

LAKE ORION MAIN STREET ACCREDITATION 2026



EMBRACING THE SIX STANDARDS



Main Street America and MSOC Year-End Evaluation

Lake Orion MI



January 14, 2026 (Wednesday)

PURPOSE AND SUMMARY

The Main Street Community Assessment Visit is an important evaluative service offered to local Main Street programs to review the progress made towards building a comprehensive revitalization program.

Your Main Street Community Assessment Visit has the following objectives:

1. Determine the progress the program has made to meet or maintain the current Main Street America Assessment Criteria.
2. Understand the Main Street America Standards discuss what steps being taken align with this holistic framework.
3. Recognize strengths and celebrate the growth and accomplishments of the past year.
4. Identify needs, trends and obstacles that might challenge the district and the program's efforts.
5. Determine technical assistance and services that can continue to grow and sustain the local Main Street Program.

AGENDA

- **9:00 a.m. Introductory meeting with staff and MSOC**
Location: Lake Orion DDA 118 N Broadway St., Lake Orion
General overview and introduction to Lake Orion
- **9:45 a.m. Meeting with Main Street Board**
Location: Village Hall – 21 E Church St. Lake Orion
 - Overview of the Accreditation Standards by MSA
 - MSA overview on how the Program meets current National Accreditation Criteria and expectations based on Program's self-assessment.
 - Opportunity for the Main Street Board to highlight the organization's direction for the past year and its priorities for 2025 and 2026.
- **Noon Lunch with Board Chair and Village Mgr. (Village Council President/Clerk)**
Location: Rise Lounge 45 W Flint, Lake Orion
- **1:30 p.m. Community Walk Thru**
- **2:00 p.m. Stakeholder Meeting**
Location: 20 Front Street Concert Space (20 Front St. Lake Orion)
 - Downtown business and building owners, residents and representatives of organizations with a presence in downtown to meet with the team and share their perspectives on the local economic environment and value of the Main Street program.
 - City leaders and staff to highlight the City's vision and support to the district's revitalization and the Main Street program.
- **4:00 p.m. Adjourn**
- **4:30 p.m. OPTIONAL: Short Tour of the Lumber Yard Project**
- **5:30 p.m. End of Evaluation**

In the spirit of compliance with the Americans with Disabilities Act, individuals with a disability should feel free to contact the Village office, at least seventy-two (72) hours in advance of the meeting, if requesting accommodations.

Posted: January 6, 2026



2025 Community Self-Assessment

Village Of Lake Orion DDA
Lake Orion, MI

[Baseline Requirements](#)

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Baseline Requirements

	LP
1. A Board of Directors formed by a representative base of the district stakeholders and community members, dedicated to leading the district's Main Street program. Please upload your Board of Directors document.	Yes
2. Communities over 5,000 in population must employ an FTE program director. Communities under 5,000 in population must employ a 20-hour minimum per week program director.	Yes
3. Identified Transformation Strategy to direct the work of the program, based on community input and market understanding. What is your Transformation Strategy? Other Date Adopted by Board of Directors 08/19/25	Yes
4. Detailed work plans aligned with the selected Transformation Strategy that outlines programming across the Main Street Four Points. Work plans must include the project, expected (measurable) outcomes, specific tasks needed to accomplish the project, assignments of those tasks showing volunteer and staff responsibilities, timelines, and budgets. Please upload your Transformation Strategy Work Plan document.	Yes
5. A dedicated budget for the district's revitalization programming and the Main Street program's operations. Please upload your Program Budget document. What is your program's annual operating budget? The total revenue projection is \$1,047,000, with the overall appropriation broken down into three primary categories; (1) Operational Costs, including appropriation for staffing, programming, capital investment, and economic development (approx. \$290,000), (2) Municipal Services, including public safety, DPW and general obligations (approx. \$310,000), and (3) debt service on Bond Funding for the Gateway Project (approx \$420,000) What percentage of your funding comes from government sources? This optional question helps inform MSA's research and advocacy efforts! Annually 85-90%	Yes
6. Demonstrated support from the municipality for the Main Street program. This can include leadership participation, funding, in-kind donations and philosophical support.	Yes
7. Reinvestment statistics are reported as required by the Coordinating Program (monthly, quarterly, or annually).	Yes
8. Be a member in good standing with Main Street America and appropriately use the Main Street America and Coordinating Program logos on the program's website and/or social media.	Yes
9. An Annual Report, Info-graphic, press release or other documentation to explain the progress of your program last year.	Yes

Cumulative Average Scores

Please refer to the [Explanation](#) section for more details about each standard.

	LP
Standard I: Broad-Based Community Commitment to Revitalization	5
I. Partnerships and Collaborations	5
Indicator I	5
II. District and Community Outreach	5
Indicator I	5
III. Communication and Public Relations	5
Indicator I	5
Indicator II	5
	LP
Standard II: Inclusive Leadership and Organizational Capacity	4.44
I. Inclusive Organizational Culture and Diverse Volunteer Engagement	4.33
Indicator I	4
Indicator II	4
Indicator III	5
II. Active Board Leadership and Supporting Volunteer Base	4
Indicator I	5
Indicator II	3
Indicator III	4
III. Professional Staff Management	5
Indicator I	5
Indicator II	5
IV. Effective Operational Structure	5
Indicator I	5
	LP
Standard III: Diversified Funding and Sustainable Program Operations	4.6
I. Balanced Funding Structure	4
Indicator I	4
II. Strategic Revenue Development and Fundraising	4
Indicator I	4
III. Budget and Work Plan Alignment	5
Indicator I	5
IV. Financial Management and Best Practices	5
Indicator I	5
Indicator II	5
	LP
Standard IV: Strategy-Driven Programming	4.33
I. Planning Guided by Inclusive Community and Market-Informed Inputs	5
Indicator I	5
II. Defining Direction Through Transformation Strategy Identification and Development	4
Indicator I	4
III. Strategy-Aligned Comprehensive Work Planning and Implementation Across All Four Points	4
Indicator I	4

