phone



VISIT  
**Detroit**







# GROW LOCAL TOURISM

Events and promotions should have one of the following purposes:

- Build community awareness/brand recognition
- Ring registers
- Community goodwill and engagement

- Unique Signature Events
- Not Every Event is a Good Event – Evaluate!
- Enhance promotions with cross-marketing
- Create Collaborations amongst Destinations
- Make it easy for businesses to promote
- Support or Create Activity Events – ie: bike rides, runs, swims (start & stop downtown), boat parade tie-in; businesses open later, work with high school events





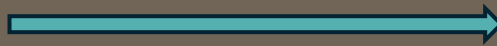


# EVENT ASSESSMENT

## Involve Partners & Stakeholders in the Evaluation Process

### Event Assessment Steps

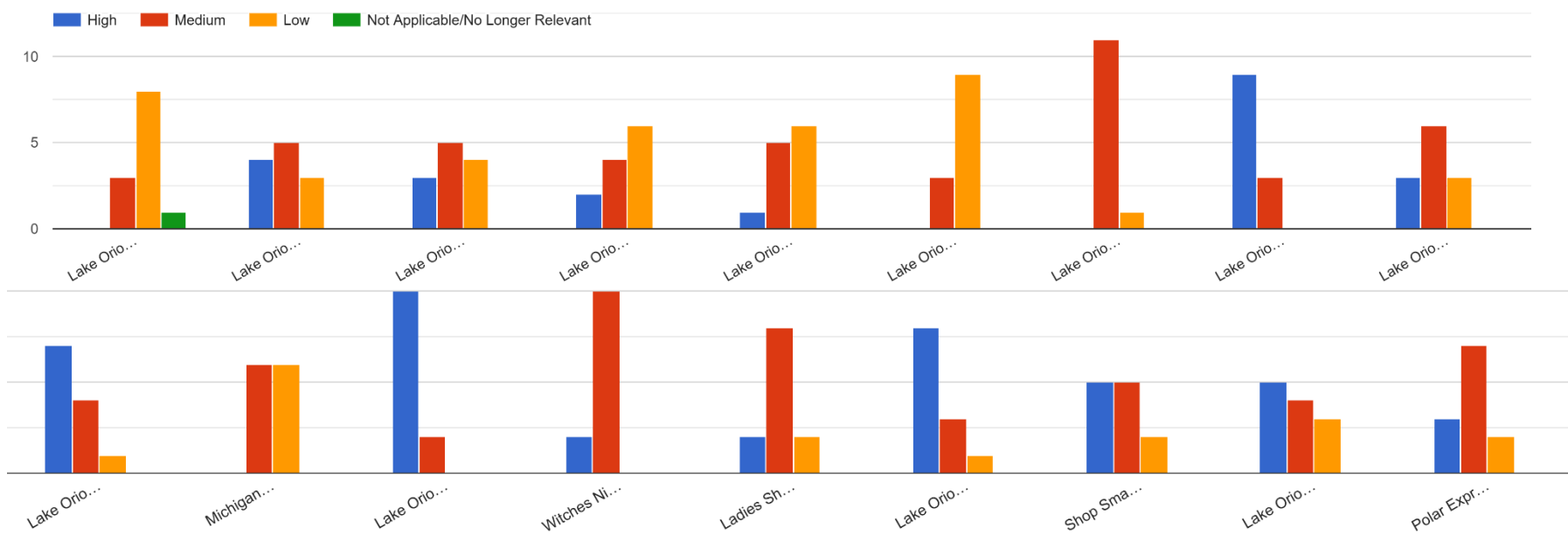
1. Define the Goal of the Event  
(Signature, Community/Goodwill, Retail Sales or Educational)
2. Target Audience
3. Vision, Mission & Core Value Alignment
4. Set Goals & Track Metrics



- Calculate Expense and Income Actuals/Ratio
- Track Social Media Reach/ Engagement
- News Media/Organic Reach
- Track Advertising Spend and Impact
- Business Participation
- Business Impact/Sales
- Attendance
- Local vs. Visitor Attendance %
- SWOT
- Community Impressions/ Economic Impacts



