



## AGENDA - CITY COUNCIL MEETING

February 9<sup>th</sup>, 2021

6:30 p.m.

1. CALL TO ORDER.
2. PLEDGE OF ALLEGIANCE - Invocation will be given by Fifth Ward Councilmember Karen Bunnell
3. ROLL CALL.
4. ADOPTION OF AGENDA.
5. PRESENTATIONS/PROCLAMATIONS.
6. PUBLIC HEARINGS.
  - A. *Conduct a Virtual Public Hearing to Receive Citizen Comments on the Community Development Block Grant - Coronavirus (CDBG-CV) Substantial Amendment for Additional Foreclosure Prevention and Administration Funding and authorize the mayor to sign required documents for submission to HUD*
7. CITIZEN COMMENTS. (3-Minute Limit)
8. PETITIONS & COMMUNICATION FROM CITY STAFF AND OTHER GOVERNMENTAL ENTITIES. (Accept & Place on File).
9. CONSENT CALENDAR.
  - A. **Minutes of the Regular Meeting of January 26, 2021**  
*Approve the minutes of the regular City Council Meeting of January 26, 2021*

**B. Receipt of Street/Alley Vacation Petition**

*Receipt of a petition circulated by John and Anne Campau to vacate the street right of way north of Carlton Blvd between S. Higby and S. Durand.*

**C. Corrective Resolution for Special Assessment Roll No. 4293**

*Approve corrective resolution for Special Assessment Roll No. 4293 for delinquent general fund accounts receivable, confirmed May 26, 2020*

**D. JDL Board Appointment**

*Approval of the Mayor's recommendation to reappoint Jacqueline Barber to the Jackson District Library Board for a term ending on 02/02/2025*

**10. OTHER BUSINESS.**

None

**11. NEW BUSINESS.**

**A. Mowing & Irrigation Contract for Parks, Cemeteries and Downtown**

*Award the parks, cemeteries and downtown mowing contract to Picture Perfect Lawn Care, L.L.C. of Concord, MI in the amount of \$229,738.38*

**B. Resolution to Amend CDBG Budgets for Fiscal Years 2016-2017, 2018-2019, and 2020-2021**

*Approve resolution amending the Community Development Block Grant (CDBG) budgets for Fiscal Years 2016-2017, 2018-2019, and 2020-2021 and reprogram excess program income to the 2020-2021 General Administration and Boos Center Rehabilitation activities.*

**C. Adoption of Resolutions Related to Refunding Bond Issues**

- 1. A resolution pledging limited tax full faith and credit in support of City of Jackson Brownfield Redevelopment Authority Tax Increment Refunding Bonds, Series 2021.*
- 2. Resolution authorization issuance of 2021 Unlimited Tax General Obligation Refunding Bonds (City Hall Bonds).*

**D. Change Order 17 to the Contract with Bailey Excavating, Inc.**

*Approve balancing Change Order 17 to the contract with Bailey Excavating, Inc. for downtown street and parking lot rehabilitation in the decreased amount of \$231,478.02 to remove site work at 135 W. Cortland Street (former Vermuelen building) and 145 W. Cortland Street (former Masonic Temple*

*building) from the contract and to authorize the City Manager and City Engineer to execute the appropriate document.*

**E. Balancing Change Order 10 to the 2017 Water Main Replacement with Dunigan Brothers, Inc.**

*Approve balancing change order 10 to the 2017 Water Main Replacement contract with Dunigan Brothers, Inc. in the decreased amount of \$50,894.98 to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document.*

**F. Change Order 6 to the Michigan Avenue Reconstruction Contract**

*Approve balancing change order 6 to the 2019 Michigan Avenue Reconstruction contract with Bailey Excavating, Inc. in the increased amount of \$42,717.28 to balance contract quantities to match quantities placed in the field and to authorize the City Manager and City Engineer to execute the appropriate document.*

**G. Approve the Sale of City Owned Property Located at 515 Waterloo Street for \$72,000**

**H. Resolution Regarding the Sparks Foundation County Park (aka Cascades)**

**I. Receipt of Appointed Officials Performance Evaluations**

**12. EXECUTIVE SESSION - If requested for the purposes of discussing Appointed Officials Performance Evaluations**

**13. CITY COUNCILMEMBER'S COMMENTS**

**14. MANAGER'S COMMENTS.**

**15. ADJOURNMENT.**

**MEMO TO:** Mayor and City Councilmembers

**FROM:** Jonathan Greene, City Manager

**DATE:** February 9, 2021

**SUBJECT:** Conduct a Virtual Public Hearing to Receive Citizen Comments on the Community Development Block Grant - Coronavirus (CDBG-CV) Substantial Amendment for Additional Foreclosure Prevention and Administration Funding and Authorize the Mayor to Sign Required Documents for Submission to HUD

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**Recommendation:**

Conduct a virtual Public Hearing to receive citizen comments on the CDBG-CV Substantial Amendment for additional Foreclosure Prevention and Administration funding and authorize the Mayor to sign Form SF-424 and any other documentation required for submittal to HUD.

Attached is a memorandum from Shane LaPorte, Director of the Department of Neighborhood & Economic Development, requesting City Council conduct a virtual Public Hearing to receive citizen comments on the CDBG-CV Substantial Amendment for additional Foreclosure Prevention and Administration funding and authorize the Mayor to sign Form SF-424 and any other documentation required for submittal to HUD.

I recommend approval of the request. Your consideration and concurrence is `appreciated.

## DEPARTMENTAL REPORT

**MEMO TO:** Jonathan Greene, City Manager

**FROM:** Shane LaPorte, Director of Neighborhood & Economic Operations

**DATE:** February 9, 2021

**RECOMMENDATION:** Conduct a Virtual Public Hearing to Receive Citizen Comments on the Community Development Block Grant - Coronavirus (CDBG-CV) Substantial Amendment for Additional Foreclosure Prevention and Administration Funding and Authorize the Mayor to Sign Required Documents for Submission to HUD

### SUMMARY

Conduct a virtual Public Hearing to receive citizen comments on the CDBG-CV Substantial Amendment for additional Foreclosure Prevention and Administration funding and authorize the Mayor to sign Form SF-424 and any other documentation required for submittal to HUD.

### BUDGETARY CONSIDERATIONS

On March 27, 2020, President Trump signed the *Coronavirus Aid, Relief, and Economic Security (CARES) Act*, a \$2 trillion economic relief package to protect the American people from the public health and economic impacts of COVID-19. The package specifically set aside \$5 billion in supplemental Community Development Block Grant (CDBG) funding for grants to prevent, prepare for, and respond to coronavirus (CDBG-CV). The first \$2 billion in CARES Act funding for CDBG grantees was distributed using the 2019 formula allocation, of which \$756,020 was earmarked for the City of Jackson. Additional CDBG-CV funds may become available in the future as well.

On September 11, 2020, the City was notified it was receiving an additional \$189,425, bringing the City's total CDBG-CV allocation to \$945,445. With \$439,425 available to allocate toward eligible activities and the new round of tax foreclosures in process, it is incumbent upon the City of Jackson to continue to assist its most disadvantaged residents through this hardship. As such, it is proposed that the budget for Foreclosure Prevention be increased by \$100,000, bringing the total budget to \$160,000. It is further proposed that CAA's administration budget be increased an additional \$20,000 to help defray the costs to deliver this service to the community, bringing the total administration budget to \$40,000.

### HISTORY, BACKGROUND and DISCUSSION

On May 26, 2020, City Council funded Homeless Prevention activities with the supplemental CDBG grant provided by HUD in response to COVID-19. Those activities consisted of Water Shutoff Protection, Foreclosure Prevention, and Eviction Protection in the initial total amount of \$305,000. Both the City and Community Action Agency also received a total of \$80,000 to properly administer the programs.

On September 8, 2020, City Council approved an increase in the Water Shutoff Protection budget as well as expanding the pool of eligible participants. CAA continues to assist the low-income community with their water bills even in light of the continued moratorium imposed by the State of Michigan. Previous funding available to the Department of Health and Human Services through Senate Bill 690 to pay delinquent water bills has been exhausted.

In a community where 30% of the entire population lives below the Federal poverty level (Source: 2018 American Community Survey 5-Year Estimates, Table S1701), the disparate impact COVID-19 placed on struggling City residents is significant. The County of Jackson is currently in the foreclosure process for those still owing 2018 and older property taxes. To protect the health, safety, and welfare of City residents during the ongoing coronavirus recovery phase, it is imperative to keep families housed.

It is recommended an additional \$100,000 is added to the Foreclosure Prevention budget to pay 2018 and older taxes owed to the County of Jackson. As CAA has agreed to continue as the City's subrecipient for these funds, it is also recommended an additional \$20,000 is added to its administration budget to help defray the costs to administer the activity.

## DISCUSSION OF THE ISSUE

The City has received many suggestions and proposals to help spend its CARES Act money; however, federal rules and regulations do not allow for the duplication of benefits already existing in the community. The NEO Grant Coordinator reviews each suggestion or proposal closely with input from HUD as necessary. Unfortunately, this has disallowed several activities due to the amount of CARES Act funding Jackson County receives from various other sources.

Notice of the Substantial Amendment and the February 9, 2021 virtual public hearing was posted to the City's webpage <http://www.cityofjackson.org/332/Grant-Reports> on January 20, 2021. Notice of the availability of this Substantial Amendment and upcoming public hearing was also broadcast through the City's social media outlets, including Facebook and Instagram.

## POSITIONS

Requested action is for City Council to conduct a Public Hearing to receive citizen comment on the CDBG-CV Substantial Amendment, approve the increases to Foreclosure Prevention and Administration funds, and authorize the Mayor to sign any documentation required for submittal to HUD.

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### ATTACHMENTS

- Substantial Amendment #4
- SF-424

**Substantial Amendment 4**  
to the  
**2019-2020 Annual Action Plan,**  
Year Five of the  
**2015-2019 Five-Year Consolidated Plan**

**Community Development Block Grant – Coronavirus (CDBG-CV)**

**Foreclosure Prevention – Additional Funding**

**Executive Summary**

On March 27, 2020, President Trump signed the *Coronavirus Aid, Relief, and Economic Security (CARES) Act*, a \$2 trillion economic relief package to protect the American people from the public health and economic impacts of COVID-19. The package specifically set aside \$5 billion in supplemental Community Development Block Grant (CDBG) funding for grants to prevent, prepare for, and respond to coronavirus (CDBG-CV).

The first \$2 billion in CARES Act funding for CDBG grantees was distributed using the 2019 formula allocation, of which \$756,020 was earmarked for the City of Jackson. A second round of funding was provided to states only in May 2020 with a third round made on September 11, 2020 in which the City received an additional \$189,425.

On May 26, 2020, the Jackson City Council funded Homeless Prevention activities which included water shutoff protection, foreclosure prevention, and eviction protection. As coronavirus continues to plague the City of Jackson as well as the entire nation, the need to continue supporting low income residents during the pandemic is necessitated.

It is incumbent upon the City of Jackson to continue to assist its most disadvantaged residents through this hardship. As such, it is proposed that the budget for Foreclosure Prevention be increased by \$100,000, bringing the total budget to \$160,000. It is further proposed that CAA's administration budget be increased an additional \$20,000 to help defray the costs to deliver this service to the community, bringing the total administration budget to \$40,000.

**General Information**

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**Grantee Name:** City of Jackson, Michigan

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**Department Administering Funds:** Neighborhood & Economic Operations

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**Contact:** Michelle L. Pultz-Orthaus, Grant Coordinator  
161 W Michigan Ave  
Jackson, MI 49201  
(517) 768-6436  
[mpultz@cityofjackson.org](mailto:mpultz@cityofjackson.org)

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**Authorized Official** Derek J. Dobies, Mayor  
161 W Michigan Ave  
Jackson, MI 49201  
(517) 788-4028  
[ddobies@cityofjackson.org](mailto:ddobies@cityofjackson.org)

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**Website:** [www.cityofjackson.org](http://www.cityofjackson.org)

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<b>Amount of Additional CDBG-CV Funds:</b>	\$756,020	Round 1 April 2, 2020
	<u>\$189,425</u>	Round 3 September 11, 2020
	<b>\$945,445</b>	<b>Total CDBG-CV Funds</b>

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## Foreclosure Prevention

In a community where 30% of the entire population lives below the Federal poverty level (*Source: 2018 American Community Survey 5-Year Estimates, Table S1701*), the disparate impact COVID-19 placed on struggling City residents is significant. The County of Jackson is currently in the foreclosure process for those still owing 2018 and older property taxes. To protect the health, safety, and welfare of City residents during the ongoing coronavirus recovery phase, it is imperative to keep families housed.

Due to the timing of receiving CDBG-CV funds from HUD and the fact many homeowners were able to redeem their home before foreclosure, only 43 properties were identified as potentially eligible in 2020. With the original \$60,000 allocation, 16 homeowners took advantage of this assistance, saving them a total of \$36,117 and ensuring they remained stably housed. Nine (9) of the 16 that received assistance in 2020 have been able to pay their taxes before foreclosure in 2021. As of January 19, 2021, approximately 124 households with 100% Principal Residency Exemption (PRE) status are in jeopardy of losing their primary residence to tax foreclosure for failing to pay 2018 property taxes.

Community Action Agency (CAA) will continue to serve as a subgrantee administering the Foreclosure Prevention Program providing assistance to income qualified low- to moderate-income homeowners to avoid foreclosure during 2021. To qualify, the residential property must be the primary residence of the applicant and located within the jurisdictional boundaries of the City of Jackson. Further, the household income of the applicant cannot exceed 80% of the Area Median Income (AMI) as published by HUD annually and adjusted for household size. In addition, the applicant must demonstrate a correlation between his/her inability to pay is a result of factors beyond his/her control due to the COVID-19 pandemic and the various emergency orders enacted by the State of Michigan. Only unpaid 2018 and prior year taxes and any penalties or administrative costs imposed by the Jackson County Treasurer are eligible for payment; mortgages will be reviewed on a case-by-case basis and paid only if sufficient funds are available. Payment is made directly to the Jackson County Treasurer or mortgage holder and not to the applicant.

**IDIS Matrix Code:** 05Q – Subsistence Payments

**Description:** One-time emergency payments on behalf individuals or families to prevent foreclosure during 2021.

**National Objective:** Low/Mod Limited Clientele (LMC) 24 CFR 570.208(a)(2)  
Activities that benefit a limited clientele, at least 51% of whom are low/mod income. LMC activities provide benefits to a specific group of persons rather than all the residents of a particular area.

**Subgrantee:** Community Action Agency  
1214 Greenwood Avenue  
Jackson, MI 49203

<b>Budget:</b>	Foreclosure Prevention	\$ 60,000	May 26, 2020
	Budget Increase	<u>\$100,000</u>	February 9, 2021
	<b>Total:</b>	<b>\$160,000</b>	
	CAA Administration	\$ 20,000	May 26, 2020
	Budget Increase	<u>\$ 20,000</u>	February 9, 2021
	<b>Total:</b>	<b>\$ 40,000</b>	

## **Citizen Participation**

Notice of the Substantial Amendment and the February 9, 2021 virtual public hearing was posted to the City's webpage <http://www.cityofjackson.org/332/Grant-Reports> on January 19, 2021. Notice of the availability of this Substantial Amendment and upcoming public hearing was also broadcast through the City's social media outlets, such as Facebook.

*Public comment to be determined.*

### Application for Federal Assistance SF-424

* 1. Type of Submission: <input type="checkbox"/> Preapplication <input type="checkbox"/> Application <input checked="" type="checkbox"/> Changed/Corrected Application	* 2. Type of Application: <input type="checkbox"/> New <input checked="" type="checkbox"/> Continuation <input type="checkbox"/> Revision	* If Revision, select appropriate letter(s): <input type="text"/> * Other (Specify): <input type="text"/>
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* 3. Date Received: <input type="text"/>	4. Applicant Identifier: <input type="text"/>
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5a. Federal Entity Identifier: <input type="text" value="B-20-MW-26-0021"/>	5b. Federal Award Identifier: <input type="text"/>
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#### State Use Only:

6. Date Received by State: <input type="text"/>	7. State Application Identifier: <input type="text"/>
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#### 8. APPLICANT INFORMATION:

* a. Legal Name: <input type="text" value="City of Jackson"/>
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* b. Employer/Taxpayer Identification Number (EIN/TIN): <input type="text" value="38-60047401"/>	* c. Organizational DUNS: <input type="text" value="0850316560000"/>
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#### d. Address:

* Street1:	<input type="text" value="161 W Michigan Avenua"/>
Street2:	<input type="text"/>
* City:	<input type="text" value="Jackson"/>
County/Parish:	<input type="text"/>
* State:	<input type="text" value="MI: Michigan"/>
Province:	<input type="text"/>
* Country:	<input type="text" value="USA: UNITED STATES"/>
* Zip / Postal Code:	<input type="text" value="49201-1315"/>

#### e. Organizational Unit:

Department Name: <input type="text" value="Neighborhood &amp; Economic Operat"/>	Division Name: <input type="text" value="Neighborhood &amp; Economic Operat"/>
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#### f. Name and contact information of person to be contacted on matters involving this application:

Prefix: <input type="text"/>	* First Name: <input type="text" value="Michelle"/>
Middle Name: <input type="text" value="L"/>	
* Last Name: <input type="text" value="Pultz-Orthaus"/>	
Suffix: <input type="text"/>	

Title: <input type="text" value="Grant Coordinator"/>
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Organizational Affiliation: <input type="text"/>
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* Telephone Number: <input type="text" value="517-768-6436"/>	Fax Number: <input type="text" value="866-971-2151"/>
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* Email: <input type="text" value="mpultz@cityofjackson.org"/>
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**Application for Federal Assistance SF-424**

**\* 9. Type of Applicant 1: Select Applicant Type:**

C: City or Township Government

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

\* Other (specify):

**\* 10. Name of Federal Agency:**

U.S. Department of Housing & Urban Development

**11. Catalog of Federal Domestic Assistance Number:**

14.218

CFDA Title:

Community Development Block Grants/Entitlement Grants (Coronavirus - CDBG-CV)

**\* 12. Funding Opportunity Number:**

\* Title:

Community Development Block Grant - Entitlement Community (Coronavirus - CDBG-CV)

**13. Competition Identification Number:**

Title:

**14. Areas Affected by Project (Cities, Counties, States, etc.):**

Add Attachment

Delete Attachment

View Attachment

**\* 15. Descriptive Title of Applicant's Project:**

Activities to prevent, prepare for, and respond to coronavirus

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

**Application for Federal Assistance SF-424**

**16. Congressional Districts Of:**

\* a. Applicant

\* b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

Add Attachment

Delete Attachment

View Attachment

**17. Proposed Project:**

\* a. Start Date:

\* b. End Date:

**18. Estimated Funding (\$):**

* a. Federal	<input type="text" value="945,445.00"/>
* b. Applicant	<input type="text" value="0.00"/>
* c. State	<input type="text" value="0.00"/>
* d. Local	<input type="text" value="0.00"/>
* e. Other	<input type="text" value="0.00"/>
* f. Program Income	<input type="text" value="0.00"/>
* g. TOTAL	<input type="text" value="945,445.00"/>

**\* 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

a. This application was made available to the State under the Executive Order 12372 Process for review on

b. Program is subject to E.O. 12372 but has not been selected by the State for review.

c. Program is not covered by E.O. 12372.

**\* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**

Yes  No

If "Yes", provide explanation and attach

Add Attachment

Delete Attachment

View Attachment

**21. \*By signing this application, I certify (1) to the statements contained in the list of certifications\*\* and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances\*\* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

\*\* I AGREE

\*\* The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

**Authorized Representative:**

Prefix:  \* First Name:

Middle Name:

\* Last Name:

Suffix:

\* Title:

\* Telephone Number:

Fax Number:

\* Email:

\* Signature of Authorized Representative:

\* Date Signed:



**CITY COUNCIL MEETING  
MINUTES  
January 26, 2021**

**CALL TO ORDER:**

The Jackson City Council, in accordance with State and Federal guidelines designed to mitigate the spread of COVID-19, met virtually in regular session and was called to order at 6:32 p.m. by Mayor Derek J. Dobies.

**PLEDGE OF ALLEGIANCE AND INVOCATION:**

The Council joined in the Pledge of Allegiance. Invocation was given by Fourth Ward Councilmember Laura Dwyer Schlecte in which she shared a poem by Gae Winn.

**ROLL CALL:**

Present: Mayor Derek Dobies, Vice Mayor Arlene Robinson, Councilmembers Freddie Dancy, Jeromy Alexander, Laura Dwyer Schlecte, Karen Bunnell, and Will Forgrave.

Absent: none.

Also present: City Manager Jonathan Greene, City Attorney Matthew Hagerty, City Clerk Andrea Muray, City Assessor Jason Yoakam, Director of Parks and Recreation Kelli Hoover, Director of Neighborhood and Economic Operations Shane LaPorte, Director of Police and Fire Services Elmer Hitt, Director of Diversity, Equity, and Inclusion John Willis, Director of Finance Phil Hones, Director of Public Works Mike Osborn, City Engineer Jon Dowling, and Public Information Office Aaron Dimick.

**ADOPTION OF AGENDA:**

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

**PRESENTATIONS/PROCLAMATIONS:**

**City of Jackson's Audit Report for Fiscal Year ended June 30, 2020** *Presentation by Rehmann Robson, LLC, of the City of Jackson's Audit Report for Fiscal Year ended June 30, 2020.*

Nathan Baldermann of Rehmann Robson, LLC made the presentation.

- A. Receipt of the City of Jackson's Audit Report for Fiscal Year ended June 30, 2020.

Motion was made by Councilmember Alexander, seconded by Councilmember Robinson to receive the City of Jackson's Audit for Fiscal Year ended June 30, 2020. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

**PUBLIC HEARINGS:**

- A. Conduct a Public Hearing to Receive Citizen Comment on the City's Housing and Community Development Needs

City Clerk Andrea Muray read into the record comments that were submitted electronically.

**CITIZEN COMMENTS:**

City Clerk Andrea Muray read into the record comments that were submitted electronically.

**PETITIONS & COMMUNICATION FROM CITY STAFF AND OTHER GOVERNMENTAL ENTITIES:**

- A. CDBG, HOME, and CDBG-CV Homeless Prevention Financial Summaries through December 31, 2020.

Motion was made by Councilmember Alexander, seconded by Councilmember Schlecte to accept and place on file the CDBG, HOME, and CDBG-CV Homeless Prevention Financial Summaries through December 31, 2020. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

- B. Environmental Action Plan (dated December 16, 2020) that has been prepared by the City of Jackson Environmental Commission and recommended to the City Council.

Motion was made by Councilmember Bunnell, seconded by Councilmember Alexander to accept and place on file the Environmental Action Plan. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

A recess was taken from 7:38 until 7:44 p.m.

**CONSENT CALENDAR:**

**A. Minutes of the Regular Meeting of January 12, 2021**

*Approve the minutes of the regular City Council Meeting of January 12, 2021*

**B. Minutes of the Special Meeting of January 5, 2021**

*Approve the minutes of the special City Council Meeting of January 5, 2021*

**C. Corrective Resolution for Special Assessment Roll No. 3411**

*Approve Corrective Resolution for Special Assessment Roll No. 3411 for Reconstruction of Park & Elizabeth, from Michigan to VanDorn, confirmed April 23, 2019.*

**D. Traffic Control Orders 2331-2333**

*Approve TCO's 2331-2333 to install "No Parking Any Time" signs on the north side of Plymouth Street from East Avenue to Elm Avenue*

**E. Traffic Control Orders 2334 - 2336 Area of New Comerica Bank Building**

*Approve Traffic Control Orders 2334-2336 to regulate the parking around the new Comerica Bank at Jackson Street and Louis Glick Highway*

**F. Traffic Control Order 2337 Louis Glick Highway - Blackstone Street to Jackson Street**

*Approve Traffic Control Order 2337 to install "2 Hour Parking" signs on the south side of Louis Glick Highway from Blackstone Street to Jackson Street*

**G. Traffic Control Orders 2338-2339 Gorham Street - Chapin Street to Plymouth Street Forbes Street - Tyson Street to Michigan Avenue**

*Approve Traffic Control Orders 2338 and 2339 to remove "2 Hour Parking" signs on the east side of Gorham Street, from Chapin Street to Plymouth Street, and "1 Hour Parking" signs on the east side of Forbes Street, from Tyson Street to Michigan Avenue.*

**H. Traffic Control Orders 2340 - 2342 Walnut Street-Locust Street-Mitchell Street**

*Approve Traffic Control Orders 2340 - 2342 to replace "No Trucks" signs with "No Thru Trucks" signs on Walnut Street, Locust Street and Mitchell Street.*

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

**OTHER BUSINESS:**

**A. Second Reading and Adoption of Ordinance No. 509 - Woodland Hills PILOT**

**Recommendation:** *Adopt Ordinance No. 509 to provide a service charge in lieu of taxes for a housing project for low income persons and families.*

Motion was made by Councilmember Forgrave, seconded by Councilmember Alexander to adopt Ordinance No. 509. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

**NEW BUSINESS:**

**A. Second Extension of the 2019 As- Needed Materials Testing Services Contract**

**Recommendation:** *Approval of the second extension of the 2019 As Needed Materials Testing Services Contract with Professional Service Industries (PSI), Inc. of Lansing, Michigan in the estimated amount of \$88,000.00, and authorization for the Mayor and City Clerk to execute the appropriate document(s) in accordance with the Purchasing Agent.*

Motion was made by Councilmember Alexander, seconded by Councilmember Schlecte to approve the second extension of the 2019 As Needed Materials Testing Services Contract with Professional Service Industries, Inc. of Lansing, MI in the estimated amount of \$88,000.00, and authorize the Mayor and City Clerk to execute the appropriate documents in accordance with the Purchasing Agent. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

**B. Change Order 2 to the 2018 Essex Heights Water Main Replacement and Street Repaving Contract with Dunigan Brothers, Inc.**

**Recommendation:** *Approve Balancing Change Order 2 to the Essex Heights Water Main Replacement and Street Repaving contract with Dunigan Brothers, Inc. in the decreased amount of \$1,385.50, to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document.*

Motion was made by Councilmember Alexander, seconded by Councilmember Bunnell to approve Change Order 2 to the 2018 Essex Heights Water Main Replacement and Street Repaving Contract with Dunigan Brothers, Inc. in the decreased amount of \$1,385.50 to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

**C. Balancing Change Order 2 to the 2018 Edgewood Street Water Main Replacement and Street Repaving Contract with Bailey Excavating, Inc.**

**Recommendation:** *Approve Balancing Change Order 2 to the 2018 Edgewood Street Water Main Replacement and Street Repaving contract with Bailey Excavating, Inc. in the decreased amount of \$97,701.25 to balance contract quantities to match quantities placed in the field, and to remove items from the contract for discontinued work, and authorize the City Manager and City Engineer to execute the appropriate document.*

Motion was made by Councilmember Alexander, seconded by Councilmember Schlecte to approve Balancing Change Order 2 to the 2018 Edgewood Street Water Main Replacement and Street Repaving Contract with Bailey Excavating, Inc. in the decreased amount of \$97,701.25 to balance contract quantities to match quantities placed in the field, remove items from the contract for discontinued work, and authorize the City Manager and City Engineer to execute the appropriate document. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

**D. Balancing Change Order 1 to the Chalet Terrace Street Resurfacing Contract with Dunigan Brothers, Inc.**

**Recommendation:** *Approve Balancing Change Order 1 to CDBG funded Chalet Terrace Street Resurfacing, Phase 1 contract with Dunigan Brothers, Inc. in the decreased amount of \$6,120.36 to balance contract quantities for original items to match quantities placed in the field, add extra items that were necessary to complete work in the field, and authorize the City Manager and City Engineer to execute the appropriate document.*

Motion was made by Councilmember Schlecte, seconded by Councilmember Robinson to approve Balancing Change Order 1 to the CDBG funded Chalet Terrace Street Resurfacing Phase 1 Contract with Dunigan Brothers, Inc. in the decreased amount of \$6,120.36 to balance contract quantities for original items to match quantities placed in the field, add extra items that were necessary to complete work in the field, and authorize the City Manager to City Engineer to execute the appropriate document. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

**E. Balancing Change Order 1 to the CDBG Street Lighting Contract with Cochran Electric Company**

**Recommendation:** *Approve Balancing Change Order 1 to the contract with Cochran Electric Co. for the CDBG Street Lighting project on Adrian and Morrell Streets in the decreased amount of \$33,362.35 to balance contract quantities for original items to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document.*

Motion was made by Councilmember Schlecte, seconded by Councilmember Alexander to approve Balancing Change Order 1 to the contract with Cochran Electric Co. for the CDBG Street Lighting project on Adrian and Morrell Streets in the decreased amount of \$33,362.35 to balance contract quantities for original items to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

**F. Balancing Change Order 1 to the 2019 West Side Overlay HMA Paving Contract with Michigan Paving and Materials Company**

**Recommendation:** *Approve Balancing Change Order 1 to the contract with Michigan Paving and Materials Company for the 2019 West Side Overlay HMA Paving contract in the decreased amount of \$41,041.50 to balance contract quantities for original items to match quantities placed in the field, and authorize the City Manager and City Engineer to execute the appropriate document.*

Motion was made by Councilmember Alexander, seconded by Councilmember Forgrave to approve Balancing Change Order 1 to the contract with Michigan Paving and Materials Company for the 2019 West Side Overlay HMA Paving Contract in the decreased amount of \$41,041.50 to balance contract quantities for original items to match quantities placed in the field, and authorize the City Manager and City Engineer to execute the appropriate document. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

**G. Balancing Change Order 1 to the CDBG Exchange Park and Loomis Park Lighting Contract with Hirst Electric Company**

**Recommendation:** *Approve Balancing Change Order 1 to the contract with Hirst Electric Co. for the CDBG Exchange Park and Loomis Park Lighting contract in the decreased amount of \$400.00 to balance contract quantities for original items to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document.*

Motion was made by Councilmember Alexander, seconded by Councilmember Forgrave to approve Balancing Change Order 1 to the contract with Hirst Electric Co. for the CDBG Exchange Park and Loomis Park Lighting contract in the decreased amount of \$400.00 to balance contract quantities for original items to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

**H. Installation of Motor Control Centers at the Water Plant to Cochran Electric**

**Recommendation:** *Award the installation of Motor Control Centers (MCC's) at the Water plant to Cochran Electric for \$83,118.00*

Motion was made by Councilmember Schlecte, seconded by Councilmember Alexander to award the installation of the Motor Control Centers at the Water Plant to Cochran Electric for \$83,118.00. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

**I. Balancing Change Order 4 to the 2019 Local Street Repaving Contract with Michigan Paving and Materials Company**

**Recommendation:** *Approve Balancing Change Order 4 to the contract with Michigan Paving and Materials Company for the 2019 Local Street Repaving contract in the decreased amount of \$62,941.55 to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document.*

Motion was made by Councilmember Schlecte, seconded by Councilmember Alexander to approve Balancing Change Order 4 to the contract with Michigan Paving and Materials Company for the 2019 Local Street Repaving Contract in the decreased amount of \$62,941.55 to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Dancy, Alexander, Schlecte, Bunnell, and Forgrave (7). Nays: none. Motion carried.