	LP
Standard V: Preservation-Based Economic Development	4.5
I. Preservation Ethics and Education on History and Cultural Assets	4.5
Indicator I	5
Indicator II	4
II. Standards and Best Practices for Place-Based, People-Focused Design	5
Indicator I	5
III. Promotion of Historic, Heritage, and Cultural Assets	4
Indicator I	4
	LP
Standard VI: Demonstrated Impact and Results	4.5
I. Demonstrating The Value of Main Street	4
Indicator I	4
II. Measuring and Packaging Quantitative and Qualitative Outcomes	4.5
Indicator I	5
Indicator II	4
III. Promoting Progress and Demonstrating Impact and Results	5
Indicator I	5

Additional Information

Date of last on-site visit
12/16/25

What year was your program started?
2001

Standard I: Broad-Based Community Commitment to Revitalization

Standard One reflects that successful and sustainable revitalization efforts are not just the work of a single organization, but should be the result of a community-wide effort that brings the public and private sectors together with a strong sense of ownership in their downtown or commercial district. This Standard reviews the Main Street organizations' essential role in fostering a culture of inclusion, engagement, collaboration, and commitment from all sectors of the community. Launching a program, growing it incrementally from one year to the next, and sustaining success for the long run are only possible through a diversity of strong partnerships and collaborations, continued outreach, and communication.

I. Partnerships and Collaborations

Indicator I

LP

The Lake Orion Main Street Program has been a coordinating entity for more than 20 years, blending its own work plan based approach to community improvement with the leadership and creative talents of multiple organizations and government entities in the community.

Government: The Village Council President is a sitting member of our Board, and plays an active role in our work plan development. Staff meets with the Village Manager and his team not less than twice monthly to discuss ongoing efforts and the Manager attends and participates in all Board meetings. Likewise, the Orion Township supervisor is a sitting member of the Board, upholding a longstanding tradition of welcoming the leadership and voice of our immediate and surrounding government partners. this partnership allows the program to be the central historic downtown to a community of more than 40,000 residents and businesses ranging from the General Motors Assembly Plant to Prime Time Comics and Cards. The collaboration allows each organization to provide its own talent and budget to needed work, examples; Lake Orion Main Street builds and provides a quarterly promotion of all activities happening Downtown in Orion Living Magazine and contributes to its production, the Township parks dept. provides bucket trucks and staff to hang banners and add workers to difficult clean up projects, the Village offers a contract for DPW add-on services where small details are cleaned, painted and kept free from trash.

Non-Profit: We have a legacy of partnership with multiple non-profits, many of whom have taken over established downtown events and programming. Main Street coordinates an annual "calendar" meeting for the dozens of events happening in the community, but the partnership goes far beyond.

The Lake Orion Art Center maintains its office and local artist gallery downtown and has partnered to restore the Flint St Alley Signs, their Director and a Board Member sit on several committees and work teams, and they are currently preserving the Starry Night Art saved for re-placement at the Historic Lumber Yard Gateway Project.

The Orion Public Library hosts the Storybook Stroll twice per year, placing storybook pages in windows of businesses and promoting downtown for families and friends.

The Lake Orion Lions host the Spring Egg Hunt and Jubilee

The Lake Orion Rotary co-hosts and plans the Winter Ice Fest and brings 18 holes of "Ice Golf" through and amongst the businesses of downtown.

The Chamber of Commerce hosts business training and networking downtown and takes on the responsibility for ribbon cuttings and new openings.

Fiscal Support: Lake Orion Main Street helps businesses and programs apply for grants and training resources with great success. Recent examples include the award of two (2) small business grants from Genisys Bank/Southeast Michigan Foundation supporting equipment needs and capital growth.

II. District and Community Outreach

Indicator I

LP

Lake Orion Main Street attacks communication through both traditional and modern/social based applications. Up to four times monthly, advertorials and marketing is placed in the local print publication "Lake Orion Review" and its partners, reaching more than 60,000 households weekly. That print based communication is blended with Township and Village publications and newsletters, allowing information to reach every household, and thereby every demographic.

Creative banner and sign placement is instrumental to the work plans adopted annually, that prescribe timely placement in areas where a diverse cross section of age, race, and gender will observe the opportunities. Our print often outweighs the use of social and online sources, including our very detailed website, but a plan exists for social too, which is showcased in these metrics

Metrics as Reported for 2025

ShopOCMainStreets.com:

2025 Sales: \$15,202.75 (as of Dec. 3)

Snap Retail:

63 e-newsletters created, 16,954 interactions, 3,566 customers

Open Rate: 29.1%, industry standard is 20-25%

X: current followers: 1,539, 90 posts

Instagram: current followers: 4,399

Views: 90.9K

Content Interactions: 1.2K

Link Clicks: 620

Visits: 2.1K

Follows: 535

Reach: 13.5K

Facebook – Downtown Lake Orion:

starting followers: 10,457

current followers: 11,160

Views: 1.3 M

Content Interactions: 12.8K

Link Clicks: 4.4K

Visits: 33.6K

Follows: 917

Facebook – Downtown Business Owners Private Page: starting followers:133

current followers: 147

Google Business Analytics:

Business Profile Interactions: 918 (July 2025 – Dec 2025)

Calls made from Business Profile: 54

Direction Requests from Business Profile: 616

Website Clicks made from Business Profile: 248

People Viewed Business Profile: 5,056

III. Communication and Public Relations

Indicator I

LP

Lake Orion Main Street maintains a broad work plan for communicating the role and value of the program;

+The Executive Director holds a regular "Update" agenda item on each Village Council Agenda, speaking twice per months on the goals and success of the program.