# DDA EVENT ASSESSMENT



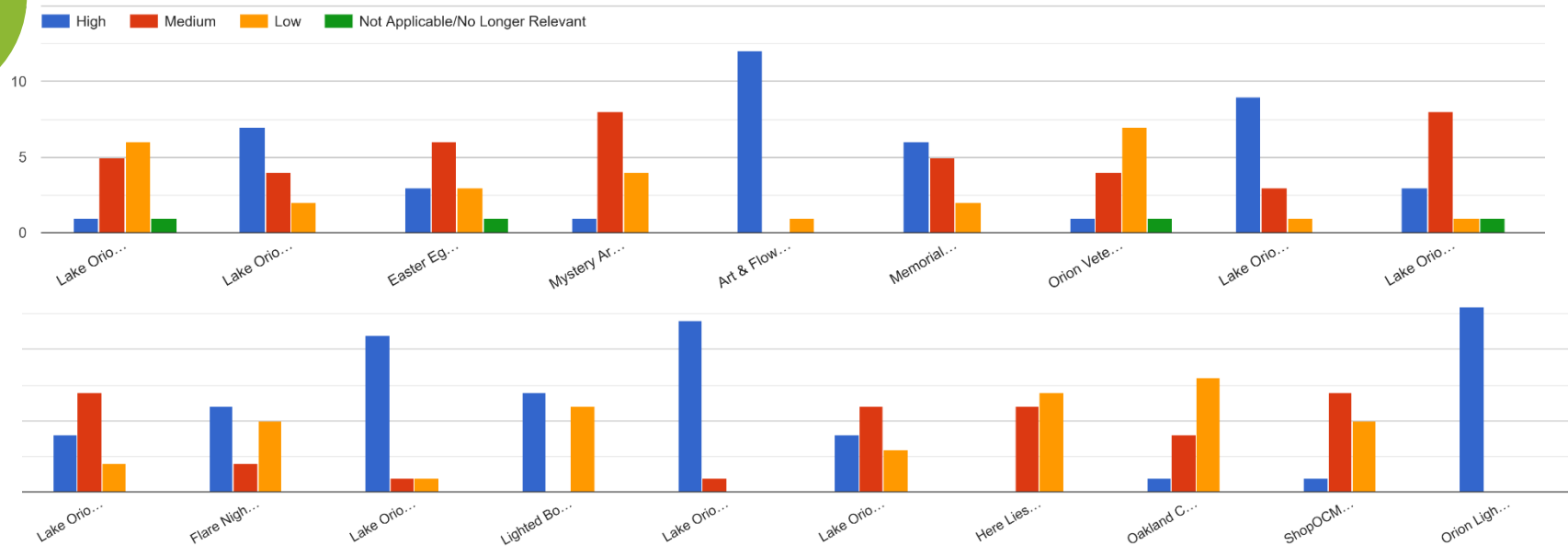
- High Priority**
  - Music Concerts
  - Halloween Extravaganza
- Medium-High Priority**
  - Ice Fest
  - Movie Night
  - Holiday Shopping Night
  - Shop Small
  - Horse & Carriage Rides
  - Shopping Passport

- Medium Priority**
  - Ladies Shopping Night
  - Polar Express
  - Witches Night
  - Oktoberfest Pub Crawl
  - 80's Ladies Night
  - Restaurant Week

- Low-Medium Priority**
  - Stronger Together Shopping Passport
  - St. Paddy's Day Pre-Game
  - Michigan Downtown Day
- Low Priority**
  - Photography & Art Contest
  - Letterboxing



# THIRD-PARTY EVENT ASSESSMENT



## High Priority

Christmas Parade  
Dragon on the Lake  
Boat Parade  
Art & Flower Fair

## Medium-High Priority

Pub Crawl  
Jubilee Carnival  
Memorial Day Parade  
Ice Cup Challenge

## Medium Priority

Zombie Walk & Poker Run  
Boat Parade  
Flare Night  
Restaurant Week  
Easter Egg Hunt

## Low-Medium Priority

Resolution Run  
Art Stroll  
Veteran's Memorial Day Race  
Cemetery Tours  
Local Gems Sweepstakes  
ShopOCMainStreet.com