**J. Modifications to the Purchasing Manual**

**Recommendation:** *Consider modifications to the purchasing policy*

Motion was made by Councilmember Schlecte, seconded by Councilmember Robinson to:

- Modify the Index and Sections 2.1 C, 2.1 K, 6.2, 7, 7.1, and 7.8 of the Purchasing Manual to return the dollar amount required for sealed bids and City Council approval back to \$20,000 or greater from \$50,000 or greater,
- Modify Section 6.2 F to be consistent with the rest of the Purchasing Manual and change the \$75,000 amount to \$20,000, and
- Modify the second paragraph of Section 17.1 to read, “When a proposed change order increases the dollar amount of a contract, the change order must be requested by the Department Head who obtained the original authorization for the contract. If the amount of the change order together with the original contract and all prior change orders is less than \$20,000, the requested change order may be approved by co-signatures of both the Department Head and the City Manager. If the total amount is \$20,000 or greater, the change order must be submitted to City Council and approved by majority vote of its members before it may become effective.

Motion was made by Mayor Dobies, seconded by Councilmember Alexander to lay the item on the table. Vote - Yeas: Mayor Dobies, Vice Mayor Robinson, Councilmembers Alexander, Schlecte, Bunnell, and Forgrave (6). Nays: Councilmember Dancy (1). Motion carried.

**CITY COUNCILMEMBER’S COMMENTS:**

Mayor Dobies, Vice Mayor Robinson, Councilmembers Alexander, Schlecte, and Forgrave all offered comments. Councilmembers Dancy and Bunnell declined to offer comments.

**MANAGER’S COMMENTS:**

City Manager Jonathan Greene declined to offer comments.

**ADJOURNMENT:**

No further business being offered, a motion to adjourn was made by Councilmember Alexander and was seconded by Councilmember Bunnell. Vote was done by voice with all in favor. Mayor Dobies adjourned the meeting at 8:38 p.m.

**MEMO TO:** Mayor and City Councilmembers  
**FROM:** Andrea Muray, City Clerk  
**DATE:** February 9, 2021  
**SUBJECT:** Receipt of Street/Alley Vacation Petition

---

**Recommendation:**

Receipt of a petition circulated by John and Anne Campau to vacate the street right of way north of Carlton Blvd between S Higby and S. Durand.

Upon receipt, the petition will be referred to staff for appropriate action. Your consideration and concurrence is appreciated.

RECEIVED

CITY OF JACKSON

JAN 28 2021

CLERK'S OFFICE

By \_\_\_\_\_

PETITION FOR STREET/ALLEY CLOSING

To the Honorable Mayor and Members of the City Council City of Jackson, Michigan:

We the undersigned, being all of the persons owning property abutting on the street or alley, more particularly described as:

THE S 16.50 FT OF LOTS 15 & 16, BLOCK 21, AS CURRENTLY USED FOR STREET RIGHT OF WAY, SHOEMAKER'S ADDITION TO THE CITY OF JACKSON, COUNTY OF JACKSON, STATE OF MICHIGAN

do hereby respectfully petition your honorable body to close and vacate said street or alley. The said street or alley has been dedicated as a public street or alley.

With respect to any taxes or special assessments levied or assessed against any property included in said street or alley, we and each of us do hereby waive any and all questions, claims or controversies relative to such taxes or special assessments which have or may hereafter be levied or assessed upon any part of the lands embraced in said street or alley, and we hereby assume and agree to pay all such taxes or special assessments thereon, and we further hereby consent to the vacating of the aforesaid street or alley.

NOTE: All persons interested either jointly or individually by deed or contract in relation to any property abutting on the street or alley proposed to be vacated are required to sign and date the above petition:

Table with 3 columns: OWNER OF PROPERTY & SIGNATURE/DATE, DESCRIPTION OF PROPERTY, LINEAL FEET OF FRONTAGE\*. Includes entries for Campau Anne W and Buda David with handwritten signatures and dates.

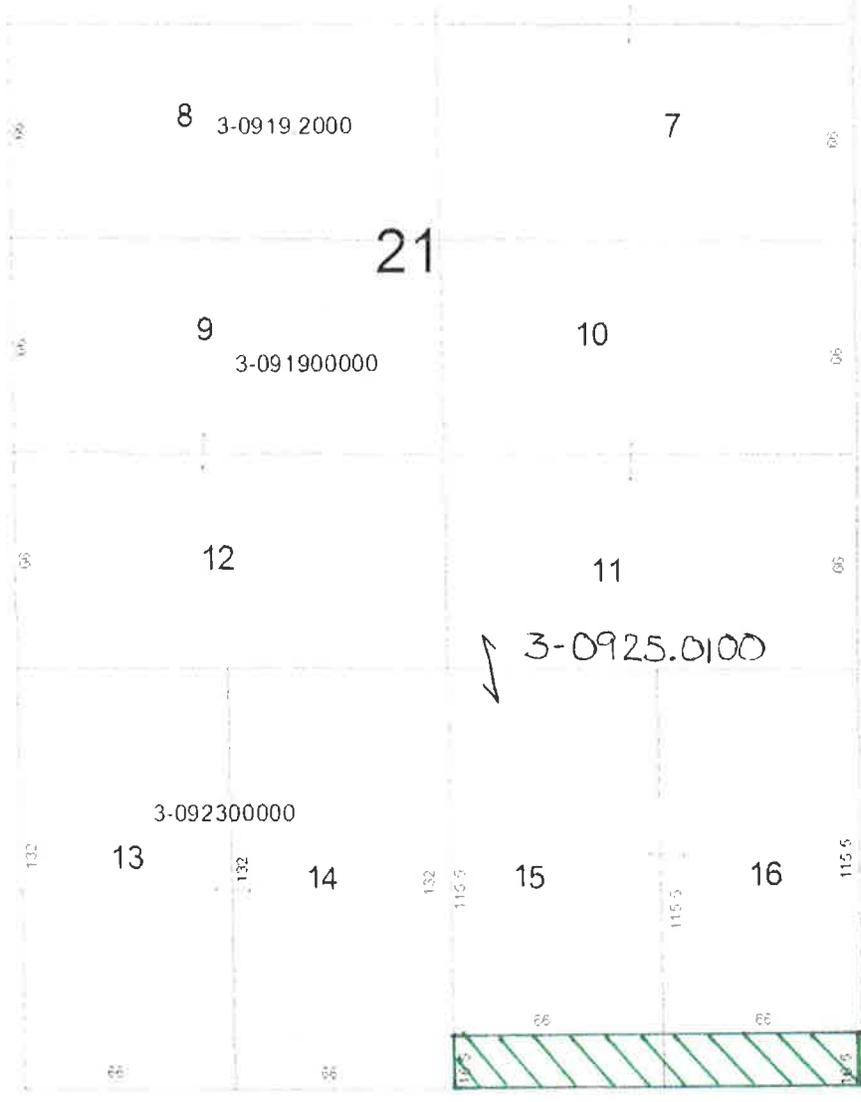
\*Needed for street vacations only.

Petition Circulated By:

Name: John & Anne Campau Date: 1-28-2021
Address: 612 S. Durand Signature: [Handwritten Signature]
City, State, Zip: Jackson, MI 49203 Phone: 517-206-3300



S Higby St



S Durand St

Carlton Blvd

**MEMOTO:** Mayor and City Councilmembers

**FROM:** Jason Yoakam, City Assessor 

**DATE:** January 12, 2021

**SUBJECT:** Corrective Resolution for Special Assessment Roll No. 4293

---

**Recommendation:** Approve Corrective Resolution for Special Assessment Roll No. 4293 for Delinquent Miscellaneous Delinquent General Fund Accounts Receivable, confirmed May 26, 2020.

Attached please find the corrective resolution for Special Assessment Roll No. 4293 for Delinquent Miscellaneous General Fund Accounts Receivable, confirmed May 26, 2020.

The Department of Public Works, which issued the invoice, has determined that the wrong property was billed for property mowing. Therefore it is requested that the special assessment for invoice 1900024362, parcel 6-154400000, in the amount of \$327.92, be removed.

I recommend approval of the above-mentioned resolution. Your consideration and concurrence is appreciated.

Attachments

## DEPARTMENTAL REPORT

**MEMO TO:** Jonathan Greene, City Manager  
**FROM:** Jason Yoakam   
**DATE:** January 12, 2021  
**RECOMMENDATION:** Recommend Adoption of a Corrective Resolution for Special Assessment Roll No.4293

---

### SUMMARY

An invoice was issued for mowing of a property located at 799 E. Washington Avenue (parcel # 6-154400000). That invoice went unpaid and became a special assessment on May 26, 2020. Upon review, the Department of Public Works discovered that the neighboring property was mowed, not 799 E. Washington Avenue. A corrective resolution to remove the special assessment is attached.

### BUDGETARY CONSIDERATIONS

None

### HISTORY, BACKGROUND and DISCUSSION

None

### DISCUSSION OF THE ISSUE

None

### POSITIONS

Recommend adoption of a Corrective Resolution

---

**ATTACHMENTS:** Memo to Council; Corrective Resolution; Letter from DPW requesting removal of special assessment.

**CORRECTIVE RESOLUTION**

BY THE CITY COUNCIL:

WHEREAS, the Assessor, in accordance with the direction of the City Council, did make assessments for Delinquent Miscellaneous General Fund Accounts Receivable, which assessments were by him placed on Assessment Roll No. 4293 and were reported to the City Council at its regular meeting held on the 26<sup>th</sup> of May, 2020; and

WHEREAS, on May 26, 2020, the City Council held a public hearing and confirmed said special assessment roll; and

WHEREAS, on December 21, 2020, the Department of Public Works determined that parcel 6-154400000 was incorrectly billed for mowing and has requested that the assessment be waived.

NOW, THEREFORE, BE IT RESOLVED, that the special assessment, in the amount of \$327.92, upon parcel 6-154400000, on special assessment roll 4293, is hereby deleted.

\* \* \* \* \*

State of Michigan )  
County of Jackson) ss  
City of Jackson )

I, Andrea Muray, City Clerk in an for the City of Jackson, County and State aforesaid, do hereby certify that the foregoing is a true and complete copy of a resolution adopted by the Jackson City Council on this 26<sup>th</sup> day of January, 2021.

IN WITNESS WHEREOF, I have hereto affixed  
My signature and the Seal of the City of Jackson,  
Michigan, on this 27<sup>th</sup> day of January, 2021.

\_\_\_\_\_  
Andrea Muray, City Clerk

To: Jason Yoakam  
Date: December 21, 2020  
From: Tina Clark/Public Works Department   
Subject: Removal of invoice **1900024362** from Special Assessment Roll

---

Invoice # 1900024362 was issued to the owner of 799 E Washington Ave for mowing completed on 6-17-2019. The owner of 799 E Washington Ave brought it to the attention of the City of Jackson that due to recent development of the surrounding and adjacent property, she has come to realize that she actually owns minimal physical property on three sides of her residential building.

Upon further investigation on site with photos from the mowing contractor and the GIS map, it was determined that the property mowed was the neighboring parcel (6-154300000).

This invoice 1900024362 was placed on assessment and has not been paid as of today's date and will need to be removed from the property. Thank you



PENALTY

1.31

PENALTY

1.88

PENALTY

0.63

PRIVATE PROPERTY MOWING COMPLETED ON 6/17/2019  
LOCATION: 799 E WASHINGTON AVE

INVOICE QUESTIONS? CALL THE DEPT OF PUBLIC WORKS AT (517) 788-4170

Total Invoice:

0.00

PLEASE SEND REMITTANCE TO: CITY CLERK, 161 W. MICHIGAN AVENUE, JACKSON, MI 49201  
OR  
PAY ONLINE AT [WWW.CITYOFJACKSON.ORG](http://WWW.CITYOFJACKSON.ORG)

(Please note that online payments will be assessed a 3% convenience fee with a minimum \$1 charge)

DUE AND PAYABLE IMMEDIATELY-DELINQUENT AFTER 30 DAYS. A FEE OF 1.25% PER MONTH (15% ANNUAL RATE) WILL BE CHARGED ON BALANCE OF INVOICE REMAINING UNPAID AFTER 60 DAYS FROM DATE OF INVOICE.

IMPORTANT BANKRUPTCY INFORMATION: IF YOU OR YOUR ACCOUNT ARE SUBJECT TO PENDING BANKRUPTCY PROCEEDINGS, OR IF YOU RECEIVED A BANKRUPTCY DISCHARGE, THIS INVOICE IS FOR INFORMATIONAL PURPOSES ONLY AND IS NOT AN ATTEMPT TO COLLECT A DEBT.



Not paid as of 12-18-20 per Lisa Skalski

- Will need a resolution to pull from assessment sent to Clerk & Assessor

# City of Jackson Board/Commission Application

## City of Jackson Board/Commission Application

First Name	Jacqueline
Last Name	Barber
Address	914 South West Ave.
City	Jackson
State	Michigan
Zip	49203
Phone Number	517-513-4069
Email	<a href="mailto:jacquelinebarber@comcast.net">jacquelinebarber@comcast.net</a>
Last four digits of Social Security Number	6270
Occupation	Education Manager
Describe your community involvement.	*Currently I'm a Jackson District Library Board of Trustee *Long standing member at Lily Missionary Baptist Church *Board member at the Lily Missions Center
Are you a City of Jackson resident? Being a non-resident does not prevent you from serving on a board or commission. However, some boards and commissions have residency requirements.	Yes
If you answered "No" where do you reside?	<i>Field not completed.</i>
If you answered "Yes" how long have you been a City resident?	65 years
Which board or commission	Jackson District Library Board of Trustees

are you interested in? You may choose more than one.

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If you selected the Civil Service Board, are you a registered voter? Only registered voters can serve on this commission.

*Field not completed.*

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Why do you want to serve on your selected board or commission?

As a life long resident of Jackson County, I grew up and looked forward to (as well as my siblings) going to the library and checking out books. This passion I have also instilled in my children and grandchildren. I am so amazed and impressed with how far the library has come since my childhood. I value being a part of an organization that takes pride in providing services that meets the needs of everyone, regardless of their background. As a current board member, I take pride in knowing that I play a major role, in assisting JDL meet their goals as outlined in their Strategic Plan and being a voice for the community.

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Upload additional documents

*Field not completed.*

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(Section Break)

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#### Appointment Process

*Following the submission of your completed application, it will be reviewed by the City Manager's Office and the City Treasurer's Office. The Treasurer will review your application to ensure you do not owe the City unpaid taxes or fines. After that clearance, the Mayor will review your application and make a recommendation for an appointment to a board or commission by the City Council. If the recommendation is confirmed by the City Council, you may officially start the process of becoming a member of a board or commission.*

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(Section Break)

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#### City Charter Section 2.15. - Person in Default to the City.

*The city shall not contract with, or give an appointive position to, one who is in default to the city. No person who is in default to the city may accept or hold an elective or appointive position unless the default is resolved. Written notice describing the default shall be filed with the clerk and verified by the treasurer and served upon the candidate before the oath of office is given, or upon the officeholder. The term "default" shall not apply if the candidate or officeholder shall, within 30 days after receiving the notice, resolve the default, or if the person shall contest it by any recognized means of legal procedure before a court or tribunal of competent jurisdiction. In the event the indebtedness is upheld, the person shall*

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*have 30 days after final determination of the obligation is made to pay it in full.*

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(Section Break)

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Final Submission

*Completed applications are kept on file for up to one year after submission. You will be contacted using the information you provided if you are selected for final consideration by the City Council. A board or commission appointment is a non-paid volunteer position.*

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Digital Signature

Jacqueline Barber

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Date of Submission

01/25/2021

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**MEMO TO:** Mayor and City Councilmembers  
**FROM:** Jonathan Greene, City Manager  
**DATE:** February 9, 2021  
**SUBJECT:** Award the Parks, Cemeteries and Downtown mowing and irrigation contract to Picture Perfect Lawn Care LLC. of Concord, Michigan in the amount of 229,738.38.

---

**Recommendation:**

Award the Parks, Cemeteries and Downtown mowing and irrigation contract to Picture Perfect Lawn Care LLC. of Concord, Michigan in the amount of 229,738.38

Attached is a memo from Kelli Hoover, Director of Parks, Recreation and Cemeteries regarding the Parks, Cemeteries and Downtown mowing and irrigation contract.

We recommend approval of contract to Picture Perfect Lawn Care LLC. of Concord, Michigan and authorization for the Mayor and Clerk to execute the appropriate documents. Your consideration and concurrence is appreciated.

JG

## DEPARTMENTAL REPORT

**MEMO TO:** Jonathan Greene, City Manager

**FROM:** Kelli Hoover, Director Parks, Recreation and Cemeteries

**DATE:** February 9, 2021

**RECOMMENDATION:** Award the Parks, Recreation, Cemeteries and Downtown Mowing and Irrigation contract to Picture Perfect Lawn Care LLC. of Concord, Michigan in the amount of \$229,738.38.

---

### SUMMARY

The City of Jackson Parks, Recreation and Cemeteries Department recommend and City Council approved the lowest bid from Picture Perfect of Grass Lake, Michigan on March 17, 2020. The agenda item allotted for approval of (6) 1 year renewals with an increase of 3% each year.

### BUDGETARY CONSIDERATIONS

2020	Picture Perfect Lawn Care, LLC.	\$223,046
2021	Picture Perfect Lawn Care, LLC	\$229,738.38.

### HISTORY, BACKGROUND and DISCUSSION

The City of Jackson Parks, Recreation and Cemeteries Department started contract mowing in 2014 in the Parks and Cemeteries. Since that time we have added more park areas, downtown landscape, parking lots irrigation, edging, weed whipping of Mt. Evergreen Cemetery and instituted the use of organic weed control.

### DISCUSSION OF THE ISSUE

The mowing and irrigation contract is an important part of assuring quality work in highly used public areas in the most effective and efficient way.

### POSITIONS

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Requested action is to award the mowing and irrigation contract to Picture Perfect Lawn Care LLC. of Concord, Michigan in the amount of \$229,738.38.

**MEMO TO:** Mayor and City Councilmembers  
**FROM:** Jonathan Greene, City Manager  
**DATE:** February 9, 2021  
**SUBJECT:** Approve the Resolution to Amend the CDBG Budgets for Fiscal Years 2016-2017, 2018-2019, and 2019-2020 and Reprogram Excess Program Income to the 2020-2021 General Administration and Boos Center Rehabilitation Activities

---

**Recommendation:**

Approve the resolution to amend the Community Development Block Grant (CDBG) budgets for Fiscal Years 2016-2017, 2018-2019 and 2019-2020 and reprogram excess program income to the 2020-2021 General Administration and Boos Center Rehabilitation activities.

Attached is a memorandum from Shane LaPorte, Director of the Department of Neighborhood & Economic Development, requesting City Council approve the resolution to amend the Community Development Block Grant (CDBG) budgets for Fiscal Years 2016-2017, 2018-2019 and 2019-2020 and reprogram excess program income to the 2020-2021 General Administration and Boos Center Rehabilitation activities.

I recommend approval of the request. Your consideration and concurrence is `appreciated.

## DEPARTMENTAL REPORT

**MEMO TO:** Jonathan Greene, City Manager

**FROM:** Shane LaPorte, Director of Neighborhood & Economic Operations

**DATE:** February 9, 2021

**RECOMMENDATION:** Approve the Resolution to Amend the CDBG Budgets for Fiscal Years 2016-2017, 2018-2019, and 2019-2020 and Reprogram Excess Program Income to the 2020-2021 General Administration and Boos Center Rehabilitation Activities

### SUMMARY

Approve the resolution to amend the Community Development Block Grant (CDBG) budgets for Fiscal Years 2016-2017, 2018-2019 and 2019-2020 and reprogram excess program income to the 2020-2021 General Administration and Boos Center Rehabilitation activities.

### BUDGETARY CONSIDERATIONS

Increase the budgets for the following CDBG activities as follows:

<b>Activity</b>	<b>Amount</b>
General Administration	\$ 50,000
Boos Center Rehabilitation	<u>\$ 75,000</u>
<b>Total to Reallocate:</b>	<b>\$125,000</b>

Staff has identified excess program income received in 2018-2019 and unspent funds from canceled projects to support these increase requests.

### HISTORY, BACKGROUND and DISCUSSION

#### **General Administration**

On April 23, 2019, City Council awarded \$480,000 in CDBG funds to reconstruct Third Street between Washington Avenue and Michigan Avenue, and Washington Avenue between First and Fourth Streets. On August 11, 2020, City Council canceled both projects for various reasons, including potential financial hardships as a result of COVID-19. Unfortunately, the cancellation required over \$50,000 already expensed toward the street projects to be paid from the General Administration budget, leaving a shortfall to cover normal anticipated costs.

#### **Boos Center Rehabilitation**

On September 8, 2020, City Council created a new CDBG activity to begin the rehabilitation process of the Boos Center in Loomis Park. Council also provided initial funding based on estimates in the amount of \$230,000 to repair and replace the 32 year old roof to prevent further interior water damage and allow for future renovation. Due to the unique nature of the project, architectural services were necessary to assist in writing the work specifications in the amount of \$4,260; RW Mercer was

awarded the low bid on November 10, 2020 in the amount of \$231,089. As expected, when work began and parts of the roof were exposed, changes to the construction plan became necessary requiring a change order increasing the contract price by \$9,033.

To help move the Boos Center rehabilitation project into the next phase, it is necessary to procure architectural/engineering services. A cost estimate of \$60,000 for these professional services is based on the similar costs experienced during the King Center renovation. A total of \$75,000 to cover the unexpected construction costs and procure architectural/engineering services is requested.

## POSITIONS

Requested action is for City Council to approve the resolution to amend the Community Development Block Grant (CDBG) budgets for Fiscal Years 2016-2017, 2018-2019, 2019-2020, and 2020-2021 to cover unplanned administration and construction shortfalls and to initiate the planning phase for the phased Boos Center rehabilitation project.

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### ATTACHMENTS

- Resolution

**City of Jackson, Michigan**  
**Resolution to Amend the Fiscal Years**  
**2016/2017 (Year 42), 2018/2019 (Year 44), 2019/2020 (Year 45), and 2020/2021 (Year 46) CDBG**  
**Budget**

WHEREAS, the U.S. Department of Housing and Urban Development approved the Community Development Block Grant (CDBG) activities for fiscal year 2016/2017 (Year 42), 2018/2019 (Year 44), 2019/2020 (Year 45), and 2020/2021 (Year 46); and

WHEREAS, in Year 44, receipts from program income exceeded budgeted revenue; and

WHEREAS, the City Council previously allocated funds for Homeowner Rehabilitation in Year 42 and for a Kitchen Manager, in Year 45; and

WHEREAS, the City Council desires to appropriate the excess program income and unutilized funding from Years 42, 43, and 45 to be made available for use in Year 46 for Planning and Administration and Loomis Park Boos Center improvements.

NOW, THEREFORE, BE IT RESOLVED, that the City Council of the City of Jackson hereby amends the subject budgets as follows:

<u>Account #</u>	<u>Account Description</u>	<u>Current Budget</u>	<u>Revised Budget</u>	<u>Increase (Decrease)</u>
<b>Entitlement Year 42 (2016/2017)</b>				
286-716-042-816.000	Homeowner Rehabilitation	75,000	28,247	(46,753)
286-743-042-965.046	Contribution to Year 46	67,277	114,030	46,753
<b>Entitlement Year 44 (2018/2019)</b>				
286-000-044-664.000	Interest Income	3,000	671	(2,329)
286-000-044-688.003	Code Enforcement Fees	0	5,321	5,321
286-000-044-688.012	Other Program Income	500	2,224	1,724
286-000-044-691.003	Deferred Loans	22,000	50,358	28,358
286-000-044-691.009	EDI Loan Payment	15,750	19,688	3,938
286-743-044-965.046	Contribution to Year 46	11,142	48,154	37,012
<b>Entitlement Year 45 (2019/2020)</b>				
286-733-045-831-061	Kitchen Manager	48,686	7,451	(41,235)
286-743-045-965.046	Contribution to Year 46	81,793	123,028	41,235
<b>Entitlement Year 46 (2020/2021)</b>				
286-000-046-695.042	Contribution from Year 42	67,277	114,030	46,753
286-000-046-695.044	Contribution from Year 44	11,142	48,154	37,012
286-000-046-695.045	Contribution from Year 45	81,793	123,028	41,235
286-725-046-831.064	Boos Center improvements	230,000	305,000	75,000
286-737-046-701.000	Planning & Admin - Salaries	22,000	72,000	50,000

\* \* \* \* \*

STATE OF MICHIGAN }  
} ss.  
County of Jackson }

I, Andrea Muray, City Clerk in and for the City of Jackson, County and State aforesaid, do hereby certify that the foregoing is a true and complete copy of a resolution adopted by the Jackson City Council on the 9<sup>th</sup> day of February, 2021.

IN WITNESS WHEREOF, I have hereto affixed my signature and the Seal of the City of Jackson, Michigan, on this 10<sup>th</sup> day of February, 2021.

By: \_\_\_\_\_  
Andrea Muray City Clerk

**MEMO TO:** Mayor and City Councilmembers

**FROM:** Jonathan Greene, City Manager

**DATE:** February 9, 2021

**SUBJECT:** **Adoption of Resolutions Related to Refunding Bond Issues:**

- 1) Resolution Pledging Limited Tax Full Faith and Credit in Support of City of Jackson Brownfield Redevelopment Authority Tax Increment Refunding Bonds, Series 2021.
- 2) Resolution Authorizing Issuance of 2021 Unlimited Tax General Obligation Refunding Bonds (City Hall Bonds).

---

**Recommendation:**

Adoption of Resolutions Related to Refunding Bond Issues.

Attached is a memo from Philip Hones, Finance Director, regarding the refunding of two current bond issues in an effort to realize potential savings in the current bond market.

I recommend approval of these Resolutions. Your consideration and concurrence is appreciated.

**MEMO TO:** Jonathan Greene, City Manager

**FROM:** Philip Hones, Finance Director

**DATE:** February 9, 2021

**RECOMMENDATION:** **Adoption of Resolutions Related to Refunding Bond Issues:**

- 1) Resolution Pledging Limited Tax Full Faith and Credit in Support of City of Jackson Brownfield Redevelopment Authority Tax Increment Refunding Bonds, Series 2021.
- 2) Resolution Authorizing Issuance of 2021 Unlimited Tax General Obligation Refunding Bonds (City Hall Bonds).

## SUMMARY

The City currently has two outstanding bond issues that, because of historically low interest rates, would result in significant interest savings if refunded.

The **2012 Brownfield Redevelopment Authority Tax Increment Refunding Bonds** were issued to partially refund the original BRA TIF Bonds issued in 2002. The debt service on these bonds is paid from the capture of school taxes on the Consumers Energy Headquarters site. Current interest rates on the remaining maturities range from 3.125% to 4.0%. This estimated interest rate savings would average \$ 33,700 per year for the next 10 years (FY 22 through FY 31) for an estimated net present value savings of approximately \$ 299,000 This savings would be reflected in a reduction of the total captured school taxes that will be required near the end of this Bond's maturity in 2031 to retire the Bonds. This will benefit, to a large extent, the State, and to a lesser extent the Jackson Public Schools, ISD and City (the recreation millage is also being captured).

The **2013 UTGO Refunding Bonds** were originally issued in 2003 in the aggregate amount of \$ 10 million for the renovation of City Hall. This original bond issue was approved by the City voters and the debt service is being funded with a dedicated tax levy, which is currently 1.25 mills. The interest rates on this bond are 3.0% through maturity at 6/30/27. Current market conditions indicate that refunding this issue would be at an approximate interest rate of 1.75%. This interest savings would approximate \$ 36,000 per year for the next 6 years (FY 22 through FY 27) for an estimated net present value savings of approximately \$ 131,000. This savings would be reflected in a reduction of the annual City tax millage rate levied to service this debt of about 4 - 5%.