+The Executive Director plans and co-hosts extensive video informational projects highlighting the historic preservation, development, and value being brought to the district, which are aired on local public television and posted on the program web site.

+Main Street hosts monthly district meetings entitled the "LODown" where business and community members are updated, but most importantly the director facilitates an open round table discussion where issues, ideas and concerns are shared. Local officials are invited and attend.

+bi-monthly, Main Street recruits and encourages a local leader to write an advertorial in the Lake Orion Review extolling that periods story of success and program attitude. this reaches more than 26,000 residents in the community.

+the Executive Director provides annual updates through annual meetings (noticed to all taxing jurisdictions) and upon invite of others to events like the "State of the Community"

+Main Street staff sit on planning committees for regional communications, meet monthly with Chamber of Commerce Staff,

Indicator II

LP

Lake Orion Main Street has a developed and implemented a branding and color guide. It has a strong logo, and also has created a brand and logo for the community/downtown that follows the history of the town (the "Dragon") and the four points of Main Street.

The program uses several social media platforms and leans heavily on the Lake Orion Review (traditional print distribution) for telling the story of the work an value of the Main Street program in Lake Orion.

The Annual Informational Report, posted on the website, www.downtownlakeorion.org, shares abundant detail as to the work and progress of the program.

Overall Standard Notes

LP: For more than 20 years, the Lake Orion Main Street program has served as a central coordinating entity for downtown revitalization, intentionally aligning its annual work plan with the leadership, resources, and expertise of local government, nonprofit organizations, and private-sector partners. These partnerships demonstrate shared responsibility for both the district's success and the sustainability of the

Main Street program.

Local Government Partnerships

The Lake Orion Main Street program maintains deeply integrated partnerships with both the Village of Lake Orion and Orion Township. Elected officials and senior staff are directly engaged in governance, strategy development, and implementation. The Village Council President and the Orion Township Supervisor are sitting members of the Main Street/DDA Board and actively participate in work plan development and policy alignment. The Executive Director meets with the Village Manager and staff no less than twice monthly, and the Manager attends and participates in all Board meetings.

This collaboration allows the Main Street program to function as the historic downtown for a broader community of more than 40,000 residents and businesses, ranging from large regional employers to small independent retailers. Each governmental partner contributes unique monetary and non-monetary resources, including coordinated communications, public works support, staff assistance, equipment use, and targeted downtown maintenance services that directly advance annual work plan goals.

Nonprofit & Civic Partnerships

Lake Orion Main Street has a long-standing history of collaboration with nonprofit and civic organizations, many of which now independently lead signature downtown events and programming. The program convenes an annual community calendar meeting to coordinate dozens of events and avoid duplication, while also maintaining ongoing partnerships that extend far beyond scheduling.

Examples include:

The Lake Orion Art Center, which maintains a downtown presence, collaborates on public art and historic preservation projects, and actively participates in Main Street committees.

The Orion Public Library, which hosts the Storybook Stroll twice annually in downtown storefronts.

Civic organizations such as the Lake Orion Lions and Rotary Clubs, which lead major downtown events including the Spring Egg Hunt, Jubilee, Winter Ice Fest, and Ice Golf.

The Chamber of Commerce, which provides business training, networking, and manages ribbon cuttings and business openings downtown.

These partnerships reflect shared leadership, volunteer engagement, and coordinated implementation of programming aligned with Main Street priorities.

Private-Sector & Fiscal Collaboration

Lake Orion Main Street actively supports downtown businesses through grant identification, application assistance, and access to training resources. Recent successes include multiple small-business grant awards supporting equipment investment and capital growth. Sponsorships, partnerships, and cooperative promotions further demonstrate private-sector investment in downtown revitalization.

Communications & Promotion Partnerships

The program leads a comprehensive, multi-platform communications strategy that is amplified through municipal, nonprofit, and media partners. Traditional print media, municipal newsletters, digital platforms, public television, and coordinated branding are used together to reach all demographics across the community. These efforts are supported by strong performance metrics across print, email marketing, social media, and web engagement.

Elected officials, partner organizations, and community leaders actively participate in promoting downtown initiatives through shared messaging, advertorials, public meetings, videos, and events—reinforcing the visibility, value, and shared ownership of the Main Street program.

Accountability & Reporting

The Lake Orion Main Street program documents and communicates its impact through regular Board updates, public presentations, district meetings, annual informational reports, and online reporting. These efforts ensure transparency, reinforce partnerships, and clearly demonstrate how collaborative resources are translated into measurable outcomes for downtown revitalization.

Standard II: Inclusive Leadership and Organizational Capacity

Strong, thriving communities don't just happen. They need effective leaders at all levels, from a broad base of committed volunteers to dedicated professional staff offering their time, talents, and passion for this work. Standard Two reflects the value we place on PEOPLE as Main Street's greatest resource and our belief that everyone in the community has a place in Main Street. This Standard encourages Main Street programs to place a strong priority on human capital and develop a clear operational structure and practices that increase the organization's capacity to engage all sectors of the community and leverage their participation in their revitalization efforts.

I. Inclusive Organizational Culture and Diverse Volunteer Engagement

Indicator I

LP

There is a large focus on drawing participation from all levels of economic and cultural backgrounds in the community. Accommodations are made for cultural norms such as work times, days of the week and personal/religious demands, and particular attention is paid to age and gender demographics to assure there is a broad base of talent and vision for the organization.

All meetings and event notices are posted as inclusive, in English and Spanish (the secondary language predominantly in the district). Accessibility for those with mobility, and other challenges, to events and programs in the district is a priority for planning and maintaining our walks and locations. Programming is done with a mindful understanding that all are welcome, and no disruptive or inappropriate materials are used.