# LAKESHORE ECONOMY



## Create Great First Impressions

Façade Improvements  
Dumpster Enclosures





# ACTION STEPS

## 1-5-YEAR PLAN





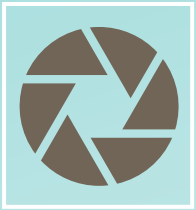
# COMMUNITY BUILDING

**Strengthen  
Local  
Partnerships**

**Increase  
Community  
Involvement &  
Understanding**



# COMMUNITY BUILDING



## **Strengthen Local Partnerships**

Optimize Operations – Contracts & Accounts

Improve Village Partnership

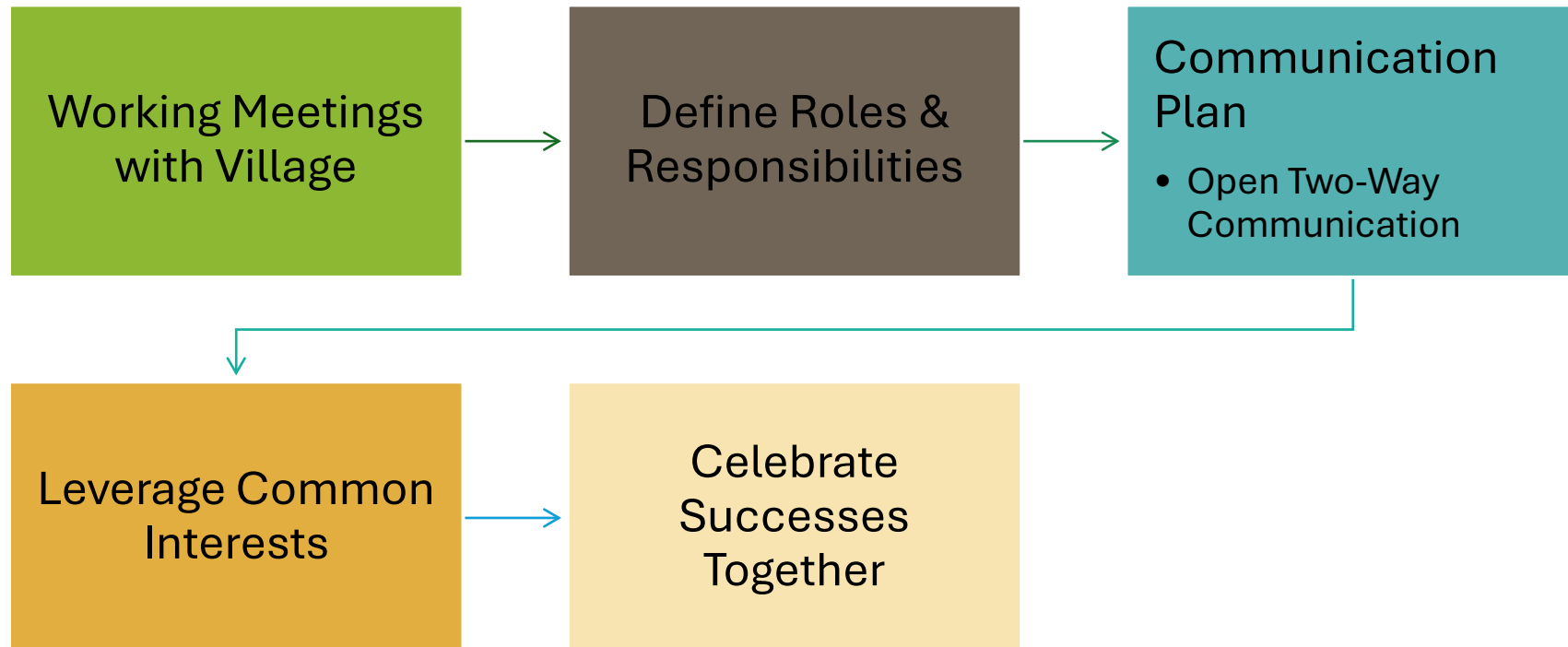
Expand Other Organizational Partnerships for Volunteer Resources & Project Alignment