## **BUDGETARY CONSIDERATIONS**

There are no budgetary considerations related to this action.

## **HISTORY, BACKGROUND and DISCUSSION**

The Bond Attorney's cover letter and the two Resolutions that are being requested for City Council adoption are attached.

The Brownfield Redevelopment Authority will also meet the morning of February 9<sup>th</sup> to approve a third resolution that approves the authorization of refunding of the BRA TIF bonds. This Resolution pledges the tax increment revenues the Authority receives pursuant to the Brownfield Plan toward the payment of the Bonds.

Northland Securities is acting as Financial Advisor in these two refunding issues. Their "Potential Refunding Analysis" for each of the two issues are also attached. The savings estimate for each issue can be found on page 7 in each analysis.

## **POSITIONS**

As previously indicated, interest rates are at historically low levels. Taking advantage of these refunding opportunities as they arise is the most financially prudent step, even in cases where the City is not significantly affected directly.

Founded in 1852  
by Sidney Davy Miller

# MILLER CANFIELD

MICHIGAN  
ILLINOIS  
NEW YORK  
OHIO  
WASHINGTON, D.C.  
CANADA  
CHINA  
MEXICO  
POLAND  
QATAR

**RONALD C. LISCOMBE**  
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January 27, 2021

*Via Email*

Mr. Philip Hones  
Director of Finance  
City of Jackson  
161 Michigan Avenue, 3<sup>rd</sup> Floor  
Jackson, MI 49201

Re: City of Jackson 2021 Unlimited Tax General Obligation Refunding Bonds  
(the “UTGO Bonds”)  
and  
City of Jackson Brownfield Redevelopment Authority Tax Increment  
Refunding Bonds, Series 2021 (Limited Tax General Obligation) (the  
“Brownfield Bonds”)

Dear Phil:

As we discussed, I have enclosed resolutions relating to the proposed refunding bond issues captioned above which are being considered by the City of Jackson (the “City”) and the City of Jackson Brownfield Redevelopment Authority (the “Authority”) at their meetings on February 9, 2021. The Brownfield refunding is being considered for the purpose of achieving debt service savings on the existing Series 2012 Bonds of the Authority. The UTGO Refunding is being considered for the purpose of achieving debt service savings on the City’s existing 2013 UTGO Refunding Bonds.

First, I have enclosed a Resolution Authorizing Tax Increment Refunding Bonds, Series 2021 (Limited Tax General Obligation) (the “BRA Bond Resolution”) for consideration for approval by the Authority. The BRA Bond Resolution authorizes the issuance of the Brownfield Bonds in an amount not to exceed \$4,500,000 to refund the callable portion of the Authority’s outstanding Tax Increment Refunding Bonds, Series 2012 (Limited Tax General Obligation).

The BRA Bond Resolution is based on the bond specifications prepared by Northland Securities, as placement agent for the Brownfield Bonds, and sets forth the terms of the Brownfield Bonds, the form of Brownfield Bonds, and provides for either a private

Mr. Philip Hones

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January 27, 2021

placement of the Brownfield Bonds with a bank (the “Brownfield Bonds Purchaser”) or, in the alternative, a negotiated sale of the Brownfield Bonds to Northland Securities as the underwriter. The BRA Bond Resolution authorizes the Chairperson, Vice-Chairperson or Secretary/Treasurer of the Authority to award and finalize the terms of the Brownfield Bonds upon sale and execute a Bond Purchase Agreement with the Brownfield Bonds Purchaser or the underwriter.

The BRA Bond Resolution is the only action item required by the Authority Board relating to the Brownfield Bonds.

I have also enclosed a Resolution Pledging Limited Tax Full Faith and Credit in Support of City of Jackson Brownfield Redevelopment Authority Tax Increment Refunding Bonds, Series 2021 (Limited Tax General Obligation) (the “City Brownfield Resolution”) for consideration by the City Council at the February 9<sup>th</sup> City Council meeting. The resolution pledges the City’s full faith and credit to make debt service payments on the Brownfield Bonds in the event the tax increment revenues are insufficient therefor.

I have also enclosed a Resolution Authorizing 2021 Unlimited Tax General Obligation Refunding Bonds (the “UTGO Bond Resolution”) for consideration for approval by the City Council at the February 9<sup>th</sup> City Council meeting. The UTGO Bond Resolution authorizes the issuance of the UTGO Bonds in an amount not to exceed \$4,600,000 to refund the callable portion of the City’s outstanding 2013 Unlimited Tax General Obligation Bonds.

The UTGO Bond Resolution is based on the bond specifications prepared by Northland Securities, as placement agent for the UTGO Bonds, and sets forth the terms of the UTGO Bonds, the form of UTGO Bonds, and provides for either a private placement of the UTGO Bonds with a bank (the “UTGO Purchaser”) or, in the alternative, a negotiated sale of the UTGO Bonds to Northland Securities as the underwriter. The UTGO Bond Resolution also authorizes various City officials to take the necessary actions to issue, sell and deliver the Bonds. The UTGO Bond Resolution authorizes the City Manager or the Finance Director of the City to award and finalize the terms of the UTGO Bonds upon sale and execute a Bond Purchase Agreement with the UTGO Purchaser or the underwriter.

I would appreciate it if you could send me three certified copies of each of the Resolutions upon approval by the City Council and the Authority Board.

MILLER, CANFIELD, PADDOCK AND STONE, P.L.C.

Mr. Philip Hones

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January 27, 2021

Either Pat or I plan on attending the City Council and Authority Board meetings to answer any questions about the documents or the refundings. If you or anyone copied on this letter have any questions, please give either Pat or I a call.

Very truly yours,

MILLER, CANFIELD, PADDOCK AND STONE, P.L.C.

By: \_\_\_\_\_  
Ronald C. Liscombe

Enclosures

Cc: (w/encl.):  
Michael Gormely  
Patrick McGow, Esq.

37128598.3/043520.00070

**Resolution Pledging Limited Tax Full Faith and Credit in Support of  
City of Jackson Brownfield Redevelopment Authority  
Tax Increment Refunding Bonds, Series 2021  
(Limited Tax General Obligation)**

City of Jackson  
County of Jackson, State of Michigan

Minutes of a regular meeting of the City Council the City of Jackson, County of Jackson, State of Michigan, held on the 9th day of February, 2021 at 6:30 p.m., Eastern Time.

PRESENT: Members \_\_\_\_\_  
\_\_\_\_\_

ABSENT: Members \_\_\_\_\_

The following preamble and resolution were offered by Member \_\_\_\_\_ and supported by Member \_\_\_\_\_:

WHEREAS, the City of Jackson Brownfield Redevelopment Authority (the "Authority") proposes to issue its Tax Increment Refunding Bonds, Series 2021 (Limited Tax General Obligation) in the original principal amount of not to exceed Four Million Five Hundred Thousand Dollars (\$4,500,000) (the "Bonds") to pay the costs of refunding the Authority's Tax Increment Refunding Bonds, Series 2012 (Limited Tax General Obligation), dated March 14, 2012 ; and

WHEREAS, the Authority has adopted a resolution authorizing the issuance of the Bonds in accordance with the provisions of Act 381, Public Acts of Michigan, 1996, as amended ("Act 381"), and Act 34, Public Acts of Michigan, 2001, as amended ("Act 34"); and

WHEREAS, Section 12(4) of Act 381 provides that the City may pledge its full faith and credit as additional security for the payment of the Bonds.

NOW, THEREFORE, BE IT RESOLVED THAT:

1. Limited Tax Pledge. The City hereby irrevocably pledges its limited tax full faith and credit and resources to the payment of the Bonds. If at any time the Debt Retirement Fund (as that Fund is established by the Authority) is insufficient to pay the principal of and interest on the Bonds as the same become due, the City upon notification by the Authority's Treasurer, shall as a first budget obligation advance from its available funds a sufficient amount to pay said principal and interest, or in the event of insufficiency of the City's general funds, levy ad valorem taxes on all taxable property within the boundaries of the City in an amount sufficient to pay said principal and interest, provided such tax levy shall be within applicable constitutional, statutory and charter tax rate limitations.

2. Tax Covenant; Qualified Tax Exempt Obligations. The City hereby covenants to take all action within its control to the extent permitted by law necessary to maintain the exclusion of the interest on the Bonds from gross income for federal income tax purposes under

the Internal Revenue Code of 1986, as amended (the “Code”), including but not limited to, actions relating to the rebate of arbitrage earnings and the expenditure and investment of proceeds of the Bonds and moneys deemed to be proceeds of the Bonds. The Bonds are hereby designated as “qualified tax exempt obligations” as defined in Section 265(b)(3)(B) of the Code for purposes of deduction of interest expenses by financial institutions pursuant to the Code.

3. Continuing Disclosure Undertaking. In the event the Authority sells the Bonds to an underwriter or otherwise required by the purchaser, the City covenants to enter into a continuing disclosure undertaking for the benefit of the holders and beneficial owners of the Bonds in accordance with the requirements of Rule 15c2-12 promulgated by the Securities and Exchange Commission, and the Authorized Officers (as herein defined) are each individually authorized to execute such undertaking prior to delivery of the Bonds.

4. Authorization for Further Actions. The Mayor, City Clerk, City Manager and Director of Finance (the “Authorized Officers”) and other officers, agents and employees of the City are each authorized and directed to take all other actions necessary or advisable, including approving the circulation of a final official statement describing the Bonds and to execute the same on behalf of the City, and to make such other filings, applications or request for waivers with the Michigan Department of Treasury or with other parties, to enable the sale and delivery of the Bonds.

5. Conflict; Rescission. All resolutions and parts of resolutions insofar as they conflict with the provisions of this resolution be and the same hereby are rescinded.

RESOLUTION DECLARED ADOPTED.

AYES: \_\_\_\_\_  
\_\_\_\_\_

NAYS: \_\_\_\_\_

\_\_\_\_\_  
Andrea Muray  
City Clerk

I hereby certify that the foregoing is a true and complete copy of a resolution adopted by the City Council of the City of Jackson, County of Jackson, State of Michigan, at a regular meeting held on February 9, 2021, and that said meeting was conducted and public notice of said meeting was given pursuant to and in full compliance with Act 267, Public Acts of Michigan, 1976, as amended, and that the minutes of said meeting were kept and will be or have been made available as required by said Act.

\_\_\_\_\_  
Andrea Muray  
City Clerk

**RESOLUTION AUTHORIZING ISSUANCE OF  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS**

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City of Jackson  
County of Jackson, State of Michigan

---

Minutes of a regular meeting of the City Council of the City of Jackson, County of Jackson, State of Michigan, held on February 9, 2021, at 6:30 p.m., prevailing Eastern Time.

PRESENT: Members \_\_\_\_\_

ABSENT: Members \_\_\_\_\_

---

The following preamble and resolution were offered by Member \_\_\_\_\_ and supported by Member \_\_\_\_\_:

WHEREAS, the City of Jackson, County of Jackson, State of Michigan (the "City") has previously issued its 2013 Unlimited Tax General Obligation Refunding Bonds (the "Prior Bonds") to pay the cost of refunding certain prior bond issues of the City, which were originally issued to pay the costs of restoring, renovating, repairing, remodeling, improving, furnishing and equipping the City Hall building; and

WHEREAS, the Revised Municipal Finance Act, Act 34, Public Acts of Michigan, 2001, as amended ("Act 34"), permits the City to refund all or part of the outstanding securities of the City; and

WHEREAS, the City has been advised that it may achieve interest costs savings through the refunding of the Prior Bonds; and

WHEREAS, it is the determination of the City Council that the City should issue its 2021 Unlimited Tax General Obligation Refunding Bonds in the principal amount of not to exceed Four Million Six Hundred Thousand Dollars (\$4,600,000) (the "Bonds") to refund all or a portion of the Prior Bonds (the "Refunded Bonds") to achieve interest cost savings for the benefit of the taxpayers of the City; and

WHEREAS, the City desires to solicit proposals from financial institutions and other prospective purchasers and negotiate the sale of the Bonds to a purchaser within the parameters established by this Resolution.

NOW, THEREFORE, BE IT RESOLVED THAT:

1. Authorization of Refunding Bonds; Bond Terms, Bonds of the City designated

2017 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS (the “Bonds”) are authorized to be issued in the aggregate principal sum of not to exceed Four Million Six Hundred Thousand Dollars (\$4,600,000) for the purpose of paying the costs of refunding the Refunded Bonds, including the costs incidental to the issuance, sale and delivery of the Bonds.

Bonds of this issue shall consist of bonds fully-registered as to principal and interest of the denomination of \$100,000 or integral multiples of \$1,000 in excess thereof not exceeding for each maturity the maximum principal amount of that maturity, or alternatively, may consist of a single-instrument, non-convertible bond, as determined at the time of sale. If the Bonds are sold to an underwriter as provided herein, Bonds of this issue shall consist of bonds fully-registered as to principal and interest of the denomination of \$5,000 or multiples thereof not exceeding for each maturity the maximum principal amount of that maturity. The Bonds will be dated as of the date of delivery, or such other date as determined by the City Manager and Director of Finance (each, an “Authorized Officer”), be payable on May 1 (or such other date as determined at the time of sale thereof) in the years and in the annual amounts as determined at the time of sale, and be subject to prior redemption as determined at the time of sale of the Bonds. The Bonds shall bear interest at a rate or rates to be determined upon negotiated sale thereof, payable semi-annually on May 1 and November 1, first payable on such date as determined by an Authorized Officer at the time of sale, *provided that* the interest rate per annum on the Bonds shall not exceed 4%. The Bonds shall be sold at a price not less than 99% of their par value. The Bonds may be issued as serial or term bonds or both and may be subject to mandatory redemption prior to maturity as determined at the time of sale.

Interest on the Bonds shall be paid by check drawn on the Transfer Agent mailed to the registered owner of the Bonds at the registered address, as shown on the registration books of the City maintained by the Transfer Agent. Interest shall be payable to the registered owner of record as of the fifteenth day of the month prior to the payment date for each interest payment. The date of determination of registered owner for purposes of payment of interest as provided in this paragraph may be changed by the City to conform to market practice in the future. The principal of the Bonds shall be payable at a Michigan bank or trust company to be selected by an Authorized Officer at the time of the sale of the Bonds as registrar and transfer agent for the Bonds (the “Transfer Agent”), provided that in the event that the Bonds are purchased by a single institutional investor the City may act as the Transfer Agent.

2. Execution of Bonds; Book-Entry-Only Form. The Bonds shall be signed by the manual or facsimile signatures of the Mayor and the City Clerk and shall have the facsimile seal of the City printed on the Bonds. No Bond signed by facsimile signature shall be validated until authenticated by an authorized signatory of the Transfer Agent. The Bonds shall be delivered to the Transfer Agent for authentication and be delivered by it to the purchaser in accordance with instructions from the Treasurer upon payment of the purchase price for the Bonds. Executed blank bonds for registration and issuance to transferees shall simultaneously, and from time to time thereafter as necessary, be delivered to the Transfer Agent for safekeeping. The Bonds may be issued in book-entry-only form through The Depository Trust Company in New York, New York.

3. Transfer of Bonds. The Transfer Agent shall keep the books of registration for this issue on behalf of the City. Any Bond may be transferred upon such registration books by

the registered owner of record, in person or by the registered owner's duly authorized attorney, upon surrender of the Bond for cancellation, accompanied by delivery of a duly executed written instrument of transfer in a form approved by the Transfer Agent. Whenever any Bond or Bonds shall be surrendered for transfer, the City shall execute and the Transfer Agent shall authenticate and deliver a new Bond or Bonds, for like aggregate principal amount. The Transfer Agent shall require the payment by the bondholder requesting the transfer of any tax or other governmental charge required to be paid with respect to the transfer.

4. Debt Retirement Fund; Defeasance of Bonds. The City Treasurer is hereby authorized to open a separate depository account with a bank or trust company designated 2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS DEBT RETIREMENT FUND (the "Debt Retirement Fund"), the moneys to be deposited into the Debt Retirement Fund to be specifically earmarked and used solely for the purpose of paying principal of and interest on the Bonds as they mature. All proceeds from taxes levied for the Debt Retirement Fund shall be deposited into the Debt Retirement Fund as collected. Commencing with the year 2021, there shall be levied upon the tax rolls of the City for the purpose of the Debt Retirement Fund each year, in the manner required by the provisions of Act 34, an amount sufficient so that the estimated collection therefrom will be sufficient to promptly pay, when due, the principal of and interest on the Bonds becoming due prior to the next annual tax levy; provided, however, that if at the time of making any such annual tax levy there shall be surplus moneys on hand in the Debt Retirement Fund for the payment of principal of and interest on the Bonds, then credit therefor may be taken against such annual levy for the Debt Retirement Fund.

In the event cash or direct obligations of the United States or obligations the principal of and interest on which are guaranteed by the United States, or a combination thereof, the principal of and interest on which, without reinvestment, come due at times and in amounts sufficient to pay at maturity or irrevocable call for earlier mandatory redemption, the principal of and interest on the Bonds, shall be deposited in trust, this resolution shall be defeased and the owners of the Bonds shall have no further rights under this resolution except to receive payment of the principal of, premium, if any, and interest on the Bonds from the cash or securities deposited in trust and the interest and gains thereon and to transfer and exchange Bonds as provided herein.

5. Bond Proceeds; Bond Issuance Fund; Escrow Fund; Escrow Agreement. The proceeds of the Bonds shall be used to pay the costs of issuance of the Bonds and to secure payment of the Refunded Bonds as provided in this paragraph. Upon receipt of the proceeds of sale of the Bonds the accrued interest, if any, shall be deposited in the Debt Retirement Fund for the Bonds. From the remaining proceeds of the Bonds there shall be set aside a sum sufficient to pay the costs of issuance of the Bonds in a fund designated 2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS BOND ISSUANCE FUND (the "Bond Issuance Fund"), which may be established by the City or by the Escrow Agent (hereinafter defined). Moneys in the Bond Issuance Fund shall be used solely to pay expenses of issuance of the Bonds. Any amounts remaining in the Bond Issuance Fund after payment of issuance expenses shall be transferred to the Debt Retirement Fund for the Bonds.

The balance of the proceeds of the Bonds, together with other available funds of the City, if any, shall be deposited in an escrow fund (the "Escrow Fund") consisting of cash and investments in direct obligations of or obligations the principal of and interest on which are

unconditionally guaranteed by the United States of America or other obligations the principal of and interest on which are fully secured by the foregoing (the “Escrow Securities”) and used to pay the principal of and interest on all or a portion of the Refunded Bonds as determined by an Authorized Officer at the time of sale. The Escrow Fund shall be held in trust by a Michigan bank or trust company selected by an Authorized Officer, as escrow agent (the “Escrow Agent”), pursuant to an escrow agreement (the “Escrow Agreement”) which shall irrevocably direct the transfer agent for the Refunded Bonds to take all necessary steps to pay the principal of, interest and redemption premium, if any, on the Refunded Bonds when due, and to call the Refunded Bonds for redemption on the first date such Refunded Bonds may be called for redemption. The Authorized Officers are each individually authorized and directed to appoint an Escrow Agent and execute the Escrow Agreement on behalf of the City. The amounts held in the Escrow Fund shall be such that the cash and investments and income received thereon will be sufficient without reinvestment to pay the principal of and interest on the Refunded Bonds when due at maturity or call for redemption as required by this section. Following establishment of the Escrow Fund, any amounts remaining in the debt retirement funds for the Refunded Bonds shall be transferred to the Debt Retirement Fund for the Bonds. The Authorized Officers are each authorized and directed to purchase or cause to be purchased, Escrow Securities, including United States Treasury Obligations – State and Local Government Series (SLGS), in an amount sufficient to fund the Escrow Fund.

6. Bond Form. The Bonds shall be in substantially the following form with such changes as may be required to conform to the final terms of the Bonds established by the Sale Order:

[THIS BOND HAS NOT BEEN REGISTERED UNDER THE SECURITIES ACT OF 1933, AS AMENDED, OR THE MICHIGAN UNIFORM SECURITIES ACT, AS AMENDED, IN RELIANCE UPON EXEMPTIONS THEREUNDER. ANY RESALE OR OTHER TRANSFER OF THIS BOND MAY BE MADE ONLY UPON REGISTRATION UNDER SUCH ACTS OR IN AN EXEMPT TRANSACTION UNDER SUCH ACTS AND UPON COMPLIANCE WITH THE CONDITIONS SET FORTH HEREIN AND MAY BE OFFERED AND SOLD ONLY IF REGISTERED PURSUANT TO THE PROVISIONS OF THOSE ACTS OR IF AN EXEMPTION FROM REGISTRATION IS AVAILABLE.]

UNITED STATES OF AMERICA  
STATE OF MICHIGAN  
COUNTY OF JACKSON

**CITY OF JACKSON**

2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BOND

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>Date of Original Issue</u>	<u>CUSIP</u>
Registered Owner:	May 1, 20__	_____, 2021	
Principal Amount:			Dollars

The City of Jackson, County of Jackson, State of Michigan (the “City”), acknowledges itself to owe and for value received hereby promises to pay to the Registered Owner specified above, or registered assigns, the Principal Amount specified above, in lawful money of the United States of America, on the Maturity Date specified above, unless prepaid prior thereto as hereinafter provided, with interest thereon (computed on the basis of a 360-day year consisting of twelve 30-day months) from the Date of Original Issue specified above or such later date to which interest has been paid, until paid, at the Interest Rate per annum specified above, first payable on November 1, 2021 and semiannually thereafter. Principal of this bond is payable at the corporate trust office of \_\_\_\_\_, \_\_\_\_\_, Michigan, or such other transfer agent as the City may hereafter designate by notice mailed to the registered owner not less than sixty (60) days prior to any interest payment date (the “Transfer Agent”). Interest on this bond is payable to the registered owner of record as of the 15th day of the month preceding the interest payment date as shown on the registration books of the City kept by the Transfer Agent by check or draft mailed by the Transfer Agent to the registered owner of record at the registered address.

This bond is [a single, fully-registered, non-convertible bond][one of a series of bonds] of even date of original issue [in][aggregating] the principal sum of \$ \_\_\_\_\_, issued pursuant to the provisions of Act 34, Public Acts of Michigan, 2001, as amended and pursuant to a resolution of the City Council of the City adopted on March 7, 2017 for the purposes of refunding the City’s outstanding 2013 Unlimited Tax General Obligation Bonds, dated February 5, 2013.

This bond is payable out of the City’s Debt Retirement Fund for this issue and in order to make such payment, the City is required each year to levy taxes on all taxable property within the boundaries of the City for such payment without limitation as to rate or amount.

[Insert Redemption or Term Bond Provisions, if applicable.]

This bond is transferable only upon the registration books of the City kept by the Transfer Agent by the registered owner of record in person, or by the registered owner’s attorney duly authorized in writing, upon the surrender of this bond together with a written instrument of transfer satisfactory to the Transfer Agent duly executed by the registered owner or the registered owner’s attorney duly authorized in writing, and thereupon a new registered bond or bonds in the same aggregate principal amount and of the same maturity shall be issued to the transferee in exchange therefor as provided in the resolution authorizing this bond and upon the payment of the

charges, if any, therein prescribed.

It is hereby certified and recited that all acts, conditions and things required by law to be done, precedent to and in the issuance of this bond and the series of bonds of which this is one, exist and have been done and performed in regular and due form and time as required by law, and that the total indebtedness of the City, including this bond and the series of bonds of which this is one, does not exceed any constitutional, statutory or charter debt limitation.

This bond is not valid or obligatory for any purpose until the Transfer Agent's Certificate of Authentication on this bond has been executed by the Transfer Agent.

IN WITNESS WHEREOF, the City, by its City Council, has caused this bond to be signed in the name of the City by the facsimile signatures of its Mayor and City Clerk and a facsimile of its corporate seal to be printed hereon, all as of the Date of Original Issue.

CITY OF JACKSON  
County of Jackson  
State of Michigan

By: \_\_\_\_\_  
Its: Mayor

(SEAL)

By: \_\_\_\_\_  
Its: City Clerk

(Form of Transfer Agent's Certificate of Authentication)

CERTIFICATE OF AUTHENTICATION

This bond is one of the bonds described in the within-mentioned resolution.

\_\_\_\_\_  
\_\_\_\_\_  
Transfer Agent

By: \_\_\_\_\_

Authorized: \_\_\_\_\_

DATE OF REGISTRATION:

[Bond printer to insert form of assignment]

7. Negotiated Sale. The City Council has considered the option of selling the Bonds through a competitive sale and a negotiated sale, and, pursuant to the requirements of Act 34 has determined to proceed with the sale of the Bonds by means of a negotiated sale because of the flexibility and efficiency provided by a negotiated sale to select and adjust the terms for the Bonds to best achieve the most advantageous interest rates and obtain the lowest issuance costs and interest costs for the City. The Bonds may be sold through a private placement or, in the alternative, as a public offering as determined by an Authorized Officer.

8. Delegation to Authorized Officers; Sale Order. Each Authorized Officer is hereby authorized to solicit proposals through a private placement with a qualified bank or other sophisticated institutional investor as purchaser thereof (the "Purchaser"). Each Authorized Officer is individually authorized to negotiate and execute a sale order specifying the final terms of the Bonds with the Purchaser and take all other necessary actions required to effectuate the sale, issuance and delivery of the Bonds, subject to the parameters set forth in this Resolution. Alternatively, if deemed appropriate by the placement agent and an Authorized Officer, the Authority is authorized to sell the Bonds to an underwriter (the "Underwriter") pursuant to a bond purchase agreement, to execute a sale order specifying the final terms of the Bonds with the Underwriter, and to take all other necessary actions required to effectuate the sale, issuance and delivery of the Bonds, subject to the parameters set forth in this Resolution.

9. Tax Covenant; Qualified Tax-Exempt Obligations. The City shall, to the extent permitted by law, take all actions within its control necessary to maintain the exclusion of the interest on the Bonds from gross income for federal income tax purposes under the Internal Revenue Code of 1986, as amended (the "Code"), including, but not limited to, actions relating to any required rebate of arbitrage earnings and the expenditure and investment of Bond proceeds and moneys deemed to be Bond proceeds. The Authorized Officers are each hereby authorized to designate the Bonds as "qualified tax exempt obligations" for purposes of deduction of interest expense by financial institutions pursuant to the Code.

10. Adjustment of Bond Terms. Each Authorized Officer is hereby authorized to adjust the final bond details to the extent necessary or convenient to complete the transaction authorized in this Resolution, and in pursuance of the foregoing are each authorized to exercise the authority and make the determinations authorized pursuant to Section 315(1)(d) of Act 34, including but not limited to, determinations regarding interest rates, prices, discounts, maturities, principal amounts, denominations, dates of issuance, interest payment dates, redemption rights, the place of delivery and payment, designation of series, and other matters, all subject to the parameters established in this Resolution, *provided* that the principal amount of Bonds issued shall not exceed the principal amount authorized in this Resolution, the interest rate on the Bonds shall not exceed four percent (4.00%) per annum, and the purchase price shall not be less than 99% of the par amount of the Bonds.

11. Bond Counsel. Miller, Canfield, Paddock and Stone, P.L.C. is hereby appointed as bond counsel for the Bonds, notwithstanding periodic representation in unrelated matters of other parties or potential parties to the transaction contemplated by this resolution, including the purchaser of the Bonds.

12. Placement Agent; Underwriter. Northland Securities is hereby appointed to act as placement agent with respect to the Bonds. In the event the Bonds are sold to an underwriter, the City approves Northland Securities to serve as Underwriter.

13. Continuing Disclosure Undertaking. In the event required by a Purchaser or if the Bonds are sold to an underwriter, the City covenants to enter into a continuing disclosure undertaking for the benefit of the holders and beneficial owners of the Bonds in accordance with the requirements of Rule 15c2-12 promulgated by the Securities and Exchange Commission, and the Authorized Officers are each individually authorized to execute such undertaking prior to delivery of the Bonds.

14. Authorization of Other Actions. The Authorized Officers are each authorized and directed to (1) if the Bonds are sold to an underwriter (a) approve the circulation of a preliminary official statement describing the Bonds and to deem the preliminary official statement "final" for purposes of Rule 15c2-12 of the SEC and (b) approve the circulation of a final official statement describing the Bonds and to execute the same on behalf of the City; (2) solicit bids for and approve the purchase of a municipal bond insurance policy for the Bonds; and (3) do all other acts and take all other necessary procedures required to effectuate the sale, issuance and delivery of the Bonds.

15. Rescission. All resolutions and parts of resolutions insofar as they conflict with the provisions of this resolution be and the same hereby are rescinded.

AYES:           Members       \_\_\_\_\_

\_\_\_\_\_

NAYS:           Members       \_\_\_\_\_

\_\_\_\_\_

RESOLUTION DECLARED ADOPTED.

\_\_\_\_\_  
Andrea Muray  
City Clerk

I hereby certify that the foregoing is a true and complete copy of a resolution adopted by the City Council of the City of Jackson, County of Jackson, State of Michigan, at a regular meeting held on February 9, 2021, and that said meeting was conducted and public notice of said meeting was given pursuant to and in full compliance with the Open Meetings Act, being Act 267, Public Acts of Michigan, 1976, as amended, and that the minutes of said meeting were kept and will be or have been made available as required by said Act.