Indicator II

LP

Lake Orion Main Street has implemented a new Volunteer Approach and built a program around the effort, the "Illuminators". The Organization Committee leads this new sub-group, which is intended to shine a light on all that is good in our community, through pop-up welcoming events, to hands on clean up days, to property tours, and more. At the first Illuminator's event the group secured interest commitments from sixty-two (62) new people and families.

Volunteer opportunities are promoted in newspapers, social media and direct email. The best approach is through online sources like Peach Tree (students and families) and when we personally invite the high school students for community service hours.

Each new member of the volunteer team, and the Illuminators, is welcomed, informed as to who they are working with, trained on the task, and thanked.

The annual report revealed last year's effort hosted 251 volunteers who worked 626 hours.

The organization hosts an annual Illuminators Night (as it is now called) to welcome new interest and to award and thank a large contingent of volunteers. Awards range from the "Strongest Paddler" giving homage to the Dragon on the Lake festival as our most dedicated/appearing volunteer to the "Handy Man" for always bringing tools.

Indicator III

LP

The current DDA Board meets all milestones listed –

- A. District business owners: D. Burgess and A. Campbell
- B. District Property Owners: S. Caruso and L. Coe
- C. Residents: H. Lorant and M. Shell
- D. Community business: S. Medina
- E. Institutions: T. Rutt and C. Barnett

II. Active Board Leadership and Supporting Volunteer Base

Indicator I

LP

The Board has a remarkable record of being "present" and active in the message and voice of Main Street.

1. Each committee is chaired by a Board Member, meeting not less than once per month. As part of this work they guide agendas and help recruit participation.
2. Board attendance is required by our bylaws, with absences noted and privately discussed when recurring. Great news is there is NEVER a discussion as no Board member has missed more than three meetings in the last year, and seven members only had one absence.
3. Board Members additionally sit on special committees for Budget, Executive Committee, and Capital Improvement. These meetings are called as needed, as published and minutes kept, and boast a 90% attendance measure over all meetings and members.
4. Four (4) Board members participated in all three levels of training in the past year, each conducted through the Coordinating Program or their recommended consultant; TIF knowledge and messaging, Renewed Transformational Strategy Development, and Board Responsibility. Four (4) others made two out of three, and two (2) other attended a Coordinating Program training on Legal Aspects of Budgets and TIF.

Every Board member participated and helped in an event or program. Some brought family and served donuts, other wore costumes, tied ribbons around corn stalks, and many were there as advocates and supporters.

The most significant training and effort was around mutually building answers to "sidewalk" questions, "What is Main Street", "What Do You Do", "Where Does Your Money Come From"

Indicator II

LP

Board members have historically made substantial sponsor based financial commitments to Main Street. Often members donate products, production capacity, and staff time and labor, which is a defined benefit to Main Street, but certainly a cost to their business.

Lake Orion is in the process, and has filed formation documents, of creating a non-profit arm to boost fundraising and financial commitment beyond traditional sponsorships and business to business support. this new non-profit will be ready to launch in 2026 with active offerings in 2027.

Indicator III

LP

Board members all chair a committee or serve directly on the Budget Task Force or the Executive Committee. Beyond that leadership, each member brings their own time and talent to the program through in kind services and advocacy. Elected leaders on the Board provide access to staff and networks making valuable resources more readily at hand. Business owners provide materials and time, and assist in clean up, business recruitment, published messaging and policy work. Residents provide group advocacy and neighborhood connection.

Lake Orion Main Street maintains four core committees aligning with the Four Point Approach. as a new focus, each committee is re-unifying its directional purpose under the newly adopted Transformational Strategy and further adopting a statement purpose of each work plan, and in the case of promotion and design each event and project. These statements will align not only with our mission and plan, but be tied to an element of consideration for GAMSA.

III. Professional Staff Management

Indicator I

LP

Our program employs a full time Executive Director and a full time Assistant Director. Staff also includes a part time Administrative Coordinator and a part time grounds and maintenance person.

All positions are supported by a job description and are annually reviewed. Staff attends training at least quarterly, and is regularly enrolled in Main Street, Michigan Downtown and other resource based conferences, webinars, and leadership events. The Board provides a budget for staff training and growth.

Full time staff meet neatly weekly with the Board Chair and provide monthly updates directly to the Board

Indicator II

LP

The Board has implemented a comprehensive approach to engaging, training, empowering, and reviewing its Executive Director.

1. The Executive Director is hired and engaged directly through the Board, and is not a reporting position to its municipal partner at the Village of Lake Orion.
2. The position is a salary position, carrying a variety of benefits, including compensation for opting out of insurance and other perks.
3. The Board budgets all salary and benefit needs and also appropriates substantial allocations for training, travel related programming and conferences, and appropriate memberships and associations.
4. The Executive Director meets with the Board Chair weekly, and with the Executive Committee, or a portion thereof, several times per month as needed.
5. An annual review is conducted that starts with a self evaluation by the Executive Director and ends with an in person interview and review that results in recommendations and advice for the next year. this report is brought to the Board for notice and filing and then passed to the Village Council for public knowledge.

As to succession planning, the Board, in its redesign in 2023, created a companion position of an Assistant Director. That role is subject to, and the beneficiary of, the same outline as set forth above. It is likewise independently reviewed and reported for performance matters annually.

IV. Effective Operational Structure

Indicator I

LP

The organization meets all stated goals and publishes the same on its website. Insurance is maintained through its municipal partner.

Overall Standard Notes

LP: Lake Orion Main Street places people at the center of its revitalization strategy by intentionally cultivating inclusive leadership, broad volunteer participation, and strong professional capacity. The organization actively engages residents across economic, cultural, age, and gender demographics by accommodating work schedules, religious and cultural considerations, language access (English and Spanish), and mobility needs in all meetings, communications, and programming. Events and initiatives are designed to be welcoming, accessible, and appropriate for all audiences, reinforcing a culture of inclusion and respect.