Grants/Foundations/Resources





# STRENGTHEN LOCAL PARTNERSHIPS (Village)







# STRENGTHEN LOCAL PARTNERSHIPS (Other Organizations)

**List & Identify Partners (Potential & Existing)**



**Determine Your Goal**



**Meet with Partners**



**Identify Common Goals, Potential Collaborations & Action Plan**

**\*Leverage Templates & Resources –**  
Michigan Main Street  
Solution Center  
<https://www.miplace.org/programs/michigan-main-street/resources/>



# COMMUNITY BUILDING



## **Increase Community Involvement & Understanding**

Refreshed Communications & Brand  
Messaging Plan

Volunteer Outreach & Management  
Plan



# INCREASE COMMUNITY INVOLVEMENT & UNDERSTANDING



## Elements of a Volunteer Outreach, Communications & Marketing Plan

- Define Audiences
- Define Issues/Needs of Each Audience
- Determine Goals/Objectives
- Determine Messaging
- Set Metrics of Success
- Communication & Training Tools
- Evaluation



# INCREASE COMMUNITY INVOLVEMENT & UNDERSTANDING



## Volunteer Management Planning

- Be Strategic - Look at needs, skills, interests and diverse representation when assessing Board and committee needs. Current Needs:
  - \*Wealth\*
  - Historic Knowledge
  - Human Resources
  - Capital Improvement
  - Technology
- Roles & Responsibilities - Arm volunteers with resources to understand their role, expectations and needs. Develop job descriptions and tasks.
- Leverage Resources – Michigan Main Street Solution Center  
<https://www.miplace.org/programs/michigan-main-street/resources/>



# INCREASE COMMUNITY INVOLVEMENT & UNDERSTANDING



## On-board & Train Volunteers on:

- Vision/Mission
- Strategy
- Action Plan
- DDA Roles & Responsibilities
- Volunteer Roles & Responsibilities
- Tasks
- Elevator Pitch

## Other Areas of Board & Committee Trainings Suggested

- Role of Management/Staff
- OMA
- CVT Master Plan
- Zoning Ordinance
- Bylaws
- Market Analysis
- Comprehensive Four-Point Approach
- Recruitment Strategy
- Historic District
- Comms & Marketing Strategy
- Funding (ie: 2 Mill/PSD)