\_\_\_\_\_  
Andrea Muray  
City Clerk

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MILLER, CANFIELD, PADDOCK AND STONE, P.L.C.

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(LIMITED TAX GENERAL OBLIGATION)  
(Refunding of 2012 TIFA Bonds)  
--Private Placement--**

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***DISCLAIMER - POTENTIAL REFUNDING ANALYSIS***

This material is intended solely for the general information of the recipient. It is based on mathematical calculations showing hypothetical potential interest cost savings if the Municipal Issuer was to refund this issue at estimated current market rates, based on the assumption that the refunding bonds had the same debt structure as the outstanding bonds. These projections do not represent a recommendation of action or the advice of Northland Securities related to the structure, terms, timing and other similar matters related to any issuance of bonds. In providing this information, Northland Securities is not acting as a municipal advisor to the Municipal Issuer and does not owe a fiduciary duty to the Municipal Issuer pursuant to applicable federal securities regulations. The Municipal Issuer should review and understand the information contained in this communication before acting on this information. Please contact me if you would like information on how to engage Northland Securities to provide advice on any of these matters.

**SOURCES AND USES OF FUNDS**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY  
COUNTY OF JACKSON, STATE OF MICHIGAN  
TAX INCREMENT REFUNDING BONDS, SERIES 2021  
(LIMITED TAX GENERAL OBLIGATION)  
(Refunding of 2012 TIFA Bonds)  
--Private Placement--**

Dated Date                    03/24/2021  
Delivery Date                03/24/2021

**Sources:**

Bond Proceeds:	
Par Amount	4,272,000.00
Other Sources of Funds:	
Prior Interest Contribution (Due 6/1)	78,684.38
	<b>4,350,684.38</b>

**Uses:**

Refunding Escrow Deposits:	
Cash Deposit	4,298,684.38
Cost of Issuance:	
Bond Counsel	29,500.00
Placement Agent	20,000.00
Treasury	854.40
Treasury Late Filing Fee	100.00
Escrow Agent	500.00
Paying Agent	500.00
MAC Fee	400.00
	<b>51,854.40</b>
Other Uses of Funds:	
Additional Proceeds	145.60
	<b>4,350,684.38</b>

Notes:

Underlying Rating of the Issuer : -- / A+ / --  
 Prior Bonds next callable on 06/01/2021 @ 100 (Any Date)  
 Interest rates, debt service schedules, and costs of issuance are preliminary and subject to change

**BOND PRICING**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY**  
**COUNTY OF JACKSON, STATE OF MICHIGAN**  
**TAX INCREMENT REFUNDING BONDS, SERIES 2021**  
**(LIMITED TAX GENERAL OBLIGATION)**  
**(Refunding of 2012 TIFA Bonds)**  
**--Private Placement--**

<b>Bond Component</b>	<b>Maturity Date</b>	<b>Amount</b>	<b>Rate</b>	<b>Yield</b>	<b>Price</b>
Serial Bonds:					
	06/01/2022	659,000	2.250%	2.250%	100.000
	06/01/2023	706,000	2.250%	2.250%	100.000
	06/01/2024	740,000	2.250%	2.250%	100.000
	06/01/2030	808,000	2.250%	2.250%	100.000
	06/01/2031	1,359,000	2.250%	2.250%	100.000
		<b>4,272,000</b>			

Dated Date	03/24/2021	
Delivery Date	03/24/2021	
First Coupon	12/01/2021	
Par Amount	4,272,000.00	
Original Issue Discount		
Production	4,272,000.00	100.000000%
Underwriter's Discount		
Purchase Price	4,272,000.00	100.000000%
Accrued Interest		
Net Proceeds	4,272,000.00	

Notes:

Underlying Rating of the Issuer : -- / A+ / --

Interest rates, debt service schedules, and costs of issuance are preliminary and subject to change

**BOND SUMMARY STATISTICS**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY  
COUNTY OF JACKSON, STATE OF MICHIGAN  
TAX INCREMENT REFUNDING BONDS, SERIES 2021  
(LIMITED TAX GENERAL OBLIGATION)  
(Refunding of 2012 TIFA Bonds)  
--Private Placement--**

Dated Date	03/24/2021
Delivery Date	03/24/2021
First Coupon	12/01/2021
Last Maturity	06/01/2031
Arbitrage Yield	2.249423%
True Interest Cost (TIC)	2.249423%
Net Interest Cost (NIC)	2.250000%
NIC w/Interest only	2.250000%
NIC w/Interest & OID	2.250000%
NIC w/Interest, OID & Und. Discount	2.250000%
All-In TIC	2.472024%
Average Coupon	2.250000%
Average Life (years)	6.074
Weighted Average Maturity (years)	6.074
Duration of Issue (years)	5.567
Par Amount	4,272,000.00
Bond Proceeds	4,272,000.00
Total Interest	583,831.50
Net Interest	583,831.50
Bond Years from Dated Date	25,948,066.67
Bond Years from Delivery Date	25,948,066.67
Total Debt Service	4,855,831.50
Maximum Annual Debt Service	1,389,577.50
Average Annual Debt Service	476,711.03
Underwriter's Fees (per \$1000)	
Average Takedown	
Other Fee	
Total Underwriter's Discount	
Bid Price	100.000000

Bond Component	Par Value	Price	Average Coupon	Average Life
Serial Bonds	4,272,000.00	100.000	2.250%	6.074
	<b>4,272,000.00</b>			<b>6.074</b>

	TIC	All-In TIC	Arbitrage Yield
Par Value	4,272,000.00	4,272,000.00	4,272,000.00
+ Accrued Interest			
+ Premium (Discount)			
- Underwriter's Discount			
- Cost of Issuance Expense		(51,854.40)	
- Other Amounts			
Target Value	4,272,000.00	4,220,145.60	4,272,000.00
Target Date	03/24/2021	03/24/2021	03/24/2021
Yield	2.249423%	2.472024%	2.249423%

**BOND DEBT SERVICE**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY**  
**COUNTY OF JACKSON, STATE OF MICHIGAN**  
**TAX INCREMENT REFUNDING BONDS, SERIES 2021**  
**(LIMITED TAX GENERAL OBLIGATION)**  
**(Refunding of 2012 TIFA Bonds)**  
**--Private Placement--**

Dated Date                    03/24/2021  
Delivery Date                03/24/2021

<b>Period Ending</b>	<b>Principal</b>	<b>Coupon</b>	<b>Interest</b>	<b>Debt Service</b>	<b>Annual Debt Service</b>
12/01/2021			65,949.00	65,949.00	
06/01/2022	659,000	2.250%	48,060.00	707,060.00	773,009.00
12/01/2022			40,646.25	40,646.25	
06/01/2023	706,000	2.250%	40,646.25	746,646.25	787,292.50
12/01/2023			32,703.75	32,703.75	
06/01/2024	740,000	2.250%	32,703.75	772,703.75	805,407.50
12/01/2024			24,378.75	24,378.75	
06/01/2025			24,378.75	24,378.75	48,757.50
12/01/2025			24,378.75	24,378.75	
06/01/2026			24,378.75	24,378.75	48,757.50
12/01/2026			24,378.75	24,378.75	
06/01/2027			24,378.75	24,378.75	48,757.50
12/01/2027			24,378.75	24,378.75	
06/01/2028			24,378.75	24,378.75	48,757.50
12/01/2028			24,378.75	24,378.75	
06/01/2029			24,378.75	24,378.75	48,757.50
12/01/2029			24,378.75	24,378.75	
06/01/2030	808,000	2.250%	24,378.75	832,378.75	856,757.50
12/01/2030			15,288.75	15,288.75	
06/01/2031	1,359,000	2.250%	15,288.75	1,374,288.75	1,389,577.50
	<b>4,272,000</b>		<b>583,831.50</b>	<b>4,855,831.50</b>	<b>4,855,831.50</b>

Note: Interest rates, debt service schedules, and costs of issuance are preliminary and subject to change

**SUMMARY OF REFUNDING RESULTS**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY  
COUNTY OF JACKSON, STATE OF MICHIGAN  
TAX INCREMENT REFUNDING BONDS, SERIES 2021  
(LIMITED TAX GENERAL OBLIGATION)  
(Refunding of 2012 TIFA Bonds)  
--Private Placement--**

Dated Date	03/24/2021
Delivery Date	03/24/2021
Arbitrage yield	2.249423%
Escrow yield	0.000000%
Value of Negative Arbitrage	
Bond Par Amount	4,272,000.00
True Interest Cost	2.249423%
Net Interest Cost	2.250000%
All-In TIC	2.472024%
Average Coupon	2.250000%
Average Life	6.074
Weighted Average Maturity	6.074
Duration	5.567
Par amount of refunded bonds	4,220,000.00
Average coupon of refunded bonds	3.882180%
Average life of refunded bonds	6.120
Remaining weighted average maturity of refunded bonds	6.080
PV of prior debt to 03/24/2021 @ 2.249423%	4,649,434.80
Net PV Savings	298,896.02
Percentage savings of refunded bonds	7.082844%
Percentage savings of refunding bonds	6.996630%
Percentage savings of refunding proceeds	6.996630%

**SAVINGS**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY**  
**COUNTY OF JACKSON, STATE OF MICHIGAN**  
**TAX INCREMENT REFUNDING BONDS, SERIES 2021**  
**(LIMITED TAX GENERAL OBLIGATION)**  
**(Refunding of 2012 TIFA Bonds)**  
**--Private Placement--**

<b>Date</b>	<b>Prior Debt Service</b>	<b>Issuer Contribution</b>	<b>Prior Net Cash Flow</b>	<b>Refunding Debt Service</b>	<b>Savings</b>	<b>Present Value to 03/24/2021 @ 2.2494231%</b>
06/30/2021	78,684.38	78,684.38				(326.89)
06/30/2022	802,368.76		802,368.76	773,009.00	29,359.76	28,730.52
06/30/2023	816,568.76		816,568.76	787,292.50	29,276.26	28,148.32
06/30/2024	835,162.50		835,162.50	805,407.50	29,755.00	27,942.56
06/30/2025	86,600.00		86,600.00	48,757.50	37,842.50	34,653.64
06/30/2026	86,600.00		86,600.00	48,757.50	37,842.50	33,887.09
06/30/2027	86,600.00		86,600.00	48,757.50	37,842.50	33,137.50
06/30/2028	86,600.00		86,600.00	48,757.50	37,842.50	32,404.48
06/30/2029	86,600.00		86,600.00	48,757.50	37,842.50	31,687.69
06/30/2030	886,600.00		886,600.00	856,757.50	29,842.50	24,472.70
06/30/2031	1,419,600.00		1,419,600.00	1,389,577.50	30,022.50	24,012.80
	<b>5,271,984.40</b>	<b>78,684.38</b>	<b>5,193,300.02</b>	<b>4,855,831.50</b>	<b>337,468.52</b>	<b>298,750.42</b>

**Savings Summary**

Dated Date	03/24/2021
Delivery Date	03/24/2021
PV of savings from cash flow	298,750.42
Plus: Refunding funds on hand	145.60
<b>Net PV Savings</b>	<b>298,896.02</b>

Note: Prior Bonds next callable on 06/01/2021 @ 100 (Any Date)

**SUMMARY OF BONDS REFUNDED**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY**  
**COUNTY OF JACKSON, STATE OF MICHIGAN**  
**TAX INCREMENT REFUNDING BONDS, SERIES 2021**  
**(LIMITED TAX GENERAL OBLIGATION)**  
**(Refunding of 2012 TIFA Bonds)**  
**--Private Placement--**

<b>Bond</b>	<b>Maturity Date</b>	<b>CUSIP</b>	<b>Interest Rate</b>	<b>Par Amount</b>	<b>Call Date</b>	<b>Call Price</b>
Tax Increment Refunding Bonds, Series 2012, 12, 902840:						
	06/01/2022	466552CD6	4.000%	645,000.00	06/01/2021	100.000
	06/01/2023	466552CE4	3.125%	685,000.00	06/01/2021	100.000
	06/01/2024	466552CF1	3.250%	725,000.00	06/01/2021	100.000
				<b>2,055,000.00</b>		
Tax Increment Refunding Bonds, Series 2012, 12, TERM31:						
	06/01/2030	466552CH7	4.000%	800,000.00	06/01/2021	100.000
	06/01/2031	466552CH7	4.000%	1,365,000.00	06/01/2021	100.000
				<b>2,165,000.00</b>		
				<b>4,220,000.00</b>		

Note: Prior Bonds next callable on 06/01/2021 @ 100 (Any Date)

**PRIOR DEBT SERVICE PAYMENT SCHEDULE**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY  
COUNTY OF JACKSON, STATE OF MICHIGAN  
TAX INCREMENT REFUNDING BONDS, SERIES 2021  
(LIMITED TAX GENERAL OBLIGATION)  
(Refunding of 2012 TIFA Bonds)  
--Private Placement--**

**Prior Debt Service (Paid by the Escrow Account or Called)**

<b>Date</b>	<b>Prior Principal</b>	<b>Prior Coupon</b>	<b>Prior Interest</b>	<b>Total Prior Debt Service</b>	<b>Prior Principal Paid by Escrow</b>	<b>Prior Interest Paid by Escrow</b>	<b>Total Debt Paid by the Escrow</b>
06/01/2021			78,684.38	78,684.38			
12/01/2021			78,684.38	78,684.38			
06/01/2022	645,000.00	4.000%	78,684.38	723,684.38	4,220,000.00	78,684.38	4,298,684.38
12/01/2022			65,784.38	65,784.38			
06/01/2023	685,000.00	3.125%	65,784.38	750,784.38			
12/01/2023			55,081.25	55,081.25			
06/01/2024	725,000.00	3.250%	55,081.25	780,081.25			
12/01/2024			43,300.00	43,300.00			
06/01/2025			43,300.00	43,300.00			
12/01/2025			43,300.00	43,300.00			
06/01/2026			43,300.00	43,300.00			
12/01/2026			43,300.00	43,300.00			
06/01/2027			43,300.00	43,300.00			
12/01/2027			43,300.00	43,300.00			
06/01/2028			43,300.00	43,300.00			
12/01/2028			43,300.00	43,300.00			
06/01/2029			43,300.00	43,300.00			
12/01/2029			43,300.00	43,300.00			
06/01/2030	800,000.00	4.000%	43,300.00	843,300.00			
12/01/2030			27,300.00	27,300.00			
06/01/2031	1,365,000.00	4.000%	27,300.00	1,392,300.00			
	<b>4,220,000.00</b>		<b>1,051,984.40</b>	<b>5,271,984.40</b>	<b>4,220,000.00</b>	<b>78,684.38</b>	<b>4,298,684.38</b>

**Unrefunded Debt Service (Issuer is Responsible for Paying)**

<b>Date</b>	<b>Unrefunded Principal</b>	<b>Unrefunded Interest</b>	<b>Unrefunded Debt Service</b>
06/01/2021	605,000.00	12,100.00	617,100.00
	<b>605,000.00</b>	<b>12,100.00</b>	<b>617,100.00</b>

**AGGREGATE DEBT SERVICE**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY  
COUNTY OF JACKSON, STATE OF MICHIGAN  
TAX INCREMENT REFUNDING BONDS, SERIES 2021  
(LIMITED TAX GENERAL OBLIGATION)  
(Refunding of 2012 TIFA Bonds)  
--Private Placement--**

<b>Period Ending</b>	<b>Ref. of 2012 TIF (Private Placement)</b>	<b>Unrefunded Bonds</b>	<b>Aggregate Debt Service</b>
06/30/2021		617,100	617,100.00
06/30/2022	773,009.00		773,009.00
06/30/2023	787,292.50		787,292.50
06/30/2024	805,407.50		805,407.50
06/30/2025	48,757.50		48,757.50
06/30/2026	48,757.50		48,757.50
06/30/2027	48,757.50		48,757.50
06/30/2028	48,757.50		48,757.50
06/30/2029	48,757.50		48,757.50
06/30/2030	856,757.50		856,757.50
06/30/2031	1,389,577.50		1,389,577.50
	<b>4,855,831.50</b>	<b>617,100</b>	<b>5,472,931.50</b>

**ESCROW REQUIREMENTS**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY  
COUNTY OF JACKSON, STATE OF MICHIGAN  
TAX INCREMENT REFUNDING BONDS, SERIES 2021  
(LIMITED TAX GENERAL OBLIGATION)  
(Refunding of 2012 TIFA Bonds)  
--Private Placement--**

<b>Period Ending</b>	<b>Interest</b>	<b>Principal Redeemed</b>	<b>Total</b>
06/01/2021	78,684.38	4,220,000.00	4,298,684.38
	<b>78,684.38</b>	<b>4,220,000.00</b>	<b>4,298,684.38</b>

**ESCROW COST DETAIL**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY  
COUNTY OF JACKSON, STATE OF MICHIGAN  
TAX INCREMENT REFUNDING BONDS, SERIES 2021  
(LIMITED TAX GENERAL OBLIGATION)  
(Refunding of 2012 TIFA Bonds)  
--Private Placement--**

<b>Escrow</b>	<b>Purchase Date</b>	<b>Cost of Securities</b>	<b>Cash Deposit</b>	<b>Total Escrow Cost</b>
DSF	03/24/2021		78,684.38	78,684.38
BP	03/24/2021		4,220,000.00	4,220,000.00
		<b>0</b>	<b>4,298,684.38</b>	<b>4,298,684.38</b>

**ESCROW SUFFICIENCY**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY  
COUNTY OF JACKSON, STATE OF MICHIGAN  
TAX INCREMENT REFUNDING BONDS, SERIES 2021  
(LIMITED TAX GENERAL OBLIGATION)  
(Refunding of 2012 TIFA Bonds)  
--Private Placement--**

<b>Date</b>	<b>Escrow Requirement</b>	<b>Net Escrow Receipts</b>	<b>Excess Receipts</b>	<b>Excess Balance</b>
03/24/2021		4,298,684.38	4,298,684.38	4,298,684.38
06/01/2021	4,298,684.38		(4,298,684.38)	
	<b>4,298,684.38</b>	<b>4,298,684.38</b>	<b>0.00</b>	

**ESCROW STATISTICS**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY  
COUNTY OF JACKSON, STATE OF MICHIGAN  
TAX INCREMENT REFUNDING BONDS, SERIES 2021  
(LIMITED TAX GENERAL OBLIGATION)  
(Refunding of 2012 TIFA Bonds)  
--Private Placement--**

<b>Escrow</b>	<b>Total Escrow Cost</b>	<b>Modified Duration (years)</b>	<b>Yield to Receipt Date</b>	<b>Yield to Disbursement Date</b>	<b>Perfect Escrow Cost</b>	<b>Value of Negative Arbitrage</b>	<b>Cost of Dead Time</b>
DSF	78,684.38				78,357.49		326.89
BP	4,220,000.00				4,202,468.41		17,531.59
	<b>4,298,684.38</b>				<b>4,280,825.90</b>	<b>0.00</b>	<b>17,858.48</b>

Delivery date                    03/24/2021  
Arbitrage yield                 2.249423%

**UNREFUNDED BOND DEBT SERVICE**

**CITY OF JACKSON BROWNFIELD REDEVELOPMENT AUTHORITY  
COUNTY OF JACKSON, STATE OF MICHIGAN  
TAX INCREMENT REFUNDING BONDS, SERIES 2021  
(LIMITED TAX GENERAL OBLIGATION)  
(Refunding of 2012 TIFA Bonds)  
--Private Placement--**

Dated Date                    03/24/2021  
Delivery Date                03/24/2021

<b>Period Ending</b>	<b>Principal</b>	<b>Coupon</b>	<b>Interest</b>	<b>Debt Service</b>	<b>Annual Debt Service</b>
06/01/2021	605,000	4.000%	12,100	617,100	617,100
	<b>605,000</b>		<b>12,100</b>	<b>617,100</b>	<b>617,100</b>

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COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

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***DISCLAIMER - POTENTIAL REFUNDING ANALYSIS***

This material is intended solely for the general information of the recipient. It is based on mathematical calculations showing hypothetical potential interest cost savings if the Municipal Issuer was to refund this issue at estimated current market rates, based on the assumption that the refunding bonds had the same debt structure as the outstanding bonds. These projections do not represent a recommendation of action or the advice of Northland Securities related to the structure, terms, timing and other similar matters related to any issuance of bonds. In providing this information, Northland Securities is not acting as a municipal advisor to the Municipal Issuer and does not owe a fiduciary duty to the Municipal Issuer pursuant to applicable federal securities regulations. The Municipal Issuer should review and understand the information contained in this communication before acting on this information. Please contact me if you would like information on how to engage Northland Securities to provide advice on any of these matters.

**SOURCES AND USES OF FUNDS**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

Dated Date                    03/24/2021  
Delivery Date                03/24/2021

**Sources:**

Bond Proceeds:	
Par Amount	4,382,000.00
Other Sources of Funds:	
Prior Interest Contribution (Due 5/1)	66,075.00
City Contribution	75,000.00
	<u>141,075.00</u>
	<b>4,523,075.00</b>

**Uses:**

Refunding Escrow Deposits:	
Cash Deposit	4,471,075.00
Cost of Issuance:	
Bond Counsel	29,500.00
Placement Agent	20,000.00
Treasury	876.40
Escrow Agent	500.00
Paying Agent	500.00
MAC Fee	400.00
	<u>51,776.40</u>
Other Uses of Funds:	
Additional Proceeds	223.60
	<u>4,523,075.00</u>

Notes:

Underlying Rating of the Issuer : -- / A+ / --  
Prior Bonds next callable on 05/01/2021 @ 100 (Any Date)  
Interest rates, debt service schedules, and costs of issuance are preliminary and subject to change

**BOND PRICING**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

<b>Bond Component</b>	<b>Maturity Date</b>	<b>Amount</b>	<b>Rate</b>	<b>Yield</b>	<b>Price</b>
Serial Bonds:					
	05/01/2022	671,000	1.750%	1.750%	100.000
	05/01/2023	686,000	1.750%	1.750%	100.000
	05/01/2024	708,000	1.750%	1.750%	100.000
	05/01/2025	744,000	1.750%	1.750%	100.000
	05/01/2026	779,000	1.750%	1.750%	100.000
	05/01/2027	794,000	1.750%	1.750%	100.000
		<b>4,382,000</b>			

Dated Date	03/24/2021	
Delivery Date	03/24/2021	
First Coupon	11/01/2021	
Par Amount	4,382,000.00	
Original Issue Discount		
Production	4,382,000.00	100.000000%
Underwriter's Discount		
Purchase Price	4,382,000.00	100.000000%
Accrued Interest		
Net Proceeds	4,382,000.00	

Notes:

Underlying Rating of the Issuer : -- / A+ / --

Interest rates, debt service schedules, and costs of issuance are preliminary and subject to change

**BOND SUMMARY STATISTICS**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

Dated Date	03/24/2021
Delivery Date	03/24/2021
First Coupon	11/01/2021
Last Maturity	05/01/2027
Arbitrage Yield	1.749736%
True Interest Cost (TIC)	1.749736%
Net Interest Cost (NIC)	1.750000%
NIC w/Interest only	1.750000%
NIC w/Interest & OID	1.750000%
NIC w/Interest, OID & Und. Discount	1.750000%
All-In TIC	2.085026%
Average Coupon	1.750000%
Average Life (years)	3.709
Weighted Average Maturity (years)	3.709
Duration of Issue (years)	3.584
Par Amount	4,382,000.00
Bond Proceeds	4,382,000.00
Total Interest	284,416.51
Net Interest	284,416.51
Bond Years from Dated Date	16,252,372.22
Bond Years from Delivery Date	16,252,372.22
Total Debt Service	4,666,416.51
Maximum Annual Debt Service	807,895.00
Average Annual Debt Service	764,638.12
Underwriter's Fees (per \$1000)	
Average Takedown	
Other Fee	
<hr/>	
Total Underwriter's Discount	
Bid Price	100.000000

<b>Bond Component</b>	<b>Par Value</b>	<b>Price</b>	<b>Average Coupon</b>	<b>Average Life</b>
Serial Bonds	4,382,000.00	100.000	1.750%	3.709
	<b>4,382,000.00</b>			<b>3.709</b>

	TIC	All-In TIC	Arbitrage Yield
Par Value	4,382,000.00	4,382,000.00	4,382,000.00
+ Accrued Interest			
+ Premium (Discount)			
- Underwriter's Discount			
- Cost of Issuance Expense		(51,776.40)	
- Other Amounts			
Target Value	4,382,000.00	4,330,223.60	4,382,000.00
Target Date	03/24/2021	03/24/2021	03/24/2021
Yield	1.749736%	2.085026%	1.749736%

**BOND DEBT SERVICE**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

Dated Date 03/24/2021  
Delivery Date 03/24/2021

<b>Period Ending</b>	<b>Principal</b>	<b>Coupon</b>	<b>Interest</b>	<b>Debt Service</b>	<b>Annual Debt Service</b>
11/01/2021			46,224.01	46,224.01	
05/01/2022	671,000	1.750%	38,342.50	709,342.50	755,566.51
11/01/2022			32,471.25	32,471.25	
05/01/2023	686,000	1.750%	32,471.25	718,471.25	750,942.50
11/01/2023			26,468.75	26,468.75	
05/01/2024	708,000	1.750%	26,468.75	734,468.75	760,937.50
11/01/2024			20,273.75	20,273.75	
05/01/2025	744,000	1.750%	20,273.75	764,273.75	784,547.50
11/01/2025			13,763.75	13,763.75	
05/01/2026	779,000	1.750%	13,763.75	792,763.75	806,527.50
11/01/2026			6,947.50	6,947.50	
05/01/2027	794,000	1.750%	6,947.50	800,947.50	807,895.00
	<b>4,382,000</b>		<b>284,416.51</b>	<b>4,666,416.51</b>	<b>4,666,416.51</b>

Note: Interest rates, debt service schedules, and costs of issuance are preliminary and subject to change

**SUMMARY OF REFUNDING RESULTS**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

Dated Date	03/24/2021
Delivery Date	03/24/2021
Arbitrage yield	1.749736%
Escrow yield	0.000000%
Value of Negative Arbitrage	
Bond Par Amount	4,382,000.00
True Interest Cost	1.749736%
Net Interest Cost	1.750000%
All-In TIC	2.085026%
Average Coupon	1.750000%
Average Life	3.709
Weighted Average Maturity	3.709
Duration	3.584
Par amount of refunded bonds	4,405,000.00
Average coupon of refunded bonds	3.000000%
Average life of refunded bonds	3.740
Remaining weighted average maturity of refunded bonds	3.717
PV of prior debt to 03/24/2021 @ 1.749736%	4,654,660.14
Net PV Savings	131,808.74
Percentage savings of refunded bonds	2.992253%
Percentage savings of refunding bonds	3.007958%
Percentage savings of refunding proceeds	3.007958%

**SAVINGS**

**CITY OF JACKSON**  
**COUNTY OF JACKSON, STATE OF MICHIGAN**  
**2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS**  
**(REFUNDS 2013 UTGO REF BONDS)**  
**--Private Placement--**

<b>Date</b>	<b>Prior Debt Service</b>	<b>Prior Interest Contribution</b>	<b>Prior Net Cash Flow</b>	<b>Refunding Debt Service</b>	<b>Savings</b>	<b>Present Value to 03/24/2021 @ 1.7497364%</b>
06/30/2021	66,075.00	66,075.00				(118.20)
06/30/2022	792,150.00		792,150.00	755,566.51	36,583.49	36,057.73
06/30/2023	787,350.00		787,350.00	750,942.50	36,407.50	35,297.83
06/30/2024	797,100.00		797,100.00	760,937.50	36,162.50	34,421.95
06/30/2025	820,950.00		820,950.00	784,547.50	36,402.50	34,015.24
06/30/2026	843,450.00		843,450.00	806,527.50	36,922.50	33,865.61
06/30/2027	844,600.00		844,600.00	807,895.00	36,705.00	33,044.99
	<b>4,951,675.00</b>	<b>66,075.00</b>	<b>4,885,600.00</b>	<b>4,666,416.51</b>	<b>219,183.49</b>	<b>206,585.14</b>

**Savings Summary**

Dated Date	03/24/2021
Delivery Date	03/24/2021
PV of savings from cash flow	206,585.14
Less: Prior funds on hand	(75,000.00)
Plus: Refunding funds on hand	223.60
<b>Net PV Savings</b>	<b>131,808.74</b>

Note: Prior Bonds next callable on 05/01/2021 @ 100 (Any Date)

**SUMMARY OF BONDS REFUNDED**

**CITY OF JACKSON**  
**COUNTY OF JACKSON, STATE OF MICHIGAN**  
**2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS**  
**(REFUNDS 2013 UTGO REF BONDS)**  
**--Private Placement--**

<b>Bond</b>	<b>Maturity Date</b>	<b>CUSIP</b>	<b>Interest Rate</b>	<b>Par Amount</b>	<b>Call Date</b>	<b>Call Price</b>
2013 Unlimited Tax General Obligation Refunding Bonds, 13, 903501:						
	05/01/2022	468268LB1	3.000%	660,000.00	05/01/2021	100.000
	05/01/2023	468268LC9	3.000%	<u>675,000.00</u>	05/01/2021	100.000
				<b>1,335,000.00</b>		
2013 Unlimited Tax General Obligation Refunding Bonds, 13, TERM25:						
	05/01/2024	468268LE5	3.000%	705,000.00	05/01/2021	100.000
	05/01/2025	468268LE5	3.000%	<u>750,000.00</u>	05/01/2021	100.000
				<b>1,455,000.00</b>		
2013 Unlimited Tax General Obligation Refunding Bonds, 13, TERM27:						
	05/01/2026	468268LG0	3.000%	795,000.00	05/01/2021	100.000
	05/01/2027	468268LG0	3.000%	<u>820,000.00</u>	05/01/2021	100.000
				<b>1,615,000.00</b>		
				<b>4,405,000.00</b>		