Volunteer engagement is a cornerstone of the program. The newly launched Illuminators initiative, led by the Organization Committee, expands community participation through welcoming events, clean-up days, property tours, and hands-on projects. In its first event alone, the Illuminators secured interest commitments from 62 new individuals and families. Volunteer opportunities are broadly promoted through newspapers, social media, email, school platforms, and direct outreach, with special attention to engaging students and families. All volunteers receive clear orientation, task training, and recognition. In the past year, 251 volunteers contributed 626 hours of service, supported by an annual recognition event celebrating service, leadership, and community spirit.

The Board of Directors provides active, accountable leadership and maintains a strong supporting volunteer base. Each committee is chaired by a Board member and meets at least monthly, with Board attendance expectations clearly enforced and consistently met. Board members also serve on standing and special committees, including Budget, Executive, and Capital Improvement, with attendance exceeding 90 percent. Board members regularly participate in events, advocacy, and volunteer activities, reinforcing visibility, trust, and community connection. Ongoing Board education is prioritized, with members completing multiple levels of Main Street and Coordinating Program training in governance, finance, TIF, strategy, and legal responsibilities.

Lake Orion Main Street maintains a professional staffing structure that supports operational excellence and long-term sustainability. The organization employs a full-time Executive Director, a full-time Assistant Director, and part-time administrative and maintenance staff, each supported by defined job descriptions, annual reviews, and regular training. Staff engage in quarterly professional development and participate in state and national Main Street, downtown, and leadership programs, supported by a dedicated training budget. Clear reporting, weekly leadership meetings, and monthly Board updates ensure transparency and accountability.

Effective operational practices further strengthen organizational capacity. The Board directly hires, supports, evaluates, and plans for succession in its executive leadership, including the creation of an Assistant Director role to ensure continuity. Committees align their work plans with the adopted Transformational Strategy, with defined purposes that support inclusive engagement and equitable revitalization outcomes. Together, these practices demonstrate Lake Orion Main Street's commitment to inclusive leadership, strong governance, professional management, and a resilient organizational structure capable of engaging the full community in its revitalization efforts.

Standard III: Diversified Funding and Sustainable Program Operations

A successful revitalization program must have the financial resources necessary to carry out its work and sustain its operations. Program sustainability relies on diversity of revenue streams as dependency on one primary or only source could jeopardize the program's operations. Through this Standard, Main Street programs demonstrate a priority for ensuring that the community is investing in the Main Street organization and programming efforts through a comprehensive and balanced funding structure that ensures successful and sustainable revitalization efforts.

I. Balanced Funding Structure

Indicator I

LP

The broad base of the organizations funding is a dedicated TIF (Tax increment Financing) plan that was amended in 2020 and extended to remain in effect through 2039. Recent changes in County and State policy make this plan very difficult to amend or rescind resulting in a strong funding base during this extended period.

Additionally, Main Street strives to make all events, promotions and programs revenue neutral through sponsorships, ticket sales, and in kind partnerships with local businesses, vendors or school volunteer groups. Examples include; Presenting sponsors for the LOLive Summer concert Series, Character Volunteer corp(s) volunteering time from Middle School Robotics teams, and the waiting list for tickets to ride the Polar Express Trolley to see Santa Clause.

Lake Orion Main Street continues to be a driver of investment and real estate growth in the downtown. Budget is allocated to support redevelopment, historic repurposing/preservation, and most significantly the seamless transfer of tenants as the district grows and matures. In the past year the program has assisted 17 new businesses through permitting, licensing, and more, resulting in more than \$2 million new investment, therefore increased TIF value.

Main Street continues to find grants, and is currently the beneficiary of a \$595,000 supporting grant from Oakland County for its historic Lumber Yard Gateway project.

We miss a score of Five(5) only as we roll out a new sponsorship approach, using a new a MSA found company at Main Street NOW.

II. Strategic Revenue Development and Fundraising

Indicator I

LP

The Organization and the Board are committed to a strong plan for funding, budget and our goal of tying all of our financial planning to an elemental goal and purpose. for each of our work plans, we now include review and adoption of a purpose statement that defines how the objective of the effort, funding and time supports the achievement of an element of the GAMSA standards. We are doing this to focus everything we do away from party planning and meeting, to a definitive baseline of long term downtown sustainability.

To Support these efforts

- + The Board reviews financial(s), budget status and revenue projections monthly.
- + A budget Task Force (made up of four Board members and the Executive Director) meets regularly to assess and direct project specific goals, cash flow and budget tracking, and the annual DDA Budget
- + Committees are charged with balancing the cost of capital investment, programming, and event cost against budgeted revenue and each committee has a separate budget, broken down into multiple general ledger lines by program, project, or focus.
- + Committees are charged with finding budget support through sponsors, volunteers, or by offering their own time or business support to pour hot chocolate, hang corn stalks, or clear ice.

Lake Orion Main Street strives to maintain an generally accepted accounting practice of holding a 20% fund balance reserve through its general fund balance and budgets to retain this amount as a constant in its annual budgeting practices. Currently, this amount is being met, but we have formed two new Non-Profit arms that will act to diversify our funding/grant/revenue opportunities as we onboard the Lumber Yard project, and deal with our commitment to public infrastructure investment through the recently adopted 75/25 capital split with our partners in the Village of Lake Orion.