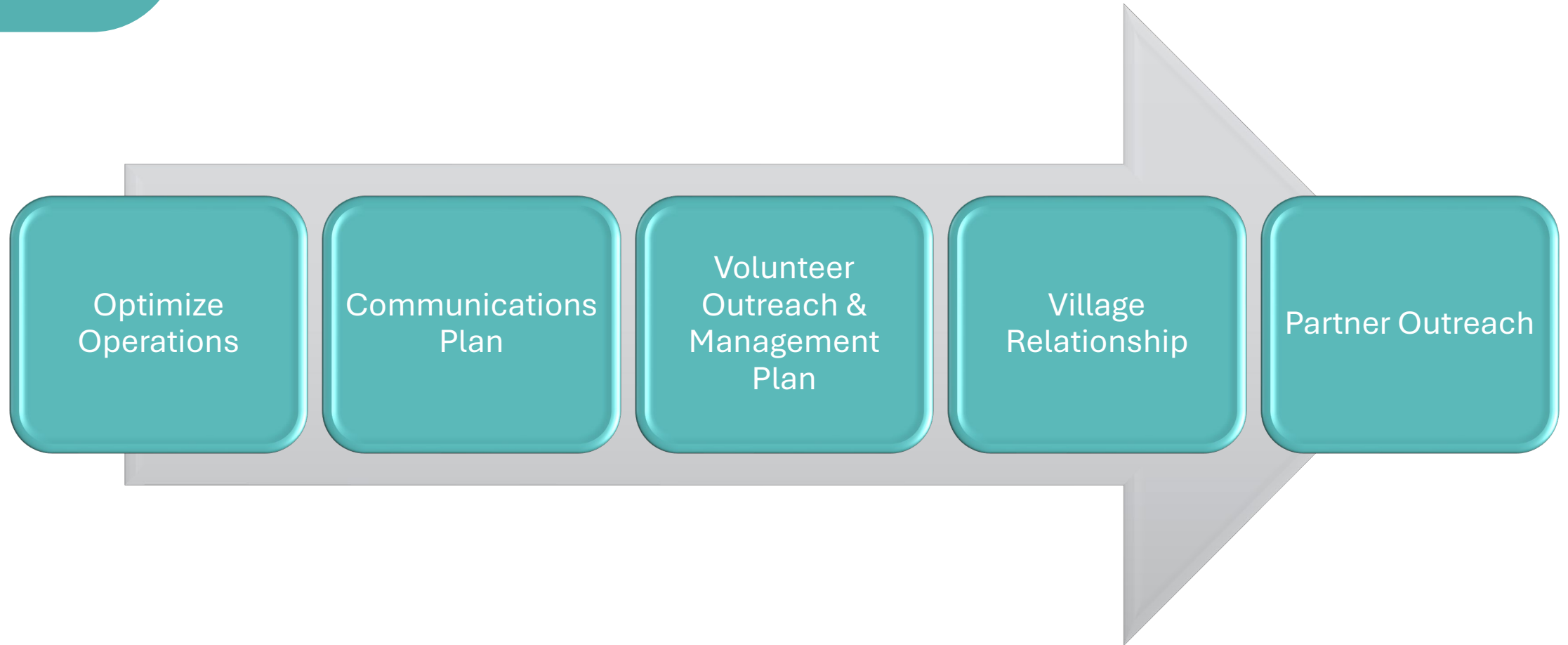
# CREATING YOUR PITCH



- Introduce Self
- State Organization Mission
- State Vision for Downtown
- Why You're Doing It
- Share a Success
- Share One Goal/Project
- Share Where Help Is Needed
- State How to Get Involved



# ACTION STEPS





# MAIN STREET GUIDING PRINCIPLES

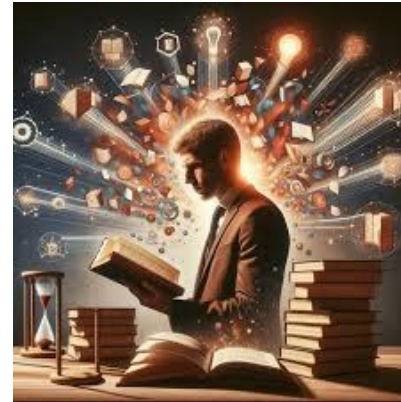
## THE EIGHT TO LIVE BY



COMPREHENSIVE



INCREMENTAL



SELF-HELP



PARTNERSHIPS



IDENTIFYING &  
CAPITALIZING ON  
EXISTING ASSETS



QUALITY



CHANGE



IMPLEMENTATION

# STRATEGY SUMMARY

## STRATEGY

## OBJECTIVE

### LAKESHORE ECONOMY

- Enhance Downtown Connections
- Grow Local Tourism Business
- Create Great First Impressions that Last

### COMMUNITY BUILDING

- Strengthen Local Partnerships
- Grow Community Involvement & Understanding

# SAMPLE STRATEGIC ACTION PLAN



STRATEGY	OBJECTIVE	Activity/ Task	Start Date	Deadline	Assigned To	Volunteers Needed	Budget	Completed	Core Values
Business Growth	Increase Retention	Conduct Retention Visits	April	June	Jane Smith	5	\$0		Progressive
		Create a Business Resource Self-Help Guide	February	April	John Doe	2	\$500		Resourceful
		Create a Micro- Loan for Expansions	May	September	Bill Johnson	3	\$25,000		Future Driven
Total						7	\$25,500		



## NEXT STEPS

- Utilize the strategic action plan worksheet to plan, track and monitor your achievements.
- Refine:
  - Timelines
  - Metrics of success
  - Responsible parties (individuals, committees)
  - Resources (partners, funding or tools needed)
- Annually assess the Strategic Plan for the next 3 years at a dedicated meeting.
- Stay focused on the **Key 2 Strategies!**
- POW! Strategies to provide the final Strategic Plan, including a trackable “Action Plan” spreadsheet.







**Cristina Sheppard-Decius, CMSM**

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