Note: Prior Bonds next callable on 05/01/2021 @ 100 (Any Date)

**PRIOR DEBT SERVICE PAYMENT SCHEDULE**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

**Prior Debt Service (Paid by the Escrow Account or Called)**

<b>Date</b>	<b>Prior Principal</b>	<b>Prior Coupon</b>	<b>Prior Interest</b>	<b>Total Prior Debt Service</b>	<b>Prior Principal Paid by Escrow</b>	<b>Prior Interest Paid by Escrow</b>	<b>Total Debt Paid by the Escrow</b>
05/01/2021			66,075.00	66,075.00	4,405,000.00	66,075.00	4,471,075.00
11/01/2021			66,075.00	66,075.00			
05/01/2022	660,000.00	3.000%	66,075.00	726,075.00			
11/01/2022			56,175.00	56,175.00			
05/01/2023	675,000.00	3.000%	56,175.00	731,175.00			
11/01/2023			46,050.00	46,050.00			
05/01/2024	705,000.00	3.000%	46,050.00	751,050.00			
11/01/2024			35,475.00	35,475.00			
05/01/2025	750,000.00	3.000%	35,475.00	785,475.00			
11/01/2025			24,225.00	24,225.00			
05/01/2026	795,000.00	3.000%	24,225.00	819,225.00			
11/01/2026			12,300.00	12,300.00			
05/01/2027	820,000.00	3.000%	12,300.00	832,300.00			
	<b>4,405,000.00</b>		<b>546,675.00</b>	<b>4,951,675.00</b>	<b>4,405,000.00</b>	<b>66,075.00</b>	<b>4,471,075.00</b>

**Unrefunded Debt Service (Issuer is Responsible for Paying)**

<b>Date</b>	<b>Unrefunded Principal</b>	<b>Unrefunded Interest</b>	<b>Unrefunded Debt Service</b>
05/01/2021	640,000.00	12,800.00	652,800.00
	<b>640,000.00</b>	<b>12,800.00</b>	<b>652,800.00</b>

**AGGREGATE DEBT SERVICE**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

<b>Period Ending</b>	<b>Ref. of 2013 UTGO REF BONDS (Private Placement)</b>	<b>Unrefunded Bonds</b>	<b>Aggregate Debt Service</b>
06/30/2021		652,800	652,800.00
06/30/2022	755,566.51		755,566.51
06/30/2023	750,942.50		750,942.50
06/30/2024	760,937.50		760,937.50
06/30/2025	784,547.50		784,547.50
06/30/2026	806,527.50		806,527.50
06/30/2027	807,895.00		807,895.00
	<b>4,666,416.51</b>	<b>652,800</b>	<b>5,319,216.51</b>

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**ESCROW REQUIREMENTS**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

<b>Period Ending</b>	<b>Interest</b>	<b>Principal Redeemed</b>	<b>Total</b>
05/01/2021	66,075.00	4,405,000.00	4,471,075.00
	<b>66,075.00</b>	<b>4,405,000.00</b>	<b>4,471,075.00</b>

**ESCROW COST DETAIL**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

<b>Escrow</b>	<b>Purchase Date</b>	<b>Cost of Securities</b>	<b>Cash Deposit</b>	<b>Total Escrow Cost</b>
DSF	03/24/2021		141,075.00	141,075.00
BP	03/24/2021		4,330,000.00	4,330,000.00
		<b>0</b>	<b>4,471,075.00</b>	<b>4,471,075.00</b>

**ESCROW SUFFICIENCY**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

<b>Date</b>	<b>Escrow Requirement</b>	<b>Net Escrow Receipts</b>	<b>Excess Receipts</b>	<b>Excess Balance</b>
03/24/2021		4,471,075.00	4,471,075.00	4,471,075.00
05/01/2021	4,471,075.00		(4,471,075.00)	
	<b>4,471,075.00</b>	<b>4,471,075.00</b>	<b>0.00</b>	

**ESCROW STATISTICS**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

<b>Escrow</b>	<b>Total Escrow Cost</b>	<b>Modified Duration (years)</b>	<b>Yield to Receipt Date</b>	<b>Yield to Disbursement Date</b>	<b>Perfect Escrow Cost</b>	<b>Value of Negative Arbitrage</b>	<b>Cost of Dead Time</b>
DSF	141,075.00				140,822.63		252.37
BP	4,330,000.00				4,322,253.99		7,746.01
	<b>4,471,075.00</b>				<b>4,463,076.62</b>	<b>0.00</b>	<b>7,998.38</b>

Delivery date 03/24/2021  
Arbitrage yield 1.749736%

**UNREFUNDED BOND DEBT SERVICE**

**CITY OF JACKSON  
COUNTY OF JACKSON, STATE OF MICHIGAN  
2021 UNLIMITED TAX GENERAL OBLIGATION REFUNDING BONDS  
(REFUNDS 2013 UTGO REF BONDS)  
--Private Placement--**

Dated Date                    03/24/2021  
Delivery Date                03/24/2021

<b>Period Ending</b>	<b>Principal</b>	<b>Coupon</b>	<b>Interest</b>	<b>Debt Service</b>	<b>Annual Debt Service</b>
05/01/2021	640,000	4.000%	12,800	652,800	652,800
	<b>640,000</b>		<b>12,800</b>	<b>652,800</b>	<b>652,800</b>

**MEMO TO:** Mayor and City Councilmembers  
**FROM:** Jonathan Greene, City Manager  
**DATE:** February 9, 2021  
**SUBJECT:** **Change Order 17 to the Downtown Street and Parking Lot Rehabilitation Contract with Bailey Excavating, Inc.**

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**Recommendation:**

**Approve Balancing Change Order 17 to the contract with Bailey Excavating, Inc. for Downtown Street and Parking Lot Rehabilitation in the decreased amount of \$231,478.02 to remove site work at 135 W. Cortland Street (former Vermuelen building) and 145 W. Cortland Street (former Masonic Temple building) from the contract and to authorize the City Manager and City Engineer to execute the appropriate document.**

Attached is a report and documentation from Jon Dowling, City Engineer, regarding approval of Change Order 17 for the Downtown Street and Parking Lot Rehabilitation contract.

I recommend approval of the change order. Your consideration and concurrence is appreciated.

JG

Attachments

# DEPARTMENTAL REPORT

**MEMO TO:** Jonathan Greene, City Manager  
**FROM:** Jon H. Dowling, P.E., City Engineer  
**DATE:** February 9, 2021

**RECOMMENDATION:** Approve Balancing Change Order 17 to the contract with Bailey Excavating, Inc. for Downtown Street and Parking Lot Rehabilitation in the decreased amount of \$231,478.02 to remove site work at 135 W. Cortland Street (former Vermuelen building) and 145 W. Cortland Street (former Masonic Temple building) from the contract and to authorize the City Manager and City Engineer to execute the appropriate document.

## SUMMARY

The attached Balancing Change Order 17 is to remove site work at 135 W. Cortland Street (former Vermuelen building) and 145 W. Cortland Street (former Masonic Temple building) from the contract.

## BUDGETARY CONSIDERATIONS

This change order represents a decrease of \$231,478.02, bringing the current contract amount to \$3,903,697.45. The work that is removed from the contract by this Balancing Changer Order was scheduled to be paid for using Public Improvement Funds.

## HISTORY, BACKGROUND and DISCUSSION

On July 12, 2016, City Council approved the award of a contract to Bailey Excavating, Inc. of Jackson, Michigan for the milling and repaving of downtown district streets (Jackson, Mechanic and Francis) and parking lots (Lots 6 and 9). Subsequent Change Orders have been approved by City Council as follows:

C.O.	Approval Date	Amount	Description
1	09-06-16	\$ 9,000.00	Add sanitary and storm services to 224 N Jackson.
2	09-20-16	\$ 374,576.22	Add expansion of Lot 20 at Lofts on Louis.
3	01-24-17	- \$ 252.23	Balance quantities.
4	05-16-17	\$ 105,958.01	Modify Lot 6 scope, add Lot 7 repaving and Washington sewer repair
5	06-27-17	\$ 503,162.68	Add Jackson Street water main, repaving and street lights
6	08-22-17	-\$ 544.86	Balance quantities.
7	09-26-17	\$ 59,753.70	Add alley repaving (1st east of Mechanic btwn Washington & Cortland)
8	11-28-18	\$ 35,474.00	Add Hupp storm sewer extension
9	01-30-18	-\$ 4,220.64	Balance quantities.
10	07-17-18	\$ 81,348.41	Add 1) Elizabeth curb at AMTRAK station, 2) driveway at 377 W Washington, 3) sidewalk at Ingham Street substation, 4) water and storm services to Vermeulen and Masonic Temple buildings
11	07-17-18	\$ 527,459.39	Add 1) Lot 6 reconstruction, 2) Bucky Harris Park sidewalk replacement, 3) Ingham Street substation landscaping and 4) E Washington curb and parkway improvements
12	09-18-18	\$ 368,323.91	Add 1) Vermeulen sanitary services and sidewalk and 2) Lot 6 perimeter landscaping, lighting and irrigation
13	10-09-18	\$ 111,856.58	Add 1) right-of-way enhancements on Martin Luther King Jr Drive and Cooper Street north of Ganson and 2) removal and replacement of the retaining wall in front of the Masonic Temple building.
14	10-23-18	\$ 106,376.30	Add sculpture base and landscaping items for the completion of the Kibby Road roundabout.
15	01-29-19	\$ 84,524.47	Balance quantities.

Balancing Change Order 17 to the

C.O.	Approval Date	Amount	Description
16	12-17-19	\$ 123,728.47	1) add sanitary sewer services and grease separators at 135 W Cortland, 2) add streetscape elements on the east side of Jackson Street between Cortland and Michigan, 3) balance quantities for curb, sidewalk and drive work at Family Dollar at 805 N Martin Luther King Jr Drive, 4) remove curb and parkway restoration work at 701 E Washington Ave. (Certainteed), and balance quantities for construction at 5) Lot 6 and 6) Lot 7.

## DISCUSSION OF THE ISSUE

As the focus for the redevelopment of the properties at 135 and 145 W Cortland Street has turned to the private sector, further site work by the City of Jackson has been discontinued. As such, this balancing change order adds items that were necessary to complete previously ordered contract work in the field and removes further site work from the contract.

This Balancing Change Order 17 represents a net decrease of \$231,478.02 bringing the current contract amount to \$3,903,697.45.

## POSITIONS

I request approval of Balancing Change Order 17 and authorization for the City Manager and the City Engineer to sign the appropriate change order document.

Attachments

**INTERIM BALANCING CHANGE ORDER NO. 17**  
**To Contract for**  
**2016 Downtown Street and Parking Lot Rehabilitation**  
**City of Jackson, Michigan**

Notice is hereby given that the following additional information and changes shall become a part of the Contract Documents, Plans and Specifications of the above-named contract.

<b>ORIGINAL CONTRACT AMOUNT</b>	<b>\$ 1,648,650.96</b>
<b>APPROVED CHANGE ORDER NO. 1</b>	<b>\$ 9,000.00</b>
<b>APPROVED CHANGE ORDER NO. 2</b>	<b>\$ 374,576.22</b>
<b>APPROVED INTERIM BALANCING CHANGE ORDER NO. 3</b>	<b>\$ (252.23)</b>
<b>APPROVED CHANGE ORDER NO. 4</b>	<b>\$ 105,958.01</b>
<b>APPROVED CHANGE ORDER NO. 5</b>	<b>\$ 503,162.68</b>
<b>APPROVED INTERIM BALANCING CHANGE ORDER NO. 6</b>	<b>\$ (544.86)</b>
<b>APPROVED CHANGE ORDER NO. 7</b>	<b>\$ 59,753.70</b>
<b>APPROVED CHANGE ORDER NO. 8</b>	<b>\$ 35,474.00</b>
<b>APPROVED INTERIM BALANCING CHANGE ORDER NO. 9</b>	<b>\$ (4,220.64)</b>
<b>APPROVED INTERIM BALANCING CHANGE ORDER NO. 10</b>	<b>\$ 81,348.41</b>
<b>APPROVED CHANGE ORDER NO. 11</b>	<b>\$ 527,459.38</b>
<b>APPROVED CHANGE ORDER NO. 12</b>	<b>\$ 368,323.91</b>
<b>APPROVED CHANGE ORDER NO. 13</b>	<b>\$ 111,856.58</b>
<b>APPROVED CHANGE ORDER NO. 14</b>	<b>\$ 106,376.30</b>
<b>APPROVED INTERIM BALANCING CHANGE ORDER 15</b>	<b>\$ 85,524.58</b>
<b>APPROVED INTERIM BALANCING CHANGE ORDER 16</b>	<b><u>\$ 123,728.47</u></b>
<b>CURRENT CONTRACT AMOUNT AS SET BY CHANGE ORDER NO. 16</b>	<b>\$ 4,135,175.47</b>
<b>BALANCING CHANGE ORDER 17</b>	<b><u>\$ (231,478.02)</u></b>
<b>NEW CONTRACT AMOUNT AS SET BY CHANGER ORDER NO. 17</b>	<b>\$ 3,903,697.45</b>

**REASON FOR CHANGE:**

To add items that were necessary to complete previously ordered contract work in the field and to remove further site work at 135 and 145 W Cortland Street from the contract.

**CONTRACT COMPLETION:**

The contract completion date remains unchanged.

ACCEPTED BY: \_\_\_\_\_ Prepared by Troy R. White, P.E.  
Assistant City Engineer

\_\_\_\_\_  
Bailey Excavating, Inc. Date: \_\_\_\_\_

ACCEPTED BY: \_\_\_\_\_

\_\_\_\_\_  
Jon H. Dowling, P.E., City Engineer Date: \_\_\_\_\_

ACCEPTED BY: \_\_\_\_\_

\_\_\_\_\_  
Jonathan Greene, City Manager Date: \_\_\_\_\_

**DOWNTOWN STREET AND PARKING LOT REHABILITATION  
INTERIM BALANCING CHANGE ORDER NUMBER 17**

ADDITIONS AND SUBTRACTIONS: Quantities for Contract pay items shall be increased or decreased as follows:

Prop Line	Item Code	Item Description	Current Contract Quantity	Quantity Change	Final Quantity	Units	Unit Price	Amount	
								ADD	DEDUCT
0799	8507060	Bailey Removals and Grading	0.00	12,817.50	12,817.50	Dlr	\$1.00	\$ 12,817.50	\$ -
0800	8507060	MI Pipe - Materials	0.00	24.19	24.19	Dlr	\$1.00	\$ 24.19	\$ -
0801	8507060	McGowen Electrical - Materials	0.00	2,107.34	2,107.34	Dlr	\$1.00	\$ 2,107.34	\$ -
0802	8507060	Maintenance Gravel	0.00	90.00	90.00	Dlr	\$1.00	\$ 90.00	\$ -
0805	8107051	Permanent Signage Installed, Spartan Barricade	0.00	1.00	1.00	LS	\$4,303.99	\$ 4,303.99	\$ -
0806	8127060	Fluorescent Plastic Drums, Give Em A Brake	0.00	945.88	945.88	Dlr	\$1.00	\$ 945.88	\$ -
0807	8157060	Brothers Outdoor World, Additional Holly Blue Prince/Princes	0.00	1,473.50	1,473.50	Dlr	\$1.00	\$ 1,473.50	\$ -
0808	8507060	Sharp's Masonary, Thoroseal lower part concrete wall and rep	0.00	1,380.00	1,380.00	Dlr	\$1.00	\$ 1,380.00	\$ -
0809	8007060	Willbee Transit, Masonary Materials	0.00	247.90	247.90	Dlr	\$1.00	\$ 247.90	\$ -
0810	2047060	Earth Work, Masonic	16,000.00	-16,000.00	0.00	Dlr	\$1.00	\$ -	\$ (16,000.00)
0811	2047060	Removals, Masonic	11,000.00	-11,000.00	0.00	Dlr	\$1.00	\$ -	\$ (11,000.00)
0812	5017060	Asphalt Paving, Masonic	14,000.00	-14,000.00	0.00	Dlr	\$1.00	\$ -	\$ (14,000.00)
0813	6027060	Concrete, Masonic	74,000.00	-74,000.00	0.00	Dlr	\$1.00	\$ -	\$ (74,000.00)
0814	8507060	Dumpster, Masonic	42,000.00	-42,000.00	0.00	Dlr	\$1.00	\$ -	\$ (42,000.00)
0815	8127060	Traffic Control, Masonic	3,000.00	-3,000.00	0.00	Dlr	\$1.00	\$ -	\$ (3,000.00)
0816	8157060	Drainage, Masonic	42,000.00	-42,000.00	0.00	Dlr	\$1.00	\$ -	\$ (42,000.00)
0817	8157060	Irrigation, Masonic	9,000.00	-9,000.00	0.00	Dlr	\$1.00	\$ -	\$ (9,000.00)
0818	8157060	Landscaping, Masonic	12,000.00	-12,000.00	0.00	Dlr	\$1.00	\$ -	\$ (12,000.00)
0819	8197060	Electrical & Lights, Masonic	33,000.00	-33,000.00	0.00	Dlr	\$1.00	\$ -	\$ (33,000.00)
0820	8157060	Landscaping, Jackson St	10,000.00	-9,543.25	456.75	Dlr	\$1.00	\$ -	\$ (9,543.25)
0823	8167060	Irrigation, Invoice 21906-JS	0.00	6,472.53	6,472.53	Dlr	\$1.00	\$ 6,472.53	\$ -
0824	8207060	Car Chargers, Lot 7, Invoice 21611-C7	0.00	2,284.50	2,284.50	Dlr	\$1.00	\$ 2,284.50	\$ -
Total:								\$ 34,065.23	\$ (265,543.25)
Net Change:								\$ (231,478.02)	
Current Contract Amount:								\$ 4,135,175.47	
Revised Contract Amount:								\$ 3,903,697.45	

**MEMO TO:** Mayor and City Councilmembers  
**FROM:** Jonathan Greene, City Manager  
**DATE:** February 9, 2021  
**SUBJECT:** **Balancing Change Order 10 to the 2017 Water Main Replacement Contract with Dunigan Brothers, Inc.**

---

**Recommendation:**

**Approve Balancing Change Order 10 to the 2017 Water Main Replacement contract with Dunigan Brothers, Inc. in the decreased amount of \$50,894.98 to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document.**

Attached is a report and documentation from Jon Dowling, City Engineer, regarding approval of Balancing Change Order 10 to the 2017 Water Main Replacement contract.

I recommend approval of the change order. Your consideration and concurrence is appreciated.

JG

Attachments

# DEPARTMENTAL REPORT

**MEMO TO:** Jonathan Greene, City Manager  
**FROM:** Jon H. Dowling, P.E., City Engineer  
**DATE:** February 9, 2021

**RECOMMENDATION:** Approve Balancing Change Order 10 to the 2017 Water Main Replacement contract with Dunigan Brothers, Inc. in the decreased amount of \$50,894.98 to balance contract quantities to match quantities placed in the field and authorize the City Manager and City Engineer to execute the appropriate document.

## SUMMARY

The attached Interim Balancing Change Order 10 is to balance contract quantities to match quantities placed in the field.

## BUDGETARY CONSIDERATIONS

This change order represents a decrease of \$50,894.98, bringing the current contract amount to \$1,444,573.23.

## HISTORY, BACKGROUND and DISCUSSION

On August 22, 2017, City Council approved the award of the contract to Dunigan Brothers, Inc. of Jackson, Michigan in the amount of \$427,593.85. The original contract was for the replacement of the water mains between First Street and Blackstone Street on both Cortland Street and Michigan Avenue. Subsequent Change Orders have been approved by City Council as follows:

C.O.	Approval Date	Amount	Description
1	10-17-17	\$ 63,363.60	Added preparation of Lydia Street roadbed for repaving with concrete by 3M Corporation for demonstrative purposes.
2	11-28-17	\$ (1,261.29)	Balanced quantities
3	01-16-18	\$ 20,405.05	Balanced quantities
4	07-17-18	\$ (16,994.09)	Balanced quantities
5	09-18-18	\$ 783,597.45	Added preparation work for resurfacing portions of Durand, Grinnell, Higby and Thompson.
6	11-13-18	\$ 118,575.00	Added asphalt paving for Grinnell Street
7	02-12-19	\$ 17,897.35	Balanced quantities for Grinnell Street
8	07-16-19	\$ 42,216.59	Balance quantities
9	02-11-20	\$ 40,074.70	Balance quantities

## DISCUSSION OF THE ISSUE

With the recent completion of paving on Higby, Durand and Thompson Streets between Carlton Boulevard and Michigan Avenue, work on the final stage of the Westside Overlay portion of this contract is now complete. As such, the attached Balancing Change Order 10 has been prepared to align contract quantities with quantities placed in the field.

As demonstrated on the attached table, the final field quantities for some items are less than contract quantities while others are more. The quantities included in the original contract and subsequent change orders were estimates. This Change Order 10 represents a net decrease of \$50,894.98 bringing the current contract amount to \$1,444,573.23.

## POSITIONS

I request approval of Balancing Change Order 10 and authorization for the City Manager and the City Engineer to sign the document.

---

JG

ATTACHMENTS

**BALANCING CHANGE ORDER NO. 10**  
**To Contract for**  
**2017 Water Main Replacement – Dunigan Brothers, Inc.**  
**City of Jackson, Michigan**

Notice is hereby given that the following additional information and changes shall become a part of the Contract Documents, Plans and Specifications of the above-named contract.

<b>ORIGINAL CONTRACT AMOUNT</b>	<b>\$ 427,593.85</b>
<b>APPROVED CHANGE ORDER NO. 1</b>	<b>\$ 63,363.60</b>
<b>APPROVED CHANGE ORDER NO. 2</b>	<b>\$ (1,261.29)</b>
<b>APPROVED INTERIM BALANCING CHANGE ORDER NO. 3</b>	<b>\$ 20,405.05</b>
<b>APPROVED BALANCING CHANGE ORDER NO. 4</b>	<b>\$ (16,994.09)</b>
<b>APPROVED CHANGE ORDER NO. 5</b>	<b>\$ 783,597.45</b>
<b>APPROVED CHANGE ORDER NO. 6</b>	<b>\$ 118,575.00</b>
<b>APPROVED CHANGE ORDER NO. 7</b>	<b>\$ 17,897.35</b>
<b>APPROVED CHANGE ORDER NO. 8</b>	<b>\$ 42,216.59</b>
<b>APPROVED CHANGE ORDER NO. 9</b>	<b>\$ 40,074.70</b>
<b>CURRENT CONTRACT AMOUNT AS SET BY CHANGE ORDER NO. 9</b>	<b>\$ 1,495,468.21</b>
<b>CHANGE ORDER NO. 10</b>	<b>\$ (50,894.98)</b>
<b>NEW CONTRACT AMOUNT AS SET BY CHANGE ORDER NO. 10</b>	<b>\$ 1,444,573.23</b>

**REASON FOR CHANGE:**

To balance contract quantities for various items to match quantities placed in the field and to add extra items that were necessary to complete work in the field.

**CONTRACT COMPLETION:**

The contract completion date is extended to November 20, 2020.

\_\_\_\_\_  
Prepared by Troy R. White, P.E.  
Assistant City Engineer

ACCEPTED BY:

\_\_\_\_\_  
Dunigan Bros., Inc.

\_\_\_\_\_  
Date:

ACCEPTED BY:

\_\_\_\_\_  
Jon H. Dowling, P.E., City Engineer

\_\_\_\_\_  
Date:

ACCEPTED BY:

\_\_\_\_\_  
Jonathan Greene, City Manager

\_\_\_\_\_  
Date:

# 2017 WATER MAIN REPLACEMENT ON CORTLAND STREET AND MICHIGAN AVENUE

## INTERIM BALANCING CHANGE ORDER NUMBER 10

ADDITIONS AND SUBTRACTIONS: Quantities for Contract pay items shall be increased or decreased as follows:

Prop Line	Item Code	Item Description	Current Contract Quantity	Quantity Change	Final Quantity	Units	Unit Price	Amount	
								ADD	DEDUCT
0432	2040020	Curb and Gutter, Rem , West Side Overlay	10,220.00	-6,260.40	3,959.60	Ft	\$8.75	\$ -	\$ (54,778.50)
0433	2040055	Sidewalk, Rem , West Side Overlay	2,043.70	-149.16	1,894.54	Syd	\$9.00	\$ -	\$ (1,342.43)
0434	4030005	Dr Structure Cover, Adj, Case 1 , West Side Overlay	189.00	-31.00	158.00	Ea	\$360.00	\$ -	\$ (11,160.00)
0435	4037050	_ Dr Struc ture, Temp Lowering, Modified, West Side	164.00	-34.00	130.00	Ea	\$220.00	\$ -	\$ (7,480.00)
0436	4037050	_ Mh Cover, Std, West Side Overlay	162.00	-31.00	131.00	Ea	\$467.00	\$ -	\$ (14,477.00)
0437	5010002	Cold Milling HMA Surface , West Side Overlay	56,204.19	-11,928.27	44,275.92	Syd	\$2.00	\$ -	\$ (23,856.54)
0438	8020002	Curb, Conc, Det E2 , West Side Overlay	844.00	-400.00	444.00	Ft	\$25.50	\$ -	\$ (10,200.00)
0439	8020038	Curb and Gutter, Conc, Det F4 , West Side Overlay	10,220.00	-6,514.70	3,705.30	Ft	\$20.51	\$ -	\$ (133,616.50)
0440	8030010	Detectable Warning Surface , West Side Overlay	620.00	-226.50	393.50	Ft	\$35.50	\$ -	\$ (8,040.75)
0441	8030030	Curb Ramp Opening, Conc , West Side Overlay	682.50	-177.00	505.50	Ft	\$24.50	\$ -	\$ (4,336.50)
0442	8030036	Sidewalk Ramp, Conc, 6 inch , West Side Overlay	9,330.35	-4,318.75	5,011.60	Sft	\$6.10	\$ -	\$ (26,344.38)
0443	8030044	Sidewalk, Conc, 4 inch , West Side Overlay	11,436.60	-390.00	11,046.60	Sft	\$3.50	\$ -	\$ (1,365.00)
0444	8157011	_ Hydroseed, West Side Overlay	1,698.12	0.00	1,698.12	Syd	\$2.25	\$ -	\$ -
0445	8160062	Topsoil Surface, Furn, 4 inch , West Side Overlay	1,815.96	0.00	1,815.96	Syd	\$9.65	\$ -	\$ -
0446	8167030	_ Fertilizer, Chemical Nutrient, Cl A, Mod , West Side	79.74	0.00	79.74	Lb	\$2.25	\$ -	\$ -
0447	8230391	Gate Box, Adj, Temp, Case 1 , West Side Overlay	24.00	-6.00	18.00	Ea	\$150.00	\$ -	\$ (900.00)
0448	8230431	Gate Box, Adj, Case 1 , West Side Overlay	24.00	-6.00	18.00	Ea	\$175.00	\$ -	\$ (1,050.00)
0449	8230432	Gate Box, Adj, Case 2 , West Side Overlay	5.00	-5.00	0.00	Ea	\$175.00	\$ -	\$ (875.00)
0450	5010034	HMA, 36A , West Side Overlay	1,541.00	-106.07	1,434.93	Ton	\$75.00	\$ -	\$ (7,955.25)
0451	5010025	Hand Patching , West Side Overlay	0.00	0.00	0.00	Ton	\$150.00	\$ -	\$ -
0452	8120370	Traf Regulator Control , West Side Overlay	1.00	0.00	1.00	LS	\$1,500.00	\$ -	\$ -
0453	8120250	Plastic Drum, High Intensity, Furn , West Side Overlay	200.00	-50.00	150.00	Ea	\$24.00	\$ -	\$ (1,200.00)
0454	8120251	Plastic Drum, High Intensity, Oper , West Side Overlay	200.00	-50.00	150.00	Ea	\$2.20	\$ -	\$ (110.00)
0455	8127060	_ Temporary Traffic Control	9,600.00	-3,200.00	6,400.00	Dir	\$1.00	\$ -	\$ (3,200.00)
0456	8120251	Plastic Drum, High Intensity, Oper	100.00	0.00	100.00	Ea	\$2.20	\$ -	\$ -
0457	8120250	Plastic Drum, High Intensity, Furn	100.00	0.00	100.00	Ea	\$24.00	\$ -	\$ -
0458	8357060	_ DR STR Repair	1,009.36	-2.00	1,007.36	Dir	\$1.00	\$ -	\$ (2.00)
0459	5017060	_ Pavement Repair	3,342.58	-2.00	3,340.58	Dir	\$1.00	\$ -	\$ (2.00)
0460	6027060	_ Curb Clean Up, Extra	6,624.64	-1.00	6,623.64	Dir	\$1.00	\$ -	\$ (1.00)
0461	6020015	Conc Base Cse, Nonreinf, 6 inch	427.50	0.00	427.50	Syd	\$29.00	\$ -	\$ -
0462	8020038	Curb and Gutter, Conc, Det F4	196.00	0.00	196.00	Ft	\$22.80	\$ -	\$ -
0463	8010005	Driveway, Nonreinf Conc, 6 inch	47.00	0.00	47.00	Syd	\$35.75	\$ -	\$ -
0464	2047011	_ Driveway, Rem	33.33	0.00	33.33	Syd	\$3.40	\$ -	\$ -
0465	2047011	_ Pavt, Rem, Modified	168.39	0.00	168.39	Syd	\$7.55	\$ -	\$ -
0466	2047001	_ Pavt, Sawcut	295.00	0.00	295.00	Ft	\$2.80	\$ -	\$ -
0468	2040020	Curb and Gutter, Rem , 2020	0.00	995.00	995.00	Ft	\$9.25	\$ 9,203.75	\$ -
0469	2040055	Sidewalk, Rem , 2020	0.00	2,002.00	2,002.00	Syd	\$10.00	\$ 20,020.00	\$ -
0470	4030005	Dr Structure Cover, Adj, Case 1 , 2020	0.00	29.00	29.00	Ea	\$396.00	\$ 11,484.00	\$ -
0471	4037050	_ Dr Structure, Temp Lowering, Modified, 2020	0.00	29.00	29.00	Ea	\$220.00	\$ 6,380.00	\$ -
0472	4037050	_ Mh Cover, Std, 2020	0.00	29.00	29.00	Ea	\$495.00	\$ 14,355.00	\$ -
0473	5010002	Cold Milling HMA Surface , 2020	0.00	15,818.00	15,818.00	Syd	\$3.00	\$ 47,454.00	\$ -
0474	8020038	Curb and Gutter, Conc, Det F4 , 2020	0.00	864.00	864.00	Ft	\$26.60	\$ 22,982.40	\$ -
0475	8030010	Detectable Warning Surface , 2020	0.00	125.00	125.00	Ft	\$40.45	\$ 5,056.25	\$ -
0476	8030030	Curb Ramp Opening, Conc , 2020	0.00	189.00	189.00	Ft	\$26.60	\$ 5,027.40	\$ -
0478	8020002	Curb, Conc, Det E2 , 2020	0.00	0.00	0.00	Ft	\$30.00	\$ -	\$ -
0479	8030036	Sidewalk Ramp, Conc, 6 inch , 2020	0.00	1,674.00	1,674.00	Sft	\$7.40	\$ 12,387.60	\$ -
0480	8030044	Sidewalk, Conc, 4 inch , 2020	0.00	14,881.00	14,881.00	Sft	\$3.95	\$ 58,779.95	\$ -
0481	8157011	_ Hydroseed, 2020	0.00	1,368.60	1,368.60	Syd	\$2.25	\$ 3,079.35	\$ -
0482	8160062	Topsoil Surface, Furn, 4 inch , 2020	0.00	1,368.60	1,368.60	Syd	\$10.35	\$ 14,165.01	\$ -
0483	8167030	_ Fertilizer, Chemical Nutrient, Cl A, Mod , 2020	0.00	64.44	64.44	Lb	\$2.25	\$ 144.99	\$ -