III. Budget and Work Plan Alignment

Indicator I

LP

Lake Orion Main Street provides a detailed budget that sets forth revenue and expenses in a manner that directly reflects the mission, purpose and planning of the organization. Highlights of the budget include:

1. Revenue. In lieu of a general revenue line, we break this down into multiple/tracked items so we can budget and follow progress in areas like state, local and federal grants, local funding, misc. revenue, and other measures intended by the Board and adopted through our annual priority planning.
2. General Operations: All salaries, office expenses, memberships, and other operational costs are tracked separately to allow for us to properly contract and align services against programming.
3. Main Street Four Points. We maintain four separate budget areas, one for each Point, and break down those four areas into core elements of the Transformational Strategy and the annually adopted work plan (focus).

IV. Financial Management and Best Practices

Indicator I

LP

The organization has adopted a fundamental Budget Policy. This policy approach ingrains a detailed and thought based method to planning, reviewing and adopting an annual budget. It roughly follows;

1. The Executive Director prepares a budget 5 months prior to the new budget year.
2. The proposed budget is sent to the Budget Task Force (board based) for review and insight against the TIF and Strategic Plan.
3. A recommended budget is brought to the Board.
4. Upon Board pre-approval, it is sent to the Village for statutory approval and returned to the Board for final consideration and adoption.
5. Monthly budget and P&L based statements are presented to the Board, questions answered, and financial statements approved.

All purchasing and budget management is conducted under the strict provisions of two procurement policies. The Village maintains a policy that the Organization, as a division of the Village through its DDA TIF, is adhered to. The second policy is that of the DDA, which includes a rider for the gate way project. These policies are kept on the organizations website for public awareness.

Lastly, all finances of the organization are subject to, and proceed through, a full annual audit in cooperation with the Village and general accounting standards.

Indicator II

LP

The bylaws, descriptions and policies of the organization are consistent with the mission and objectives of both the Strategic Plan, but importantly, follow established accounting practices.

All budget reports, presented and reviewed monthly at the Board level and weekly at the staff level, are tracked with budget amount, current period expenses, total budget use, and balance available. Budget adjustments are made on a regular basis, within fund and by Board action, to keep the budget in line with trends.

Overall Standard Notes

LP: Lake Orion Main Street demonstrates a strong and sustainable financial foundation supported by diversified revenue streams, disciplined financial management, and intentional alignment between funding, work plans, and long-term revitalization outcomes. The program's funding model prioritizes stability while actively expanding revenue diversity to ensure resilience and long-term sustainability.

Balanced Funding Structure

The primary funding source for Lake Orion Main Street is a dedicated Tax Increment Financing (TIF) plan, amended in 2020 and extended through 2039. Recent county and state policy changes make this plan difficult to amend or rescind, providing a reliable and predictable revenue base that supports long-range planning and program continuity. This stable public investment reflects the community's commitment to downtown revitalization and the Main Street program.

To reduce reliance on any single funding source, the organization actively supplements TIF revenue through sponsorships, ticket sales, grants, and in-kind partnerships. Events, promotions, and programs are intentionally structured to be revenue-neutral whenever possible, leveraging presenting sponsors, volunteer organizations, school groups, and business partnerships to offset operational costs while maximizing community engagement.

Strategic Revenue Development and Fundraising

Lake Orion Main Street actively pursues grant opportunities and private-sector investment to advance revitalization goals. Recent successes include securing a \$595,000 Oakland County grant supporting the historic Lumber Yard Gateway Project, as well as assisting downtown businesses in obtaining external funding for capital improvements and equipment purchases.

The program continues to refine its sponsorship and fundraising strategies, including the rollout of a new sponsorship approach informed by national Main Street best practices. These efforts reflect a deliberate shift toward diversified, mission-driven revenue development tied directly to strategic priorities rather than short-term event dependence.

Budget and Work Plan Alignment

Financial planning is intentionally aligned with adopted work plans and strategic objectives. Each annual work plan includes a defined purpose statement that articulates how funding, staff time, and programming advance specific Main Street elements and long-term downtown sustainability goals. This approach represents a conscious move away from reactive or event-driven budgeting toward a performance-based model focused on measurable impact.

Committees are assigned individual budgets tied to specific programs or projects and are responsible for balancing costs with identified revenue sources, sponsorships, volunteer support, or in-kind contributions. This structure reinforces fiscal accountability at all levels of the organization.

Financial Management and Best Practices

Lake Orion Main Street adheres to rigorous financial management practices consistent with generally accepted accounting standards. The organization maintains a target fund balance reserve of approximately 20% within its general fund to support financial stability and risk management, a benchmark that is currently being met.

Oversight and accountability are reinforced through:

Monthly Board review and approval of financial statements, budget status, and revenue projections

A standing Budget Task Force comprised of Board members and the Executive Director to guide budget development, cash flow management, and project-level financial oversight

A formal budget development and adoption process beginning five months prior to each fiscal year and proceeding through Board and statutory municipal approval

Procurement and purchasing conducted under adopted Village and DDA policies, publicly posted for transparency

Annual independent audits conducted in coordination with the Village

Budget performance is tracked regularly using detailed financial reports that show budgeted amounts, current-period expenditures, total usage, and remaining balances. Adjustments are made by Board action as needed to respond to trends and maintain fiscal alignment.

Commitment to Long-Term Sustainability

To further diversify funding and prepare for future capital and operational demands, Lake Orion Main Street has established additional nonprofit entities to support grant eligibility, fundraising, and project-specific investment—particularly related to the Lumber Yard redevelopment and public infrastructure partnerships. These steps reflect a proactive commitment to sustainable operations, balanced funding, and long-term downtown vitality.

Standard IV: Strategy-Driven Programming

Main Street has built a strong track record for making change happen in communities across the country. Change is an important guiding principle for Main Street. But rather than letting change just happen, Main Street programs define and manage it from one year to the next through a strategy-driven work plan and aligned implementation process. Standard Four brings together all integrated components that must be in place to plan and successfully implement the revitalization work. Centered around Main Street's Four Point Approach, these integrated components are driven by a local Transformation Strategy(s) aligned through community participation and based on understanding of the district's unique and competitive market position.

I. Planning Guided by Inclusive Community and Market-Informed Inputs

Indicator I

LP

Our strength is in our knowledge. the organization is building on the efforts implemented in the past two years and are adding key resources;

1. We have taken a very proactive approach to the BOOMS tracker system to build out our business inventory and real estate key knowledge. This is transforming our access to data and compelling a better state of readiness when questions and opportunities arise. This is coordinated through the Economic Vitality committee.

2. We have gained an account to the Village DPW base program for asset mapping and work order tracking, a program called "silversmith". We have populated the program to show all capital infrastructure assets in the district, e.g. streetlights, benches, banners, and more. this allows us to manage the downtown assets as part of our work in the Design Committee.

3. Our research and data collection showing trends, real estate and business demands continues to be guided by metrics gained from our coordinating partner and their broad access to PlacerAI; we continue to hold monthly LODown business and community roundtable discussions where first hand knowledge is shared; we engaged a third party expert in real estate market demands and assessments which brought a comprehensive study in retail demand areas for the downtown (this will be a bi-annual report); and we maintain active membership in associations (i.e Michigan Retailers Assoc., ICSC, CBOR and others).

We brought historic data, and newly discovered trending to the Board in its effort to redefine our Transformational Strategy (2025-2030) that was adopted in August 2025. The metrics and knowledge weighed heavily in both the concepts of tourism based economic sustainability and the core infrastructure responsibilities in building a more cohesive community.

II. Defining Direction Through Transformation Strategy Identification and Development

Indicator I

LP

In August 2025 the Board adopted a renewed and re-focused Transformational Strategy to shape the goals of the next five years. Two main concepts were chosen; (1) become a tourism based destination economy by reflecting our history and our place in the region thus being a "Lakeshore Economy", and (2) build a stronger community by casting a broader demographic net and finishing the work to repair those legacy infrastructure and relationship hiccups that interfere with the mission, calling this simply "Community Building".

To get this new strategy moving we have already launched a new Committee focus on a restated and renewed mission and basis for everything we do. Each work plan must be based in mission and have a specific purpose statement which aligns to one or more of the GAMSAs standards, setting a high bar for approval and budgeting.

Our Organization and Design Committees are sharing the work plan development for setting a series of key performance indicators to gauge how well we are restoring partner relationships and building a knowledgeable and trained volunteer base.

Our Promotion Committee is doing the same, marking each event and opportunity with a specific purpose that will be reported as a "Minute for Mission" at our Board meetings. Likewise, Economic Vitality is building on the data underlying the strategy to create work plans around business attraction and the completion of the Lumber Yard Gateway.

Those plans adopted for 2026 are included in this application, with several more in progress.

III. Strategy-Aligned Comprehensive Work Planning and Implementation Across All Four Points

Indicator I

LP

The Entire Board participated in multiple training meetings, refreshing its knowledge of how the organization is financed, how to "pitch" what Main Street is and its importance in building Lake Orion, and, through a series of facilitated sessions, a new and data driven Transformational Strategy. The Board then implemented its plan to restate the role, work and member type for each of its committees, particularly those based on the four Points. An explanation of the significance of the four points, and the work behind the committees they represent has been issued in both print and electronic format. the newly formed Illuminators Group has taken charge of using the updated communication to role out to the 60+ interested members who signed on to learn about the organization in the fall.

The work plans developed under this new strategy include a description, an objective, a statement of success, roles and responsibilities, estimated budgets and revenues, and an outline of steps and tasks. These are presented to the Board monthly for progress reporting by the Executive Director

Overall Standard Notes

LP: Lake Orion Main Street manages change through a disciplined, data-driven planning process grounded in community participation and market understanding. Over the past two years, the organization has significantly strengthened its knowledge base through business and real estate tracking in BOOMS, downtown asset mapping and work-order management through the Village's Silversmith system, coordinating-program metrics and PlacerAI data, monthly business and community roundtables, and third-party retail demand studies. These inputs directly informed the Board's adoption of a renewed 2025–2030 Transformational Strategy in August 2025, defining two clear directions: building a tourism-based "Lakeshore Economy" rooted in local identity, and strengthening community connections through inclusive engagement and infrastructure completion. All committee work plans, budgets, and projects are now required to align with this strategy and the Four Point Approach, with defined objectives, success measures, and monthly Board reporting. This integrated approach ensures programming is intentional, accountable, and aligned with Lake Orion's competitive market position and long-term revitalization goals.

Standard V: Preservation-Based Economic Development

Successful Main Street efforts are built on the guiding principle that district economic development is obtained by leveraging and preserving its unique historic and cultural assets. Standard Five confirms our strong belief that a community's own place-based and diverse cultural assets reflect the richness and strength of its identity and establishes a competitive market advantage.

I. Preservation Ethics and Education on History and Cultural Assets

Indicator I

LP

The entirety of the Main Street downtown district is a Registered Historic District where the overarching priority is the enhancement and promotion of the history, place and "legend" of the community.

- + We are updating our award winning historic way-finding and video "Then and Now" location program.
- + We regularly host interviews and historical lessons from heritage families, incorporating the stories into events and programming.
- + We partner with the historical society to bring the "Here Lies" cemetery tours telling the stories of our past.
- + We write, apply for, and obtain grants for historic preservation.
- + We built, promote and maintain a program for facade improvement and reconstruction, including design and research services.
- + The historic lumber yard gateway project seeks to rehabilitate and restore three main structures of historic significance into public space for markets and congregation.

Indicator II

LP

The "Here Lies" tours and local television video productions highlight our commitment to educating the public on the value of our historic assets and the effort and process of their preservation.