**2017 WATER MAIN REPLACEMENT ON CORTLAND STREET AND MICHIGAN AVENUE**

**INTERIM BALANCING CHANGE ORDER NUMBER 10**

ADDITIONS AND SUBTRACTIONS: Quantities for Contract pay items shall be increased or decreased as follows:

Prop Line	Item Code	Item Description	Current Contract Quantity	Quantity Change	Final Quantity	Units	Unit Price	Amount	
								ADD	DEDUCT
0484	8230391	Gate Box, Adj, Temp, Case 1 , 2020	0.00	17.00	17.00	Ea	\$150.00	\$ 2,550.00	\$ -
0485	8230431	Gate Box, Adj, Case 1 , 2020	0.00	17.00	17.00	Ea	\$200.00	\$ 3,400.00	\$ -
0486	8230432	Gate Box, Adj, Case 2 , 2020	0.00	0.00	0.00	Ea	\$200.00	\$ -	\$ -
0488	2047001	_ Pavt, Sawcut, 2020	0.00	1,067.00	1,067.00	Ft	\$2.80	\$ 2,987.60	\$ -
0489	2087050	_ Erosion Control, Inlet Protection, Grate Filter, Rect	0.00	30.00	30.00	Ea	\$75.00	\$ 2,250.00	\$ -
0490	2047011	_ Driveway, Rem, 2020	0.00	70.00	70.00	Syd	\$4.00	\$ 280.00	\$ -
0491	6020015	Conc Base Cse, Nonreinf, 6 inch , 2020	0.00	110.00	110.00	Syd	\$33.00	\$ 3,630.00	\$ -
0492	8030046	Sidewalk, Conc, 6 inch , 2020	0.00	1,495.50	1,495.50	Sft	\$4.60	\$ 6,879.30	\$ -
0493	8127050	_ Plastic Drum, High Intensity, Furn, 2020	0.00	45.00	45.00	Ea	\$26.00	\$ 1,170.00	\$ -
0494	8127050	_ Plastic Drum, High Intensity, Operated, 2020	0.00	45.00	45.00	Ea	\$2.25	\$ 101.25	\$ -
0497	8237050	_ Gate Box, 6 inch, 2020	0.00	2.00	2.00	Ea	\$400.00	\$ 800.00	\$ -
0498	2020003	Tree, Rem, 37 inch or Larger , 2020	0.00	1.00	1.00	Ea	\$3,165.00	\$ 3,165.00	\$ -
0499	2040025	Fence, Rem , 2020	0.00	305.00	305.00	Ft	\$3.00	\$ 915.00	\$ -
0500	8127060	_ Sign, Type III, Temp, Prism, Furn, 2020	0.00	2,500.00	2,500.00	Dlr	\$1.00	\$ 2,500.00	\$ -
0501	8127060	_ Sign, Type III, Temp, Prism, Operated, 2020	0.00	250.00	250.00	Dlr	\$1.00	\$ 250.00	\$ -
0503	8507060	_ Adjustment, Previous Items	0.00	0.00	0.00	Dlr	\$1.00	\$ -	\$ -
0504	8507060	_ Adjustment, 2020	0.00	0.00	0.00	Dlr	\$1.00	\$ -	\$ -

Total: \$ 261,397.85 \$ (312,292.85)

Net Change: \$ (50,894.98)

Current Contract Amount: \$ 1,495,468.21

Revised Contract Amount: \$ 1,444,573.23

**MEMO TO:** Mayor and City Councilmembers  
**FROM:** Jonathan Greene, City Manager  
**DATE:** February 9, 2021  
**SUBJECT:** **Change Order 6 to the 2019 Michigan Avenue Reconstruction Contract with Bailey Excavating, Inc.**

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**Recommendation:**

**Approve Balancing Change Order 6 to the 2019 Michigan Avenue Reconstruction contract with Bailey Excavating, Inc. in the increased amount of \$42,717.28 to balance contract quantities to match quantities placed in the field and to authorize the City Manager and City Engineer to execute the appropriate document.**

Attached is a report and documentation from Jon Dowling, City Engineer, regarding approval of Change Order 6 for the 2019 Michigan Avenue Reconstruction contract.

I recommend approval of the change order. Your consideration and concurrence is appreciated.

JG

Attachments

## DEPARTMENTAL REPORT

**MEMO TO:** Jonathan Greene, City Manager  
**FROM:** Jon H. Dowling, P.E., City Engineer  
**DATE:** January 26, 2021

**RECOMMENDATION:** Approve Balancing Change Order 6 to the 2019 Michigan Avenue Reconstruction contract with Bailey Excavating, Inc. in the increased amount of \$42,717.28 to balance contract quantities to match quantities placed in the field and to authorize the City Manager and City Engineer to execute the appropriate document.

### SUMMARY

The attached Balancing Change Order 2 will balance contract quantities to match quantities placed in the field.

### BUDGETARY CONSIDERATIONS

This change order represents an increase of \$42,717.38, bringing the current contract amount to \$1,371,237.84.

### HISTORY, BACKGROUND and DISCUSSION

On March 26, 2019, City Council approved the award of the contract to Bailey Excavating, Inc. of Jackson, Michigan in the amount of \$978,076.33. The original contract was for the reconstruction of Michigan Avenue between First Street and Blackstone Street. Subsequent Change Orders have been approved by City Council as follows:

C.O.	Approval Date	Amount	Description
1	06-25-20	\$ 60,767.61	Add a) curb and sidewalk improvements on Pearl Street, b) add drive approach improvements on Elizabeth Street and c) add curb, sidewalk and drive approach improvements on N. Martin Luther King Jr Drive and Cooper Street adjacent to the Family Dollar Store property.
2	02-11-20	\$ 54,732.34	To a) balance contact quantities to match quantities placed in the field and b) add the relocation of the curb on the west side of Mechanic Street between Detroit Street and Trail Street.
3	06-16-20	\$ 179,722.81	Add the reconstruction of the first alley east of Mechanic Street between Cortland Street and Michigan Avenue.
4	06-16-20	\$ 32,730.84	Add the gateway landscaping treatment to the center island of the Cooper Street roundabout on the south side of I-94.
5	07-14-20	\$22,490.63	Add items for repair of the sanitary sewer service at 330 W. Michigan Ave.

### DISCUSSION OF THE ISSUE

All work contained in this contract is now complete. As such, the attached Balancing Change Order has been prepared to align various contract quantities with quantities placed in the field and to add items that were necessary to complete the work in the field. As demonstrated on the attached table, the final field quantities for some items are less than contract quantities while others are more. The quantities included in the original contract and subsequent change orders were estimates. The change in contract costs represents an increase of \$42,717.28.

### POSITIONS

I request approval of Change Order 6 and authorization for the Interim City Manager and the City Engineer to sign the document.

#### ATTACHMENTS

T:\2019 projects\ENG19-02\_Michigan Ave\_First to Blackstone\3\_CONSTRUCTION\CONTRACT MODS\CO6\_BALANCING\ENG19-02 MICH AVE\_CO 6\_BALANCING\_Report to Council.docx

**BALANCING CHANGE ORDER NO. 5  
To Contract for  
2019 Michigan Avenue Reconstruction  
City of Jackson, Michigan**

Notice is hereby given that the following additional information and changes shall become a part of the Contract Documents, Plans and Specifications of the above-named contract.

<b>ORIGINAL CONTRACT AMOUNT</b>	<b>\$ 978,076.33</b>
<b>APPROVED CHANGE ORDER NO. 1</b>	<b>\$ 60,767.61</b>
<b>APPROVED CHANGE ORDER NO. 2</b>	<b>\$ 54,732.34</b>
<b>APPROVED CHANGE ORDER NO. 3</b>	<b>\$ 179,722.81</b>
<b>APPROVED CHANGE ORDER NO. 4</b>	<b>\$ 32,730.84</b>
<b>APPROVED CHANGE ORDER NO. 5</b>	<b>\$ 22,490.63</b>
<b>CONTRACT AMOUNT AS SET BY CHANGE ORDER NO. 5</b>	<b>\$ 1,328,520.56</b>
<b>CHANGE ORDER NO. 6</b>	<b>\$ 42,717.28</b>
<b>NEW CONTRACT AMOUNT AS SET BY CHANGE ORDER NO. 6</b>	<b>\$ 1,371,237.84</b>

**REASON FOR CHANGE:**

To balance contract quantities to match quantities placed in the field for various items and to add extra items that were necessary to complete work in the field.

**CONTRACT COMPLETION:**

The contract completion date remains unchanged.

\_\_\_\_\_  
Prepared by Troy R. White, P.E.  
Assistant City Engineer

ACCEPTED BY:

\_\_\_\_\_  
Bailey Excavating, Inc.

\_\_\_\_\_  
Date:

ACCEPTED BY:

\_\_\_\_\_  
Jon H. Dowling, P.E., City Engineer

\_\_\_\_\_  
Date:

ACCEPTED BY:

\_\_\_\_\_  
Jonathan Greene, City Manager

\_\_\_\_\_  
Date:

# ENG19-02 MICHIGAN AVENUE RECONSTRUCTION

## CHANGE ORDER NUMBER 6

ADDITIONS AND SUBTRACTIONS: Quantities for Contract pay items shall be increased or decreased as follows:

Prop Line	Item Code	Item Description	Current Contract Quantity	Quantity Change	Final Quantity	Units	Unit Price	Amount	
								ADD	DEDUCT
0270	2040020	Curb and Gutter, Rem	66.00	1.00	67.00	Ft	\$11.21	\$ 11.21	\$ -
0275	2040045	Masonry and Conc Structure, Rem	10.00	6.00	16.00	Cyd	\$155.34	\$ 932.04	\$ -
0280	2040055	Sidewalk, Rem	41.00	-10.00	31.00	Syd	\$9.62	\$ -	\$ (96.20)
0285	2040080	Exploratory Investigation, Vertical	5.00	-5.00	0.00	Ft	\$105.00	\$ -	\$ (525.00)
0290	2047011	_ Driveway, Rem	73.00	-13.00	60.00	Syd	\$13.10	\$ -	\$ (170.30)
0295	2047011	_ Pavt, Rem, Modified	655.00	241.00	896.00	Syd	\$12.45	\$ 3,000.45	\$ -
0310	2087050	_ Erosion Control, Inlet Protection, Sediment Trap, F	6.00	-6.00	0.00	Ea	\$275.00	\$ -	\$ (1,650.00)
0320	3027011	_ Aggregate Base, 8 inch, 21AA	511.00	-511.00	0.00	Syd	\$13.00	\$ -	\$ (6,643.00)
0330	4027001	_ Sewer, DI, 6 inch	80.00	-21.00	59.00	Ft	\$64.86	\$ -	\$ (1,362.06)
0335	4027001	_ Sewer, DI, 8 inch	310.00	13.00	323.00	Ft	\$68.21	\$ 886.73	\$ -
0340	4037030	_ Sewer Fittings, DI	250.00	340.00	590.00	Lb	\$5.35	\$ 1,819.00	\$ -
0350	4030005	Dr Structure Cover, Adj, Case 1	3.00	-1.00	2.00	Ea	\$625.00	\$ -	\$ (625.00)
0355	4030308	Dr Structure, Tap, 8 inch	7.00	-6.00	1.00	Ea	\$275.00	\$ -	\$ (1,650.00)
0360	4037001	_ Sewer Backfill, Class II	390.00	-8.00	382.00	Ft	\$27.19	\$ -	\$ (217.52)
0365	4037050	_ Catch Basin Cover, Curb	1.00	1.00	2.00	Ea	\$732.13	\$ 732.13	\$ -
0370	4037050	_ Catch Basin Cover, Drive	4.00	1.00	5.00	Ea	\$593.31	\$ 593.31	\$ -
0375	4037050	_ Catch Basin, 24 inch dia	5.00	2.00	7.00	Ea	\$1,375.00	\$ 2,750.00	\$ -
0380	4037050	_ Dr Structure, Temp Lowering, Modified	3.00	-3.00	0.00	Ea	\$275.00	\$ -	\$ (825.00)
0385	4037050	_ Mh Cover, Std	2.00	-2.00	0.00	Ea	\$572.91	\$ -	\$ (1,145.82)
0390	5010025	Hand Patching	8.00	41.30	49.30	Ton	\$350.00	\$ 14,455.00	\$ -
0395	6020100	Conc Pavt, Nonreinf, 6 inch	511.00	-511.00	0.00	Syd	\$55.78	\$ -	\$ (28,503.58)
0400	7067001	_ Joint Sealant	350.00	-350.00	0.00	Ft	\$9.49	\$ -	\$ (3,321.50)
0405	7067001	_ Retaining Wall	20.00	8.50	28.50	Ft	\$405.00	\$ 3,442.50	\$ -
0410	8010005	Driveway, Nonreinf Conc, 6 inch	73.00	355.00	428.00	Syd	\$41.69	\$ 14,799.95	\$ -
0415	8027001	_ Curb and Gutter, Conc, Det D1, Modified	263.00	-3.00	260.00	Ft	\$28.75	\$ -	\$ (86.25)
0420	8027001	_ Curb and Gutter, Conc, Det F4, Modified	66.00	425.00	491.00	Ft	\$26.57	\$ 11,292.25	\$ -
0425	8027001	_ Curb and Gutter, Conc, Double Sided	132.00	-132.00	0.00	Ft	\$69.00	\$ -	\$ (9,108.00)
0430	8030046	Sidewalk, Conc, 6 inch	365.00	162.00	527.00	Sft	\$4.83	\$ 782.46	\$ -
0455	8120352	Sign, Type B,Temp,Prismatic,Spec, Furn	60.00	-60.00	0.00	Sft	\$9.20	\$ -	\$ (552.00)
0460	8120353	Sign, Type B,Temp,Prismatic,Spec, Oper	60.00	-60.00	0.00	Sft	\$5.61	\$ -	\$ (336.60)
0465	2047001	_ Pavt Sawcut	1,040.00	76.00	1,116.00	Ft	\$4.15	\$ 315.40	\$ -
0475	8127051	_ Traffic Controls	1.00	-1.00	0.00	LS	\$3,000.00	\$ -	\$ (3,000.00)
0490	8157050	_ Dwarf Panicle Hydrangea	5.00	-2.00	3.00	Ea	\$125.00	\$ -	\$ (250.00)
0530	8167021	_ Natural Hardwood Mulch	12.00	4.00	16.00	Cyd	\$25.39	\$ 101.56	\$ -
0545	8237050	_ Hunter PGV Globe Valve 1"	7.00	-2.00	5.00	Ea	\$27.45	\$ -	\$ (54.90)
0565	8237050	_ Valve Box 21x24	6.00	-3.00	3.00	Ea	\$30.27	\$ -	\$ (90.81)
0595	8507060	_ Sewer lead repair at 330 W Michigan	12,108.43	-12,108.43	0.00	Dlr	\$1.00	\$ -	\$ (12,108.43)
0605	8507050	_ Waterproofing Window Well	0.00	7.00	7.00	Ea	\$1,650.00	\$ 11,550.00	\$ -
0615	2057050	_ Hydro Excavating	0.00	6,509.46	6,509.46	Ea	\$1.00	\$ 6,509.46	\$ -
0620	6020015	Conc Base Cse, Nonreinf, 6 inch	0.00	308.00	308.00	Syd	\$36.80	\$ 11,334.40	\$ -
0625	6020104	Conc Pavt, Nonreinf, 8 inch	0.00	417.00	417.00	Syd	\$55.20	\$ 23,018.40	\$ -
0630	6027011	_ Conc Pavt, Nonreinf, 4 inch	0.00	45.00	45.00	Syd	\$41.40	\$ 1,863.00	\$ -
0635	4037050	_ Yard Basin, 12x12	0.00	4.00	4.00	Ea	\$625.00	\$ 2,500.00	\$ -
0640	8127051	_ Additional Traffic Control	0.00	1.00	1.00	LS	\$2,350.00	\$ 2,350.00	\$ -

Total: \$ 115,039.25 \$ (72,321.97)

Net Change: \$ 42,717.28

Current Contract Amount: \$ 1,328,520.56

Revised Contract Amount: \$ 1,371,237.84

**MEMO TO:** Mayor and City Councilmembers  
**FROM:** Jonathan Greene, City Manager  
**DATE:** February 9<sup>th</sup>, 2021  
**SUBJECT:** Approve the sale of City owned property located at 515 N Waterloo St, for \$72,000.

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**Recommendation:** Approve the sale of City owned property located at 515 N Waterloo St, for \$72,000. Authorize the City Manager to sign all sale documents associated with the Property Transfer and to make minor modifications.

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Attachments: Purchase agreement, cost calculation and Real Estate Net sheet.

# DEPARTMENTAL REPORT

**MEMO TO:** Jonathan Green, City Manager

**FROM:** Shane LaPorte, Director of NEO

**DATE:** February 9<sup>th</sup>, 2021

**RECOMMENDATION:** Approve the sale of City owned property located at 515 N Waterloo St, for \$72,000.

## SUMMARY

The City of Jackson owns real property located at 515 N Waterloo Ave. Property was placed on the MLS by Real Estate Agent Rich Cook. On February 4<sup>th</sup>, 2021 an offer of \$72,000 was submitted to purchase the property. According to the offer to purchase, closing date is set to take place on or before March 12<sup>th</sup>, 2021.

## BUDGETARY CONSIDERATIONS

Total project cost associated with additions, upgrades, personnel, maintenance, acquisition and real estate cost/fees \$19,411.30. Sale price \$72,000. Revenue generated \$52,588.70. Upon sale the property will be placed back on the tax roll.

## HISTORY, BACKGROUND and DISCUSSION

Property located at 515 N Waterloo St was obtained by the County of Jackson through tax foreclosure and deeded to the City of Jackson through right of first refusal. In an effort to make the structure marketable and ensure code compliance the Neighborhood and Economic Operations Department oversaw repairs and upgrades to the structure interior and exterior. General Fund dollars were used to finance the project. After completion of the property improvements, the house was placed on the Multiple Listing Service (MLS) by Real Estate Agent Rich Cook of ERA Reardon Real Estate. On February 4<sup>st</sup>, 2021 the buyer's Agent Scott Timms of Beiswanger & Risner Real Estate Group assisted the Buyer with submitting an offer to purchase 515 N Waterloo St from the City of Jackson for the amount of \$72,000. Should Council agree to accept the bid amount, the closing is set on or before March 12<sup>th</sup>, 2021.

## POSITIONS

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**ATTACHMENTS:** Purchase agreement, cost calculation and Real Estate Net sheet.



# REARDON REALTY

Property Address: 515 Waterloo

Date: \_\_\_\_\_

Seller Name(s): \_\_\_\_\_

	<b>Debit</b>	<b>Credit</b>
Sale Price		<u><b>72000</b></u>
Brokerage Fee	<u><b>3600</b></u>	
Transfer Tax	<u><b>619.20</b></u>	
Tax Proration (Approximate)	<u>                    </u>	
Title Insurance	<u><b>900</b></u>	
Home Warranty	<u>                    </u>	
Well & Septic	<u>                    </u>	
Transaction Fee	<u>                    </u>	
Pest Inspection	<u>                    </u>	
Wire Fees	<u>                    </u>	
Doc. Preparation (Deed)	<u><b>50</b></u>	
Seller's Concession	<u>                    </u>	
<span style="border: 1px solid black; padding: 2px;">american title closing fee</span>	<u><b>250</b></u>	<u>                    </u>
	<u>                    </u>	<u>                    </u>
	<u>                    </u>	<u>                    </u>
Subtotal	<u><b>5419.2</b></u>	<u><b>72000</b></u>
Net Credit/Debit	<u><b>66580.8</b></u>	
Less Mortgage Balance	<u>                    </u>	
Total Net To Sellers	<span style="border: 2px solid black; padding: 2px;"><b>66580.8</b></span>	

**\*These figures are estimates only, and subject to change.**

Seller  \_\_\_\_\_

Seller  \_\_\_\_\_

# 515 N. Waterloo

G/L: 101-571-000-818.571

Sales Price	\$	72,000.00
Project Cost *	\$	19,411.30
<b>Net Sale</b>	<b>\$</b>	<b>52,588.70</b>

Contracts	Cost	Pd to Date	Remaining Balance
Michigan Building & Restoration	\$ 8,530.00		\$ 8,530.00
Change Order #1	\$ 1,845.00		\$ 1,845.00
Change Order #2	\$ 250.00	1.11.21	\$ 250.00
Michigan Building Total	\$ 10,625.00	\$ -	\$ 10,625.00
<b>Subtotal</b>	<b>\$ 10,625.00</b>	<b>\$ -</b>	<b>\$ 10,625.00</b>

Additional Project Cost	Cost	Pd to Date	Remaining Balance
Consumers - Acct #103039854858 (Dec 2020)			
Dec 1-21	71.27	71.27	\$ -
Dec 22 - Jan 21, 2021	108.71	0	\$ 108.71
Water			
12/9/2020 Meter Replace	0	0	\$ -
Billing #1	\$ 50.00		\$ 50.00
Procurement Card			
11/30/2020 Home Depot - Lock & Keys for City Owned Homes	10.05	10.05	\$ -
12/15/2020 Home Depot - Lock & Keys for City Owned Homes	31.61	31.61	\$ -
12/30/2020 Home Depot - 513 Waterloo (City Owned)	\$ 45.35	\$ 45.35	\$ -
City Employee(s) Hrs.	Hrly Rate	# of Hrs.	
Brian Taylor	\$ 64.46	5.00	\$ 322.30
Sven Harrison	\$ 48.34	8.00	\$ 386.72
County Tax Foreclosure / Chargeback Cost	12/3/2019	\$ 2,341.09	\$ 2,341.09
Open Receivables			\$ -
Open Utility			\$ -
Net Real Estate Fees	\$ 5,419.20		\$ 5,419.20
<b>Subtotal</b>	<b>\$ 8,786.30</b>	<b>\$ 3,208.39</b>	<b>\$ 5,577.91</b>

	Cost	Pd to Date	Remaining Balance Still Outstanding
<b>Total Project Cost</b>	<b>\$ 19,411.30</b>	<b>\$ 3,208.39</b>	<b>\$ 16,202.91</b>

\* Project Cost Includes Remaining Balance Still Outstanding



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**PURCHASE AGREEMENT**

Property Address: 515 Waterloo, Jackson, mi 49201

Listing Office: ERA REARDON REALTY, L.L.C.

Office License: \_\_\_\_\_

Office Phone: 517-782-2996

Listing Agent: RICH E COOK

Agent License: \_\_\_\_\_

Agent Cell: 517-474-7424

Email: cook087@msn.com

Selling Office: Beiswanger & Risner RE Group

Office License: 6505425011

Office Phone: 517-435-1500

Selling Agent: Scott Timms

Agent License: 6501424452

Agent Cell: 517-817-9517

Email: Scott@CapitalMidwestHoldings.com

Seller's Agent  Dual Agent

Transaction Coordinator

Seller's Agent  Buyer's Agent

Dual Agent  Transaction Coordinator

1. **OFFER:** This offer made at 5pm on 02/04/2021 between (Purchaser) Tammy Lynn Crocker and  
(Seller) Owner of Record

2. **PROPERTY:** The purchase of property commonly known as 515 Waterloo,  
(Mailing City) Jackson, (Zip) 49201, located in the City \_\_\_\_\_ of  
Jackson, County of Jackson, described as Tax Identification Number or  
Legal Description of Tax ID: 7-0764.3000, State of Michigan; subject to all existing  
restrictions, easements, rights-of-way, zoning laws, the lien of taxes not yet due and payable at the time of closing, and  
land use regulations affecting the use of property. ALL buildings, improvements, built-in appliances, attached fixtures  
(including carpeting, flooring, lighting, fans, window treatments/hardware/rods, water heater, water softener (unless  
rented), water pump and pressure tank, sump pump, satellite dish, garage door openers and remotes, attached work  
benches, all attached shelving, fireplace doors and screens, stationary outdoor grills, all support equipment for in-ground  
pools and above ground pools if the pool is remaining with the home, mailbox, all planting, underground sprinklers  
systems/pumps/timers, fences, awnings, in-ground basketball hoops, outdoor play equipment secured to the ground,  
detached storage buildings, landscaping, fuel (unless metered), full tanks (unless metered), and gas, oil, and mineral rights  
owned Seller(s) are include in the purchase price.

Exceptions  Additions: \_\_\_\_\_

Seller Initials

\_\_\_\_\_  
\_\_\_\_\_

Purchaser Initials

TLC  
02/04/21  
\_\_\_\_\_

Seller Initials

Purchaser Initials





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ESCALATION CLAUSE. Buyer will increase his/her/their offer by \$ \_\_\_\_\_ more than any bona fide or good faith competing offer made in an amount not to exceed \$ \_\_\_\_\_. Buyer must be provided with a copy of the competing offer together with a bank pre-qualification or pre-approval letter demonstrating, to Buyer's sole satisfaction, that the second buyer is qualified to purchase at the price set forth in the competing offer. This offer shall remain effective until five days after the date of this offer. Prior to increasing the purchase price pursuant to this paragraph, the total of all seller concessions and any separate consideration for personal property provided for in the competing offer shall be deducted from the purchase price contained in said offer. (Buyer is advised to seek advice from legal counsel prior to making an offer with an escalation clause.)

**6. SELLER(S) CONCESSIONS:**

Seller agree to pay up to \_\_\_\_\_ % of the purchase price or up to \$ \_\_\_\_\_ at the closing to be used toward the Purchaser closing costs, to include points, prepays, escrows, and miscellaneous costs to close.  
 No Seller concessions requested.

**7. HOME OF SALE CONTINGENCY:** This agreement is contingent upon  None  Sale Of  Close of:  
(Address) \_\_\_\_\_

**8. EARNEST MONEY:** Purchaser herewith deposits \$500 \_\_\_\_\_ in the form of check at acceptance \_\_\_\_\_ as earnest money to be held by American Title \_\_\_\_\_ as part of the purchase price or down payment portion where applicable. If this agreement is not accepted, or the conditions, contingencies, and/or any inspections specified are not satisfied, the earnest money shall be refunded to the Purchaser. If the Seller defaults in the performance of this agreement, Purchaser may receive an immediate refund of all earnest money in full termination of this agreement or may pursue specific performance of this agreement. If Purchaser defaults in the performance of this agreement, all deposits shall be forfeited to Seller in full termination of this agreement or Seller may pursue specific performance of this agreement. If the sale is not closed, the REALTOR® may notify Purchaser and Seller in writing, of REALTOR®'s intended disposition of the earnest money deposit. All parties shall be deemed to have agreed to the disposition of the earnest money deposit unless REALTOR® receives written objection from either party within ten (10) calendar days of receipt of notification. If a dispute occurs involving the deposit, in whole or in part, the non-prevailing party, as determined by the court, will reimburse the other party and Brokers for reasonable attorney's fees and expenses incurred in connection with the dispute, including interpleader actions. If a dispute exists between the Seller and Purchaser, Seller

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Purchaser Initials



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and Purchaser agree that the Selling Broker/Escrow Agent shall not release the Earnest Money Deposit without the written consent of both parties.