Examples:

https://youtu.be/zPuja_OxAQ8?si=vEiS6USkl-9ZlnJT

<https://youtu.be/lwSdxisPUI?si=azOQAxIM3nvbBlte>

Staff maintains memberships in the Michigan Historic Preservation Network and attends State Historic Preservation events and educational programming.

II. Standards and Best Practices for Place-Based, People-Focused Design

Indicator I

LP

Presently working on projects that indicate the commitment to these goals.

1. Adaptive Reuse of the 1926 Lake Orion High School. Providing guidance and implementation of historic tax credits, planned unit development, community placemaking grants, and Michigan based obsolete property rehabilitation credits to restore and adapt the three story school building into loft apartments while maintaining the historic character and amenities, leaving them restored and as incorporated features.
2. The Lumber Yard project. Securing MSOC grants for public space development tied to historic preservation, using Brownfield and tax abatement strategy and private funded public art and music concepts, this 5 acre site will host markets, events and concerts in its 1917 era, 6,000 sq ft, barn while offering the 1910 supply shed canopy as a family based trailhead to the iconic Paint Creek Trail
3. An expanded historic facade improvement program, bringing state based community redevelopment grants and funding to small retail projects.

III. Promotion of Historic, Heritage, and Cultural Assets

Indicator I

LP

We have been engaged in the scripting and production of video based historic preservation efforts in the District, including extended instructional and narrated videos that speak to the condition, effort, tools, incentives and resources brought to bring the history back to life while creating re-purposed value. The videos are produced with the help of another local official and maintained on our website, and broadcasted on local public television.

Overall Standard Notes

LP: We promote Lake Orion's heritage as a competitive advantage by turning historic assets into active destinations. The Lumber Yard project is positioned as a new public-facing "gateway" experience—markets, gatherings, trailhead activity, and festivals—grounded in authentic historic structures and interpreted history, which strengthens downtown's identity and supports business activity through increased visitation and longer dwell times.

Lake Orion is also advancing preservation-based redevelopment through the rehabilitation of the 1927 Lake Orion High School site, where the project will rehabilitate the original building (the "Lofts") alongside complementary new construction (the "Flats"), reinforcing our community's broader commitment to adaptive reuse as an economic development tool.

Our preservation ethic centers on telling the story of place while keeping structures in productive use. For the Lumber Yard at Paint Creek, our public communications and project materials emphasize the site's historic evolution and its role in community identity, and we actively invite community participation ("share your ideas and thoughts") as part of the planning process.

Standard VI: Demonstrated Impact and Results

Main Street communities are part of a national network with a proven record for generating strong economic returns and strengthening the district's position within a highly competitive marketplace. Standard Six highlights the importance of tracking, packaging, and demonstrating the qualitative and quantitative impact of the program's revitalization efforts. It also provides the opportunity for the local Main Street program to tell their stories and advocate for resources needed for sustainability.

I. Demonstrating The Value of Main Street

Indicator I

LP

Main Street is an active member of the coordinating council for zoning, planning, fire and development, attending meetings and participating in advice and recommendation. As a part of this work;

1. The district has established land use categories for the downtown that reflect a preference for preservation and adaptive reuse, building on use criteria that diversifies the district.
2. Main Street has taken the lead in the process to receive Redevelopment Ready Certification from the state of Michigan.
3. Main Street staff, members and stakeholders are consistently asked to comment and represent the interests of downtown/historic redevelopment at public legislative meetings
4. Presentations are given presenting the success of the district at "state of the community" based events
5. The district, and Main Street, were the primary focus of the Township garnering national recognition from America in Bloom, and was the host of the 2025 national symposium.
6. Main Street prominently applies the Main Street logo, brand and four points in web-based, social, print and other media resources.
6. Main Street is the primary source of information on investing in the district, and the program staff act as the principal liaisons for finding and permitting space for new and redesigned opportunities.
7. Main Street facilitates grant opportunities for district businesses, and regularly updates and informs the district of available resources, how to use them, and advice on writing and application. Recent success include two of the five annual small business grants from the Community Foundation for SE Michigan/Genysis program.

II. Measuring and Packaging Quantitative and Qualitative Outcomes

Indicator I

LP

This data is tracked in detail. Main Street reports core data to its coordinating partner on a quarterly basis and uses AI based resource support to track demographic, sales, value and other economic indicators.

Indicator II

LP

The Board receives an annual report (attached earlier) outlining the successes and numbers achieved in the program.

Examples of data tracked and reported:

DDA Public Projects/Infrastructure \$ 654,580

Private Sector Investment \$20, 015,004

New construction Projects Six (6)

Building Rehabilitation(s) Eleven (11)

Square foot of New and Improved Bldgs 71, 240

Number of New Businesses Fifteen (15)

Spent on Marketing/Promotion \$ 28,196

Spent on Events \$ 17,662

Net Gain of Full & Part time Jobs Seventy-Six (76)

Volunteers 251

Hours 626

III. Promoting Progress and Demonstrating Impact and Results

Indicator I

LP

As reported earlier, Main Street submits regular reports of economic activity to its coordinating partner, gives annual reports, and provides monthly public reporting through Board activity and meetings.

Of note is the new effort to publish advertorials in local media that extol the benefits and success of the program. A great example is the published article "The DDA Shines" which set forth the immense effort of the Main Street team.

Overall Standard Notes

LP: At its kick-off training for 2025 the Board focused a significant effort in answering the question "What do you do?" The exercise was not just about the actual nature of what we do, but about how we answer the question in advocacy. The Board, staff, and stakeholders all remain privy to investment data, resource details, and strategic plan priorities so they can act with knowledge about how our funding works, how we attract new partners, and how we measure performance indicators in the plan.