9. **CONVEYANCE:** Conveyance shall be made by:

A. Seller shall convey and transfer, by  Warranty Deed or  Land Contract, a marketable record title in the property and improvements as evidenced by Owner's Title Insurance Policy  with standard exceptions  without standard exception dated in the amount of the purchase price, subsequent to this agreement, and pay all County/State transfer tax. Any additional costs to attain a policy without standard exceptions shall be at Purchaser cost.

B. When applicable, insert the number of divisions and include in deed/land contract: "The grantor grants to the grantee the right to make 100% (insert number) division(s) under Section 108 of the Land Division Act, Act No. 288 of the Public Acts of 1967".

C. For cash transactions, Purchaser and Seller shall equally share the Title Company closing fee. For non-VA mortgage purchases, land contracts, and assumptions, the Purchaser shall pay the Title Company closing fee. For VA mortgage purchases, the Seller shall pay the Title Company closing fee.

10. **CLOSING:** The close of sale shall be on or before 03/12/2021. A closing date prior to this date requires the approval of both Purchaser and Seller.

11. **PRORATIONS:** Rent and association fees, if any, are to be prorated as of the date of closing. Purchaser will reimburse Seller for fuel oil/propane in the tank at possession. If possession is not at close, Purchaser will escrow the sum of \$ \_\_\_\_\_ for final reading with the title company funding the transaction. Upon verification of remaining amounts at possession, written authorization for release of funds is required. Any excess funds will be returned to the Purchaser and Purchaser will be responsible for any shortage.

Seller will escrow the sum of \$ 150 for final water and sewer bill with the funding title company. Escrowed fund will be released to Seller upon verification that the final bill has been paid or funds will be used to pay the final bill upon receipt by the title company funding the transaction. Any excess funds will be returned to Seller and Seller will be responsible for any shortage. Any unmetered water and sewer to be prorated to the date of closing.

12. **POSSESSION:** Seller will maintain the property in its present condition until the completion of the closing.

Possession shall be delivered to Purchaser  immediately at time of closing  at \_\_\_\_\_ on or before \_\_\_\_\_, during which time Seller will have the privilege to occupy the property and hereby agrees to

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Purchaser Initials



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pay the Purchaser \$ \_\_\_\_\_ as an occupancy fee for this period, to be escrowed by the title company funding the transaction at time of closing. If Seller occupies the property after closing, Seller will pay all utilities and be responsible for routine maintenance during such occupancy. Purchaser will maintain the property structural components and mechanical systems during such occupancy. If any repairs or replacements necessitated by Seller misuse, abuse, or neglect of the property Seller will be responsible for the expense of such repairs and replacement. On the agreed possession date, Seller shall deliver the property free of trash and debris, in broom-clean condition, shall remove all personal property (unless otherwise agreed by the parties), make arrangements for final payment of all utilities, and shall deliver all keys and remote controls to Purchaser. If Seller fails to deliver possession to Purchaser(s) on the agreed date and time, Purchaser shall be entitled to immediate possession without any notice to Seller. Any unagreed upon holdover by Seller shall be subject to a \$500.00 per day charge and paying Purchaser attorney fees and court costs to remedy the matter. Exceptions: \_\_\_\_\_

- Subject to Tenant Rights:
  - Seller will cause the tenant(s) to vacate the property before closing.
  - Purchaser will take the property subject to the rights of the tenant(s).

13. TAXES:

Property taxes are to be treated as if they cover the calendar year in which they are first billed. Taxes first billed in years prior to year of closing shall be paid by the Seller. Taxes which are first billed in the year of closing shall be prorated so that Seller shall pay taxes from the first of the year to closing date and Purchaser shall pay taxes for the balance of the year, including the day of closing. If any bill for taxes is not issued as of the closing date, the current taxable value, homestead status and millage rate shall be used for proration purposes, plus collection fees, if any. EXCEPT, if taxes are unallocated as to the parcel being sold Purchaser and Seller agree that this split represents 100 % of the total and this allocation will be used for proration purposes as well as for any reimbursements owed by either party for future bills that do not reflect the split. (Common in Jackson, Hillsdale, Ingham Counties)

Property taxes will be prorated as of the date of closing based on a 30-day-month, 360-day-year basis. Taxes will be prorated as if paid in advance, based on the due date of the taxing authority. (Common in Washtenaw, Lenawee, Livingston Counties)

Property taxes are to be prorated per the customary format for which the property is located.

14. ASSESSMENTS: Seller shall pay all installments of special assessments due as of the closing date. Installments of

Seller Initials	<input type="text"/>	Purchaser Initials	<input type="text" value="ZC"/>
Seller Initials	<input type="text"/>	Purchaser Initials	<input type="text" value="02/04/21"/>



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existing special assessments due after the closing date shall be paid by the  Seller  Purchaser. (If Purchaser elect to assume existing special assessments and is obtaining a mortgage, Purchaser should confirm with lender that the assessment can be assumed). Assessments levied after the closing date to be paid by Purchaser. Seller has no knowledge of any pending assessments and/or benefit charges that have not been disclosed in writing to the Purchaser(s) in this agreement. Any exceptions shall be disclosed to Purchaser in writing.

**15. ACKNOWLEDGEMENT OF DISCLOSURES:**

Lead Based Paint Disclosure: (For residential housing built prior to 1978 only): Purchaser acknowledges that prior to signing this agreement, Purchaser has received a copy of the Lead-based Paint Disclosure Form completed by Seller on 01/28/2021, the terms of which shall be part of this agreement.

Purchaser shall have 10 calendar days from the date of Agreement acceptance to conduct an inspection of the property for the presence of lead-based paint and/or lead based paint hazards. (Federal regulations require a 10-day period or other mutually agreed upon period of time.) If Purchaser is not satisfied with the results of this inspection, upon notice from Purchaser to Seller within this period, this Agreement shall terminate, and any deposit shall be refunded to Purchaser.

Purchaser hereby waives his/her opportunity to conduct a risk assessment or inspection for the presence of lead-based paint and/or lead-based paint hazards.

This property was built in/after 1978 as is therefore except from Lead Based Paint Disclosure

**Seller's Disclosure:**

Purchaser acknowledges that a Seller's Disclosure statement dated 01/28/2021 has been provided to Purchaser in compliance with the Michigan Seller Disclosure Act.

Seller shall provide Purchaser with a Seller's Disclosure Statement with Seller's acceptance of this offer. Pursuant to the Seller Disclosure Act, MCL 559.951, et seq., Purchaser will have 72 hours after hand-delivery of the disclosure statement (or 120 hours after delivery by registered mail) to terminate this agreement by delivery of a written notice to Seller or Seller's agent.

**16. HOME WARRANTY:** Purchaser has been advised of the availability of a Home Warranty program. Said Home Warranty plan to be provided by American Home Shield through Beiswanger & Risner Real Estate Group at

Purchaser  Seller \$ \_\_\_\_\_ expense.

Purchaser waive Home Warranty coverage.

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Purchaser Initials

  
02/04/21  
1:59 PM EST

Seller Initials

Purchaser Initials



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17. **PROPERTY INSPECTIONS:** Purchaser has personally inspected the property and accepts it in AS IS present condition and agrees that there are no additional written or verbal understandings except otherwise provided in this agreement.

This offer is contingent upon satisfactory inspection of the property, at Purchaser's choice and Purchaser's expense, no later than ten (10) calendar days after the date of acceptance. These inspections may include, but are not limited to, mechanical, electrical, structural inspections, as well as inspections for radon, mold and/or asbestos. Purchaser agrees to return the property to its prior condition after any inspections or tests. If Purchaser is not satisfied with the results of any inspection, Purchaser shall, within the ten (10) day inspection period, provide written notice of Purchaser dissatisfaction with the inspections. Seller shall then have five (5) calendar days to accept the proposed modifications to the purchase agreement or refuse to accept the proposed modifications. If Seller fails to respond with the five (5) calendar day period, Seller's failure to respond shall constitute a rejection of the proposed modification. If Seller agrees to the modification, the sale shall proceed to closing. If Seller refuses to respond or rejects the proposed modifications, Purchaser may either withdraw its objections and proceed to closing or terminate the Agreement and have the earnest money deposit returned to Purchaser. Purchaser failure to respond to Seller's rejection within five (5) calendar days from Seller's notice of rejection, shall constitute a termination of this Agreement. Purchaser failure to notify Seller of any unsatisfactory inspection results within ten (10) calendar days of acceptance shall indicate Purchaser acceptance of the property AS IS and automatically remove this contingency from the agreement.

Purchaser acknowledge that Selling Broker/REALTOR® has recommended that Purchaser obtain an inspection of the property by an inspector and/or licensed builder/contractor. Purchaser does not desire to obtain an inspection of the property.

18. **WELL, WATER, AND SEPTIC INSPECTIONS:** Contingency to be removed within 10 days of acceptance:

Connected to community water                       Connected to community sewer

This property requires mandatory well and septic inspections. Purchaser and Seller acknowledge that Seller is required to perform and pay for a Point of Sale Mandatory Well and Septic Inspections on the above named property. (Common in Washtenaw, Ingham, Eaton, Barry Counties)

This property does not require mandatory Well and Septic Inspections. (Common in Jackson, Hillsdale, Lenawee, Calhoun Counties)

Purchaser  Seller to furnish a written report from a third party provider stating that the water is potable.

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Seller Initials

Purchaser Initials   
Purchaser Initials



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Purchaser  Seller to furnish a written report from a third party provider stating that the well system is in good working order.

Purchaser  Seller to furnish a written report from a third party provider stating that the septic system, including sewage ejection pump (if applicable), is in good working order.

Purchaser waive water, well, and septic inspection.

If any of the above reports regarding well, water, and septic systems are found deficient, the Seller and the Purchaser agree to negotiate in good faith the cost of the correction. Any request by Purchaser to modify this Agreement based on the results of an inspection shall terminate this Agreement unless: (a) the request is agreed to by Seller in writing, or (b) the Purchaser removes the inspection contingency in writing after Seller rejects Purchaser modification request or Seller fails to respond with five (5) calendar days or receiving Purchaser's request.

19. **WOOD DESTROYING INSECT INSPECTIONS:**  Purchaser  Seller shall furnish at his/her expense, within 10 days of acceptance, an inspection by a licensed pest control company for termites, powder post beetles, carpenter ants and carpenter bees. If active infestation is found, or evidence of previous untreated termite infestation, it shall be the option of the Seller within five (5) calendar days from inspection to contract to treat and to contract to repair any ruined material resulting from termites, powder post beetles, carpenter ants, or carpenter bees. If the Seller does not contract to treat or repair, this agreement may be declared null and void by the Purchaser. Regardless of any indication made above, if the terms in paragraph five of the Agreement is a Veterans Administration (VA) loan, the Seller shall furnish this report as required by the Department of Veteran Affairs loan terms.

Purchaser(s) waives wood destroying insect inspection.

20. **SURVEY/MORTGAGE REPORT/PROPERTY IMPROVEMENT REPORT:**

Mortgage Report. Purchaser shall provide, at Purchaser expense, a current mortgage report certified to Purchaser lender only if required by lender. This report shall identify any buildings and improvements on the property as described with no boundary lines established.

Property Improvement Report. Purchaser shall furnish at Purchaser expense a current property improvement report certified to the Purchaser. This report shall identify any buildings and improvements on the property as described with no boundary lines established. (This document can be utilized in situations where the lender does not require a mortgage certificate.)

Seller Initials   
Seller Initials

Purchaser Initials   
Purchaser Initials



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Boundary (Stake) Survey.  Purchaser  Seller shall furnish at their expense a current report identifying any buildings, encroachments, and improvements within the boundaries of the described property. This survey shall show all boundaries and property shall be staked at all corners.

Purchaser waives stake survey, mortgage report and property improvement report.

21. **CONDITION OF PROPERTY:** Purchaser has personally examined this property and agrees to accept same in its “as is” condition and Seller agrees not to adversely alter the present condition. If said premises are damaged by fire or other casualty prior to closing, Purchaser may elect to revoke this agreement and be reimbursed for all earnest money hereunder, or conclude this sale on the payment to Purchaser of such insurance proceeds necessary to repair the property to its condition at the time of this agreement’s acceptance. Purchaser shall assume all risk of loss or damage not caused by acts of negligence of the Seller from date of closing.

Walk Through Inspection: Although the Purchaser has the right to a walk-through inspection of the property prior to closing, the sole purpose is to determine if it is in the same condition as when the Purchase Agreement was executed, and the included personal property remains on the premises.

22. **SELLER/PURCHASER HAS BEEN ADVISED TO SEEK LEGAL COUNSEL TO INSURE THAT:**

1) the details of the Purchase Agreement are being adhered to, 2) title is marketable, 3) property complies with or is not affected by the Land Division Act, as amended, and 4) to determine how Purchaser(s) will take title.

23. **OTHER PROVISIONS:** Addenda 1&2, Notice of Agency, PreApproval

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

24. **MISCELLANEOUS:** The parties agree that a) there are no additional written, any oral agreements or understandings, b) the agreement shall not be amended or modified unless both parties do so in writing, c) this agreement shall be governed and construed in accordance with the laws of the State of Michigan, d) invalidation of one or more terms shall not affect the validity of the remaining terms, e) this agreement shall survive the closing, the delivery of deeds, instruments or contracts and shall not merge into any such documents of conveyance provided for herein and f) information concerning the sale of property shall be reported for statistical and comparison purposes to the Jackson Area Association of REALTORS®. Parties waive any right to claim damage from the dissemination of such information.

Seller Initials	<input type="text"/>	Purchaser Initials	<input type="text" value="ZLP"/>
Seller Initials	<input type="text"/>	Purchaser Initials	<input type="text" value="02/04/21"/>



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25. **ELECTRONIC COMMUNICATION:** As an alternative to physical delivery, the parties agree that this agreement, any amendment or modification of this agreement and/or any written notice or communication in connection with this agreement may be delivered to the Seller(s) in care of the listing REALTOR® and the Purchaser(s) in care of the Selling REALTOR® via electronic mail or by facsimile via the contact information set forth above. Any such communication shall be deemed delivered at the time it is sent or transmitted. Seller(s) represents and warrants that an electronic email address has been provided to Listing REALTOR® from which Seller(s) may receive electronic mail. Purchaser(s) represents and warrants that an electronic email address has been provided to Selling REALTOR® from which Purchaser(s) may receive electronic mail. The parties agree that the electronic signatures and initials shall be deemed to be valid and binding upon the parties as if the original signatures or initials were present in the documents in the handwriting of each party.

26. **ARBITRATION:** Any dispute over the disposition of any earnest money deposits or claim arising out of or related to the physical condition of any property covered by this agreement, included without limitation, claims of fraud, misrepresentation, warranty and negligence, shall be settled in accordance with the rules, then in effect, adopted by the endorsed provider of arbitration services for the Michigan REALTORS®. This is a voluntary agreement between the Purchaser(s) and Seller(s). Failure to agree to arbitrate does not affect the validity of the Agreement. A judgement of any circuit court shall be rendered on the award or determination made pursuant to this Agreement. This Agreement is specifically made subject to and incorporates the provisions of the Michigan Uniform Arbitration Act, MCL 691.1681, et seq. This agreement is enforceable only as to parties and brokers/agents who have agreed to arbitrate as acknowledged by their initials below. The terms of this paragraph shall survive the closing.

Initial if you agree to arbitrate: Purchaser  Purchaser   
Seller  Seller

27. **ASSIGNMENT:** Purchaser(s) will not assign this Agreement without the consent of Seller(s).

28. **RELEASE AND LIMITATION:** Purchaser(s) and Seller(s) acknowledge that neither Listing Broker nor Selling Broker, not their respective agents, have made any representations concerning the condition of the property covered by this Agreement or the marketability of title, and Purchaser(s) and Seller(s) release the Listing Broker and Selling Broker and their respective agents, with respect to claims arising out of or related to this Agreement, any addendums, or counteroffers; all claims arising from any purported representations as to the physical and environmental condition of the

Seller Initials  Purchaser Initials   
Seller Initials  Purchaser Initials



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property covered by this Agreement or the marketability of title; and all claims arising from any special assessments and/or utility bills which have been or may in the future be charged against the property covered by this Agreement and, in addition, agree to indemnify and hold harmless the Listing Broker and Selling Broker and their respective agents from any and all claims related to those matters.

Purchaser(s) and Seller(s) agree that any and all claims or lawsuits which they may have against the Listing Broker and its Agents and/or Selling Broker and its Agents relating to their services must be filed no more than six (6) months after the date of closing of the transaction described in this Agreement. Purchaser(s) and Seller(s) waive any statute of limitations to the contrary.

29. **PURCHASER OFFER.** Purchaser(s) give the Seller(s) until 5pm on 02/09/2021, for written acceptance of this agreement and agrees that this agreement, when accepted by Seller(s) via original, facsimile, or email signature(s), will constitute a binding agreement between Buyer(s) and Seller(s).

*Tammy Lynn Crocker*  
dotloop verified  
02/04/21 1:33 PM EST  
NLLF-S3H3-SIL3-HOAX

[Signature box]

Buyer:  
Tammy Lynn Crocker

Buyer:

Print Legal Name:

Print Legal Name:

30. **SELLER RESPONSE:** Date: \_\_\_\_\_

Accept  Reject  Accept as Follows: Buyer is responsible for any FHA repairs

and Seller(s) give the Buyer(s) until 6pm on 02/11/2021 to accept any changes. Receipt is acknowledged by Seller(s) of a copy of this agreement.

[Signature box]

[Signature box]

Seller:

Seller:

Print Legal Name:

Print Legal Name:

Seller Initials

[Initials box]

Purchaser Initials

*TL*  
02/04/21  
1:33 PM EST

Seller Initials

[Initials box]

Purchaser Initials

[Initials box]



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31. **PURCHASER ACKNOWLEDGEMENT.** Purchaser Receipt and Acceptance of Changes:

Date: \_\_\_\_\_

Accept     Reject     Except: See Addendum: \_\_\_\_\_

Purchaser:

Purchaser:

(THE REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK)

Seller Initials

Seller Initials

Purchaser Initials

*ZRP*  
02/04/21

Purchaser Initials

**RESOLUTION 2021-\_\_**

**WHEREAS**, the Sparks Foundation County Park as well as the Cascades waterfall, and the lagoons surrounding the waterfall within the park are owned and maintained by Jackson County; and

**WHEREAS**, property owners and homeowners surrounding the Sparks Foundation County Park within the City of Jackson have experienced flooding since 2004 and significant property damage since 2014; and

**WHEREAS**, property and homeowners have consistently requested assistance from Jackson County regarding the flooding issue for the last three years; and

**WHEREAS**, Jackson County officials have done nothing of note to alleviate the flooding issue that has resulted in irreparable water damage to properties surrounding the park; and

**WHEREAS**, City of Jackson officials continue to find ways to moderate flooding in and around the Sparks Foundation County Park including digging water retention trenches, road construction projects, and infrastructure maintenance that directs water away from properties around the park despite not being responsible for the park itself; and

**WHEREAS**, in the past, the Cascades has delivered roughly 131,000 gallons of water per day from sources outside the system and deposited them into the lagoons surrounding the Cascades (as cited in the EGLE Water Use Program Database) instead of recycling water from the lagoons, accumulating more than 11,000,000 gallons of water per year into the groundwater surrounding the Cascades; and

**WHEREAS**, Jackson County did not operate the Cascades as scheduled in the summer of 2020 due to water pump failures, resulting in a dramatic decrease in basement flooding observed by residents and property owners near the park;

**THEREFORE BE IT RESOLVED**, the Jackson City Council hereby requests that Jackson County officials drastically reduce the number of hours that the Cascades falls operates until such a time when a solution to the flooding surrounding the park is implemented.

February 1, 2021

To: Personnel Committee, City of Jackson

From: Amy Cell

Re: Jason Yoakam, City Assessor Evaluation Summary

## **Purpose and Use**

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The following summary reflects themes and patterns pulled directly from feedback provided by four “rater groups” - City Council (leadership), City of Jackson Department Heads (peers), City Assessor’s Office staff (direct-reports), and the City Assessor (self). This feedback was collected between October 14th and November 12th using a 360°, or multirater, performance evaluation process, as supported by the Primologik review platform. Raters were provided with a series of questions relating to the work performance of the City Assessor and were asked to provide responses based on their firsthand interactions and observations.

The purpose of this summary is to provide guidance and points of interest to address with the City Assessor at the time of their performance evaluation. Because 360° reviews are designed to provide anonymity and draw from multiple perspectives within an organization (leadership, peers, and direct reports), they are able to provide a more comprehensive view of current work performance than traditional performance reviews. These perspectives, along with the insights gained through self-evaluation, can help steer performance evaluations, particularly when identifying future goals, areas of improvement, and qualities/behaviors that warrant rewards and/or recognition.

Please note: Because there was a small sample size for the City Assessor’s office, and we wanted to preserve their anonymity, we have combined the Office Staff and Department Head scores in the rating summary below.

## Overview

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<b>Rater Groups and Response Rate</b>			
<b>Rater Group</b>	<b># Contacted</b>	<b># Survey Responses</b>	<b>Response Rate</b>
<b>City Council</b>	7	6	86%
<b>Department Heads</b>	15	12	80%
<b>Assessor Office Staff</b>	2	2	100%
<b>City Assessor (self)</b>	1	1	100%
<b>Total</b>	25	21	84%

<b>Rating by Rater Group</b>				
<b>Rater Group</b>	<b>Council - Specific Questions</b>	<b>CoJ Employee - Specific Questions</b>	<b>Employee and Council Questions</b>	<b>Overall Rating*</b>
City Council	4.4	-	4.4	<b>4.4</b>
Department Heads and Assessor Office Staff	-	4.5	4.6	<b>4.5</b>
City Assessor (self)	4.0	4.1	3.8	<b>4.0</b>
<b>All</b>	4.3	4.5	4.5	<b>4.4</b>
<b>1 = Does Not Meet Expectations · 2 = Below Expectations ·</b> <b>3 = Almost Always Meets Expectations · 4 = Meets Expectations · 5 = Exceeds Expectations</b>				
* Overall ratings have been calculated by ACT using data from Primalogik, but are not directly represented in the Primalogik Summary attached.				

To further aid with performance evaluation discussions, we have organized feedback into a few key competency groups, listed below. These sections reflect responses aggregated from all rater groups, however, in instances where rater groups provided significantly different feedback, we will note these discrepancies.

## Competency Areas

- Work Quality
- Accountability
- Collaboration
- Leadership
- Professionalism
- Communication

## Work Quality

Score: 4.4

---

Mr. Yoakam rated highly in all topics relating to his day-to-day responsibilities. Particularly high ratings were provided for these prompts:

- “Maintains knowledge of current developments affecting the practice of local government management.”
  - Score: 4.6
- “Effectively manages records and indexing of records for public and internal use.”
  - Score: 4.7

The comments in this area were all strongly positive, and the common theme was that Mr. Yoakam’s supervisors, peers, and direct-reports all have a high level of confidence in his ability to perform his role in a thoughtful and effective manner.

## Accountability

Score: 4.4

---

Mr. Yoakam received similarly high scores in the area of accountability, with the following prompts rated highest:

- “Provides complete and accurate information to Council upon request.”
  - Score: 4.6
- “Tracks and reviews work as appropriate, and takes appropriate action based on City's procedures, rules, and regulations.”
  - Score: 4.5

Many of the associated comments for this area mentioned Mr. Yoakam's commitment to researching issues thoroughly and making fact-based decisions. He has demonstrated willingness to provide in-depth information when called for, and is comfortable raising concerns when he is unsure if a process or procedure adheres with local or state law.

## **Collaboration**

Score: 4.5

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Collaboration was identified as one of Mr. Yoakam's particular strengths, as seen in the following prompts:

- "Provides assistance to other departments as needed."
  - Score: 4.7
- "Coordinates effectively with internal and external stakeholders."
  - Score: 4.3

Mr. Yoakam's peers and direct reports both emphasized his eagerness to assist other departments in a thorough and timely manner. He is considered to be highly dependable and service oriented. He goes above and beyond to ensure other employees have the information and resources they need from his department, and he fosters strongly collaborative relationships with his coworkers.

## **Leadership**

Score: 4.3

---

In the area of leadership, there were no concerns expressed, and the following prompts were rated particularly high:

- "Manages regular performance based on goals and objectives."
  - Score: 4.5
- "Provides support, including training, to allow employees to effectively and safely perform their jobs."
  - Score 4.5

Mr. Yoakam's direct reports emphasized his commitment to the department and ensuring that those staff receive the needed continuing education, certification, and training. Although they have not conducted formal performance evaluations, it was stated that Mr. Yoakam provides effective feedback relating to work performance. Issues are addressed directly as needed, but "gratitude and appreciation" is expressed to his direct reports on a daily basis.

## **Professionalism**

Score: 4.6

---

Professionalism was another strong area for Mr. Yoakam. He received particularly high ratings in the following prompts:

- “Establishes and maintains effective working relationships and uses good judgement, initiative and resourcefulness when dealing with employees, professional contacts, elected officials, and the public.”
  - Score: 4.8
- “Sets a professional example by handling affairs of the public office in a fair and impartial manner.”
  - Score: 4.7

The overall themes of the associated comments were that Mr. Yoakam is knowledgeable, personable, and presents himself in a professional manner. He is viewed as reliable and highly capable when representing his department. Because of the nature of his job, we included a prompt relating to how he manages stressful situations (such as distressed taxpayers). Although there were no concerns expressed by other raters, Mr. Yoakam did identify this as a potential area for improvement (this is also noted in the “Suggested Goals” section later in this document.)

## **Communication**

Score: 4.4

---

Mr. Yoakam’s scores and comments relating to communication were also largely positive, as seen in the following prompts:

- “Responds in a timely manner to requests for information.”
  - Score: 4.6
- “Demonstrates exceptional oral and written communication skills.”
  - Score: 4.5

The associated comments note that Mr. Yoakam is an excellent communicator and can be relied on to follow up. When necessary, he delegates requests for information, but has set a standard for quick follow-up in his department. The only somewhat negative comment noted that, although he is a good communicator, he can be conflict-avoidant at times.

## Long Form Responses

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The following questions and responses are provided to guide discussions relating to the City Assessor's view of the role currently, as well as potential goals, and areas for improvement in the future.

### **Suggested goals, objectives and areas of improvement for the next evaluation period:**

#### ➤ **From Council and Staff**

- Working on matters of equity in the community by actions of the City Assessor
- Updating workflow processes in writing as needed
- Assist Council members with identifying opportunities that will benefit constituents in their areas
- Working towards more freely/comfortably speaking about what he would do in certain situations, even if it feels like it is "not his place"
- Continue to address needs of distressed taxpayers in dealing with poverty exemptions
- Work with staff and outside counsel to handle forthcoming property tax appeals, particularly given the impact of Covid-19 on economic outlook
- Sharing updates on the happenings of the Assessor's Office

#### ➤ **Self-identified Goals**

- Continue to refine processes
- Learn more deescalation techniques

### **Self-Evaluation Responses:**

#### **How does your role connect to the broader City vision?**

By providing transparency and working to eliminate inefficient processes whereby providing the taxpayer with cost effective assessment administration.

#### **What additional developmental opportunities would you like to have?**

Conflict resolution.

#### **If you could improve one thing about communication in your workplace, what would it be?**

When COVID ends it would be nice to take down the Plexiglas barrier. It has made it difficult to communicate with the public.

## Evaluation Response

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The following response was provided by Mr. Yoakam after reviewing the above:

*“Thank you to all who participated in my performance evaluation. The positive review was refreshing and uplifting to know that I hold your confidence in my ability as the assessor .The “suggested goals, objectives and areas of improvement for the next evaluation period” appear prudent, obtainable, and necessary to solidify working relationships and a cohesive work environment. I strive to live in a constant quality improvement mindset and am eager to apply that mindset to achieve the goals outlined. I am grateful to hold the position of City Assessor and will continue to work hard to meet the needs of the public, staff, administration, and city council.*

*Sincerely,*

*Jason Yoakam*

*Assessor, City of Jackson”*

February 1, 2021

To: Personnel Committee, City of Jackson

From: Amy Cell

Re: Matthew Hagerty, City Attorney Evaluation Summary

## **Purpose and Use**

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The following summary reflects themes and patterns pulled directly from feedback provided by four “rater groups” - City Council (leadership), City of Jackson Department Heads (peers), City Attorney’s Office staff (direct-reports), and the City Attorney (self). This feedback was collected between October 14th and November 12th using a 360°, or multirater, performance evaluation process, as supported by the Primologik review platform. Raters were provided with a series of questions relating to the work performance of the City Attorney, and were asked to provide responses based on their firsthand interactions and observations.

The purpose of this summary is to provide guidance and points of interest to address with the City Attorney at the time of their performance evaluation. Because 360° reviews are designed to provide anonymity and draw from multiple perspectives within an organization (leadership, peers, and direct reports), they are able to provide a more comprehensive view of current work performance than traditional performance reviews. These perspectives, along with the insights gained through self-evaluation, can help steer performance evaluations, particularly when identifying future goals, areas of improvement, and qualities/behaviors that warrant rewards and/or recognition.

Please note: Because there was a small sample size for the City Attorney’s office, and in an effort to preserve anonymity, we have combined the Office Staff and Department Head scores in the rating summary below.

February 1, 2021

To: Personnel Committee, City of Jackson

From: Amy Cell

Re: Andrea Muray, City Clerk Evaluation Summary

## **Purpose and Use**

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The following summary reflects themes and patterns pulled directly from feedback provided by four “rater groups” - City Council (leadership), City of Jackson Department Heads (peers), City Clerk’s Office staff (direct-reports), and the City Clerk (self). This feedback was collected between October 14th and November 12th using a 360°, or multirater, performance evaluation process, as supported by the Primologik review platform. Raters were provided with a series of questions relating to the work performance of the City Clerk and were asked to provide responses based on their firsthand interactions and observations.

The purpose of this summary is to provide guidance and points of interest to address with the City Clerk at the time of their performance evaluation. Because 360° reviews are designed to provide anonymity and draw from multiple perspectives within an organization (leadership, peers, and direct reports), they are able to provide a more comprehensive view of current work performance than traditional performance reviews. These perspectives, along with the insights gained through self-evaluation, can help steer performance evaluations, particularly when identifying future goals, areas of improvement, and qualities/behaviors that warrant rewards and/or recognition.

Please note: Because there was a small sample size for the City Clerk’s office, and we wanted to preserve their anonymity, we have combined the Office Staff and Department Head scores in the rating summary below.

February 1, 2021

To: Personnel Committee, City of Jackson

From: Amy Cell

Re: Jonathan Greene, City Manager Evaluation Summary

## **Purpose and Use**

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The following summary reflects themes and patterns pulled directly from feedback provided by four “rater groups” - City Council (leadership), City of Jackson Department Heads (peers), City Manager’s Office staff and a random sampling of other City staff (direct and indirect reports), and the City Manager (self). This feedback was collected between October 14th and November 12th using a 360°, or multirater, performance evaluation process, as supported by the Primologik review platform. Raters were provided with a series of questions relating to the work performance of the City Manager and were asked to provide responses based on their firsthand interactions and observations.

The purpose of this summary is to provide guidance and points of interest to address with the City Manager at the time of their performance evaluation. Because 360° reviews are designed to provide anonymity and draw from multiple perspectives within an organization (leadership, peers, and direct reports), they are able to provide a more comprehensive view of current work performance than traditional performance reviews. These perspectives, along with the insights gained through self-evaluation, can help steer performance evaluations, particularly when identifying future goals, areas of improvement, and qualities/behaviors that warrant rewards and/or recognition.

## Overview

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<b>Rater Groups and Response Rate</b>			
<b>Rater Group</b>	<b># Contacted</b>	<b># Survey Responses</b>	<b>Response Rate</b>
<b>City Council</b>	7	6	86%
<b>Department Heads</b>	15	11	73%
<b>City Staff</b>	15	6	40%
<b>City Manager (self)</b>	1	1	100%
<b>Total</b>	38	24	63%

<b>Rating by Rater Group</b>				
<b>Rater Group</b>	<b>Council - Specific Questions</b>	<b>CoJ Employee - Specific Questions</b>	<b>Employee and Council Questions</b>	<b>Overall Rating*</b>
City Council	4.3	-	4.3	4.3
Department Heads	-	4.0	4.2	4.0
City Staff	-	4.5	4.6	4.5
City Manager (self)	4.1	4.1	4.3	4.1
<b>All</b>	4.3	4.2	4.3	<b>4.3</b>
<b>1 = Does Not Meet Expectations · 2 = Below Expectations ·            3 = Almost Always Meets Expectations · 4 = Meets Expectations · 5 = Exceeds Expectations</b>				
* Overall ratings have been calculated by ACT using data from Primalogik, but are not directly represented in the Primalogik Summary attached.				

To further aid with performance evaluation discussions, we have organized feedback into a few key competency groups, listed below. These sections reflect responses aggregated from all rater groups, however, in instances where rater groups provided significantly different feedback, we will note these discrepancies.

## Competency Areas

- Work Quality
- Accountability
- Collaboration
- Leadership
- Professionalism
- Communication

## Work Quality

Score: 4.4

---

Mr. Greene rated highly in all topics relating to his day-to-day responsibilities. Particularly high ratings were provided for these prompts:

- “Anticipates and analyzes problems to develop effective approaches for solving them.”
  - Rating: 4.7
- “Demonstrates agility and adaptability in the face of unpredictable circumstances (e.g. COVID-19).”
  - Rating: 4.6

These high ratings align with many of the submitted comments we reviewed. Raters felt that Mr. Greene excelled at problem solving and adapting to challenges, allowing him to manage assigned tasks without issue. Other common themes included his proactive and holistic approach to studying and addressing potential issues, as well as his positive working relationship with Council. Raters indicated that they were confident in his understanding of his role as well as his ability to meet goals effectively.

## Accountability

Score: 4.2

---

The responses that related to Mr. Greene’s accountability were positive and spoke to his willingness to support Council decisions and promote transparency in reporting and other communications. Particularly high ratings were provided for these prompts:

- “Supports the actions of the City Council after a decision has been reached, both inside and outside the organization.”
  - Rating: 4.5
- “Appropriately monitors and manages fiscal activities of the City”

- Rating: 4.4

Comments noted that Mr. Greene’s decision-making process ensures that appropriate procedures and guidelines are being followed and emphasizes the need for transparency in government work. He provides weekly updates to the Council regarding current projects, and when assistance is needed internally, he takes responsibility personally, or delegates to an appropriate member of staff as needed.

## **Collaboration**

Score: 4.3

---

Mr. Greene scored well on the topic of collaboration, in which we considered his working relationships with Council, City staff, and external partners. Particularly high ratings were provided for these prompts:

- “Assists in facilitating decision making without usurping authority.”
  - Score: 4.4
- “Cooperates with neighboring communities, county, regional, state, and federal agencies.”
  - Score: 4.4

Many of the comments we reviewed spoke to the positive changes in the area of collaboration since Mr. Greene took on the City Manager role. He recognizes the value of feedback and can be adaptable, while keeping Council directives and the City’s best interests in mind. City Staff specifically noted his positive impact on the workplace culture, feeling that he had a great understanding of when and how to lean on the expertise of those around him in a collaborative way. In regards to relationships with other communities/government bodies/agencies, it was again noted that Mr. Greene is positively advancing those relationships, and in some cases, mending those that have been strained in the past.

## **Leadership**

Score: 4.1

---

Responses relating to Mr. Greene’s leadership abilities were largely positive, with the exception of one prompt we’ve provided below, along with one of the highest rated prompts:

- “Manages regular performance based on goals and objectives.”
  - Score: 4.4
- “Conducts regular employee performance appraisals.”

- Score: 3.2

Within the comments for this prompt, we found that the lower rating was likely due to Mr. Greene's relatively short time in the role. Although there were comments noting that feedback on performance was provided frequently and appropriately, there has not been a formal performance appraisal conducted for City staff since his start. Despite this, City Staff and Department Heads felt that he could be relied on to hold employees accountable, address any performance issues appropriately, and coach/motivate where needed.

City Staff felt that Mr. Greene fosters a healthy, dignified workplace. Mr. Greene was also applauded for his approach to diversity and willingness to take new steps to ensure that the City of Jackson "walks the talk when it comes to diversity."

City Staff comments also noted Mr. Greene's commitment to the staff and his willingness to support them by providing the necessary resources, training, and access to information needed to perform their jobs. Mr. Greene's commitment to staff safety, especially during Covid-19, was another common theme in these responses.

## **Professionalism**

Score: 4.4

---

Mr. Greene scored well in areas relating to professionalism, especially with Department Heads and City Staff. Particularly high ratings were provided for these prompts:

- "Treats staff with dignity and respect."
  - Score: 4.7
- "Fosters a professional working environment."
  - Score: 4.4

The repeating themes for this area were that Mr. Greene models exceptional, professional behavior, thereby creating the expectation for professionalism in the office. He actively ensures decisions are considered fairly and without bias, and he presents himself as approachable, allowing for open, productive conversations.

Most comments additionally noted that Mr. Greene was reliable and punctual, however, one point of concern was mentioned, relating to his attendance at Committee meetings. It was suggested that if Mr. Greene is unable to attend a committee meeting personally, an alternate should be sent in his stead.

## **Communication**

Score: 4.1

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In regard to communication skills, Mr. Greene rated well, however, there was a slightly lower rating for the following prompt:

- “Follows up on issues presented and reports back to employees.”
  - Score: 3.8

The comments associated with this prompt recognized that this was likely due to the heavy workload of the City Manager, but they also noted that there had been clear improvement on this recently. Another area for improvement mentioned was that additional proofreading for written communications could be beneficial.

Overall, Mr. Greene was reported to have exceptional listening skills and an open door policy for all employees. It was mentioned that his public speaking skills are also a particular strength, and his personality allows for open and free communication.

## **Long Form Responses**

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The following questions and responses are provided to guide discussions relating to the City Manager’s view of the role currently as well as potential goals and areas for improvement in the future.

### **Suggested goals, objectives and areas of improvement for the next evaluation period:**

#### **➤ From Council and Staff:**

- Work to bring progress out of downtown and into neighborhoods
- Leading by example
- Meet with those that will be affected by changes in policies, programs, or funding (staff or citizens) prior to making changes to help improve buy-in and relations
- Encourage interdepartmental relationships and staff unity
- Staff recognition and motivation - focus on work culture and enriching work life and environment
- Increased communication with staff
- Continued improvement with response time
- Collective goals/objectives that all Departments could focus on/work towards

➤ **Self-identified goals:**

- Increased staff trainings and perform regular appraisals of department heads

**Self-Evaluation Responses:**

**How does your role connect to the broader City vision?**

My job is to set the vision and make it happen. So, by promoting a culture of teamwork and accountability, we get it done.

**What additional developmental opportunities would you like to have?**

I would like to take more strategic planning training.

**If you could improve one thing about communication in your workplace, what would it be?**

I am seeking to create better employee feedback.

## Overview

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<b>Rater Groups and Response Rate</b>			
<b>Rater Group</b>	<b># Contacted</b>	<b># Survey Responses</b>	<b>Response Rate</b>
<b>City Council</b>	7	6	86%
<b>Department Heads</b>	15	10	67%
<b>Clerk Office Staff</b>	2	1	50%
<b>City Clerk (self)</b>	1	1	100%
<b>Total</b>	25	18	72%

<b>Rating by Rater Group</b>				
<b>Rater Group</b>	<b>Council - Specific Questions</b>	<b>CoJ Employee - Specific Questions</b>	<b>Employee and Council Questions</b>	<b>Overall Rating*</b>
City Council	3.4	-	3.6	<b>3.4</b>
Department Heads and Clerk Office Staff	-	3.7	3.8	<b>3.8</b>
City Clerk (self)	4.3	4.0	4.0	<b>4.1</b>
<b>All</b>	3.5	3.7	3.7	<b>3.6</b>
<b>1 = Does Not Meet Expectations · 2 = Below Expectations ·</b> <b>3 = Almost Always Meets Expectations · 4 = Meets Expectations · 5 = Exceeds Expectations</b>				
<small>* Overall ratings have been calculated by ACT using data from Primalogik, but are not directly represented in the Primalogik Summary attached.</small>				

To further aid with performance evaluation discussions, we have organized feedback into a few key competency groups, listed below. These sections reflect responses aggregated from all rater groups, however, in instances where rater groups provided significantly different feedback, we will note these discrepancies.

## Competency Areas

- Work Quality
- Accountability
- Collaboration
- Leadership
- Professionalism
- Communication

### Work Quality

Score: 3.5

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Ms. Murray received an average rating of 3.4 or 3.6 for each prompt relating to work quality, which translates to “meeting expectations” on the scale provided to the rater groups. Some raters indicated that they believed she had managed a difficult endeavor - an election during Covid-19 - successfully, and had adapted well to those challenges.

There weren't any additional themes in the comments, however, there were a few specific concerns mentioned:

- Decision making is sometimes more influenced by what Council requests/suggests than what is in the best interest of the citizens of Jackson
- Did not ensure safety for early voting lines at City Hall
- Sometimes seems to be learning-on-the job and not as clear on responsibilities as would be expected

### Accountability

Score: 3.8

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In the area of accountability, raters indicated that Ms. Murray met expectations, with the following two prompts receiving the highest ratings:

- “Attends all regular and special meetings of City Council and successfully provides accurate official minutes of the proceedings.”
  - Score: 4.0
- “Effectively manages multiple projects and deadlines simultaneously.”
  - Score: 3.9

Ms. Murray attends and prepares in advance for regular meetings, and is willing to follow up on questions as requested by Council. She follows directions from Council as presented, and seeks

clarification as needed. Despite the expanded workload created by the election, raters noted that there was no notable impact on Ms. Murray's ability to carry out her other, non-election-related responsibilities.

## **Collaboration**

Score: 3.6

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Ms. Murray's rating for collaboration also fell in the "meets expectations" rating, with some mixed responses relating to accessibility and responsiveness. The highest rated prompt for this category was:

- "Listens and responds to employee issues and problems in a considerate and timely manner."
  - Score: 3.7

Within the comments, some raters noted that they always received quick responses and could rely on Ms. Murray to be available when needed via email or in person. Other raters, however, expressed some concerns with the timeliness of responses.

## **Leadership**

Score: 3.5

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In the area of leadership, Ms. Murray was rated as "meeting expectations." Prompts that were rated highly included:

- "Provides support, including training, to allow employees to effectively and safely perform their jobs."
  - Score: 3.8
- "Provides resources to allow staff to perform their duties."
  - Score: 3.8

There were, again, some contradictory responses in this section. Some raters felt that the Clerk's Office staff were well instructed and prepared for the tasks assigned to them, while others indicated that staff did not seem to always receive clear instructions from Ms. Murray. Additionally, a rater did indicate that they had noted some abruptness on Ms. Murray's part when managing her staff.

## **Professionalism**

Score: 3.8

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In the area of professionalism, Ms. Murray also met expectations, with the following prompts ranking highest:

- “Practices discretion in handling confidential information.”
  - Score: 4.0
- “Establishes and maintains effective working relationships internally and with members of the public.”
  - Score: 3.9

Ms. Murray’s colleagues describe her as courteous and professional in their interactions. She respects guidelines and rules when making decisions, and performs her role with integrity. One specific concern that was raised was that citizen comments were cut off too soon in meetings.

## **Communication**

Score: 3.8

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Ms. Murray also received a rating of “meets expectations” for the area of communications. The comments for this section echo those provided earlier. Ms. Murray’s communications are effective and professional, however, there have been some instances where responses have not been received in a timely manner. One additional concern presented was that the Clerk’s office should offer more in the way of accessibility and/or individual guidance for citizens seeking information or looking to engage in a process related to the Clerk’s office.

## **Long Form Responses**

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The following questions and responses are provided to guide discussions relating to the City Clerk’s view of the role currently as well as potential goals and areas for improvement in the future.

### **Suggested goals, objectives and areas of improvement for the next evaluation period:**

#### **➤ From Council and Staff:**

- Working to be more flexible related to Covid-19, in relation to policies/procedures that would be beneficial to residents
- Help those with questions they have regarding running for local office, especially new candidates who don’t understand the process involved
- Continue to maintain Municode updates
- Study the ordinances
- Looking at innovative ways to get Jacksonians registered and voting

- Focus on making processes for Citizens easier, whether it's citizen comments, voting, instructions for forms. The Clerk's Office should have a customer service focus
- Responding in a timely manner
- **Self-identified goals:**
  - Explore the Certified Municipal Clerk (CMC) program and the education requirements for the certification

## **Self-Evaluation Responses:**

### **How does your role connect to the broader City vision?**

Ideally the City will have citizens that are engaged and active in matters that impact their daily lives. The most common way that citizens are able to exhibit their engagement is by voting. As the City Clerk I want to not only encourage registration, but also turnout. Targeting the group with the lowest turnout has been one of the strategies that I have employed to accomplish that objective. We have been able to recruit students from the local high schools as well as the local College to work elections. Our hope is that by getting these students engaged in the process it will result in their friends and families becoming engaged. Voter turnout in the 18-21 demographic in the August 2020 Primary increased 121% from 2016; and in the 2018 State General Election we saw a 200% increase from 2014.

### **What additional developmental opportunities would you like to have?**

Parliamentarian rules would be a developmental opportunity I would like to consider.

### **If you could improve one thing about communication in your workplace, what would it be?**

I would like to see the department head meeting to discuss the upcoming agenda resume.

## Evaluation Response

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The following response was provided by Ms. Murray after reviewing the above:

*“I appreciate having the opportunity to review the draft summary of my evaluation. What’s more, I am grateful to have an opportunity to address the concerns that were mentioned in it. There were just a few concerns that I felt it was important to provide some additional background on the matter and/or mention things that responders may not have been aware of (please see attachment). I look forward to revisiting this process later this year. Thank you for all of your work on this.”*

(We have included the attached information below.)

### Work Quality

Concerns mentioned:

- Decision making is sometimes more influenced by what Council requests/suggests than what is in the best interest of the citizens of Jackson

Response: As an appointed position, the Clerk takes direction from Council. Requests are honored the same way that any subordinate would from their supervisor. Suggestions are evaluated based on what the City Charter states and Michigan Law.

- Did not ensure safety for early voting lines at City Hall

Response: The 2020 Presidential Election was unlike anything that has been seen before. The amount of people who came to vote early was unprecedented and sporadic. Regular requests were made to electors who arrived at City Hall to vote early to social distance and those who were actually voting were separated from those who were waiting to vote. In a proactive move to minimize traffic in City Hall on Election Day, a request was made (and honored) to have City employees work from home on November 3, 2020. Additionally, voters were encourage to utilize the drop box that is located outside of the building to lower traffic inside.

- Sometimes seems to be learning-on-the job and not as clear on responsibilities as would be expected

Response: When hired, Council was aware that I had never served as a Clerk for another municipality. With that being said, if I wasn’t learning-on-the job, it would seem that would be and should be a concern, not the other way around. What’s more, no two City Clerk positions

are the same. A City's Charter is specific and dictates how a Clerk executes their responsibilities, in addition to Michigan Election Law. Both a City Charter and Michigan Election Law can be amended, and has been, and therefore there is an inherent element of learning-on-the job that is part of being a Clerk, especially for a city.

### Communication

Concern mentioned:

- The Clerk's office should offer more in the way of accessibility and/or individual guidance for citizens seeking information or looking to engage in a process related to the Clerk's office.

Response: Since being appointed to the position of City Clerk for the City of Jackson, I have worked with two different City Attorneys appointed by Council. Understanding that interpretation may vary from one attorney to another, I have sought both of their counsel on what would be appropriate in terms of "guidance" when it comes to elections and the filing process (which is typically the only process related to the Clerk's Office that individuals may request help with). Both City Attorneys have provided the same counsel as it pertains to providing "guidance"; don't do it. As required by law, we provide the forms needed to file to all potential candidates. In addition, we also provide copies of applicable Michigan Election Law and Charter requirements so that they are aware of what is needed as a candidate in the City of Jackson. The legal opinion of both City Attorneys that have worked for the City of Jackson during my tenure as Clerk is that anything above and beyond what we are currently doing could be interpreted as providing legal advice which could expose the City (to lawsuits).

## Overview

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<b>Rater Groups and Response Rate</b>			
<b>Rater Group</b>	<b># Contacted</b>	<b># Survey Responses</b>	<b>Response Rate</b>
<b>City Council</b>	7	6	86%
<b>Department Heads</b>	15	11	73%
<b>Attorney Office Staff</b>	4	3	75%
<b>City Attorney (self)</b>	1	1	100%
<b>Total</b>	27	21	78%

<b>Rating by Rater Group</b>				
<b>Rater Group</b>	<b>Council - Specific Questions</b>	<b>CoJ Employee - Specific Questions</b>	<b>Employee and Council Questions</b>	<b>Overall Rating*</b>
<b>City Council</b>	4.3	-	4.3	4.3
<b>Department Heads and Attorney Office Staff</b>	-	4.6	4.7	4.6
<b>City Attorney (self)</b>	4	4.1	4.0	4.1
<b>All</b>	<b>4.2</b>	<b>4.6</b>	<b>4.6</b>	<b>4.5</b>
<b>1 = Does Not Meet Expectations · 2 = Below Expectations ·</b> <b>3 = Almost Always Meets Expectations · 4 = Meets Expectations · 5 = Exceeds Expectations</b>				
<small>* Overall ratings have been calculated by ACT using data from Primalogik, but are not directly represented in the Primalogik Summary attached.</small>				

To further aid with performance evaluation discussions, we have organized feedback into a few key competency groups, listed below. These sections reflect responses aggregated from all rater groups, however, if there were instances where rater groups provided significantly different feedback, we noted these discrepancies.

## Competency Areas

- Work Quality
- Accountability
- Collaboration
- Leadership
- Professionalism
- Communication

## Work Quality

Score: 4.4

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Mr. Hagerty rated highly in the topics relating to his daily responsibilities. Two prompts that received particularly high ratings were:

- “Regularly provides the scope of legal expertise necessary to meet the City’s needs on issues that arise. Provides this expertise himself, or through delegation to staff or others.”
  - Score: 4.7
- “Provides legal advice that is objective, professional, and adequate for use by Council in formulating policies and making decisions.”
  - Score: 4.3

It was indicated throughout the associated comments that Mr. Hagerty is considered to be highly capable in his role. He is well-informed, and recognizes instances where further research is required. He is responsive and helpful when asked for information or guidance, and provides recommendations that reflect the best interests of the City.

## Accountability

Score: 4.4

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Mr. Hagerty received high ratings in the area of accountability, particularly on the following prompts:

- “Provides their best and honest recommendations given all existing legal issues and ramifications.”
  - Score: 4.9

- “Communicates effectively with City Council by being accessible for legal information/ assistance and completing legal review and requests for information in a timely manner.”
  - Score: 4.6

The comments in this area indicate that Mr. Hagerty is considered highly reliable, and can be depended on to provide well-researched information. He is highly responsive to requests, and his colleagues have confidence in the information and guidance he provides. In addition to providing information and recommendations, Mr. Hagerty promotes deeper understanding of the issues at hand, and follows up with additional details as needed. His colleagues feel that he provides honest recommendations, based on the interests of the City, regardless of the popularity of the decision.

## **Collaboration**

Score: 4.6

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Through these responses, collaboration was identified as a particular strength for Mr. Hagerty, as seen in the following prompts:

- “Communicates effectively with staff and other department heads by being accessible for legal information/assistance and completing legal review/requests for information in a timely manner.”
  - Score: 4.9
- “Fosters cooperation and coordination within the Office of the City Attorney, between the City departments, and outside municipal departments.”
  - Score: 4.6

Within the City Attorney’s office, the staff indicated that Mr. Hagerty emphasizes the importance of cooperation and ensures that it is a priority for all staff. His peers felt that he demonstrated an exceptional team-centered mentality, and provided assistance, proactively or as requested, in a complete and timely manner. Additionally, it was noted that his professional and courteous demeanor made these interactions easier still.

## **Leadership**

Score: 4.3

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There were no concerns mentioned regarding Mr. Hagerty’s leadership style, and the following prompts received particularly high ratings:

- “Provides resources to allow staff to perform their duties.”

- Rating: 4.4
- “Provides support, including training, to allow employees to effectively and safely perform their jobs.”
  - Rating: 4.4

Overall, the comments for this section focused on Mr. Hagerty’s commitment to ensuring that his office has the materials/resources necessary to perform their work at a high level. Much of the work done in the attorney’s office is independent, but Mr. Hagerty is aware of what his staff is working on, and ensures they are supported in those tasks.

## **Professionalism**

Score: 4.6

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Professionalism was another area identified as a strength for Mr. Hagerty.

- “Treats staff with dignity and respect.”
  - Score: 4.8
- “Carries out duties and responsibilities in an impartial, ethical, and objective manner.”
  - Score: 4.6

As demonstrated in many of the comments we received, Mr. Hagerty is highly respected by his peers and direct-reports, who view him as having exceptionally high integrity. Direct reports especially noted his respectful demeanor and found that he created a strongly professional, productive workplace. All rater groups noted that he was highly trustworthy and demonstrated good judgement. He is considerate in his decision-making, and seeks out any potential biases or negative ramifications before presenting a recommendation.

## **Communication**

Score: 4.5

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Mr. Hagerty’s ratings for communication were positive as well:

- “Listens and responds to employee issues and problems in a considerate and timely manner.”
  - Score: 4.5
- “Demonstrates exceptional oral and written communication skills.”

- Score: 4.5

The majority of comments noted that Mr. Hagerty was a great communicator, and provided in-depth information in a timely manner. One potential area of improvement was noted; when presenting on a complex or dense issue, it was suggested that Mr. Hagerty work on using more concise language, or providing a summary with the offer of further details as requested.

## **Long Form Responses**

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The following questions and responses are provided to guide discussions relating to the City Attorney's view of the role currently, as well as potential goals and areas for improvement in the future.

### **Suggested goals, objectives and areas of improvement for the next evaluation period:**

#### **➤ From Council and Staff**

- Identify high-risk areas of exposure for the City in terms of civil liability and share with all Departments. Citywide plan on reducing exposure in these areas
- Lobby for legislative fixes at the state level working with lobbying team
- More precision in communication. Get to the point with less words and add more detail after if requested

#### **➤ Self-identified Goals**

- Improve collections on delinquencies for Neighborhood and Economic Operations and Administrative Hearings Bureau judgments
- Hold more one on one meetings with Council Members as Covid-19 permits
- Engage more with community and business stakeholders as Covid-19 permits
- Work with staff on continued economic development opportunities

### **Self-Evaluation Responses:**

#### **How does your role connect to the broader City vision?**

As City Attorney, my office interacts with multiple City Departments on a weekly, if not daily basis. As such, my role is to assist in implementing the vision set forth by the City Council, and executed by City Staff. The execution of many of these goals intersects with my office as I am involved with/oversee all litigation to protect the City's interests; ordinance creation and adoption; prosecution of the City Code of Ordinances; addressing blight; assisting with

development opportunities; employment matters; and decisions made at the managerial level including those related to the Covid-19 pandemic.

In this way, I consider my office as a "referee" of sorts, providing guidance and the best available legal counsel as to how to implement the City's goals and vision, be it large development projects, addressing crime, statute interpretation, FOIA coordination, or simply answering a citizen walk-in's question. I want my office to be an asset for each City Department and to the community at large.

**What additional developmental opportunities would you like to have?**

As we all know, the Covid-19 pandemic continues to impact our professional and personal lives. Certainly, a part of this has included the inability to meet more often in face to face settings and attend conferences and other professional development seminars. Michigan Municipal League-sponsored conferences and other continuing education seminars - if actually valuable to, and impactful on, the day to day work my office carries out - are things I would like to pursue, along with the staff attorneys in my office. My office continues to stay abreast of updates on municipal law and legislation that impacts the City of Jackson.

**If you could improve one thing about communication in your workplace, what would it be?**

While I have made it a point during my tenure as City Attorney to have an open door policy for both my staff and all City Employees and Council Members, the dynamics of Covid-19 have created a situation where Zoom and other electronic communication is now the norm. Prior to the pandemic, I enjoyed having semi-regular meetings with Council and department heads to ensure any issues they had were properly addressed. These in-person meetings also provided an opportunity to discuss with my staff their workload, assignments, getting a sense as to how everyone was doing, and if they were being given enough support and direction from me. Covid-19 has impacted that dynamic somewhat, but we have also been very adaptive and flexible to ensure both proper communication as well as prioritizing safety. So, having more face to face and one on one interactions to discuss issues involving my staff and City Departments at large will be a priority in the coming year, as we hopefully come out on the other side of this pandemic a stronger and more resilient City.

## Evaluation Response

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The following response was provided by Mr. Hagerty after reviewing the above:

*“Mr. Mayor and Members of the City Council,*

*I would like to express my genuine thanks for the trust you have placed in me as City Attorney. While we have all dealt with unprecedented and ongoing challenges over the last year, I can say that my tenure with the City of Jackson since January of 2020 has nonetheless been some of the most professionally rewarding time I have spent practicing law. I have also enjoyed getting to know each of you better as both Council and community members. Our City has a dedicated and hard-working team of professionals that I am very proud to be a part of. It is unquestionably a team effort and my staff in the City Attorney’s Office - Mark Porterfield, Deb Noga, Gilbert Carlson and Karen McKay - deserve special recognition for their work ethic and efforts assisting me in making the transition to my role as City Attorney in the midst of a global pandemic.*

*I also appreciate the opportunity to participate in the City Council’s evaluation process for its appointed officials. I hope that the evaluation results speak to the efforts I have made over the last year to work collaboratively; competently address the concerns of Council, constituents, and staff; and provide excellent overall legal services in the City’s best interests. I also commit to using the feedback received during the evaluation process to both make individual improvements and better the Office of City Attorney.*

*With Sincere Appreciation,*

*Matt Hagerty  
City Attorney”*